Iraq Development Management System

(IDMS)

User Handbook

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1. INTRODUCTION

1.1 What This Document Is about

The purpose of this document is to explain the basic concepts of the *Iraq Development Management System (IDMS).* It is meant to assist all IDMS users in filling in properly the information requested and performing meaningful analysis on the data gathered.

1.2 Who This Document Is For

This document is intended for users of the Iraq Development Management System for Iraq.

1.3 How This Document Is Structured

This document is designed to describe the rationale and the implementation of the 5 IDMS/Iraq applications:

- External Assistance
- Requests
- Donor Profile
- National Budget PIP
- Country Project Activity

For your convenience, each application of the IDMS (listed above) is covered in a separate section.

2. OVERVIEW

2.1 What Is IDMS?

The Iraq Development Management System (IDMS) is an Aid Management and Coordination system that strengthens the effectiveness and transparency of international assistance. IDMS is a powerful Web-based information collection, tracking, analysis, reporting, and planning tool used by governments and the broader assistance community (including bilateral donors, international organizations, and NGOs).

IDMS is a commercial-off-the-shelf database application powered by Synergy's flagship Intelligence Data Manager™ (IDM) technology. The IDM technology enables rapid creation and easy customization of web-based database applications that feature powerful querying, analytics, reporting, and data visualization. Within an integrated environment, IDMS applications simplify the deployment and ongoing administration of data management, M&E (Monitoring and Evaluation), and dissemination of mission critical information.

The most distinct feature of the IDM is its capacity to store and utilize the target applications "knowledge" containing information on the specificity of the application being created, including knowledge on data, business logic, rules and procedures of data searching, aggregation and visual analysis. IDM uses this knowledge, so as to accelerate the application development process. In addition, it provides a comprehensive environment for data entry, updating, querying and analysis. IDM is extremely flexible in its capacity for modifying data structure and includes a powerful set of querying and analytical tools.

The IDMS helps you in achieving the following objectives:

- Identifying national priorities and requests for donor assistance, and linking aid assistance to the national budget,
- Enabling the effective management of international assistance rendered by the donor community to the recipient country by tracking donor funded projects, promoting private sector projects for foreign investment, as well as Public Investment Programs funded by the national budget,
- Providing a consolidated overview, understanding and impact assessment of the entire assistance effort, facilitating coordination among various donor organizations and national government agencies to avoid duplication,
- Expanding public information and awareness on the reconstruction and development process.

The IDMS is designed to capture the most critical international assistance data relevant to a project, including pledges, commitment and disbursement amounts, sector and location of implementation, brief description, implementing agency and other contacts, as well as information on funding that has been channeled through various Trust Funds. The IDMS provides secure access through the web for data entry. Grant and loan programs are broken down into projects and activities with programmatic and budgetary details, as well as disbursement schedule and execution. You can filter, group and sort all projects by any category or group of categories (e.g. by sector, by location, by Donor, etc.). The IDMS system provides you with a wide range of analytical functions, including querying, reporting, charts and Geographic Information System (GIS) functions (which enable you to plot projects on the map

of Iraq and analyze assistance at the country level). Various predefined and ad-hoc reports and charts can be produced immediately with a powerful report generator online. In this manner, the IDMS helps in assessing how assistance flows are meeting national development priorities and in building capacity for tracking support to and within the national budget.

The key features of IDMS include:

- **On-the-fly querying/searching:** you can conduct custom querying of the data by any combination of variables (sector, donor, project status, executing agency, etc) online and retrieve results within seconds in your Web browser.

- **Analytical reporting, charting, mapping:** you can easily create sophisticated reports, charts and maps to support policy-making through analysis. All analytical tools are integrated into the software, providing a consistent user-interface and allowing non-technical users to develop customized analytical reports on-the-fly.

- **On-line data entry:** if authorized, you can easily submit and subsequently modify all project/program information directly through the Internet, enhancing the quality of the data by facilitating the collection/submission process.

- **Multi-lingual Support:** IDMS is adapted to the specific needs of Iraq, including the localization of the software into the Arabic language.

- **Scalability:** IDMS's flexible and seamless architecture allows easy deployment for use in technically austere and sophisticated environments.

- **Sustainability:** IDMS contains all-inclusive database administration and other tools which are designed to facilitate any modifications in the system, as the need arises. The tool set includes importing and exporting functions, the creation and management of users' access rights, backup/restore features, etc. All administrator functions are standardized and centralized, and require minimum time for training.

3. IDMS IRAQ

The *Iraq Development Management System (IDMS)* is an aid management solution promoting good governance and public accountability and transparency. The database provides financial information on relief, recovery and reconstruction activities in Iraq. It is possible to see what sectors, governorates and districts are receiving funding, who is supporting these activities and from where the funds are sourced. The database is publicly accessible to the Iraqi population at large as well as the local media and it is hoped that it can be used to ensure and promote accountability, both from the Government and its development partners. The database is designed to serve the needs of the Government of Iraq and its international partners, be it International Finance Institutions, United Nations funds and programmes, other international organizations, private sector companies or national or international non-governmental organizations (NGOs).

The *IDMS* application is designed to provide quick access to the project and aid data remotely via Internet. Once you access the application, you can view the project data stored in the database, add new projects, edit existing ones, etc. Moreover, you can view aid and project data organized into lists, reports, charts, and maps. In the *IDMS – Iraq* application, you are able to create, memorize/save, and print reports and export them into PDF, MS Word and MS Excel format files.

As mentioned above, the *IDMS* consists of the following applications:

- **External Assistance** – holds information on all the projects that are implemented through external funding.
- **Requests** – contains information about the priority requests of the Iraqi Line Ministries
- **Donor Profiles** – provides information on the mission, main focus, and contact info of each donor, as well as each donor's pledges and its funds that are contributed via Trust Funds
- **National Budget PIP** – holds information on all the projects that are implemented through the national budget and managed by the governmental agencies and Line Ministries of Iraq
- **Country Project Activity** – consolidates in one place all projects that are implemented in Iraq, either funded by external assistance or the national budget

3.1 External Assistance

In this application you can view, add or modify (according to your permissions) the External Assistance project data. This is done through the built-in Online Data Entry Module. In the Online Data Entry Module, you are called to specify information organized around a specific project (i.e. sectors that the project supports, locations in which the project extends, donors contributing to the project, etc.) – all individual project data is then aggregated to give the bigger picture according to the parameters of interest you specify during your analysis/reporting.

In *IDMS-Iraq* most donors are requested to provide all their project-specific data to the Ministry of Planning and Development Cooperation – then the Ministry personnel is responsible for the

actual data entry (at which point they make an effort to additionally verify the data they have received themselves). There are also few cases of Donors that update the data in IDMS themselves directly.

Since all data entered is project-specific, there is a problem in the case that bilateral institutions channel their funds through one of the Trust Funds (i.e. UNDP Trust Fund for Crisis Prevention and Recovery, UNDG and WB Trust Funds of International Reconstruction Fund Facility of Iraq). Trust Funds represent the modality of pooled funding by multiple bilateral donors to different projects; therefore, it is impossible to track whose funds are used for which project and the direct linkage between bilateral donors and projects is lost. For this reason, in External Assistance application, there was a consensus to treat Trust Funds as Donors alongside with all bilateral donors (since Trust Funds practically play the role/function of a Donor vis-à-vis their contributions to project funding). This compromise, resulting from the primarily project aid modality currently in effect in respect of Iraq, predefines the level of visibility of Iraq's donors and development partners: contributions of those, who have chosen to provide support through pooled funding modality is not directly visible at the project level.

For this reason, a new application was designed and implemented, the Donor Profiles application, which records the contributions of bilateral donors/institutions through different Trust Funds. Even though bilateral institutions do not appear as the direct Donors of Trust Fund-funded projects, through the Donor Profiles application their contribution is still recorded in IDMS at the Donor level (a level higher than the project). This information (amount of bilateral funds channeled through Trust Funds) can also be retrieved and viewed in the External Assistance application, but only at the level of the Donor (i.e. X Donor contributed Y amount through WB Trust Fund, etc) – no direct association can still be made between bilateral Donors and projects funded by Trust Funds.

By recording the Trust Fund contributions of bilateral Donors and making them available in External Assistance application, we enable the External Assistance application to provide the complete picture of the bilateral Donors' contributions (even if they do not always appear to be directly associated to projects).

3.2 Requests

In post-war and emergency situations the areas of immediate actions are being identified by donor community and the recipient country usually receives an already compiled set of externally funded projects. However, in the long run the priorities are being changed towards the satisfying needs of the national economy.

As a result the Government of the recipient country starts to compose on its own the list of priority projects contributing to the national economy development. These projects may seek for external financing. Due to the fact that all available financing sources are usually limited in size and sometimes in time, the task of identifying the projects with the highest priority becomes very crucial.

IDMS addresses this issue by providing users with the Requests application. This application is very similar to the project based application of External Assistance, with the only difference that it provides information on the requests submitted by the line-ministries of the Iraqi Government.

Line-ministries are expected to access the Requests application and through the Online Data Entry Module provide the list of their priority requests, indicating the purpose of the project, the area of implementation, the funds required, etc. After the submission of a request, the Iraqi

Strategic Review Board (ISRB) is supposed to evaluate it. If the request is approved as one having national priority, it will be transferred to the External Assistance application.

As of now the Requests application is being managed by the Ministry of Planning and Development Cooperation and contains a list of priority requests currently seeking external funding. Within the List Module, you can sort requests by ISRB approval status, which allows you to identify the list of national priorities and to check the current status of the approval process of a particular request.

In addition, the Online Data Entry Module of the Requests application holds extra fields, which are restricted to ISRB members only. These fields serve for comments exchange and request rating during the reviewing process.

3.3 Donor Profiles

The Donor Profiles application provides you with the comprehensive information relevant to the Donors providing assistance to Iraq. This application captures the funds pledged by each donor and the amounts committed and disbursed by each donor through various channels.

While the External Assistance Projects application provides information on donor commitments and disbursements made through bilateral assistance (projects), the Donor Profiles application tracks commitments made through Multilateral channels such as Trust Funds administered by UN (UNDG, UNDP) and international financial institutions (The World Bank). The Donor Profiles application does not only provide overall information on funds pledged, but also the funds breakdown by years and sectors. Each pledge is also described by the conference (occasion) where it was made.

In order to get the full picture of a Donor's contributions, under a Donor's Profile one can view the total bilateral contributions that is recorded in and retrieved from the External Assistance application.

In addition to quantitative data used for analysis, a Donor's profile contains information on Donor's mission and vision, funding policy and source of funds as well as the list of offices in Iraq and list of main contacts.

On the level of the lists, charts, maps and reports, you may operate with the pledges, commitments, and disbursements, and you may analyze the gaps between funds pledged and the amounts already committed to the projects. This might be done by examining the difference between amounts pledged and amounts committed, amounts committed and amounts disbursed, and amounts pledged and amounts disbursed.

You can group all abovementioned quantitative indicators by Sectors, Years, and Channels, which provides you with the complete and clear picture of the overall External Assistance provided to Iraq by each Donor separately.

Similarly to other applications of *IDMS*, the authorized users (donor representatives) are granted with the rights to access the Online Data Entry and add/modify data related to the profile of the Donor they represent.

3.4 National Budget PIP

The National Budget PIP application was designed to track projects of the national capital investment budget. The National Budget PIP application supports the national budget execution process by recording all the project information from budget allocation up to completion.

In this application project data is recorded in a higher level of detail. Except from the standard project title, description, locations and sectors, Ministries are also interested in recording the objectives of the project and its expected impacts. If any studies were conducted to analyze the impacts of project implementation, details on these studies are also recorded.

In terms of Financial Information, Line Ministries are expected to enter information on the planned yearly budget allocations throughout project duration, as well as the actual payments provided by the Ministry of Finance. Payments information is recorded from the stage that a payment request is submitted to the Ministry of Planning and Development Cooperation up to the point that funding is actually received by the requesting Line Ministry.

Information on budget allocations along with project focus will help to evaluate the effectiveness of the national budget; the detailed payments information will assist you in monitoring the financial progress of the project and the performance and efficiency of the Ministry of Finance in releasing the national budget funds.

In the same project form (of the National Budget PIP application), Technical Line Ministry personnel submit the project progress results of their on-site evaluation visits. In this manner you can also measure the physical progress of the project.

Each Line Ministry is responsible to have its project data entered and regularly updated in IDMS – they either have to provide all project information to Ministry of Planning and Development Cooperation or enter it directly themselves.

3.5 Country Project Activity

The IDMS can offer a transparent way to identify gaps, needs, priority sectors and locations in order to evenly distribute or reallocate funds. The IDMS enables the government to measure budgetary implications of international assistance and public investment along with recurrent costs in the national budget. In addition, it assists in tracking budget performance in relation to planned and ongoing public investment and international assistance programs.

As it has been mentioned above, the External Assistance application provides the complete picture of the external assistance provided by the Donor Community to the Government of Iraq. On the other side the National Budget PIP provides information on the public investment projects financed through the Iraqi national budget. In other words, two applications provide the information on the both components of the development process taking place in Iraq.

While the External Assistance and National Budget PIP applications are different and operate with different sets of data, one may need to compile the data from both applications in order to analyze comprehensively the current development efforts in Iraq. The Country Project Activity application satisfies this need: it consolidates all external assistance and public investment projects in one separate application for review and analysis only.

Due to the different data structure of the two applications, the Country Project Activity application is based only on the fields that are common for both applications. This data can be used to identify more globally the gaps and overlaps of national and external projects. This application does not have built-in Online Data Entry Module – it operates with data that is collected through the other two project-based applications only.

4. HOW IDMS CALCULATES

It is important to understand that the IDMS is an analytical software and should not be used as an accounting or auditing system, counting each and every cent and dollar spent in Iraq. Unfortunately, it is not always possible to capture the most detailed and precise information while dealing with external assistance in the emergency or post-war situations. At the same time, such data is required to identify the priority areas and economic sectors in order to provide quick response and to create the package of the most demanded assistance projects. In the long run, similar if not identical task is being performed by the country's government to formulate the national development strategy and to finalize the set of public investment projects. For both of these tasks, all financial data should have more of a representative and relative character in order to allow comparing funding within different sectors and locations.

4.1 IDMS Financial Indicators

In order to understand how IDMS calculates financial figures, it is important to point out the current financial indicators of IDMS:

- Project Total Cost (PTC)
- Funding Agency Commitments (FAC): amount that a donor has committed to a 1st level implementer for a given project
- Funding Agency Disbursements (FAD): amount that a donor has disbursed to a 1st level implementer for a given project

While several values of commitments (FAC) and disbursements (FAD) can be recorded for each project, the Project Total Cost (PTC) is designated by a *single* value.

In addition to financial indicators, IDMS associates projects with other categories such as Sectors, Geographic Locations, Project Types, Assistance Types, etc. In almost all cases more than one value for a given category could be associated with a particular project. For example, a project could be implemented in 2 Governorates and contribute to 3 economic sectors.

This project, when grouped by Governorates or Sectors, would be listed 2 or 3 times respectively (under each one of the Governorates/Sectors it supports). Therefore, when financial amounts of these projects would be added together the resulting total would show a value much higher than the actual total value of all projects, which would cause double counting of the same project.

In order to provide users with accurate financial data, IDMS defines special aggregation rules to avoid this type of double counting in all outputs (Reports, Views, Charts, Maps). The particular rule applied in each case depends on the category or grouping used in the given report.

This built-in mechanism of IDMS is described in more detail below. Several scenarios are outlined here in order to provide a thorough explanation of the aggregation rules applied within the IDMS.

4.2 Project Total Cost

IDMS shows the same value of the PTC for a given project, regardless of its appearance in different groupings, e.g. no additional prorating or distribution is being applied for various categories. Meanwhile IDMS aggregation rules allow eliminating of the double counting for PTC.

We will use the sample project data outlined in Table 1.1 "Sample Data" below, and analyze how each is calculated within IDMS.

Table 1.1 Sample data

Title	Total Cost	Funding Agencies	Sectors	Project Types	Assistance Types
Project 1	$ 15,000,000	FA 1; FA 2	Sector 1; Sector 2; Sector 3	PT 1; PT 2; PT 3; PT 4	AT 1; AT 2; AT 3;
Project 2	$ 12,000,000	FA 3	Sector 1; Sector 3	PT 1; PT 2; PT 4	AT 1;
Project 3	$ 4,000,000	FA 2	Sector 3	PT 1; PT 2	AT 2; AT 4;
Project 4	$ 20,000,000	FA 1	Sector 4	PT 3	AT 3;
Total	**$ 51,000,000**				

When adding PTCs of projects grouped by a category such as sector (report 1.1 below) and funding agency and sector (report 1.2) one project may appear under different groups. The IDMS's aggregation rule skips all duplicate project records in order to avoid double counting of the same project. The sample reports listed below show the breakdown of PTC in more detail.

Example 1:

Report 1.1 Sample report listing projects grouped by Sector

Sector / Project	Project Total Cost
Sector 1	***$ 27,000,000***
Project 1	$ 15,000,000
Project 2	$ 12,000,000
Sector 2	***$ 15,000,000***
Project 1	$ 15,000,000
Sector 3	***$ 31,000,000***
Project 1	$ 15,000,000
Project 2	$ 12,000,000
Project 3	$ 4,000,000
Sector 4	**$ 20,000,000**
Project 4	$ 20,000,000
Total:	**$ 51,000,000***

* While the sum of Sector subtotals is $93,000,000, IDMS will display the correct total equal to $51,000,000, which calculates only once the PTC for Project 1 and Project 2 though the amount of $15,000,000 of Project 1 appears three times: under Sector 1, Sector 2 and Sector 3, and the amount of $12,000,000 of Project 2 appears twice: under Sector 1 and Sector 3.

Example 2:

Report 1.2 Sample report listing projects grouped by Funding Agency and Sector

Funding Agency / Sector / Project	Project Total Cost
FA 1	**$ 35,000,000***
Sector 1	***$ 15,000,000***
Project 1	$ 15,000,000
Sector 2	***$ 15,000,000***
Project 1	$ 15,000,000
Sector 3	***$ 15,000,000***
Project 1	$ 15,000,000
Sector 4	***$ 20,000,000***
Project 4	$ 20,000,000
FA 2	**$ 19,000,000**
Sector 1	***$ 15,000,000***
Project 1	$ 15,000,000
Sector 2	***$ 15,000,000***
Project 1	$ 15,000,000
Sector 3	***$ 19,000,000***
Project 1	$ 15,000,000
Project 3	$ 4,000,000
FA 3	**$ 12,000,000**
Sector 1	***$ 12,000,000***
Project 2	$ 12,000,000
Sector 3	***$ 12,000,000***
Project 2	$ 12,000,000
Total:	**$ 51,000,000****

* While the sum of Sector subtotals for Funding Agency 1 is $65,000,000, IDMS will display the correct total equal to $35,000,000, which calculates only once the PTC for Project 1 and Project 4 though the amount of $15,000,000 of Project 1 appears three times.

** While the sum of FA subtotals is $66,000,000, IDMS will display the correct total equal to $51,000,000, which calculates only once the PTC for Project 1, Project 2, Project 3, and Project 4.

4.3 Funding Agency Commitments and Disbursements

While IDMS shows the same value of the PTC for a given project, regardless of its appearance in different groupings, it prorates values of FAC and FAD with certain aggregation rules. The aggregation rules applied depend on the groupings included in report. The following aggregation rules are used to prorate FAC and FAD amounts:

a. No prorating is applied for category when IDMS allows associating no more than one value with the entire project record or particular commitment and disbursement.

b. No prorating is applied for the time based categories such as Year and Year/Month. When grouped by year, the projects will be listed for particular year or year/month only if they have commitments or disbursements made within this period.

c. IDMS allows users to prorate the FAC and FAD by sector and location. If the user does not prorate them the system automatically prorates equally by number of sectors or locations assigned to a given project.

d. For the Project Types, Assistance Types, Recipients, etc., IDMS automatically prorates FAC and FAD equally by number of the values assigned to the project for the each category

e. These rules will be superimposed on one another when applied in complex reports. In such reports, the prorating of the amounts will be made based on multiplication of the aggregation rules for selected groupings

Below all the abovementioned rules are presented in more details.

We will use the sample project data outlined in Table 2.1 "Sample Data" below, to examine different scenarios of the IDMS calculations.

Table 2.1 Sample data

Title	Funding Agencies	1st Level Implementers	Funding Type	Amount Committed
Project 1	FA 1	Implementer 1	Grant	$ 4,000,000
	FA 1	Implementer 2	Grant	$ 5,000,000
	FA 2	Implementer 1	Grant	$ 4,000,000
Project 2	FA 3	Implementer 3	Grant	$ 3,000,000
	FA 3	Implementer 3	Loan	$ 6,000,000
Project 3	FA 2	Implementer 1	Grant	$ 2,000,000
	FA 2	Implementer 1	Loan	$ 2,000,000
Project 4	FA 1	Implementer 2	Loan	$ 20,000,000
Total				**$ 46,000,000**

When aggregated by categories such as Funding Agency Type, Funding Source and Funding Agency, 1st Level Implementer, Funding Type, Assistance Type, Year/Month, and Project Status, prorating rules for calculating FAC and FAD are applied.

Example 1:

Report 2.1 Sample report listing Funding Agency Contributions grouped by Project

Project / Funding Agency	Amount Committed
Project 1	***$ 13,000,000***
FA 1	$ 9,000,000
FA 2	$ 4,000,000
Project 2	***$ 9,000,000***
FA 3	$ 9,000,000
Project 3	***$ 4,000,000***
FA 2	$ 4,000,000
Project 4	**$ 20,000,000**
FA 1	$ 20,000,000
Total:	**$ 46,000,000**

⇦The Total Amount Committed by Funding Agency 1 is equal to the sum of all the commitments made by that Agency to Project 1

⇦The Total Amount Committed is equal to the sum of the all Amounts Committed to Projects 1,2,3 and 4

Example 2:

Report 2.2 Sample report listing projects grouped by 1st Level Implementer and Funding Type

1st Level Implementer / Funding Type / Project		Amount Committed
Implementer 1		**$ 12,000,000**
Grant		***$ 10,000,000***
	Project 1	$ 8,000,000
	Project 3	$ 2,000,000
Loan		***$ 2,000,000***
	Project 3	$ 2,000,000
Implementer 2		**$ 25,000,000**
Grant		***$ 5,000,000***
	Project 1	$ 5,000,000
Loan		***$ 20,000,000***
	Project 4	$ 20,000,000
Implementer 3		**$ 9,000,000**
Grant		***$ 3,000,000***
	Project 2	$ 3,000,000
Loan		***$ 6,000,000***
	Project 2	$ 6,000,000
Total:		**$ 46,000,000**

4.3.1 Fund Allocations by Sector and Geographical Area

1) While FAC and FAD are disaggregated by funding agency, 1st level implementer and type of assistance (see table 2.1), these amounts are not disaggregated by other categories such as sector and location. However, IDMS implements certain aggregation rules to avoid double counting of FAC and FAD when they are aggregated by sectors and location; instead, IDMS allows users to prorate the PTC by sector and location. If the user does not prorate them the system automatically prorates equally by number of sectors or locations assigned to a given project. Thus, the IDMS calculates percentages for sectors and locations and applies the same percentages when prorating FAC and FAD per sectors or locations.

The examples below illustrate this concept in more detail.

We already know the following:

1. *Project 1 Total Cost is equal to $ 15,000,000 (see Table 1.1)*
2. *FA 1 Amount Committed to Project 1 is equal to $ 9,000,000 (see Table 2.1)*

We will use the sample project data outlined in Tables 3.1 and 3.2 below, to examine different scenarios:

Table 3.1 Sample data: Funds allocation by Sector/Sub-Sector for **Project 1**
(users provide a breakdown of the PTC by sector in absolute values or percentages at the data entry)

Sector	Sub-Sector	Funds Allocated	% of Funds Allocated
Sector 1	Sub-Sector 1.1	$ 4,500,000	%30.00
Sector 1	Sub-Sector 1.2	$ 2,250,000	%15.00
Sector 2	Sub-Sector 2.1	$ 3,750,000	%25.00
Sector 3	Sub-Sector 3.1	$ 4,500,000	%30.00
Total		**$ 15,000,000**	%100.00

Table 3.2 Sample data: Funds allocation by Location for **Project 1**
(users provide a breakdown of the PTC by location in absolute values or percentages at the data entry)

Governorate	Qadha	Funds Allocated	% of Funds Allocated
Governorate 1	Qadha 1.1	$ 1,500,000	%10.00
Governorate 1	Qadha 1.2	$ 750,000	%5.00
Governorate 2	Qadha 2.1	$ 2,250,000	%15.00
Governorate 3	Qadha 3.1	$ 6,750,000	%45.00
Governorate 4	Qadha 4.1	$ 1,950,000	%13.00
Governorate 4	Qadha 4.2	$ 1,800,000	%12.00
Total		**$ 15,000,000**	%100.00

Example 1:

Report 3.1 Sample report listing **FA 1** Commitment allocation by Sector for **Project 1**

Sector	Amount Committed
Sector 1	$ 4,050,000
Sector 2	$ 2,250,000
Sector 3	$ 2,700,000
Total:	**$ 9,000,000**

⇦The Amount Committed to Sector 1 is calculated by taking 45% (see table 2.1.1 – 30% for sub-sector 1.1 and 15% for sub-sector 1.2) from the total Amount Committed by FA1 ($9,000,000). Similarly for other sectors are being calculated.

⇦The Total Amount is equal to Amount Committed by FA 1 to Project 1

Example 2:

Report 3.2 Sample report listing **FA 1** Commitment allocation by Governorate for **Project 1**

Governorate	Amount Committed
Governorate 1	$ 1,350,000
Governorate 2	$ 1,350,000
Governorate 3	$ 4,050,000
Governorate 4	$ 2,250,000
Total:	**$ 9,000,000**

⇦ The Amount Committed to Governorate 1 is calculated by taking 15% (see table 2.1.2 – 10% + 5%) from the total Amount Committed by FA1 ($9,000,000). Similarly for other Governorates are being calculated.

⇦The Total Amount is equal to Amount Committed by FA 1 to Project 1

Example 3:

Report 3.3 Sample Report listing **FA 1** Commitment Allocation by Governorate and Sector for **Project 1**

Governorate / Sector	Amount Committed	
Governorate 1	***$ 1,350,000***	⇦Total Committed Amount of FA 1 for Project 1 ($9,000,000) is being prorated first by Governorate and then by sector in accordance to percentages as shown in tables 2.1.2 and 2.1.1. So, Amount Committed for Governorate 1 is $1,350,000 (15% from $9,000,000) and it is being further prorated by 45% for the Sector 1 to make Amount Committed for Sector 1 equal to $607,500.
Sector 1	$ 607,500	
Sector 2	$ 337,500	
Sector 3	$ 405,000	
Governorate 2	***$ 1,350,000***	
Sector 1	$ 607,500	
Sector 2	$ 337,500	The same approach as above applies to other sectors of governorates
Sector 3	$ 405,000	
Governorate 3	***$ 4,050,000***	
Sector 1	$ 1,822,500	
Sector 2	$ 1,012,500	
Sector 3	$ 1,215,000	
Governorate 4	***$ 2,250,000***	
Sector 1	$ 1,012,500	
Sector 2	$ 562,500	
Sector 3	$ 675,000	
Total:	**$ 9,000,000**	⇦The Total Amount is equal to Amount Committed by FA 1 to Project 1

4.3.2 Equal Distribution

While the IDMS allows users to prorate the PTC for Sectors and Governorates at the time of data entry, for the Project Types, Assistance Types, and Recipients it automatically prorates PTC (and therefore FAC, FAD) equally by number of the values assigned to the project for the each category.

In other words, if a project has 2 Project Types, each of the FACs listed per Project Type will be divided by 2. The example below illustrates this concept in more detail.

We already know the following:

1. *FA 1 Amount Committed to Project 1 is equal to $ 9,000,000 (see Table 2.1)*
2. *Project 1 is associated with PT1, PT2, PT3, and PT4 and AT1, AT2, and AT3*

Example 1:

Report 4.1. Sample report listing FA **1** Commitment allocation by Project Type for **Project 1**

Project Type	Amount Committed	
PT 1	$ 2,250,000	⇦In total, four PTs are assigned to Project 1. That's why Amount Committed to each Project Type is equal to ¼ of FA 1 Commitment
PT 2	$ 2,250,000	
PT 3	$ 2,250,000	
PT 4	$ 2,250,000	
Total:	**$ 9,000,000**	⇦The Total Amount is equal to Amount Committed by FA 1 to Project 1

When the multiple groupings based on equal prorating are included in the report, the FAC and FAD are being divided into *multiplication* of the total numbers of the items assigned to the project for these groupings.

Example 2:

Report 4.2 Sample report listing **FA 1** Commitment allocation by Project Type and Assistance Type for **Project 1**

Project Type / Assistance Type	Amount Committed
PT 1	***$ 2,250,000***
AT 1	$ 750,000
AT 2	$ 750,000
AT 3	$ 750,000
PT 2	***$ 2,250,000***
AT 1	$ 750,000
AT 2	$ 750,000
AT 3	$ 750,000
PT 3	***$ 2,250,000***
AT 1	$ 750,000
AT 2	$ 750,000
AT 3	$ 750,000
PT 4	***$ 2,250,000***
AT 1	$ 750,000
AT 2	$ 750,000
AT 3	$ 750,000
Total:	**$ 9,000,000**

⇦The Amount committed per each pair of Project Type and Assistance Type is equal to 1/12 of the FA 1 CommiPTent, where 12 is the multiplication of the number of Project Types (4) and Assistance Types (3) assigned to Project 1.

⇦ The Total Amount is equal to Amount Committed by FA 1 to Project 1

4.3.3 Superimposition of Aggregation Rules

Superimposition occurs when complex reports include a combination of groupings by applying different aggregation rules. In such reports, the prorating of the amounts will be made based on multiplication of the aggregation rules for selected groupings. Note that for the given project all the combinations of the instances associated with the two groupings will be listed.

For example, for the list of projects grouped by Funding Types, Sector, and Project Types, IDMS will display in the rows the FAC multiplied by PTC prorating rate for sector and prorated equally by the number of assigned Project Types. The sample reports listed below show the breakdown of FAC in more detail.

Table 5.1 Sample data

Title	Funding Type / FA 3 Commitment		Sector(s) / % of Fund Allocation		Project Types
Project 2	$ 3,000,000	Grant	Sector 1	% 70.00	PT 1; PT 2; PT 4
	$ 6,000,000	Loan	Sector 3	% 30.00	
Project 5	$ 5,000,000	Grant	**No data entered**		PT 3; PT 4
Project 6	$ 8,000,000	Grant	Sector 2	%100.00	**No data entered**
Project 7	$ 10,000,000	Loan	Sector 3	%100.00	**No data entered**
Total	**$ 32,000,000**				

Example 1:

Report 5.1 Sample report listing projects grouped by Funding Type, Sector, and Project Type

Funding Type / Sector / Project Type/ Project		Amount Committed	
Grant		**$ 16, 000,000**	⇦The total for Grant is equal to the sum of the subtotals for Sectors
Sector 1		**$ 2,100,000**	The total for Sector is equal to the sum of the subtotals for TMs
PT 1		***$ 700,000***	
	Project 2	$ 700,000	
PT 2		***$ 700,000***	
	Project 2	$ 700,000	
PT 4		***$ 700,000***	
	Project 2	$ 700,000	
Sector 2		**$ 8,000,000**	
UNSPECIFIED		***$ 8,000,000***	⇦Additional Sector2 – Unspecified combination is being added in order to include Project 6 in the report
	Project 6	$ 8,000,000	
Sector 3		**$ 900,000**	
PT 1		***$ 300,000***	⇦The row value is equal to 1/3 of the 30% of the donor commitment, since Sector 3 receives 30% of commitment and project is associated with 3 Project Types
	Project 2	$ 300,000	
PT 2		***$ 300,000***	
	Project 2	$ 300,000	
PT 4		***$ 300,000***	
	Project 2	$ 300,000	
UNSPECIFIED		**$ 5,000,000**	
PT 3		***$ 2,500,000***	
	Project 2	$ 2,500,000	
PT 4		***$ 2,500,000***	
	Project 2	$ 2,500,000	
Loan		**$ 16,000,000**	
Sector 1		**$ 4,200,000**	
PT 1		***$ 1,400,000***	
	Project 2	$ 1,400,000	
PT 2		***$ 1,400,000***	
	Project 2	$ 1,400,000	
PT 4		***$ 1,400,000***	
	Project 2	$ 1,400,000	
Sector 3		**$ 11,800,000**	
PT 1		***$ 600,000***	
	Project 2	$ 600,000	
PT 2		***$ 600,000***	
	Project 2	$ 600,000	
PT 3		***$ 600,000***	
	Project 2	$ 600,000	
UNSPECIFIED		***$ 10,000,000***	
	Project 7	$ 10,000,000	
Total:		**$ 32,000,000**	⇦The Total Amount is equal to the sum of Amounts Committed by FA 3 to Projects 2,5,6, and 7

4.4 Unallocated and Unspecified instances

There are cases when the amount of the PTC is not fully broken down by sector and/or location. In order to keep consistency in producing reports by sectors and locations, IDMS automatically adds a special "unallocated" item assigning the remaining balance that has not been allocated to any sector or location.

We already know the following:

1. *Project 2 Total Cost is equal to $ 12,000,000*
2. *FA 3 Amount Committed is equal to $ 9,000,000*

Table 6.1 Sample data: Funds allocation by Sector/Sub-Sector for **Project 2 (45% has not been allocated to any sectors)**

Sector	Sub-Sector	Funds Allocated	% of Funds Allocated
Sector 1	Sub-Sector 1.1	$ 3,600,000	%30.00
Sector 3	Sub-Sector 3.1	$ 3,000,000	%25.00
SUBTOTAL		$ 6,600,000	%55.00
Unallocated		***$ 5,400,000***	***%45.00***
TOTAL		**$ 12,000,000**	**% 100.00**

Example 1:

Report 6.1 Sample report listing **FA 3** Commitment allocation by Sector for **Project 2**

Sector	Amount Committed
Sector 1	$ 2,700,000
Sector 3	$ 2,250,000
Unallocated	$ 4,050,000
Total:	**$ 9,000,000**

The same approach as in report 2.1.1 applies here with the difference that unallocated sector is also being prorated (by %45%).

⇦The ***Unallocated*** item allows making the Total Amount equal to Amount Committed by FA 3 to Project 2

Some data such as sector or recipient might have not been provided by users at the data entry thus making the project data incomplete. IDMS provides capabilities for handling with such incomplete project data. Missing data may create inconsistency when producing aggregated reports. For example, when producing a report by recipients, a project that had missing item of recipients will not be listed and its costs will not be aggregated in the total. As a result of this, the reported Total aggregated by recipients may show different value from the total aggregated by another category such as a sector. Moreover, while IDMS applies validity control on all required fields at the time of data entry to avoid missing data for key fields (such as sector, governorate, funding agency), some of Synergy's clients requested allowing partial saving of projects. Therefore, additional rules have been implemented in the IDMS to allow temporarily saving of project data with missing required fields. In order to keep the consistency in producing reports with these type of partially saved projects (with missing data), IDMS automatically introduces a special UNSPECIFIED value to all categories that are having missing data.

We will use the sample data outlined in Table 7.1 "Sample Data" below, to examine different scenarios of the IDMS calculations.

Table 7.1 Sample data

Title	FA 3 Commitment	Sector(s) / % of Fund Allocation		Project Types
Project 2	$ 9,000,000	Sector 1	% 70.00	PT 1; PT 2; PT 4
		Sector 3	% 30.00	
Project 5	$ 5,000,000	**No data entered**		PT 3; PT 4
Project 6	$ 8,000,000	Sector 2	%100.00	**No data entered**
Project 7	$ 10,000,000	Sector 3	%100.00	**No data entered**
Total	**$ 32,000,000**			

Example 1:

Report 7.1 Sample report listing projects grouped by Sector

Sector / Project	Amount Committed
Sector 1	***$ 6,300,000***
Project 2	$ 6,300,000
Sector 2	***$ 8,000,000***
Project 6	$ 8.000,000
Sector 3	***$ 12,700,000***
Project 2	$ 2,700,000
Project 7	$ 10,000,000
UNSPECIFIED	***$ 5,000,000***
Project 5	$ 5,000,000
Total:	**$ 32,000,000**

⇦Without applying the UNSPECIFIED item, Project 5 would not be listed in the report and, as a result the Total Amount Committed would be less than it originally was.

⇦The Total Amount is equal to the sum of Amounts Committed by FA 3 to Projects 2,5,6, and 7

Example 2:

Report 7.2 Sample report listing projects grouped by Project Type

Project Types / Project	Amount Committed
PT 1	***$ 3,000,000***
Project 2	$ 3,000,000
PT 2	***$ 3,000,000***
Project 2	$ 3,000,000
PT 3	***$ 2,500,000***
Project 5	$ 2,500,000
PT 4	**$ 5,500,000**
Project 2	$ 3,000,000
Project 5	$ 2,500,000
UNSPECIFIED	**$ 18,000,000**
Project 6	$ 8,000,000
Project 7	$ 10,000,000
Total:	**$ 32,000,000**

⇦Without applying the UNSPECIFIED item, Project 6 and Project 7 would not be listed in the report and, as a result the Total Amount Committed would be less than it originally was.

⇦The Total Amount is equal to the sum of Amounts Committed by FA 3 to Projects 2,5,6, and 7

4.5 IDMS Currency Conversions

For reporting, all financial indicators are being presented in US Dollars and Iraqi Dinars. Meanwhile, for your convenience, all the amounts are being entered in original donor currencies. IDMS automatically performs the currency conversion while saving project data. First amounts are being converted into US Dollars and then amounts are converted from US Dollars into Iraqi Dinars.

IDMS contains the *quarterly exchange rates* to convert main donor currencies into US Dollars for the past ten years. These exchange rates indicate how many units of original currency correspond to one dollar. In order to convert the amount entered into US Dollars, the original amount should be divided by the exchange rate. The appropriate exchange rate is being identified based on the corresponding time indicator (Project Start Date for Project Total Cost and Date of Commitment/Disbursement for Donor Commitments and Disbursements). The exchange rate for closest quarter is being used when the appropriate exchange rate is missing from the system. The default rates are being used unless the user manually provided the exchange rate. The provided rate will be associated only with the particular value and will be stored along with the project record.

While converting from US Dollars into Iraqi Dinars, IDMS uses the exchange rates to convert Iraqi Dinars into US Dollars. But this time the amount in US Dollars is being multiplied by exchange rate.

Ministry of Planning and Development Cooperation

UNDP Iraq

Iraq Development Management System (IDMS)

Standard Operating Procedures for Donor Data Entry

2 August 2010

IDMS Standard Operating Procedures:
Ensuring IDMS captures your agency's contribution

The purpose of this Standard Operating Procedure (SOP) is to establish sustainable cooperation between the Government of Iraq and donor agencies by sharing information on assistance in order to improve aid effectiveness. This document explains the role of IDMS as an aid management tool and how to update it. It is aimed at donor agencies, which have the primary responsibility to update project information on a quarterly basis.

A. What is IDMS and why is it important?

The Iraq Development Management System (IDMS) is a bi-lingual web-based aid information management system, owned and hosted by the Ministry of Planning (MoP). Under Regulation 7 of the Coalition Provisional Authority (CPA) of Iraq, MoP is mandated to undertake necessary actions under its own discretion to promote, allocate, and follow up on international assistance.

Donor aid to Iraq has been unprecedented in size and scale with committed grant assistance alone in excess of $23 billon in the period 2003-2007. In addition, the multiplicity of actors involved in Iraq (including UN agencies, bilateral donors and NGOs) and the complex operating environment present significant problems for effective aid management. IDMS helps to restore control of development to the Government of Iraq by providing a consolidated repository of aid information aligned with government systems. Some of the key benefits of IDMS for aid effectiveness are:

1. **Enhanced Transparency**: enables Government to track aid flows and activities funded by multilateral and bilateral agencies in addition to national budget programmes to provide a holistic multi-year picture of development in Iraq. Publicly-available online reporting presents information on the status of aid activities.
2. **Improved Planning**: informs integrated planning of development initiatives and resource allocation, helps to identify funding gaps against national strategy as well as minimise overlaps in implementation.
3. **Managing for Results**: keeps donors aware of their commitment calendars, tracks disbursements and monitors results.

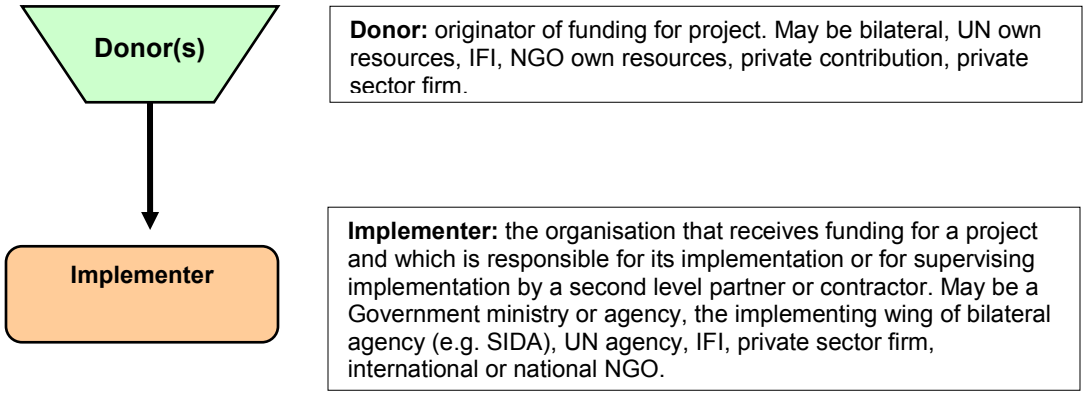
IDMS (publicly accessible through the MoP website: http://www.mop-iraq.org/idms) is the only source of consolidated information on development projects in Iraq. To date, IDMS contains information on 17,489 grant assistance projects implemented in Iraq with the support of donor countries and multi-lateral institutions since 2003. The total amount of committed assistance, as recorded in the External Assistance Application of IDMS, is US$ 15.6 billion, representing 70% of the total.

However, IDMS's utility as a tool for effective aid management is dependent on the completeness, accuracy and timeliness of the information provided.

B. Who should update IDMS?

All organisations involved in the Iraqi reconstruction and development process should check to see that IDMS has captured your contribution. This includes donors, United Nations agencies, International Financial Institutions, international and national NGOs.

IDMS tracks aid by individual *project*, defined as an activity or a set of activities and defined outputs, usually in pursuit of a certain goal, with clearly defined start and end dates, source of funding and budget/project cost. IDMS distinguishes between two roles for organizations involved in projects: **donors** and **implementers** (see figure 1 below). Note that in some cases the donor and the implementer can be the same organisation, e.g. if a UN agency project is funded from its own core resources.



IMPORTANT: Donor Agencies have the primary responsibility for entering projects and updating information in IDMS.

In the case of co-funded projects, donor agencies must select a leading agency to update IDMS. As an exception, implementing agencies and even executing agencies can also update the database, if the donor agency of the project agrees and assigns responsibility accordingly. The IRFFI Secretariat, in conjunction with MoP, are responsible for updating projects funded by the UNDG and World Bank Trust Funds (please also see the section on "How to Report Donor Contributions to Trust Funds" below).

To facilitate entering and updating project information into IDMS, each donor is requested to nominate an **Information Provider (IP)** within their organisation. This person will serve as a focal point for communication with the MoP International Cooperation Directorate (ICD) team, who manage IDMS. The IP will be responsible for adding and updating projects to ensure their agency's contribution is reflected.

D. When should you update IDMS?

There are three stages when data entry is required to ensure that IDMS contains up to date, accurate information. These are when the project is approved, quarterly progress updates and when the project finished:

1. **New Project**: enter new project information into IDMS once the project has been approved. This is the most time-consuming period of data entry but completing in a timely manner is essential for planning purposes.

   Before entering a new project, **check very carefully whether or not IDMS already contains the project to avoid double counting**. To do this, you should check under the donor agency's name and also the implementer's name to see if the project has already been recorded, as follows:

   1. Make sure that you are in the "List" tab of the "External Assistance" application. N.B. this is the default view when you log in to IDMS.
   2. Select "Projects listed by Donor" from the "Public Views" list on the left hand side. Click on the [+] button next to the name of the project donor to view a list of their projects.
   3. Select "Projects listed by Implementer" from the "Public Views" list on the left hand side. Click on the [+] button next to the name of the project implementer to view a list of their projects.

   If the project already exists, please do not add a duplicate copy but rather update the existing project. Please contact the donor agency and the MoP team if you are unsure whose responsibility this is. If the project does not exist in the database, the donor agency should enter it as a new project record and share this information with the implementer(s) and the other funding agency(ies), if any.

2. **Update Project**: IP should review their project information on a **quarterly** basis to ensure that information is complete and up to date. This typically includes updating project progress, disbursements and any changes to expected project costs and overall delivery.

3. **Close Project**: finalise project information when the project comes to an end. This typically includes adding any final disbursements and changing implementation status to "completed".

C. How to update IDMS

The Information Provider can request a user account on-line via the link on the http://www.mop-iraq.org/idms log-in screen. When you have provided the name, title, telephone and email address for your agency's Information Provider, you will receive a secure user name and password. This user name and password gives your Information Provider the rights and ability to edit data in IDMS that relates to your agency (and your agency only). Please contact idms@mop.gov.iq if you require assistance.

The "**External Assistance**" application in IDMS holds information on all the projects that are implemented through external funding. Information Providers may choose to provide information on their respective projects either by directly entering information online through the inbuilt Data Entry Module or, if this is not possible, by providing information indirectly to the MoP team:

a. **On-line submission** (preferred option) through the Web-based IDMS: http://www.mop-iraq.org/idms
b. **Off-line submission** via word or excel spreadsheet: http://www.mop-iraq.org/MoP/index.jsp?sid=1&id=260&pid=128. Adhere to the IDMS Project fields therein.

N.B. Please see the "User Manual for External Assistance Data Entry" for detailed steps on completing the online data entry process (available from the IDMS homepage).

Three IPs have direct online access to IDMS so far: SIDA on behalf of Sweden, CIDA on behalf of Canada and DFID on behalf of UK. Please see the detailed steps on data entry contained in the annex for further guidance.

E. What information is required?

The required information in the data entry process is split into four categories:

1. **Project Details**: containing general information on the project such as title, start date, end date, approval status, implementation status, progress (%), type of project, type of assistance, recipient and contact information.

2. **Project Funding**: containing financial information on the project such as project cost by year, by sector, by location and by type as well as donor commitments and disbursements over time and any government co-financing arrangements.

3. **Project Outputs**: containing information on the outputs of the project including beneficiaries and factors causing delay.

4. **Notes and Attachments**: where additional project documents and other background information can be uploaded.

F. How to Report Donor Contributions to Trust Funds

As data entered in IDMS is project-specific, Information Providers need an option for reporting funds channelled through one of the Trust Funds (e.g. the two IRFFI funds: UNDG and WB Trust Fund). Trust Funds represent pooled funding by multiple bilateral donors to different projects. Therefore it is impossible to track whose funds are used for which project, and the direct linkage between bilateral donors and projects is lost.

For this reason, the "**Donor Profiles**" application was added to IDMS. It records the consolidated contributions of donors through different Trust Funds and bilaterally. Even though bilateral institutions do not appear as the direct donors of Trust Fund projects, through the Donor Profiles application their contribution is still recorded in IDMS at the donor level (a level higher than the project). This data has been collected by MoP from numerous sources, including the IRFFI web-site (www.irffi.org), and entered into the IDMS as a baseline for tracking the financial commitments and pledges of donors.

Information Providers should verify accuracy and update their donor profile quarterly as per the external assistance application. Please see the "User Manual for Donor Profile Data Entry" for detailed guidance on how to update your Donor Profile, available from the IDMS homepage.

G. Support and resources

The International Cooperation Directorate (ICD) of the MoP manages IDMS on behalf of the Government of Iraq (GoI). The ICD team is responsible for:

- providing support and training to users to enter new projects and update project information in IDMS
- entering project information and data updates received off-line from IPs
- data management to monitor quality and completeness of data in IDMS
- disseminating regular analytical reports based on the data in IDMS to support planning and aid effectiveness

Contact the IDMS administrator: Mr. Saif Hassan, idms@mop.gov.iq to organise training by MoP and UNDP Iraq. Core training is for Information Providers (IPs) and will cover how to update IDMS. Training can also be delivered via teleconference facility.

In 2008, regular trainings will be planned for implementation in the IZ, Baghdad in the premises of MoP. Visit the MoP web-portal at www.mop-iraq.org/mop or contact the above mentioned focal points for more details on the schedule.

In addition, there are a number of technical guides and manuals available, which you can take advantage of to make full use of IDMS and update your data. These are all available from the IDMS front page: www.mop-iraq.org/idms.

User guides:

1. **IDMS Handbook**: explains the basic concepts of IDMS.

2. **Analytics User Manual**: describe how IDMS functions and provides instructions which the user should follow to ensure successful work.

Data entry manuals:

1. **"External Assistance Projects" application, online data entry**: for use by donors and GoI to add and update externally financed projects.
2. **"Donor Profile" application, online data entry**: for use by donors and GoI to add and update donor profile information in IDMS.
3. **"Capital Investment Projects" application, online data entry**: for use by GoI ministries to add and monitor capital investment projects financed out of the national budget.
4. **"Iraq Development Projects" application, online data entry**: for use by GoI ministries to identify priority projects that are ready for implementation once appropriate funding is made available.

H. Non Compliance

MoP will produce a quarterly report measuring the completeness and accuracy of data and publish it on the MoP Web Portal (http://www.mop-iraq.org/mop). Agencies that do not update their information will be listed and their data will remain out of date in reports and publications.

To assist compliance, e-mail notifications will be sent out to IPs on a quarterly basis, notifying them of projects that need to be updated. This will help to streamline the workflow process and allow all stakeholders to utilize the IDMS more effectively.

I. Definition of Terms

Key terms used in IDMS are defined below:

General Definitions:

Project: Activity or a set of activities and defined outputs, usually in pursuit of a certain goal, with clearly defined start and end dates, source of funding and budget/project cost.

Donor: the agency that is the source of funds for the project.

Implementer: the organisation that receives funds from the donor to implement the project.

Recipient: the Government agency, civil society or private sector institution of the aid recipient country to which the ownership of the project outputs is to be transferred.

Beneficiary: the Government agency, civil society or private sector institution of the aid recipient country, which benefits from the implementation of the project.

Financial Definitions:

Pledge: the grant or loan resources promised by a donor to Iraq over one year or a fixed number of years.

Project Cost: the expected total amount required for the implementation of the project. In the case of multi-year projects, the project cost may be respectively distributed, reflecting the planned implementation/delivery of the project activities each year.

Commitment*:* a firm obligation expressed in writing by the donor to the implementer for a particular project that is backed by the availability of the necessary funds or resources. Multiple commitments may be distributed throughout the duration of the project but the total sum of commitments should not exceed the total cost of the project.

Commitment date: the date of the written agreement committing donor funds or resources to the implementing organisation.

Disbursement: the placement of resources at the disposal of the implementing partner (UN agency, government, NGO, private sector etc.). Usually this involves the transfer of funds into the implementer's bank account or the draw down by the implementer of funds held in an account by the donor.

Disbursement Date: the date at which resources were actually transferred from donor to implementer.

Other Definitions can be found in IDMS User handbook and manual at www.mop-iraq.org/idms.

J. Glossary

CIDA: Canadian International Development Agency
CPA: Coalition Provisional Authority
DFID: Department for International Development
EC: European Commission
GoI: Government of Iraq
ICD: International Cooperation Directorate, MoP
IDMS: Iraq Development Management System
IFI: International Financial Institution
IM: Information Manager
IP: Information Provider
IRFFI: International Reconstruction Fund Facility for Iraq
ISRB: Iraqi Strategic Review Board
JICA: Japanese International Cooperation Agency
MoP: Ministry of Planning
NGO: Non-Governmental Organization
PIU: Project Implementation Unit
SIDA: Swedish International Development Cooperation Agency
SOP: Standard Operating Procedures
UNDG.ITF: United Nations Development Group Iraqi Trust Fund
UNDP: United Nations Development Programme
WB: World Bank
WB.ITF: World Bank Iraqi Trust Fund

K. Amendments to this Document

The Standard Operating Procedures (SOP) is a dynamic document and will be amended as new upgrades and changes to IDMS are implemented. If you have comments on how to improve this document or any other feedback, please send to: idms@mop.gov.iq.

IRAQ DEVELOPMENT MANAGEMENT SYSTEM (IDMS)

ANALYTICS

USER MANUAL

Version 2.0

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1. INTRODUCTION

The purpose of this document is to describe how the *Iraq Development Management System (IDMS)* application functions and to provide the necessary instructions ensure successful work with the application. Use of this document and compliance with the standards specified herein is mandatory for anyone working with the mentioned application.

2. OVERVIEW

The *Iraq Development Management System (IDMS)* is an automated information management system which is designed to improve efficiency and coordination of donor activities in Iraq. 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 objectives of the *IDMS* is to serve as a reliable and credible source of information on overall donor contributions to Iraq's reconstruction, economic recovery and socio-economic development, as well as to support the Government in effectively managing development assistance and promoting the accountable and transparent use of resources.

The *IDMS* is a powerful tool to view project data organized into lists, reports, charts, and maps, present the project data in the form of list, chart and map reports, memorize/save the reports, print them, and export them into PDF, MS Word and MS Excel format files.

The *IDMS* 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, the *IDMS* consists of four applications, which are:

- **External Assistance Projects** – this application is designed to track the ongoing projects that are financed from external sources, e.g. donor community, 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 forms of Lists, Charts, and Maps. Moreover, in this application you can add new projects or modify the information of existing projects through the built-in *Online Data Entry Module*.

- **Donor Profile -** this application is designed to track the donor profile information. Moreover, it gives the donor organizations / entities the possibility to provide information about the amount of assistance provided to the country, etc. This is done in the built-in *Online Data Entry Module.* Also, you can create analytical reports in the forms of Lists and Charts.

- **Capital Investment Projects -** this application is designed to track the public investment projects that have been approved for the implementation and the projects that are currently being implemented. These projects comprise the Public Investment Portfolio and are financed out of the national budget. Once you have accessed this application, you are able to view project details and create analytical reports in the forms of Lists, Charts, and Maps. Moreover, in this application you can add new projects or modify the information of existing projects, which is done in the built-in *Online Data Entry Module*.

- **Iraq Development Projects** - this application is designed to consolidate the data from the two applications: *External Assistance Projects and Capital Investment Projects.*

- **Indicators** - this application is designed to track project indicators and the related progress.

The examples described in the sections below are based on the *External Assistance Projects* application.

The IDMS provides a web-based user interface and requires a web browser (Internet Explorer) pre-installed.

Note: To ensure more flexibility and a more user-friendly environment, the IDMS application has been implemented as a bi-lingual system allowing the data to be presented in the system in two languages: English and Arabic.

3. WHO USES IDMS?

The table below lists the groups of users that might be accessing and managing the *IDMS* application:

Users Group	Who are they?	Why they need IDMS access?
Administrators	IDMS system administrator.	Access to the entire data stored in *IDMS*.
Executing Body (ExB)	Ministry or Governorate users.	Responsible for creating a new project request with all the required data and saving it as a draft.
Assigned MoP Sectorial Unit (MSU)	Ministry of Planning's Sectorial Unit users.	Responsible for revising the draft project requests, making necessary changes and applying the draft for a submission. This user also negotiates with the Line Ministry before sending the draft forward to the MIU.
MoP Investment Unit (MIU)	Ministry of Planning's Investment Unit users.	Responsible for sending the revised draft project request for an approval first to the Council of Ministers and then to the country Parliament.

For each user group, a specific role is assigned by the IDMS system administrator, in accordance to the requirements. Depending on the role, users get certain permissions to add, edit or modify and view entries in the IDMS application.

Note: If you do not have enough permission to perform certain actions, please refer to your project coordinator or system administrator.

Besides the group listed above, customized groups may also be created on demand.

4. LOGGING INTO THE IDMS APPLICATION

The starting screen of the *IDMS* is the *Login Screen*. The application requires to enter a valid username and password and then to submit them. The section below provides for the necessary instructions on logging into the *IDMS* application. You may change the IDMS language into Arabic by pressing التحويل إلى العربية link in the right upper corner of the page.

In order to log into the application, follow the steps described below:

1. Provide the username and password in the appropriate fields on the *Login Screen* (Figure 1).
2. Click the **Login** button.
   Note: The password is case sensitive.

Figure 1: The IDMS Application Login Screen

A successful login directs to the *My Workspace* module of the *IDMS* application.

Note: If you have forgotten your password, you can retrieve it by clicking the **Forgot Your Password?** link in the *Login Screen* and confirming your identity. After submitting your identity information, you will receive the password into the e-mail account indicated.

4.1 Registering for a Username and Password

New users can sign up for a username and password to start using the system. In order to register in the system, follow the steps described below:

1. Click on the **Request a New Account** link at the bottom of the *Login Screen*. A *User Registration Form* (Figure 2) will appear.
2. Fill in the information requested.
3. Click the **Submit** button to submit the information provided.

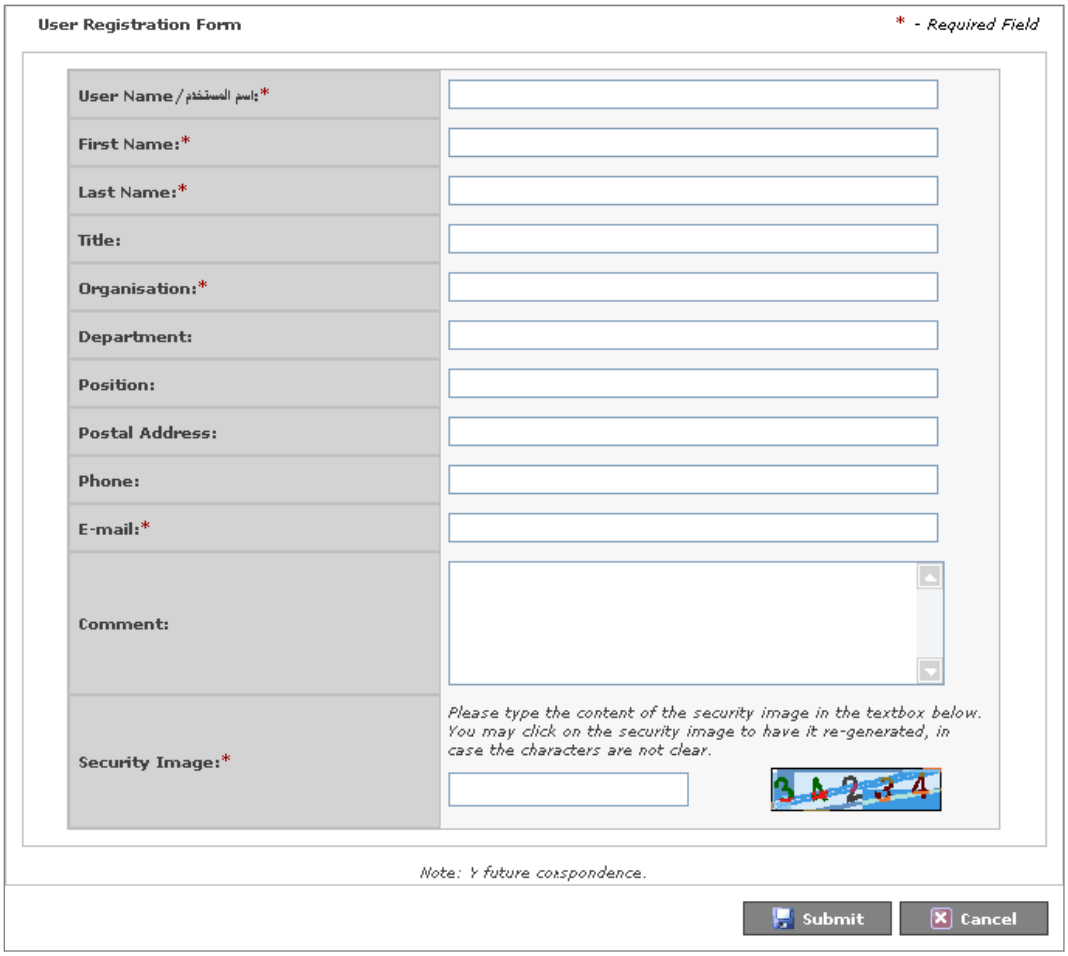


Figure 2: The User Registration Form

Once you submit the registration form, the IDMS's administrator receives a notification. The administrator will review the information submitted and either approve the application or reject it. In case the application is approved, you will receive an e-mail message to the provided e-mail address. The e-mail will contain your login information details (automatically generated username and password) and the link to the IDMS's login page.

Once logged in with the received username/password, you can manage your details, i.e. change personal data and the password. To edit personal details, log into the application, go to the My Profile section (Figure 3) and make the appropriate changes.

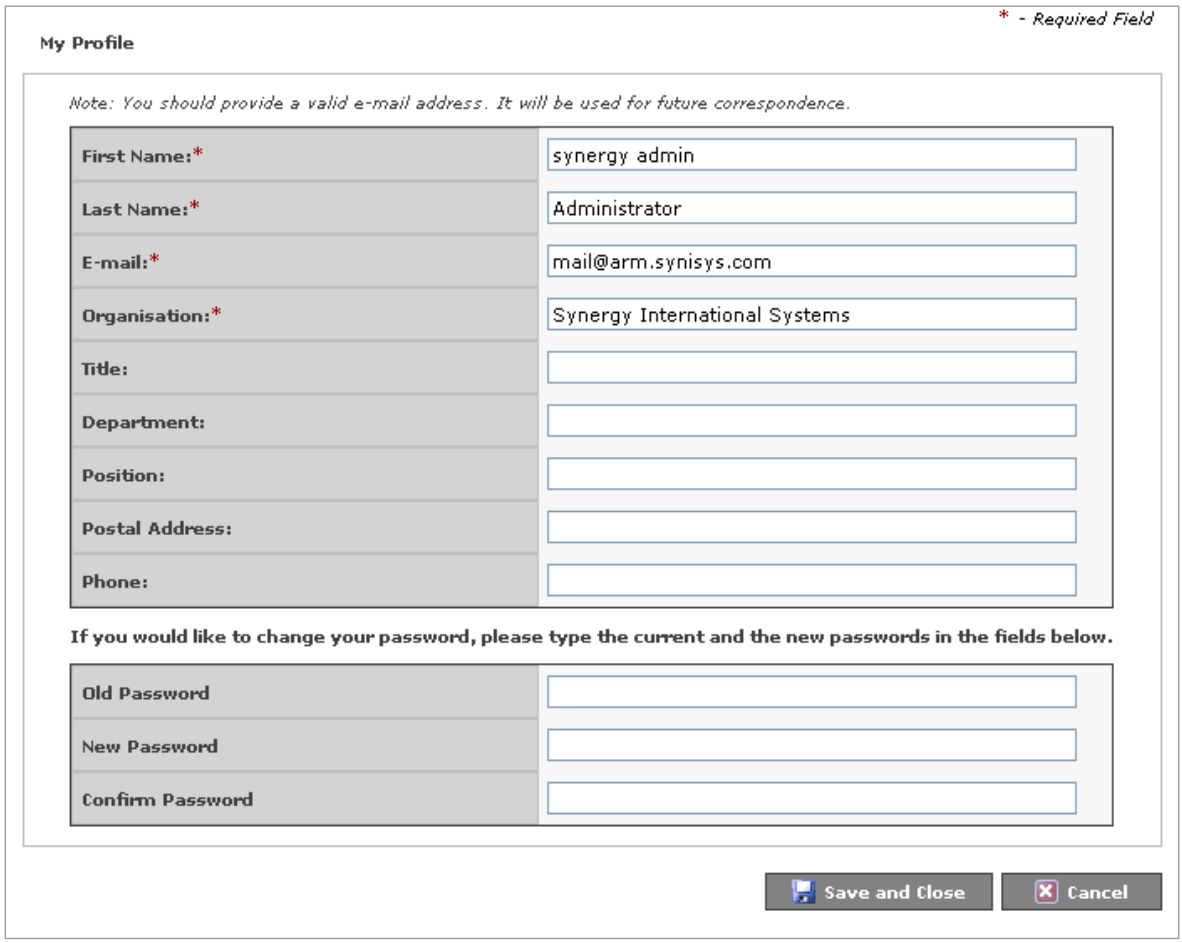


Figure 3: My Profile Section

4.2 Accessing IDMS without Registration

To ensure more flexibility and to provide access to the project data to a wider range of users, the system is designed in such a way that it allows public users to enter it without having to register for a username and password. Although, public users have access to the project data, they are not able to create new projects or modify / delete the existing ones.

Public users wishing to view project data should click on the **ENTER IDMS AS A GUEST** button (Figure 1). They will be directed to the *List* module of the *IDMS* application.

5. IDMS ANALYTICS STRUCTURE

The following applications are available in the current design of the *IDMS*:

- **External Assistance Projects** – serves for inserting and modifying the ongoing projects that are financed from external sources.
- **Donor Profile -** serves for inserting and modifying the donor profile information.
- **Capital Investment Projects -** serves for inserting and modifying the public investment projects that have been approved for the implementation and the projects that are currently being implemented. These projects comprise the Public Investment Portfolio and are financed out of the national budget.
- **Iraq Development Projects** - consolidates the data from the two applications: *External Assistance Projects and Capital Investment Projects.*
- **Indicators** - serves for inserting and modifying project indicators and the related progress.

The application contains a built-in online data entry possibility, which is designed to allow entering the corresponding data online from your web browser (Internet Explorer).

The *IDMS* consists of the following main sections:

- MY WORKSPACE MODULE – used for quick access to the projects registered in the *IDMS* system by the user's group.
- LIST MODULE – used to create and execute ad-hoc queries on the data, and acquire results in the form of a list.
- CHART MODULE – used to filter and display the data in a chart form.
- MAP MODULE - used to filter and display the data in a map form.
- REPORT MODULE – generates complex reports over one or more criteria and presents the output in the printable and user-friendly format.
- DASHBOARD MODULE - used for quick access to the projects registered in the *IDMS* system.

The *IDMS* main window has a complex preview as it is shown in the Figure 4.

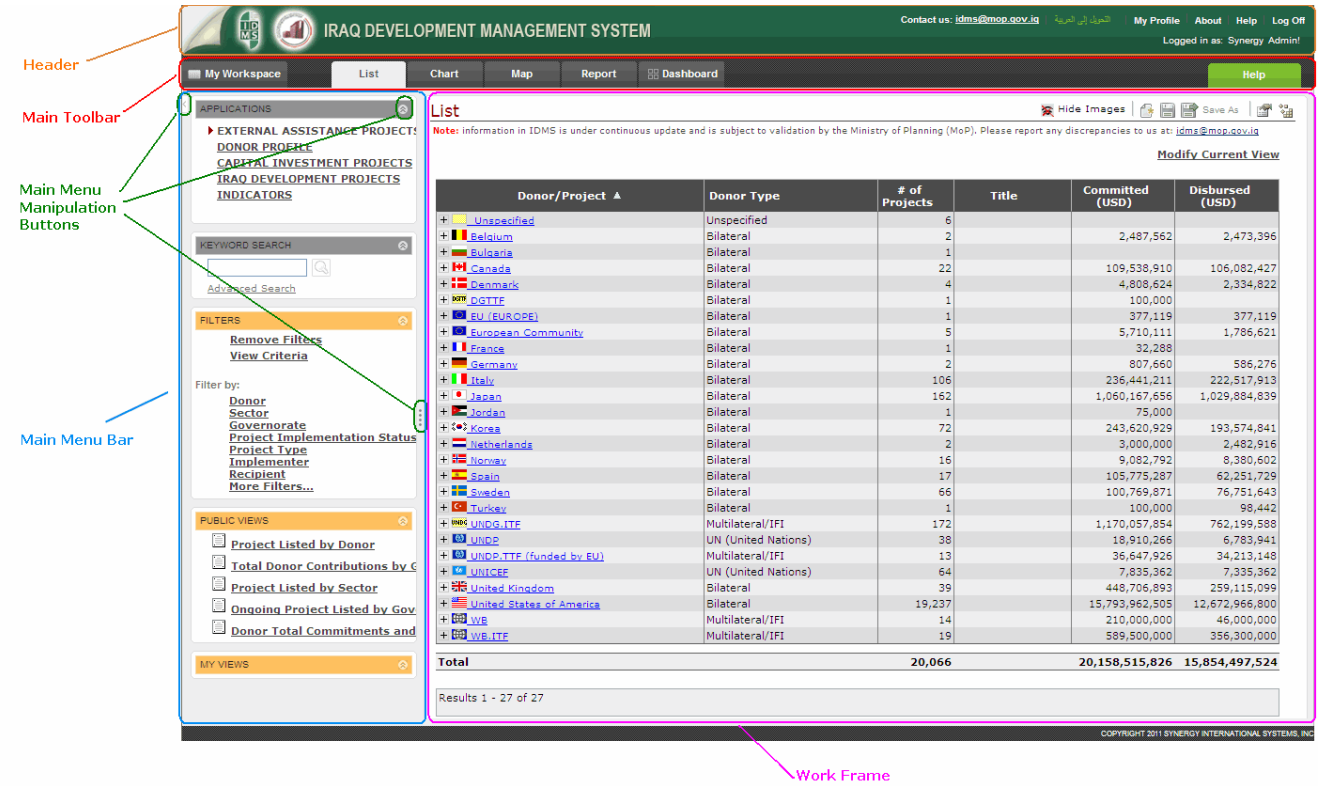


Figure 4: IDMS Analytics Structure

It contains the following components:

Component Name	Description
Header	This is the application header that contains application name and the IDMS logo. On the right side, following functions are available: • **Contact Us** – e-mail address of the IDMS System Administrator. • **My Profile** – this opens your personal settings and details. For details, see Registering for a Username and Password. • **About** – opens *IDMS* about window. • **Log Out** – this button is used to log off the application.
Main Toolbar	This is the main toolbar of the *IDMS* application. Following tabs are available here: • **My Workspace** – opens MY WORKSPACE MODULE to manage user specific projects. • **List** – opens the LIST MODULE of the selected Application (see Main Menu description below). • **Chart** –opens the CHART MODULE. • **Map** –opens the MAP MODULE. • **Report** - opens the REPORT MODULE. • **Dashboard** – opens the DASHBOARD MODULE for quick access to the projects registered in the *IDMS* system. • **Help** – opens the IDMS application's help.

Main Menu Bar	This menu contains sections with main functions of the IDMS application: • **Application** – lists all applications present in the *IDMS*. • **Search** –contains a common and advanced search functions among the selected application list. For details, see SEARCH. • **Filter** – contains filtering options. For details, see FILTERING. • **Public Views/Charts/Maps/Reports** – saved list views / charts / maps / reports (depending on the opened module) available to all users of the application. • **My Views/Charts/Maps/Reports** – views / charts / maps / reports (depending on the opened module) created by and available to the current user only.
Main Menu Manipulation Buttons	• **Left/Right arrows** ( ) – used to hide/open the Main Menu bar. • **Up/Down arrows** ( ) – used to collapse/expand the section in the Main Menu bar. • **Frame Divider** – used to adjust the width of the Main Menu bar.
Workspace	In this frame all applications and modules are managed. Here are filtering and search results displayed.

6. MY WORKSPACE MODULE

The *My Workspace* section (Figure 5) of the *IDMS* application provides quick access to the projects and indicators created corresponding user.

In order to access *My Workspace* module, click on the **My Workspace** tab in the Main Menu of *IDMS* application. Editing permissions of records in *My Workspace* can be based on the user (whether the user has created the record) or user's group (whether someone from the group user belongs to has created the record). All these permissions are granted and managed from IDMS Administration Center.

My Workspace contains the following sections:

- **External Assistance Projects** – the draft and submitted external assistance projects are displayed here. See External Assistance Projects in My Workspace Module.
- **Capital Investments Projects** - the draft requests and approved capital investment projects are displayed here. See Capital Investment Projects in My Workspace Module.
- **NDP Indicators** – the National Development Plan Indicators are displayed here. See NDP Indicators in My Workspace Module.

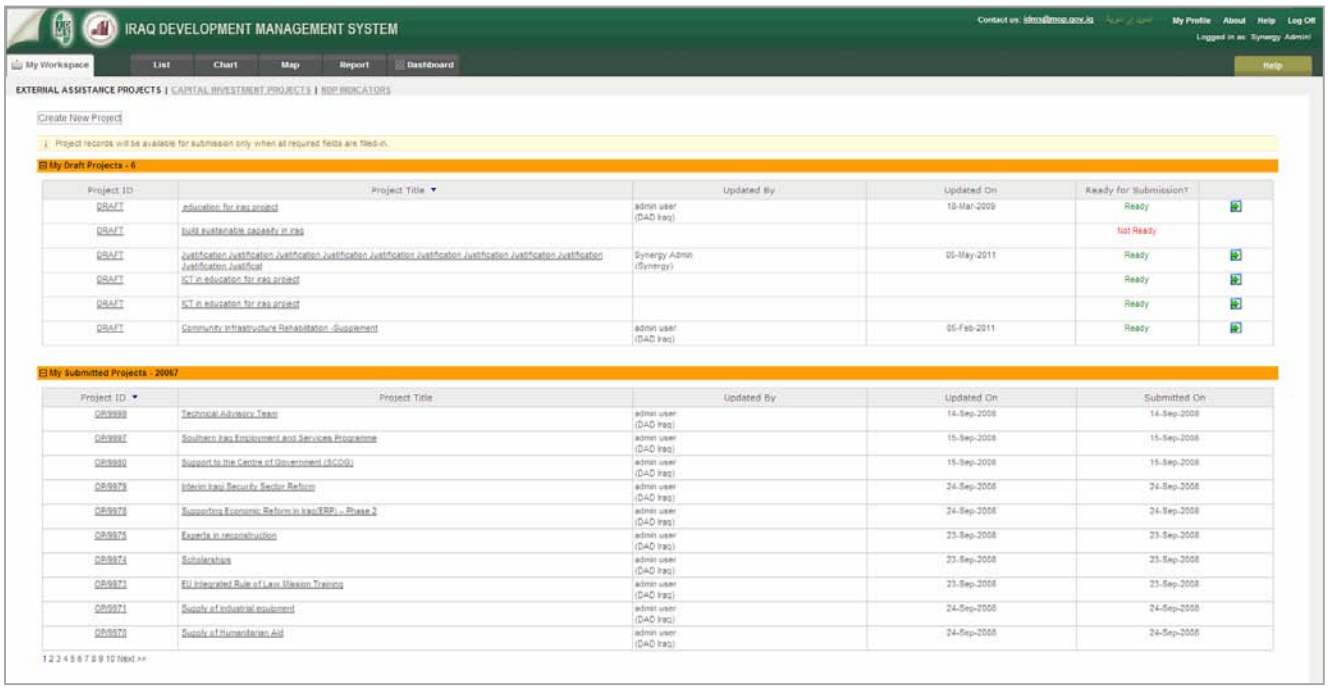


Figure 5: My Workspace Section

6.1 External Assistance Projects in My Workspace Module

In this page you may see a list of draft and submitted external assistance projects. Each project created in IDMS either from *My Workspace* module or from the corresponding application should get submitted first in order to become public and official. Below is the procedure of project submission:

- User adds an external assistance project. It is saved as a draft in the user's workspace, in the *My Draft Projects* list (Figure 6). Drafts may also be viewed and edited by others users that have the corresponding permissions. Further, drafts should be revised by the user or by the corresponding project manager.
- If all mandatory fields are filled in the project form, then draft gets a "Ready" state in the *Ready for Submission?* column of the drafts table. If at least one mandatory field is not yet filled, the draft has "Not Ready" state.
- Only drafts with the "Ready" state can be submitted. To submit the draft, press the **Submit** button ( ) in the *My Draft Projects* table.

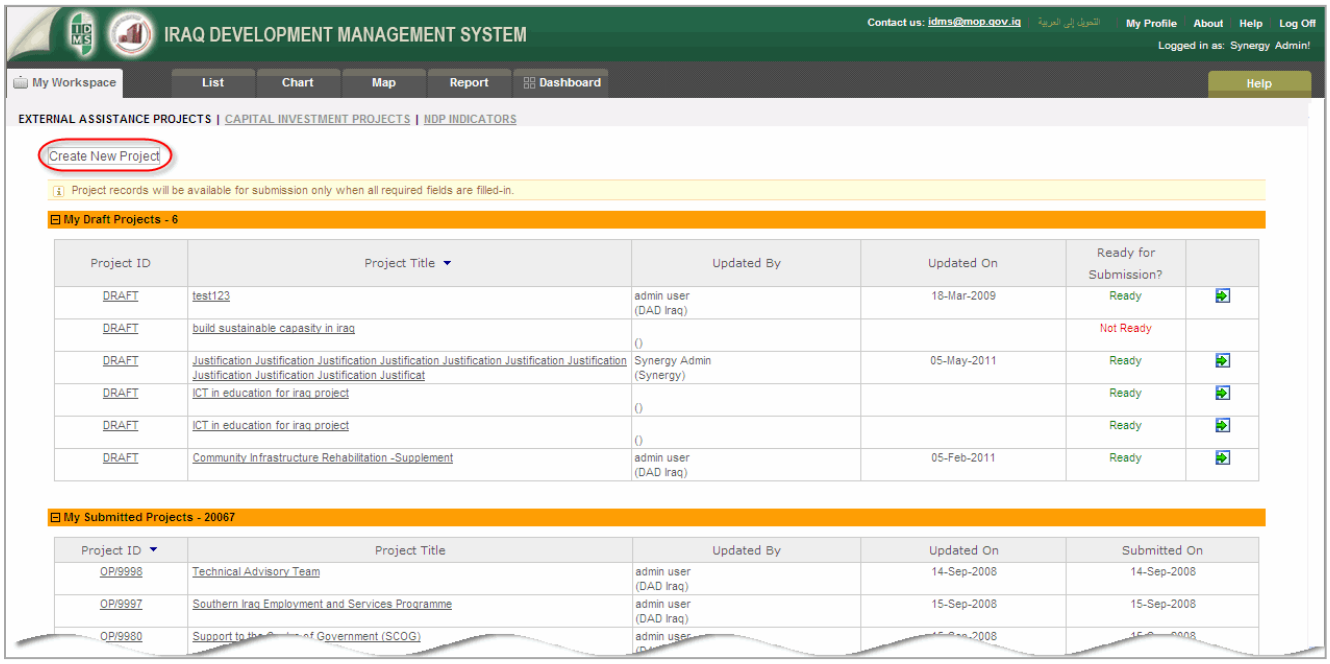


Figure 6: External Assistance Projects Section in My Workspace

Note: Only submitted drafts are displayed in the External Assistance Projects application's **List** table (see REFERENCES) and accessible to other users of IDMS application.

In this section, the external assistance project may be created; details of the existing projects can be viewed and edited.

The information displayed in **My Workspace** for each project includes the following information:

- **Project ID** – the code of the External Assistance Project,
- **Project Title** – the title of the External Assistance Project,
- **Updated By** – last update author,
- **Updated On** – last update date,
- **Ready for Submission?** – indicates whether all mandatory fields are provided in the project draft and it is ready to be submitted or not. If the project draft is ready to be submitted, a corresponding **Submit** button ( ) appears next to this column.

6.1.1 Adding an External Assistance Project

To add a new external assistance project from *My Workspace* module, follow the instructions below:

1. Go to the **External Assistance Projects** tab of *My Workspace* module.
2. Click the **Create New Project** button (Figure 6).
3. This will open an **Add External Assistance Project** form which is described in the External Assistance Projects Application Users Manual, see REFERENCES.

6.1.2 Viewing External Assistance Project Details

Depending on your permissions you may also see or edit external assistance projects added by other users.

To view details of drafts and submitted projects in the *My Workspace* module, follow the steps below:

1. Go to the **My Workspace** module.
2. Click the **External Assistance Project** tab.
3. Expand the **My Drafts Projects** or **My Submitted Projects** list correspondingly (Figure 6).
4. Click on the project you wish to see the details for. This will open external assistance project details. For details, see REFERENCES.

6.2 Capital Investment Projects in My Workspace Module

To create a capital investment project in the IDMS, you should first add a project request, which should pass an approval procedure first and then become a project (see Project Request Approval Procedure). The approval of the project requests is handled by the MoP Investment Unit users. Before project request gets approved, it should be first submitted as a draft request and then pass a revision cycle. The approved request is copied into a project entry, while request itself remains in the system as well. Both the submitted requests and the approved projects are visible from the LIST MODULE and are available for analytics in CHART MODULE, MAP MODULE and REPORT MODULE of the IDMS application.

Note: To keep the project active, the responsible entity should re-submit the project request every year.

The **Capital Investment Project** section of the *My Workspace* module is divided into three groups (Figure 7): **My Draft Funding Requests**, **Submitted Funding Requests** and **Approved Projects**. These lists display the draft and submitted project requests and the approved capital investment projects correspondingly.

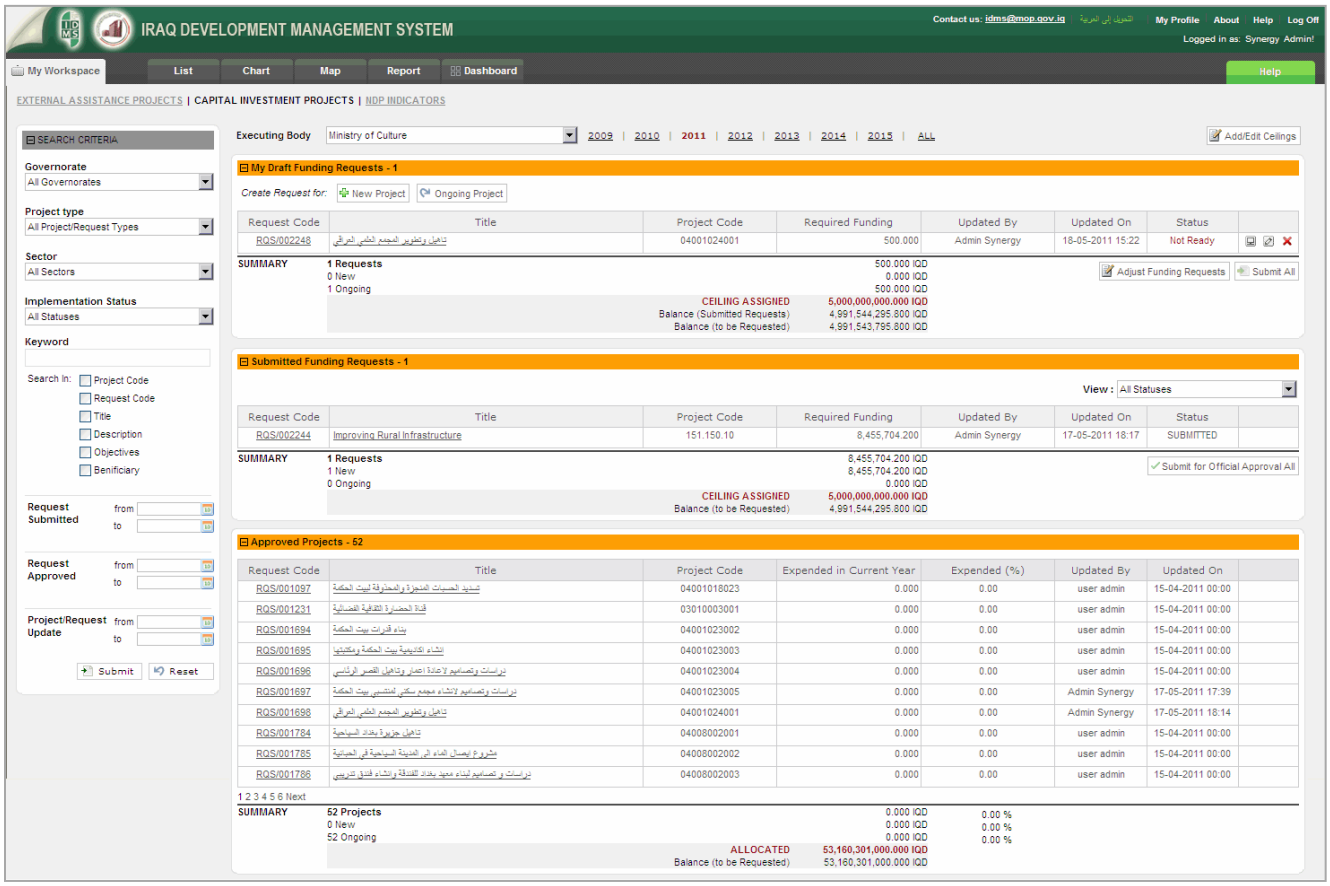


Figure 7: Capital Investment Projects Section in My Workspace

Certain actions are available for each of these sections. For details see the corresponding list description below.

The **Capital Investment Indicators** section in *My Workspace* module is enriched with an advanced search mechanism. For details, see chapter Search in Capital Investment Projects.

The **Add/Edit Ceilings** button is used to adjust Budget Ceilings of GoI (Government of Iraq) entities for the corresponding year. This option is only available to the IDMS administrators and MoP Investment Unit group users. For details, see Adjust Budget Ceilings.

6.2.1 My Draft Funding Requests

The **My Draft Funding Requests** list displays the draft requests created by the Executing Body group users. The following information is displayed in the list:

- **Request Code** – the code of the request. You will see the request code here if the request is copied from an approved project, and *New* for the new request for the selected year.
- **Title** – the title of the request,
- **Project Code** – the request related project code,
- **Required Funding** – the funds requested in the request,
- **Updated By** – last update author,

- **Updated On** – last update date,
- **Status** - the status of the draft: *Ready* when all mandatory fields are provided, and *Not Ready* when some mandatory information is missing.
- **Actions** – you may view ( ), edit ( ) and delete ( ) the draft request.

The following functions are available for the **My Draft Funding Requests** list (Figure 8):

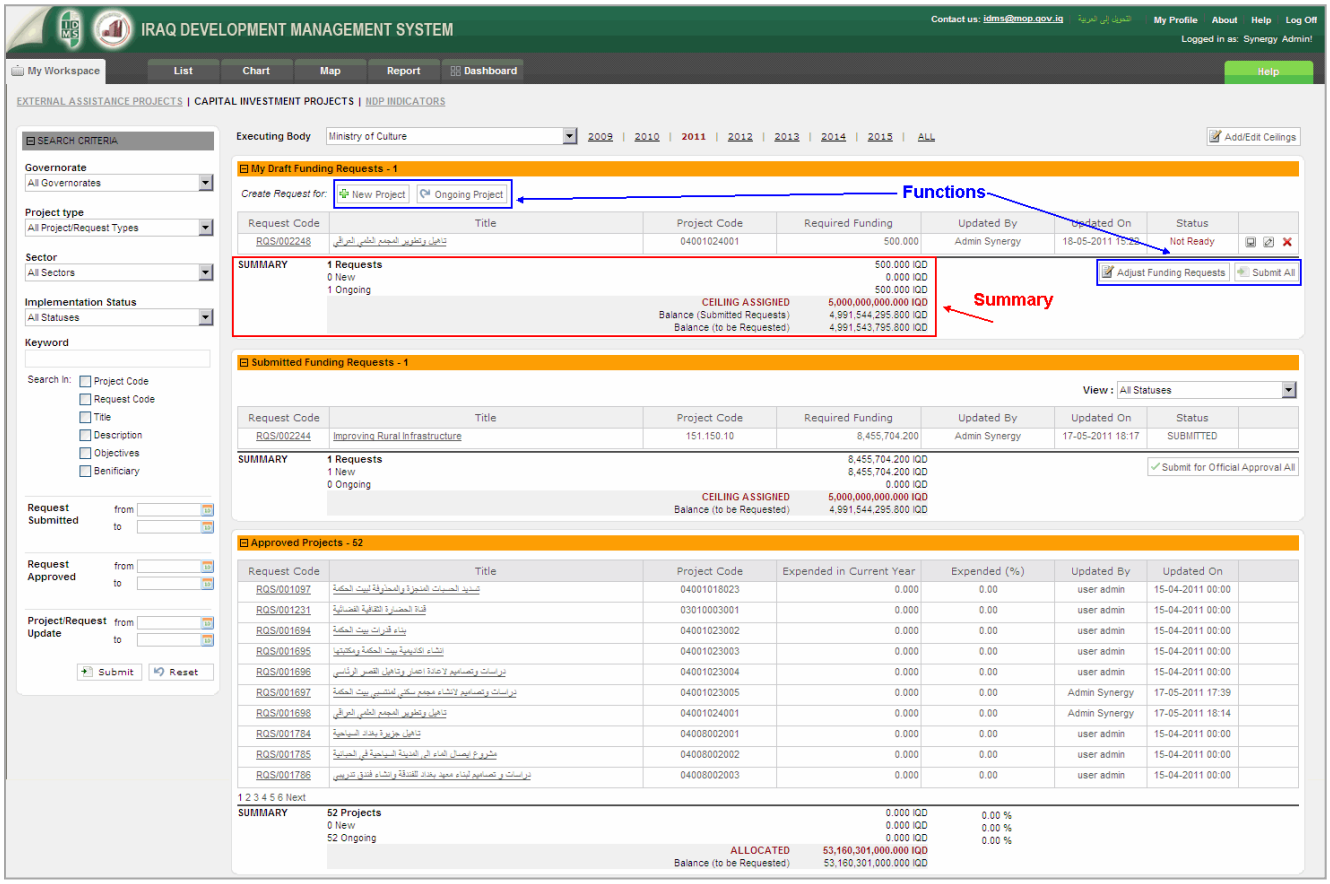


Figure 8: Functions and Summary in Draft List of Capital Investment Projects Section

- **New Project** – opens a form where new project request may be created. For details on the *New Project* form, see IDMS Capital Investments Projects Application User Manual (see REFERENCES).
- **Ongoing Project** – opens a list of approved projects for the selected Executing Body for the selected year (Figure 9). This list displays only projects marked other than Accomplished (set from the field **Implementation Status**, in *IDMS Capital Investments Projects Application User Manual*, see REFERENCES) and with the Start/End Dates spanning the selected year. Projects that already have an ongoing request created for the selected year are not listed here.

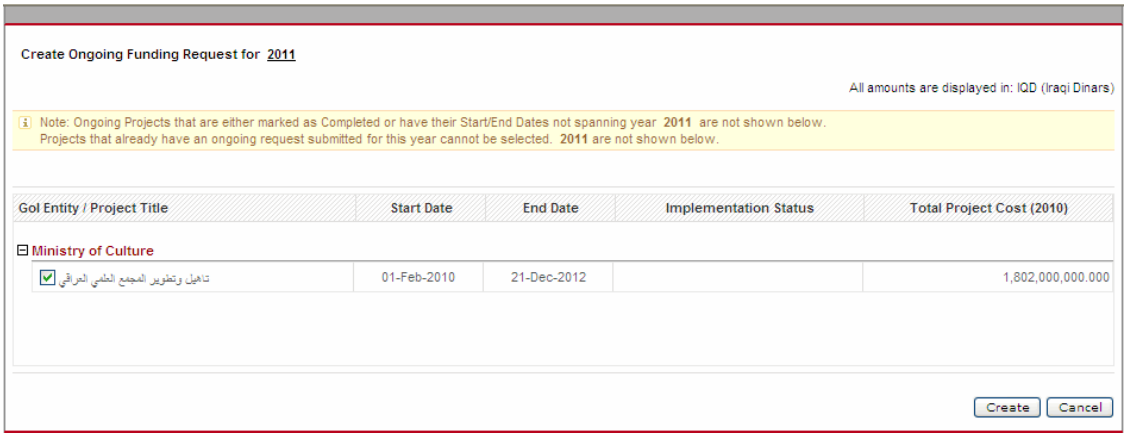


Figure 9: Create Ongoing Funding Request Window

By selecting the ongoing project you may create a new request for the current year for that project. To do that, expand the GoI list, choose one or more ongoing projects and press **Create** button. The new funding request will be generated with the unique *Request Code* and will appear in the *My Draft Funding Requests* list. The project **Type** for the new funding requests will be "Ongoing".

- **Adjust Funding Requests** – available for administrator and Executing Body group users and displays a list of GoI (Government of Iraq) entity the Executing Body is responsible for all the whole list of entities for the administrator. Here you may adjust the yearly allocations for the requests' local and foreign amounts. For details, see Adjust Project Funding Requests/Allocations.
- **Submit All** – submits all draft requests in the list.
  Note: This button is only available when all drafts have status "Ready" and the **Balance (to be Requested)** summary field has a positive value (for details on balance requirements, see below).

The following summary is displayed for the **My Draft Funding Requests** list:

- **Requests** – the number of draft requests in the list and the total required funds for those drafts.
- **New** – the number of new drafts in the list and the total required funds for those drafts.
- **Ongoing** – the number of ongoing drafts (requests created for ongoing projects) in the list and the total required funds for those drafts.
- **CEILING ASSIGNED** – the ceilings assigned to the selected Executing Body, as defined in the *Final Allocation* field of the *Adjust Budget Ceilings* form. For details, see Adjust Budget Ceilings.
- **Balance (Submitted Requests) –** the remainder calculated based on the Assigned Ceiling and the total of all submitted requested funds.
- **Balance (to be Requested) -** the remainder calculated based on the Assigned Ceiling, the total of all draft and submitted requested funds.

6.2.2 Submitted Funding Requests

The **Submitted Funding Requests** list displays the submitted requests (Figure 10) created by the Assigned MoP Sectorial Unit group users. The following information is displayed in the list:

- **Request Code** – the code of the request. You will see the request code here if the request is copied from an approved project, and *New* for the new request for the selected year.
- **Title** – the title of the request,
- **Project Code** – the request related project code,
- **Required Funding** – the funds requested in the request,
- **Updated By** – last update author,
- **Updated On** – last update date,
- **Status** - the status of the submitted project describes its revision stage. The following statuses are available:
  - **ABANDONED** - appears when the project is abandoned.
    Note: The abandoned projects remain in the *Submitted Funding Requests* list for the current year and cannot be deleted.
  - **NEGOTIATION** – appears when project request is in a negotiation with the relevant Line Ministry.
  - **PENDING APPROVAL** – appears when the MoP Sectoral Unit requires further revisions made on the project request.
  - **PROCESSED** – appears when the project request has been accepted by the MoP Sectoral Unit and there are enough funds available (per assigned ceilings of the corresponding Executing Body, see Adjust Budget Ceilings).
  - **REJECTED** – appears when the project is rejected.
  - **REQUIRING FUNDING** – appears when there is lack of funds requested in the project.
  - **SUBMITTED** – appears when the project is submitted to the revision.
  - **UNDER PRIMARY REVIEW** – appears when the MoP Sectoral Unit is reviewing the project.
  - **UNDER SPECIALIZED REVIEW** – appears when a specialized review is necessary and the responsible MoP Sectoral Unit forwards the project request to another MoP Sectoral Unit for further advice.
  - **UNDERGOING REVISIONS** – appears when the MoP Sectoral Unit requires further revisions made on the project request.
  - **VERIFICATION** – appears when project is sent to verification internally within the MoP Sectoral Unit.

The following functions are available for the **Approved Projects** list (Figure 10):

- **View** – you may filter the submitted requests in the *Submitted Funding Requests* list by the specific report status. The **View** drop-down list contains all statuses that the request can get in the submission cycle. By selecting the certain status from the list, only requests with the specific status will be displayed in the *Submitted Funding Requests* list.
- **Submit for Official Approval All** – sends all requests in the list for an approval.
  Note: This button appears when all submitted requests passed a revision, have the status **PROCESSED** and when for all projects in the list available funds exist in the Budget

Ceilings (see Adjust Budget Ceilings). Please note, that if a GoI entity has other projects submitted, the available funds for the new project will be calculated depending on the ceiling allocated to the corresponding GoI entity and the funds already used by other approved projects for the selected year.

Note: If you have projects in the *Submitted Funding Requests* list that are not ready to the submission, but others with the PROCESSED state do, you should first filter the processed projects by selecting the PROCESSED state from the **View** drop-down list and then submit the processed projects.

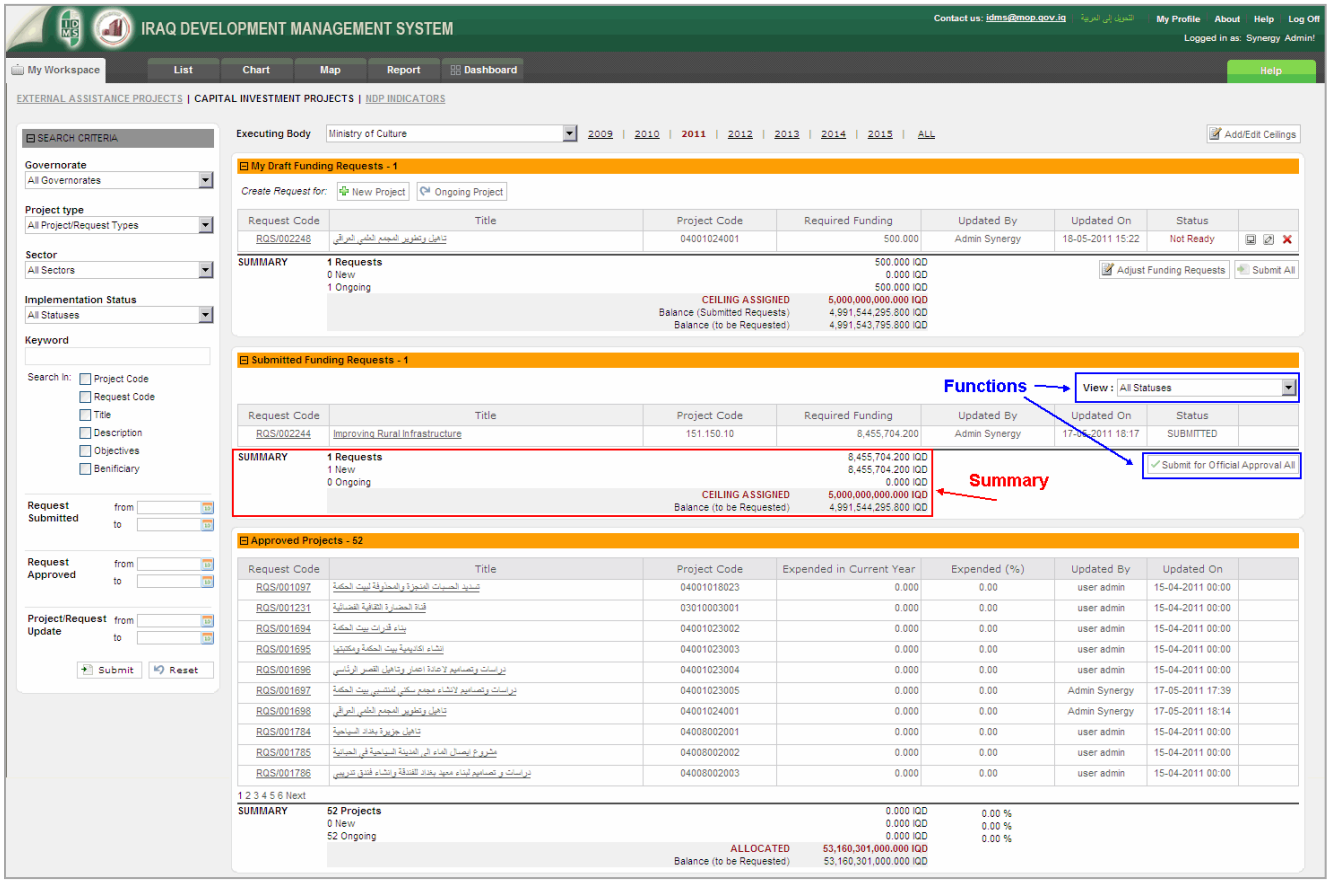


Figure 10: Functions and Summary in Submitted List of Capital Investment Projects Section

The following summary is displayed for the **Submitted Funding Requests** list:

- **Requests** – the number of submitted requests in the list and the total required funds for those requests.
- **New** – the number of new drafts in the list and the total required funds for those requests.
- **Ongoing** – the number of ongoing project requests (created for ongoing projects) in the list and the total required funds for those requests.
- **CEILING ASSIGNED** – the ceilings assigned to the selected Executing Body, as defined in the *Final Allocation* field of the *Adjust Budget Ceilings* form. For details, see Adjust Budget Ceilings.
- **Balance (Submitted Requests) -** the remainder calculated based on the Assigned Ceiling and the total of all submitted requested funds.

- **Balance (to be Requested) –** the remainder calculated based on the Assigned Ceiling, the total of all draft and submitted requested funds.

6.2.3 Approved Projects

The **Approved Projects** list displays projects approved by the MoP Investment Unit group users (Figure 11). The following information is displayed in the list:

- **Request Code** – the code of the request. You will see the request code here if the request is copied from an approved project, and *New* for the new request for the selected year.
- **Title** – the title of the project.
- **Project Code** – the project code.
- **Expended in Current Year** – the funds expended for the project in the selected year,
- **Expended (%)** – the expended funds from the originally approved amount allocated for the selected year.
- **Updated By** – last update author.
- **Updated On** – last update date.

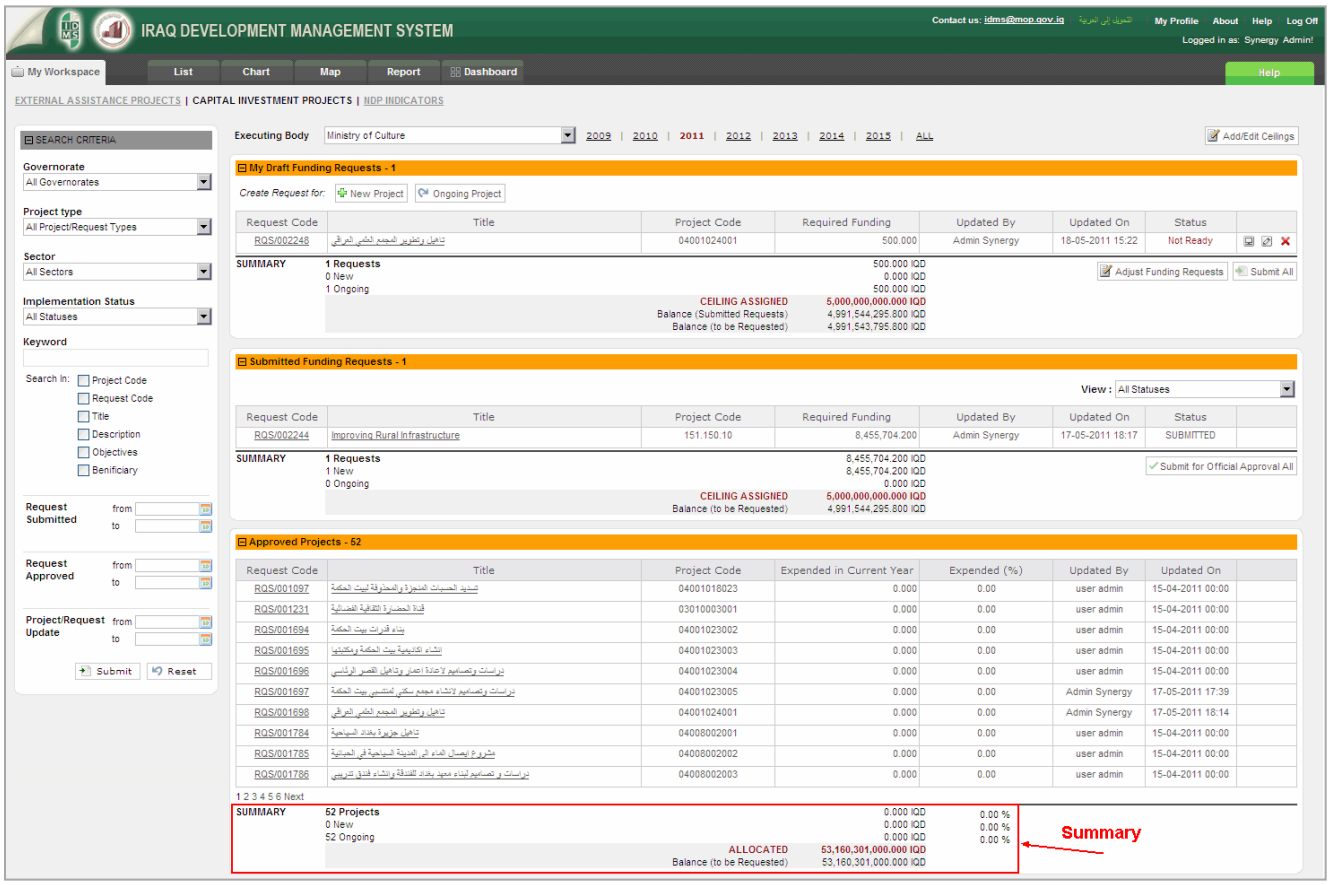


Figure 11: Summary in Approved List of Capital Investment Projects Section

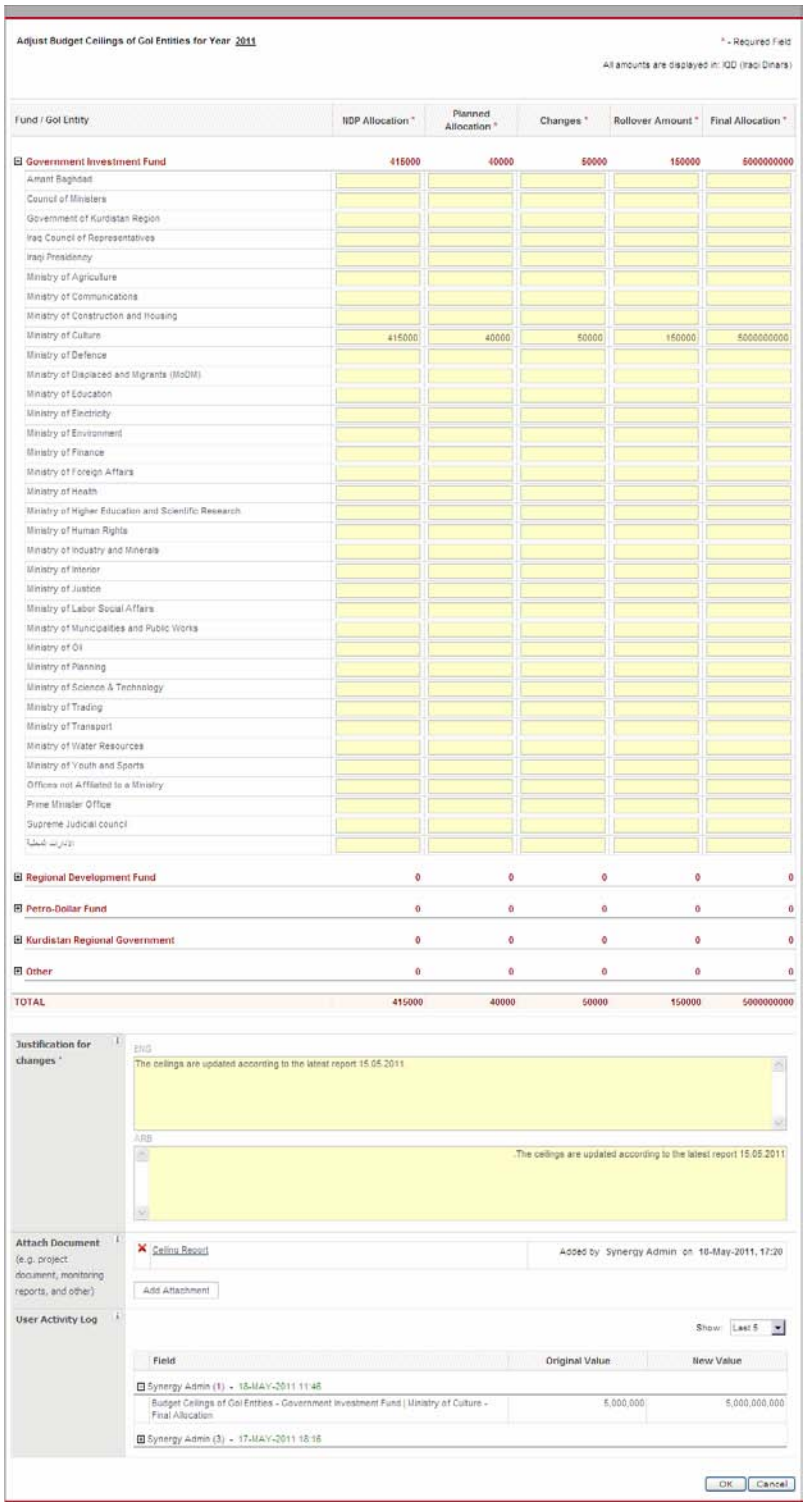
The following summary is displayed for the **Approved Projects** list:

- **Projects** – the number of approved projects in the list and the total required funds for those projects.
- **New** – the number of new approved projects in the list and the total required funds for those projects.
- **Ongoing** – the number of ongoing approved projects (created for ongoing projects) in the list and the total required funds for those projects.
- **ALLOCATED** – the total funds allocated for all approved projects.
- **Balance (to be Requested) –** the remainder calculated based on the Assigned Ceiling (see Adjust Budget Ceilings), the total of all draft and submitted requested funds.

6.2.4 Adjust Budget Ceilings

In the **Adjust Budget Ceilings** form (Figure 12) adjust Budget Ceilings of GoI (Government of Iraq) entities for the corresponding year. The GoI entities are grouped in funds.

Note: The users can only be associated to Government Investment Fund and Regional Development Fund. Other funds in the list do not have any user associations.



Adjust Budget Ceilings of GoI Entities for Year 2011

* - Required Field

All amounts are displayed in: IQD (Iraqi Dinars)

Fund / GoI Entity	NDP Allocation *	Planned Allocation *	Changes *	Rollover Amount *	Final Allocation *
Government Investment Fund	415000	40000	50000	150000	5000000000
Amant Baghdad					
Council of Ministers					
Government of Kurdistan Region					
Iraq Council of Representatives					
Iraqi Presidenny					
Ministry of Agriculture					
Ministry of Communications					
Ministry of Construction and Housing					
Ministry of Culture	415000	40000	50000	150000	5000000000
Ministry of Defence					
Ministry of Displaced and Migrants (MoDM)					
Ministry of Education					
Ministry of Electricity					
Ministry of Environment					
Ministry of Finance					
Ministry of Foreign Affairs					
Ministry of Health					
Ministry of Higher Education and Scientific Research					
Ministry of Human Rights					
Ministry of Industry and Minerals					
Ministry of Interior					
Ministry of Justice					
Ministry of Labor Social Affairs					
Ministry of Municipalities and Public Works					
Ministry of Oil					
Ministry of Planning					
Ministry of Science & Technology					
Ministry of Trading					
Ministry of Transport					
Ministry of Water Resources					
Ministry of Youth and Sports					
Offices not Affiliated to a Ministry					
Prime Minister Office					
Supreme Judicial council					
الادارة المحلية					
Regional Development Fund	0	0	0	0	0
Petro-Dollar Fund	0	0	0	0	0
Kurdistan Regional Government	0	0	0	0	0
Other	0	0	0	0	0
TOTAL	415000	40000	50000	150000	5000000000

Justification for changes *

ENG

The ceilings are updated according to the latest report 15.05.2011

ARB

.The ceilings are updated according to the latest report 15.05.2011

Attach Document (e.g. project document, monitoring reports, and other)

Ceiling Report — Added by Synergy Admin on 18-May-2011, 17:20

Add Attachment

User Activity Log

Show: Last 5

Field	Original Value	New Value
Synergy Admin (1) - 18-MAY-2011 11:46		
Budget Ceilings of GoI Entities - Government Investment Fund | Ministry of Culture - Final Allocation	5,000,000	5,000,000,000
Synergy Admin (3) - 17-MAY-2011 18:16		

OK Cancel

Figure 12: Adjust Budget Ceilings Form

You may expand the list of budget ceiling for the corresponding GoI entity by clicking the plus sign next to it.

The following information may be managed here for each project:

- **NDP Allocation**
- **Planned Allocation**
- **Changes**
- **Rollover Amount**
- **Final Allocation**

The **Total** of each of these fields for all GoI entities in the list is automatically calculated and is displayed in red.

Note: All values in the *Adjust Budget Ceilings* form are displayed and inserted in the local currency (Iraqi Dinar).

For each modification made to the ceilings, you should provide a comment in the **Justification for Changes** in both English and Arabic languages.

You may additionally attach any ceilings related attachments from **Attach Document** section. For details on how to attach documents or other related files, see *IDMS Capital Investments Projects Application User Manual* in REFERENCES.

The **Projects History** displays information about the recent changes made to the funds. Identifies the users who performed the changes and the date/time when the modifications were made.

Note: In the right side you may select the number of latest updates to be displayed or you may choose to display whole modification history on the particular record.

6.2.5 Adjust Project Funding Requests / Allocations

In the *Adjust Project Funding Requests/Allocations* form (Figure 13) you may see only those GoI entities which you are allowed to manage. You may expand the list of requests/projects for the corresponding GoI entity by clicking the plus sign next to it. The **Foreign Currency** is defined from each project's details. See *IDMS Capital Investments Projects Application User Manual* in REFERENCES.

The following information may be managed here for each project:

- **Local** – indicates the local funds requested by the project/request in the local currency IRQ (Iraqi Dinar).
- **Foreign** - indicates the foreign funds requested by the project/request in the defined currency.

The **Total** of local and foreign funds provided is automatically calculated, converted into local currency IRQ (Iraqi Dinar) and is displayed in red.

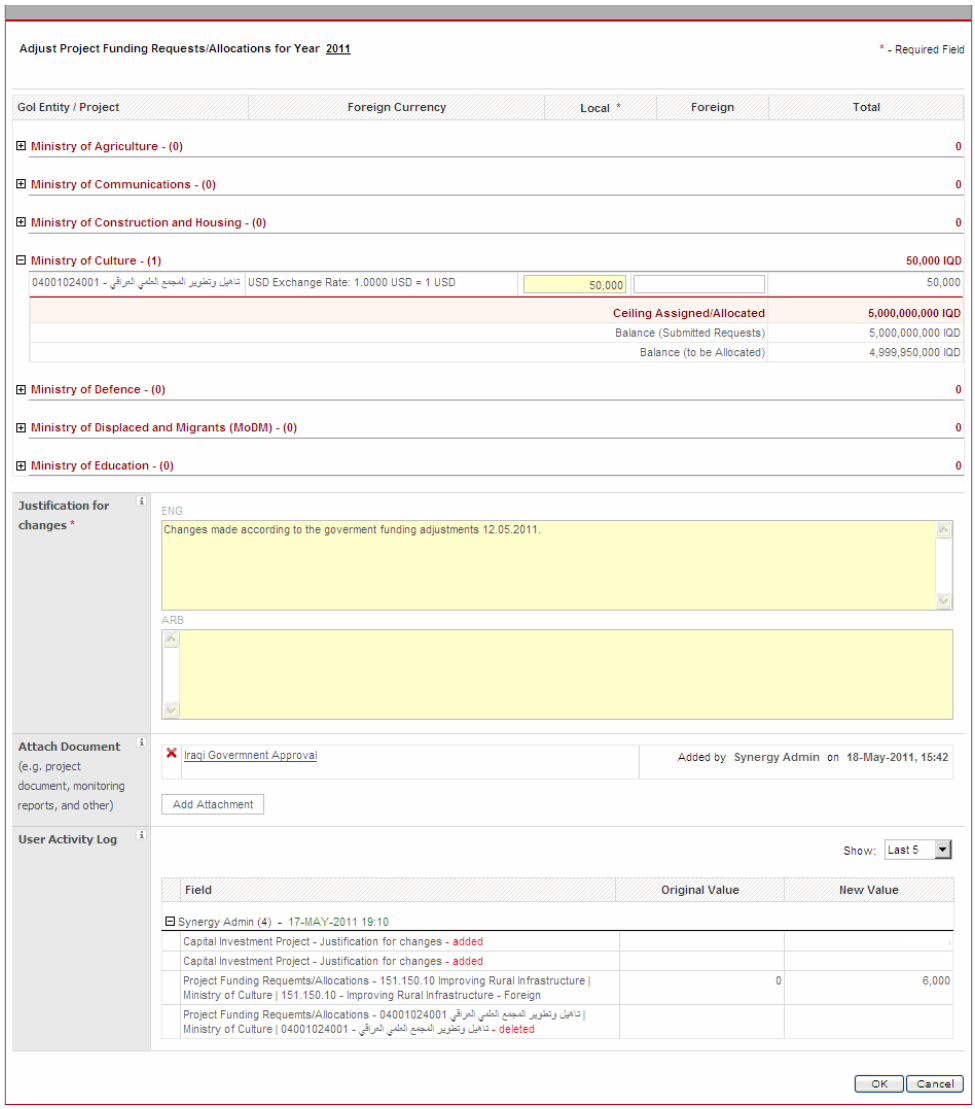


Figure 13: Adjust Funding Requests / Allocations Form

Additionally, the following summary information is displayed for each GoI:

- **CEILING ASSIGNED** – the total ceilings for all listed drafts of the selected executing body, defined in the *Final Allocation* field of the Adjust Budget Ceilings form.
- **Balance (Submitted Requests) -** the remainder calculated based on the **Assigned Ceiling** and the total of all submitted requested funds.
- **Balance (to be Requested) –** the remainder calculated based on the **Assigned Ceiling**, the total of all draft and submitted requested funds.

For each modification made to the list of funds, you should provide the comment in the **Justification for Changes** in both English and Arabic languages.

You may additionally attach any related attachments to the defined funds from **Attach Document** section. For details on how to attach documents or other related files, see *IDMS Capital Investments Projects Application User Manual* in REFERENCES.

The **Projects History** displays information about the recent changes made to the funds. Identifies the users who performed the changes and the date/time when the modifications were made.

Note: In the right side you may select the number of latest updates to be displayed or you may choose to display whole modification history on the particular record.

6.2.6 Project Request Approval Procedure

The project request approval diagram is presented in the Figure 14.

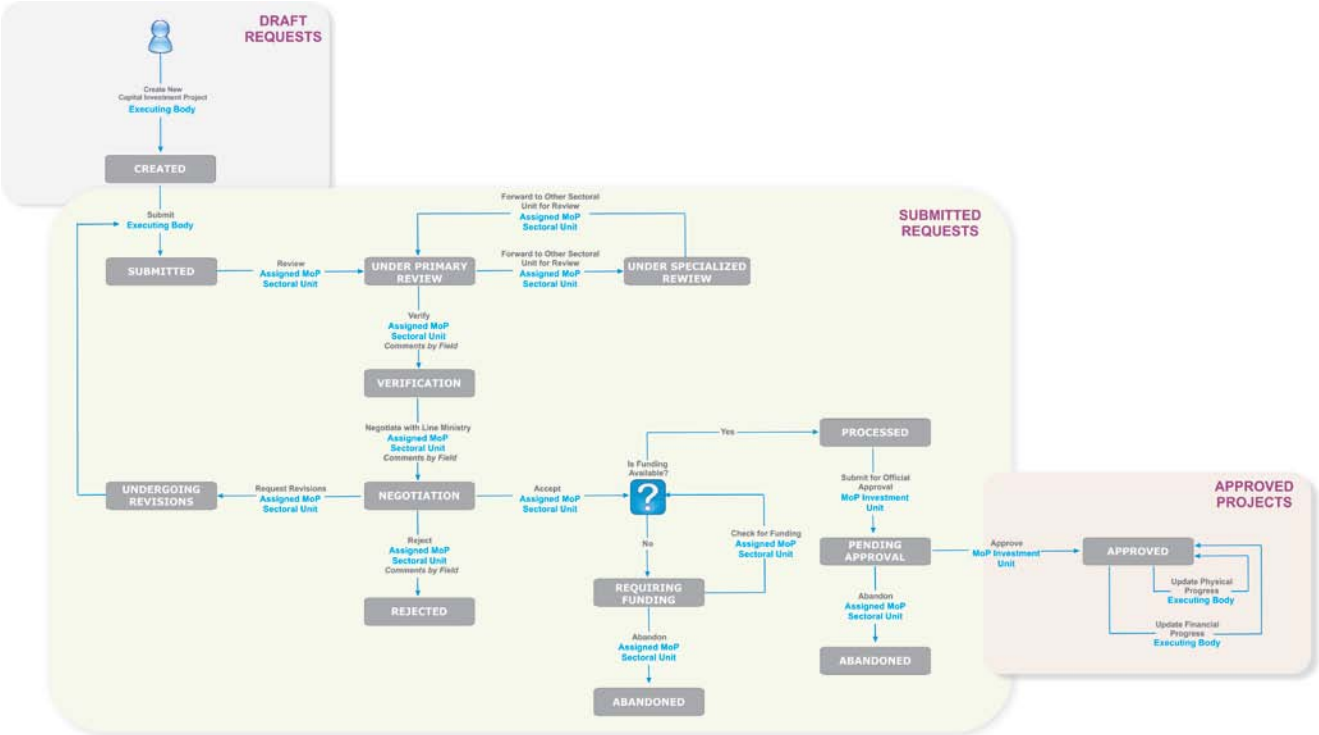


Figure 14: Project Request Approval Procedure

1. The Executing Body group user creates a project request. It is saved as a draft in the *My Draft Funding Requests* list of My Workspace module (Figure 8).
   Note: Only Executing Body group users and administrators are capable to edit the request drafts at this stage.
2. When all drafts in the *My Draft Funding Requests* list are ready for the submission (i.e. all mandatory information is provided) and the Balance to be requested is a positive value, the **Submit All** buttons becomes active which allows the Executing Body group user to submit all drafts in the list for further revision. The submitted project requests appear in the *Submitted Funding Requests* list (Figure 10).
3. On the next stage, the submitted project requests are passing through the complicated revision cycle managed by the Assigned Mop Sectoral Unit group users. During the multistage revision (including revisions by one or more Sectoral Units and negotiations with the Line Ministry), the submitted project requests may get rejected due to negotiation results, abandoned due to insufficient funding available or other reasons that

may come out during the official revision, and finally get approved for an implementation. The approved requests are copied into a project and are displayed in the *Approved Projects* list (Figure 11).

4. For approved projects, financial and progress information may be updated. Also new requests may be created on the ongoing approved projects.

6.2.7 Adding a Capital Investment Project Request

To add a new project request, follow the instructions below:

1. Go to the **Capital Investment Projects** tab of *My Workspace* module.
2. In the *My Draft Funding Requests* section, click the **New Project** button (Figure 8).
3. This will open a form which is described in the IDMS Capital Investments Projects Application User Manual, see REFERENCES.

6.2.8 Viewing Capital Investment Project Details

Depending on your permissions you may also see or edit project requests added by other users.

To view details of draft and submitted request and the approved projects in the *My Workspace* module, follow the steps below:

1. Go to the *My Workspace* module.
2. Click on the **Capital Investment Projects** tab.
3. Expand the *My Draft Funding Requests*, *Submitted Funding Requests* or *Approved Projects* lists, as needed (Figure 7).
4. Click on the request or project *Title* you wish to see the details for. This will open indicator's details. For details, see REFERENCES.

6.2.9 Search in Capital Investment Projects of My Workspace

In the Capital Investments Projects section of My Workspace module you are offered to use an advanced search and a quick search features to filter the list of projects/requests with some criteria (Figure 15).

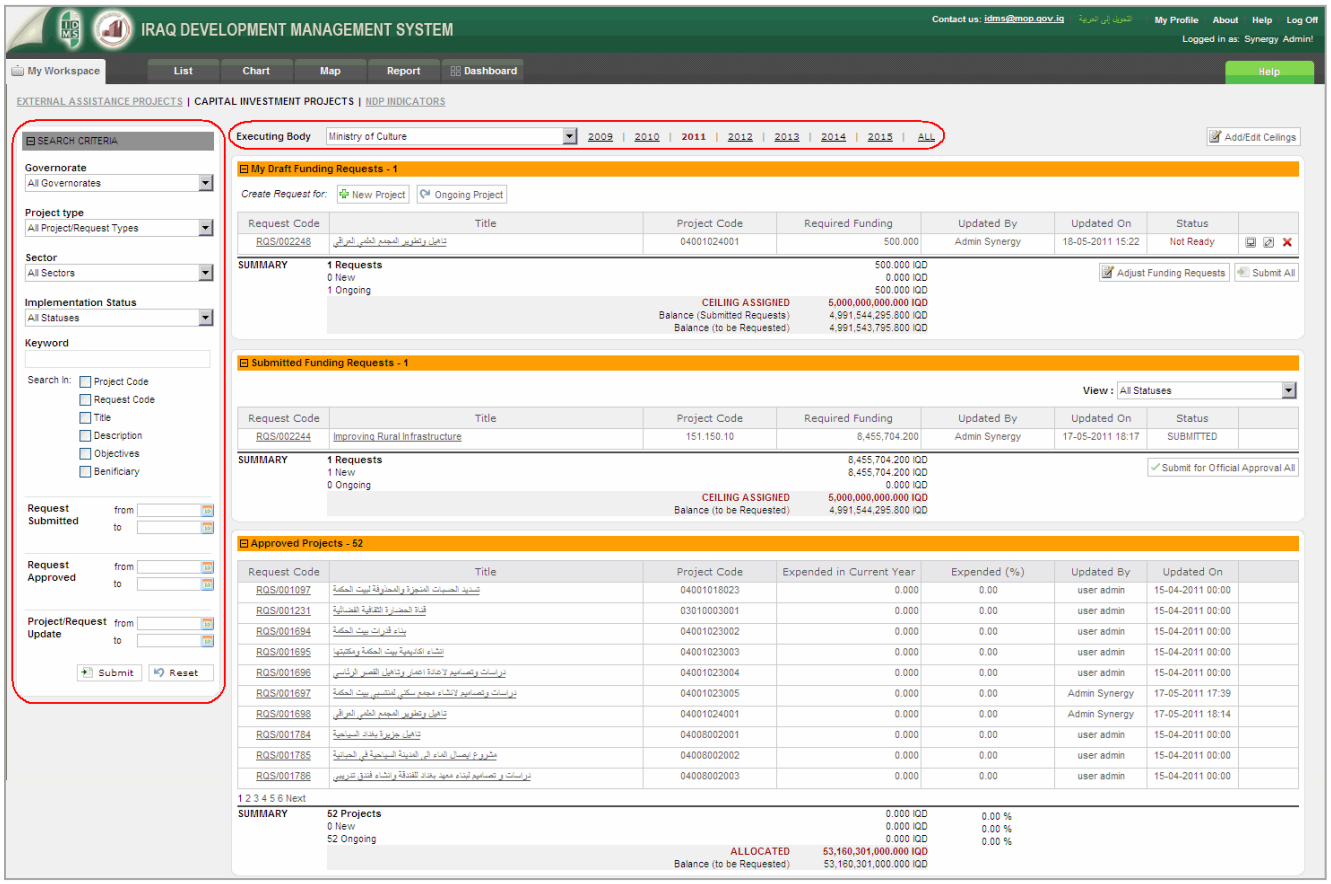


Figure 15: Advanced Search in Capital Investment Projects Section

6.2.9.1 Quick Search

The quick search options are displayed in the My Workspace module right above the list of capital investment projects and requests. You may want to filter the list of projects and requests for the certain **Year** or **Executing Body**.

Selecting either of the criteria in the quick search toolbar will displayed a filtered list of projects/requests.

Note: You may join both the Quick Search and the Advanced Search criteria together to get the needed filtering.

To reset the yearly filtration and display the list of projects/requests of all years, press the **All** link in the right side of the quick search toolbar.

6.2.9.2 Advanced Search

The advanced search mechanism is used to filter the list of indicators depending on the given one or more advanced search criteria (Figure 15).

The following advanced search criteria are available:

- **Governorate** – filters by the governorate the project is dedicated to.
- **Project Type** – filters by the new or ongoing projects.

- **Sector** - filters by the economy sector the project is dedicated to.
- **Project/Request Implementation Status** –filters by the status of the project/request.
- **Keyword** –filters the indicators by the keywords. You may want to search the indicated keywords in the **Project** or **Request Code**, **Request Code**, **Title**, **Description**, **Objectives** and/or **Beneficiary** fields.
- **Request Submitted** – filters by the date or a range of dates when the request was submitted. Calendar popup is available for these fields, see Figure 16: Calendar.
- **Request Approved** – filters by the date or a range of dates when the request was approved. Calendar popup is available for these fields, see Figure 16: Calendar.
- **Project/Request Updated** – filters by the date or a range of dates when the project or request was updated the last time. Calendar popup is available for these fields, see Figure 16: Calendar.

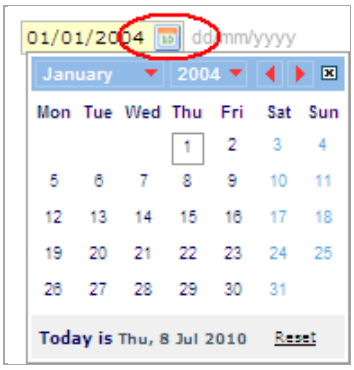


Figure 16: Calendar

Once one or more criteria are selected, press the **Submit** button to get the filtered list of projects/requests. If you want to clean the filtering, press the **Reset** button in the searching section of the screen to clear the defined criteria and then press **Submit** to get the whole list of projects/requests.

6.3 NDP Indicators in My Workspace Module

In this page you may see a list of all indicators created from *My Workspace* module or from the corresponding application by the corresponding user or other users from the same user group. The indicator related information and progress is also outlined in the NDP Indicators table.

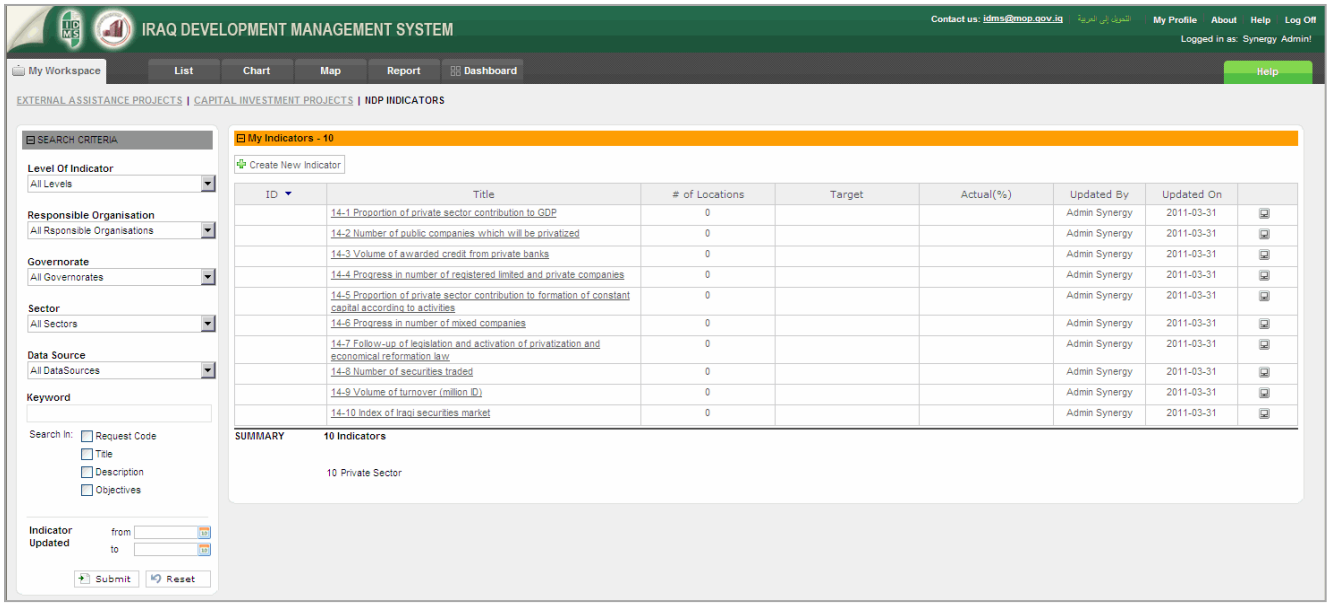


Figure 17: NDP Indicators Section in My Workspace

In this section, the NDP indicator may be created; details of the existing indicators can be viewed and edited.

The information displayed in **My Workspace** for each indicator includes the following information:

- **Request Code** – the code of the indicator.
- **Title** – the title of the indicator.
- **# of Locations** – the number of locations covered by the indicator.
- **Target** – the target value of the indicator.
- **Actual (%) –** actual progress of the indicator, in percents.
- **Updated By** – last update author.
- **Updated On** – last update date.
- **Actions** – you may view ( ), edit ( ) and delete ( ) the indicator.

The **NDP Indicators** section in *My Workspace* module is enriched with an advanced search mechanism. For details, see chapter Search in NDP Indicators of My Workspace.

6.3.1 Adding New Indicator

To add a new NDP indicator from *My Workspace* module, follow the instructions below:

1. Go to the **NDP Indicators** tab of *My Workspace* module.
2. Click the **Create New Indicator** button (Figure 18).

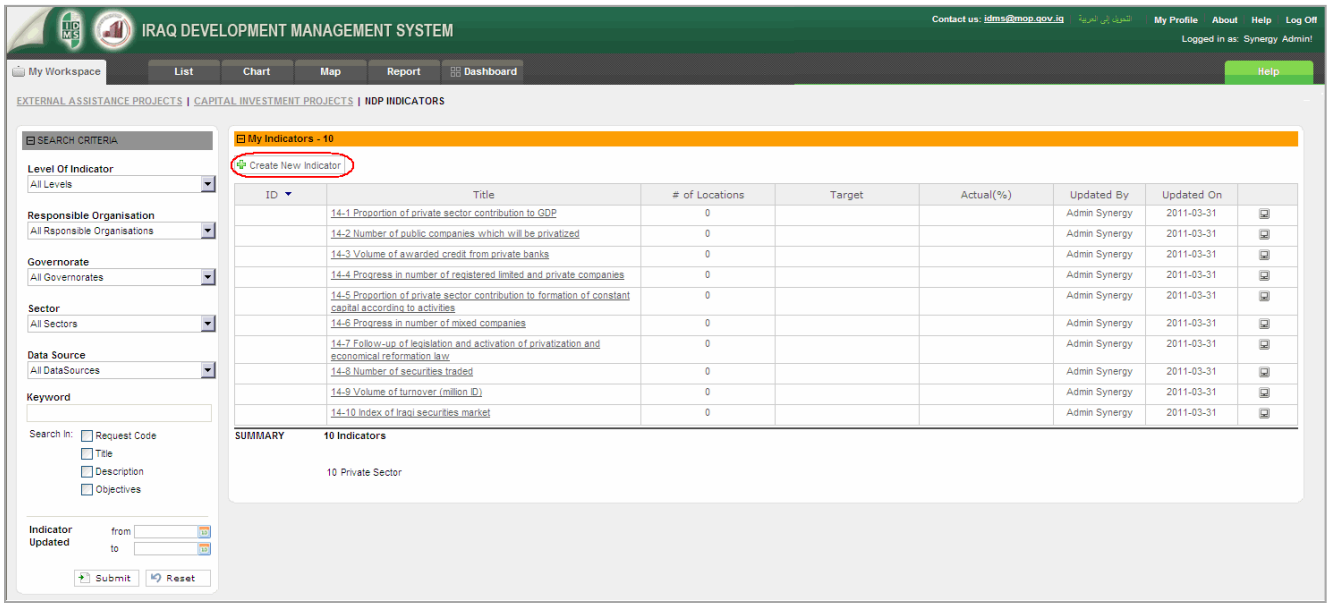


Figure 18: Create New Indicator button in NDP Indicators Section

3. This will open an **Add Indicator** form which is described in the Indicators Users Manual, see REFERENCES.

6.3.2 Viewing Indicator Details

Depending on your permissions you may also see or edit NDP indicators added by other users.

To view details of drafts and submitted projects in the *My Workspace* module, follow the steps below:

1. Go to the **My Workspace** module.
2. Click the **NDP Indicator** tab.
3. Click on the indicator you wish to see the details for. This will open indicator details. For details, see REFERENCES.

6.3.3 Search in NDP Indicators of My Workspace

The advanced search mechanism is used to filter the list of indicators depending on the given one or more search criteria (Figure 19).

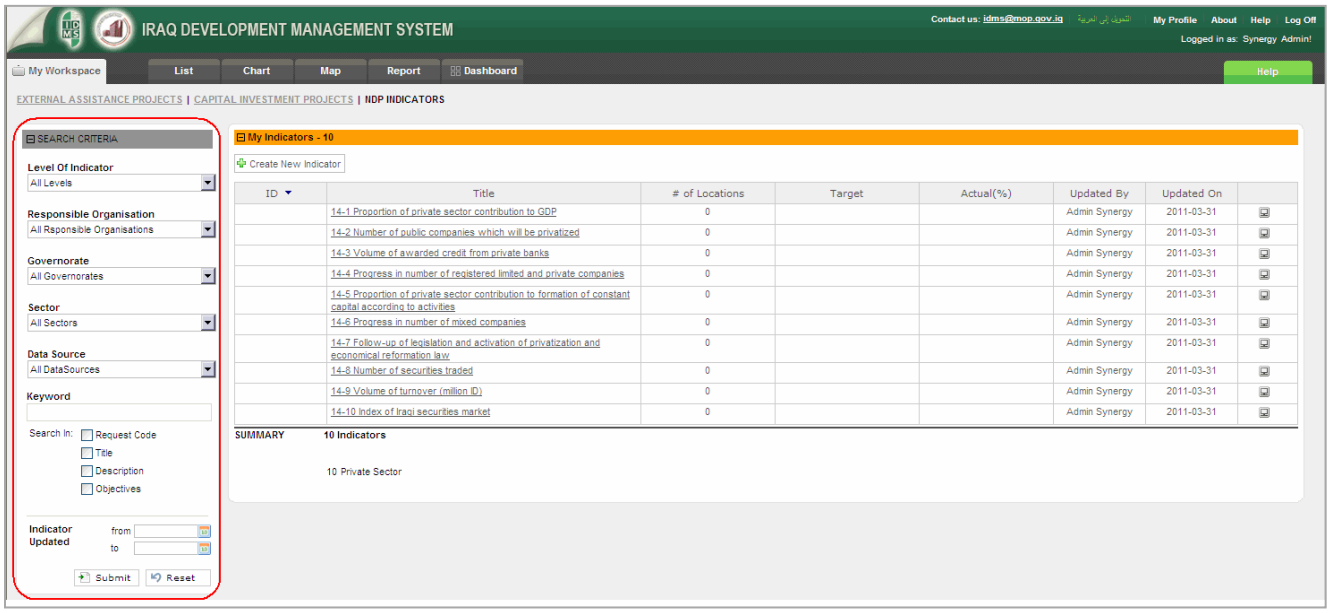


Figure 19: Advanced Search in NDP Indicators Section

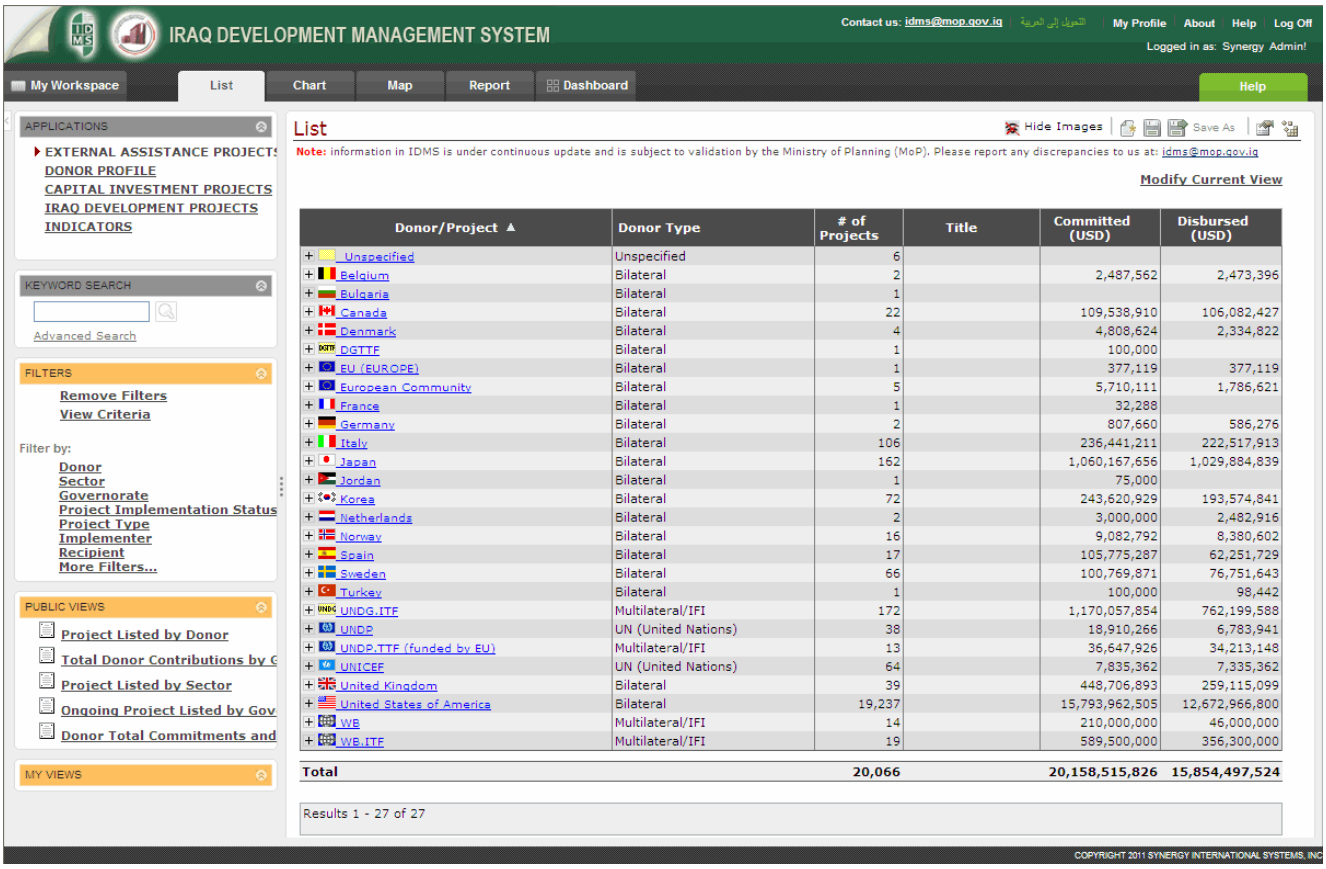
The following search criteria are available:

- **Level of Indicator** – filters by the type of the indicator: outcome or output.
- **Responsible Organisation** – filters by the organisation responsible for the indicator.
- **Governorate** – filters by the governorate the indicator is dedicated to.
- **Sector** - filters by the economy sector the indicator is dedicated to.
- **Data Source** –filters by the data source information for the indicator.
- **Keyword** –filters the indicators by the keywords. You may want to search the indicated keywords in the **Request Code**, **Title**, **Description** and/or **Objectives** fields.
- **Indicator Updated** – filters by the date or a range of dates when indicators were updated the last time. Calendar popup is available for these fields, see Figure 16: Calendar.

Once one or more criteria are selected, press the **Submit** button to get the filtered list of indicators. If you want to clean the filtering, press the **Reset** button in the searching section of the screen to clear the defined criteria and then press **Submit** to get the whole list of indicators.

7. LIST MODULE

In the *List* module (Figure 20) of the *IDMS* application, you can create and execute ad-hoc queries on projects data, and acquire results in the form of a list.



Donor/Project	Donor Type	# of Projects	Title	Committed (USD)	Disbursed (USD)
Unspecified	Unspecified	6			
Belgium	Bilateral	2		2,487,562	2,473,396
Bulgaria	Bilateral	1			
Canada	Bilateral	22		109,538,910	106,082,427
Denmark	Bilateral	4		4,808,624	2,334,822
DGTTF	Bilateral	1		100,000	
EU (EUROPE)	Bilateral	1		377,119	377,119
European Community	Bilateral	5		5,710,111	1,786,621
France	Bilateral	1		32,288	
Germany	Bilateral	2		807,660	586,276
Italy	Bilateral	106		236,441,211	222,517,913
Japan	Bilateral	162		1,060,167,656	1,029,884,839
Jordan	Bilateral	1		75,000	
Korea	Bilateral	72		243,620,929	193,574,841
Netherlands	Bilateral	2		3,000,000	2,482,916
Norway	Bilateral	16		9,082,792	8,380,602
Spain	Bilateral	17		105,775,287	62,251,729
Sweden	Bilateral	66		100,769,871	76,751,643
Turkey	Bilateral	1		100,000	98,442
UNDG.ITF	Multilateral/IFI	172		1,170,057,854	762,199,588
UNDP	UN (United Nations)	38		18,910,266	6,783,941
UNDP.TTF (funded by EU)	Multilateral/IFI	13		36,647,926	34,213,148
UNICEF	UN (United Nations)	64		7,835,362	7,335,362
United Kingdom	Bilateral	39		448,706,893	259,115,099
United States of America	Bilateral	19,237		15,793,962,505	12,672,966,800
WB	Multilateral/IFI	14		210,000,000	46,000,000
WB.ITF	Multilateral/IFI	19		589,500,000	356,300,000
Total		**20,066**		**20,158,515,826**	**15,854,497,524**

Figure 20: IDMS Application List Module

7.1 Accessing the List Module

A list consists of at least one group and one column, but the actual quantity of groups and columns is defined by the user's choice of view. Please see Modifying the Current View for more details on how to define groups / columns of a list.

In order to access the *List* module, click on the **List** tab. You will be navigated to the *List* module. In this module, you can view data organized according to the selected groupings and columns, modify the currently used list, save it as a pre-defined report, include it under a definite group, print it, etc.

7.2 Expanding the List Item

It is possible to expand the list item level to view the information of the sub-level(s). 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 21). 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.

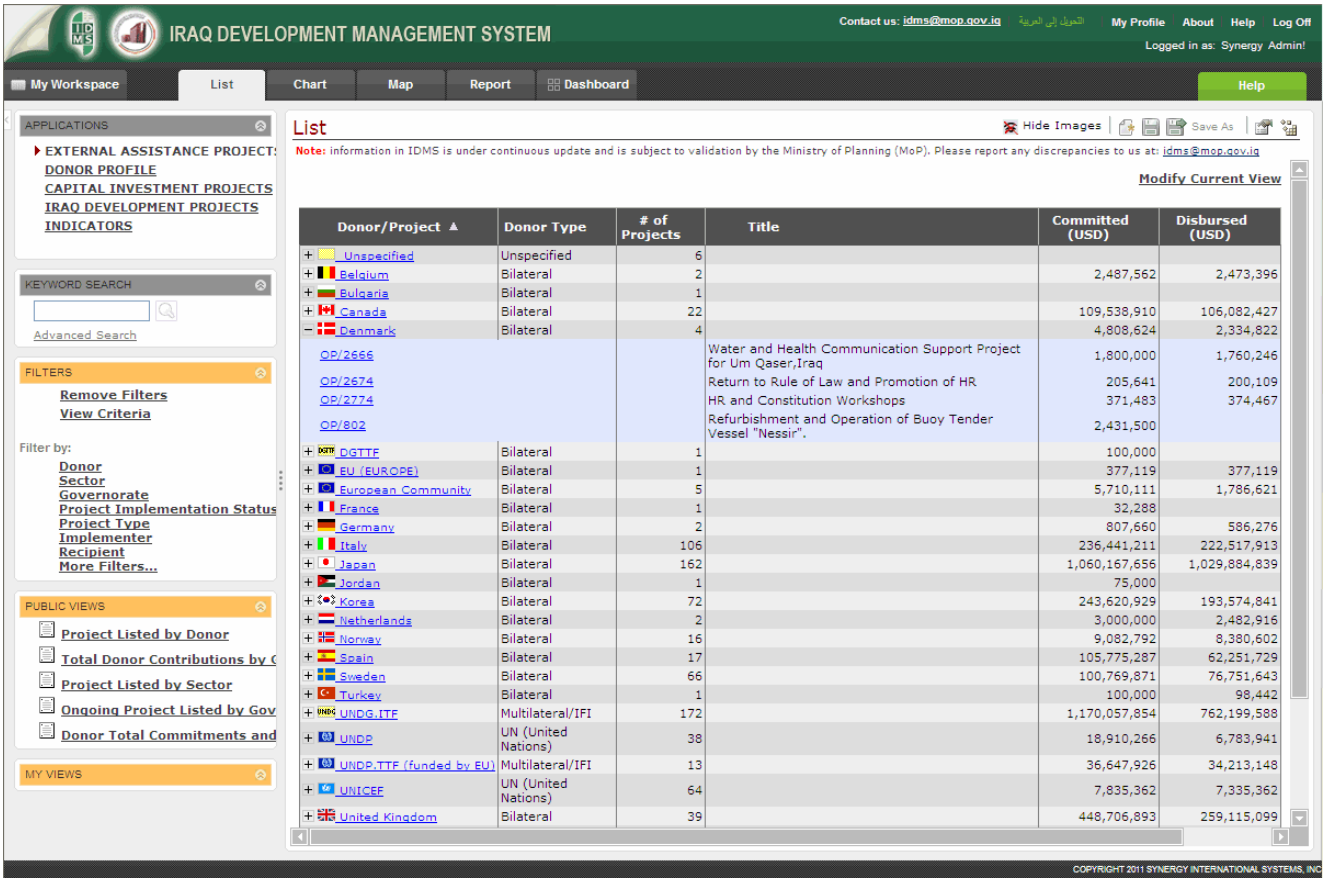


Figure 21: Expanding the List Item Level

7.3 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 red arrow that appears on the column can reverse the order of the list.

7.4 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.

7.5 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 22).

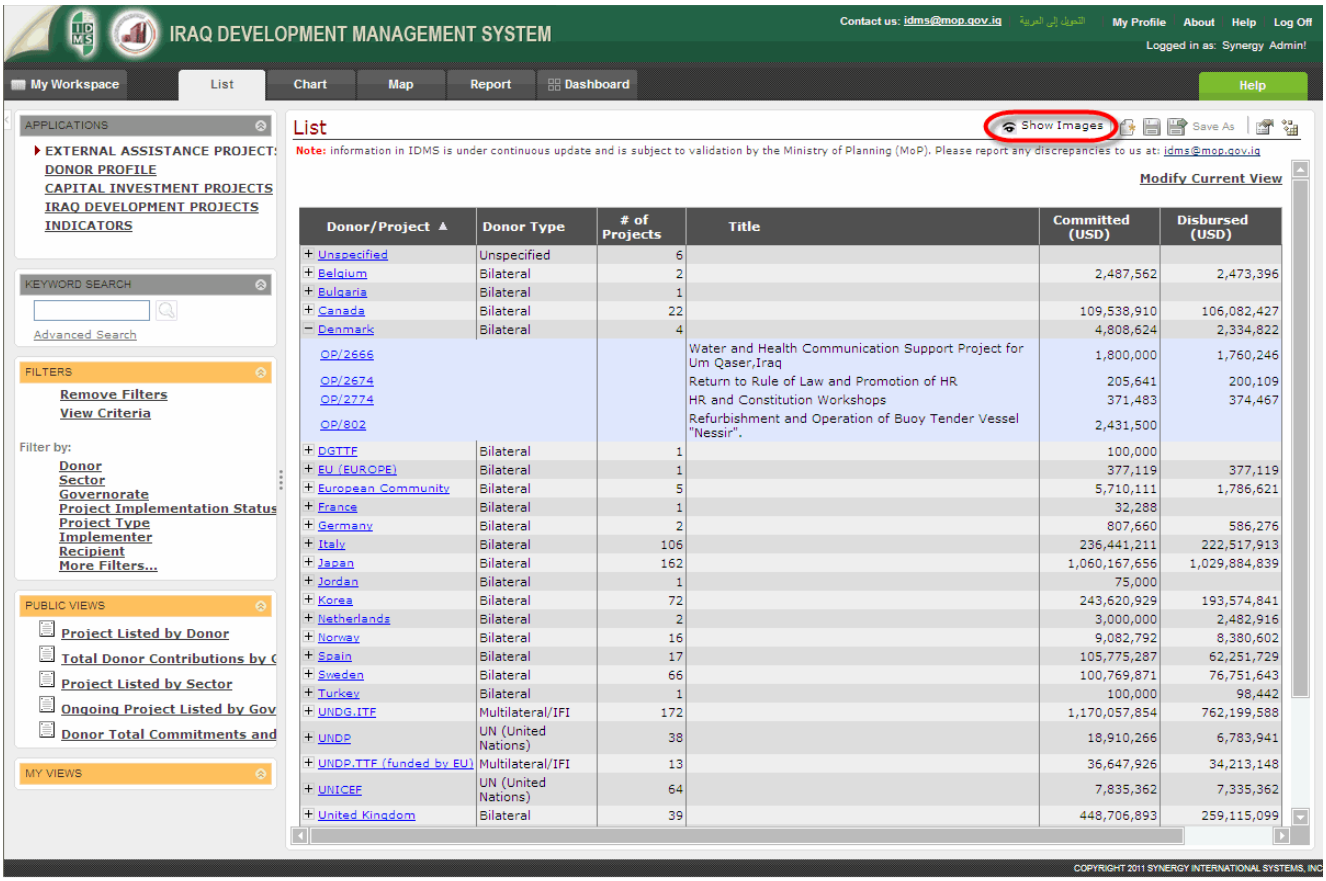


Figure 22: Hiding Images in the List

Note: Clicking the Show Images button will show the images.

7.6 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 23) will appear presenting the administrator with the groupings/columns selected and available for the list view.
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.
6. After finishing making changes in the view, click the **OK** button for the changes to take effect. Or, click the **Cancel** button to discard the changes made.

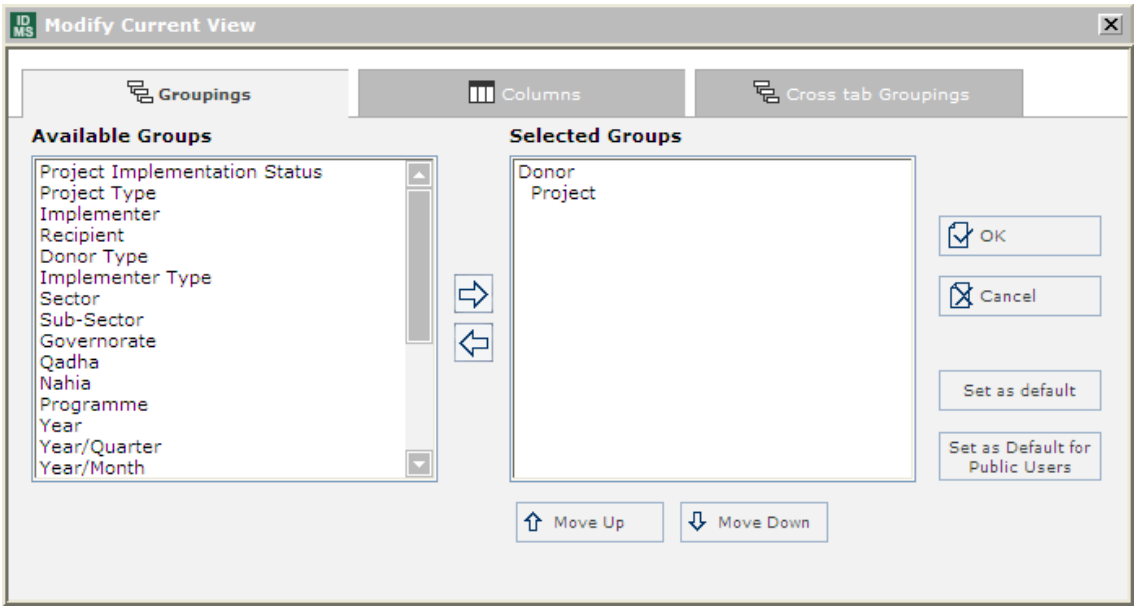


Figure 23: Modifying the Current View

7.6.1 Adding List Groups / Columns / Column Groupings

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

1. 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.
2. Click the **(Select)** button. The selected group(s) / column(s) will appear in the *Selected Groups / Columns* panel.

7.6.2 Re-ordering Groups / Columns / Column Groupings

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

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

7.6.3 Removing Groups / Columns / Column Groupings

In order to remove the selected groups / columns / column groupings from the list, follow the steps below:

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

7.6.4 Setting a View as Default

After making changes in the view currently displayed in the *List* module, you can set the newly created view as default. This means that the new view will be displayed when the user accesses the *List* module.

In order to set a view as default, follow the steps below:

1. Make the necessary changes in the current view as described in the sections above.
2. 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.

7.7 Sample Views

In the following chapters you can see several samples on list reports.

7.1.1 Sample View 1: Projects Distribution by Sectors

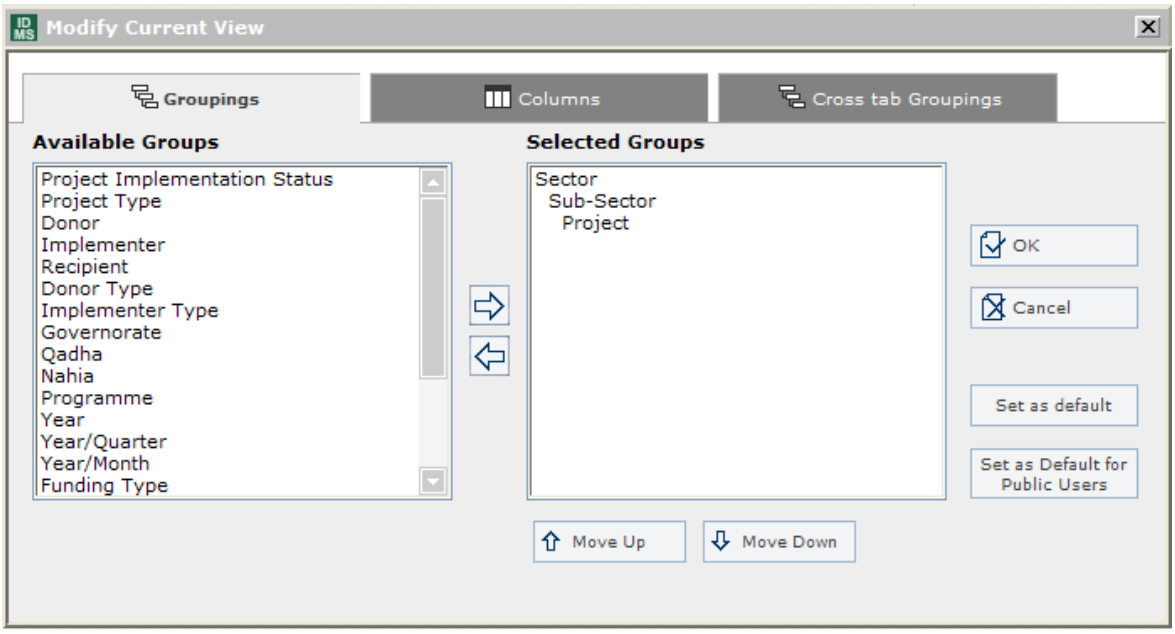


Figure 24: Defining List View Groupings for Sample View 1

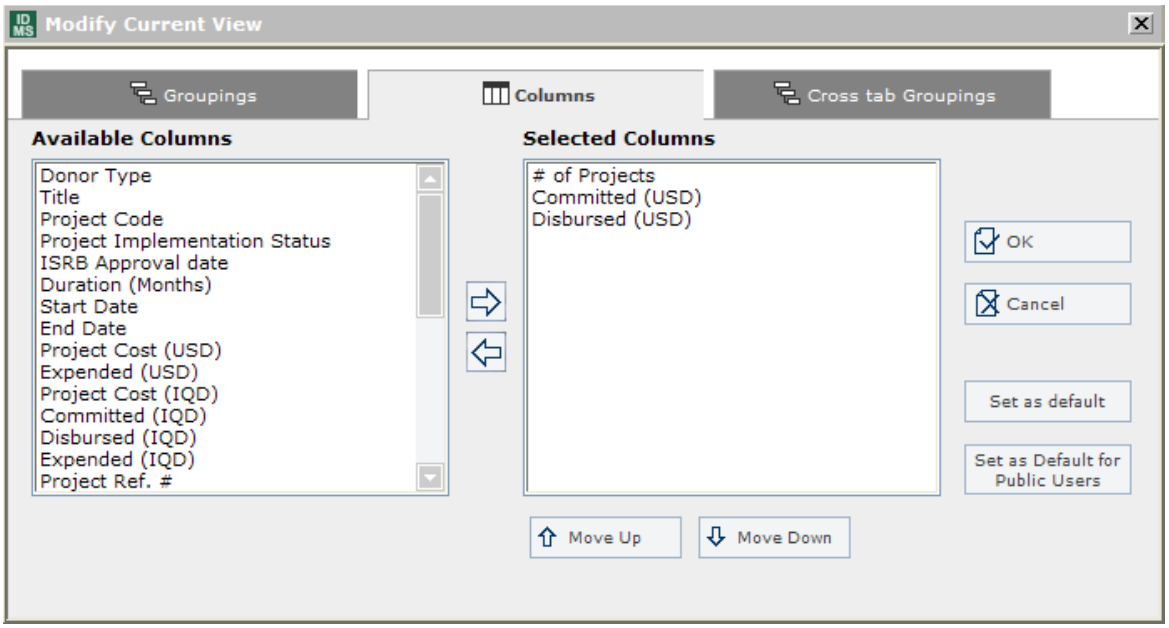


Figure 25: Defining List View Columns for Sample View 1

If you have indicated **Sector** / **Sub-sector** / **Project** hierarchy as a grouping (Figure 24) and, **# of Projects** / **Committed (USD)** / **Disbursed (USD)** as columns (Figure 25), following list view will appear (Figure 26):

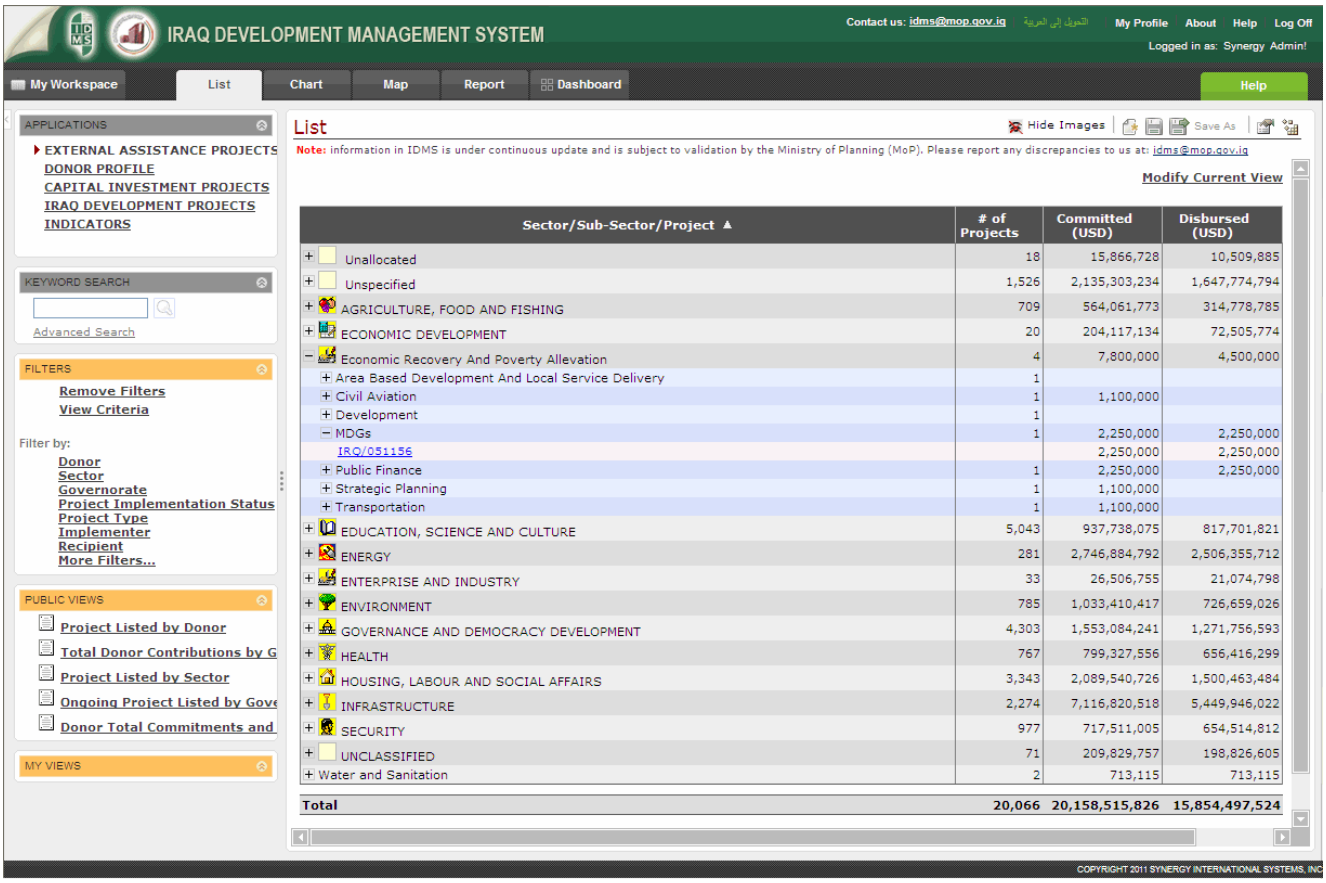


Figure 26: Sample View 1

7.1.2 Sample View 2: Projects Distribution by Location

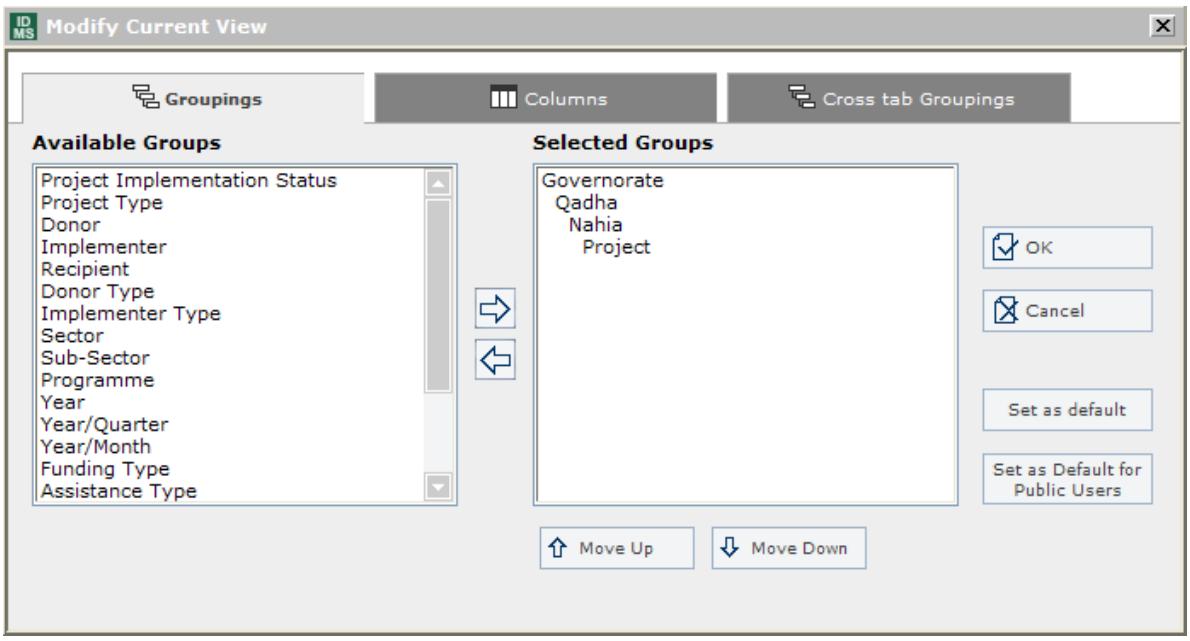


Figure 27: Defining List View Groupings for Sample View 2

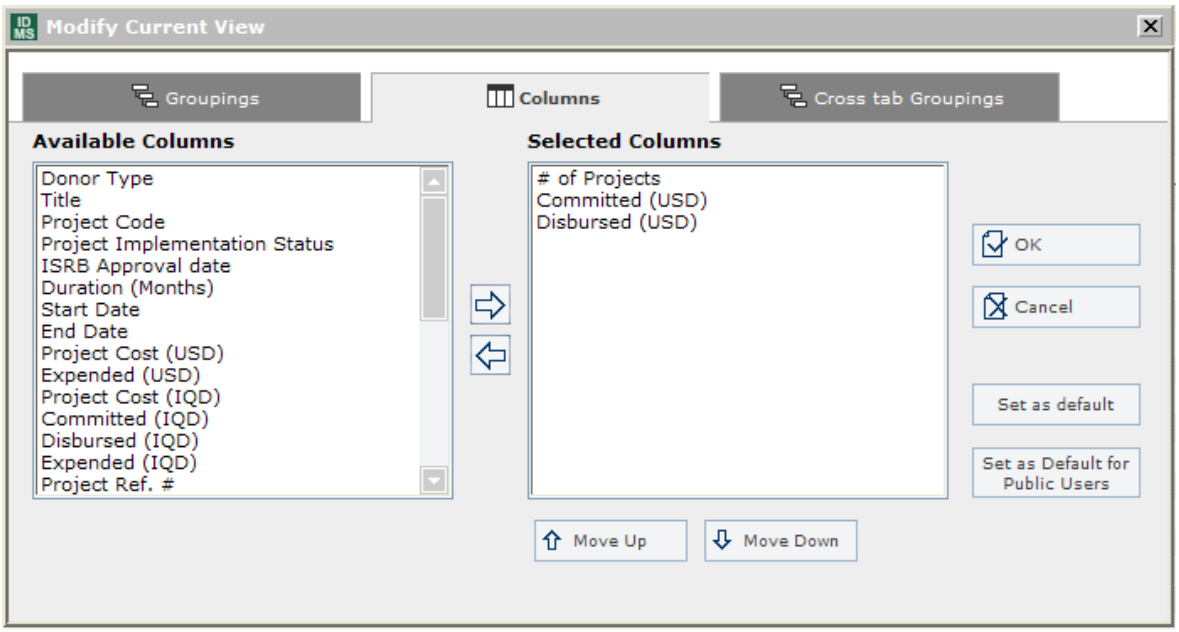
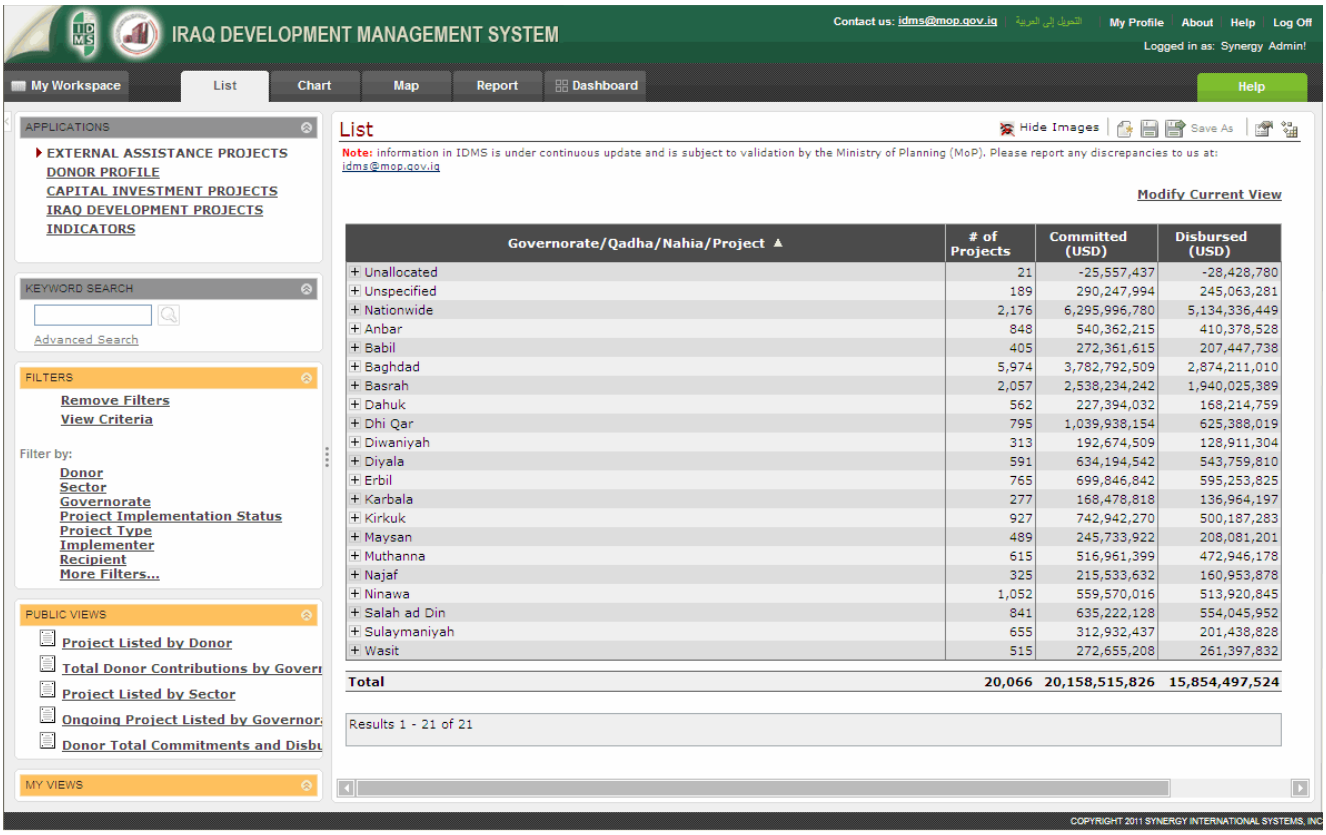


Figure 28: Defining List View Columns for Sample View 2

If you have indicated **Governorate** / **Qadha** / **Nahia** / **Project** hierarchy as a grouping (Figure 27) and, **# of Projects** / **Committed (USD)** / **Disbursed (USD)** as columns (Figure 28), following list view will appear (Figure 29):



Governorate/Qadha/Nahia/Project	# of Projects	Committed (USD)	Disbursed (USD)
Unallocated	21	-25,557,437	-28,428,780
Unspecified	189	290,247,994	245,063,281
Nationwide	2,176	6,295,996,780	5,134,336,449
Anbar	848	540,362,215	410,378,528
Babil	405	272,361,615	207,447,738
Baghdad	5,974	3,782,792,509	2,874,211,010
Basrah	2,057	2,538,234,242	1,940,025,389
Dahuk	562	227,394,032	168,214,759
Dhi Qar	795	1,039,938,154	625,388,019
Diwaniyah	313	192,674,509	128,911,304
Diyala	591	634,194,542	543,759,810
Erbil	765	699,846,842	595,253,825
Karbala	277	168,478,818	136,964,197
Kirkuk	927	742,942,270	500,187,283
Maysan	489	245,733,922	208,081,201
Muthanna	615	516,961,399	472,946,178
Najaf	325	215,533,632	160,953,878
Ninawa	1,052	559,570,016	513,920,845
Salah ad Din	841	635,222,128	554,045,952
Sulaymaniyah	655	312,932,437	201,438,828
Wasit	515	272,655,208	261,397,832
Total	**20,066**	**20,158,515,826**	**15,854,497,524**

Figure 29: Sample View 2

8. CHART MODULE

The *IDMS* application is equipped with a powerful chart designer that empowers you with all necessary tools to create charts for professionally looking presentations and reports. A user-friendly interface, great number of visual effects and pre-defined chart types, flexible chart components selection, and on-screen real-time chart visualization make using the chart designer an easy and delightful experience.

8.1 Key Features

You can make use of the following key features of the Chart tool in *IDMS*:

- ✓ Rich user interface that supports movable windows for arranging the screen as desired.
- ✓ The ability to resize the charts directly in the workspace.
- ✓ The ability to show or hide the data labels and legends.
- ✓ The ability to customize the coloring, or choose pattern-filled charts for black and white printing.

8.2 Accessing the Chart Module

As it has been stated above, the system provides for the opportunity to present data in the form of different charts. In order to access the *Chart* module of the system, click on the **Chart** tab. The *Chart* module appears where a pre-defined chart is displayed.

8.3 Main Screen and Its Components

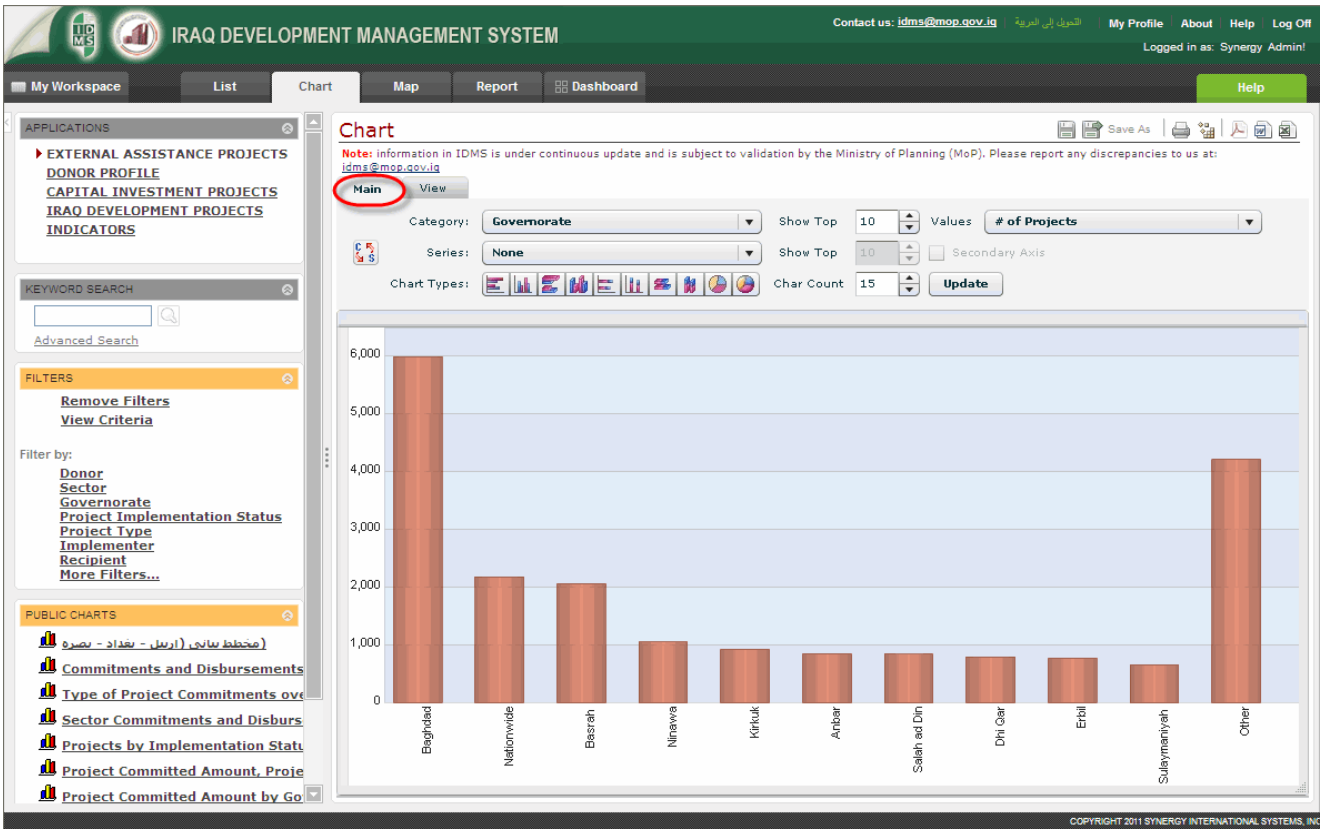


Figure 30: Main Screen of the Chart Module

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.
   Note: 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.
   Note: Selection of a series for the chart report is optional.

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

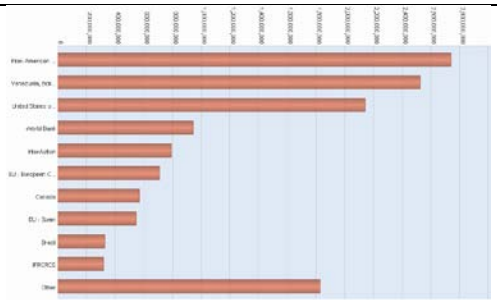
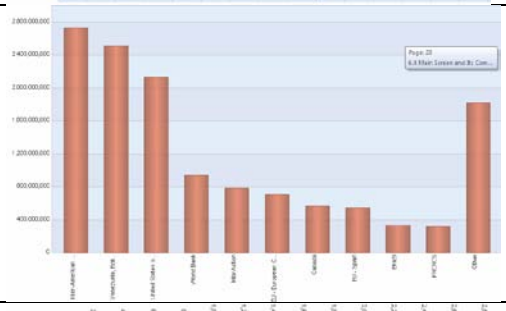
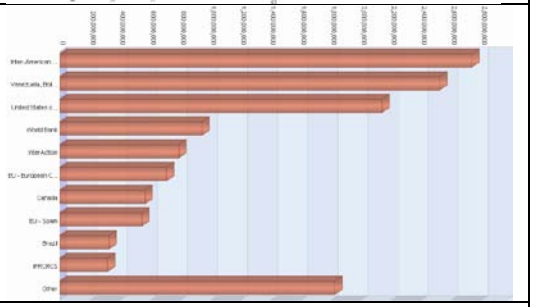
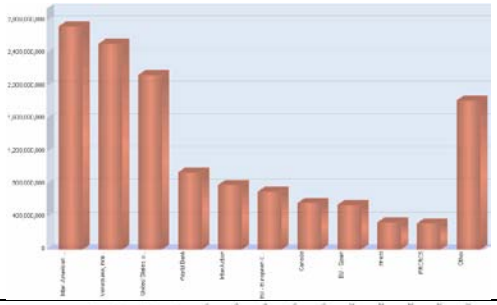
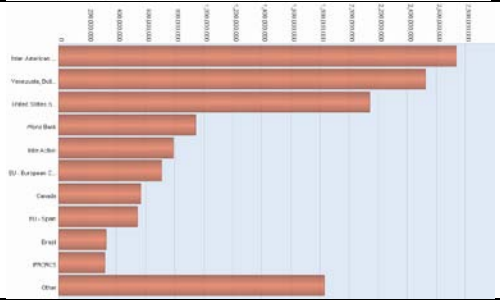
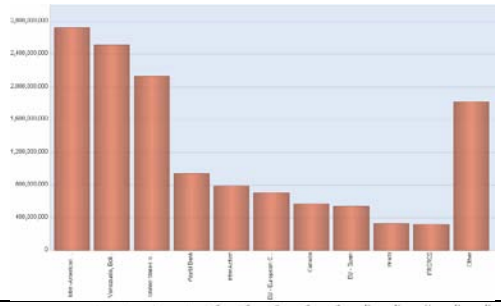
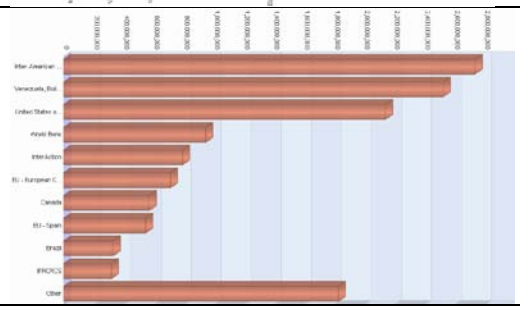
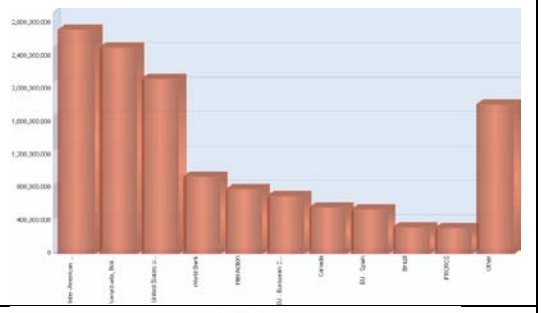
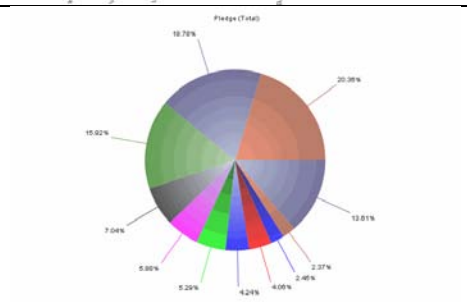
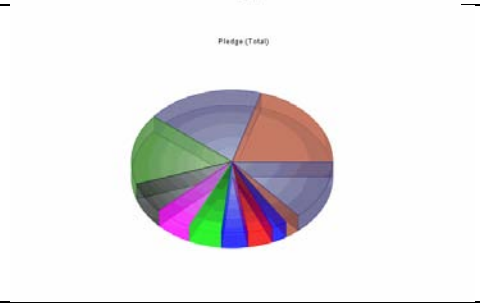
Chart Type	Example
1. Bar chart	
2. Column chart	
3. 3D Bar chart	
4. 3D Column chart	
5. Stacked Bar chart	

Chart Type	Example
6. Stacked Column chart	
7. Stacked 3D Bar chart	
8. Stacked 3D Column chart	
9. Pie chart	
10. 3D Pie 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.

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. **Workspace** - the main working area in the *Chart* module where the chart designed is displayed.

8.4 View Screen and Its Components

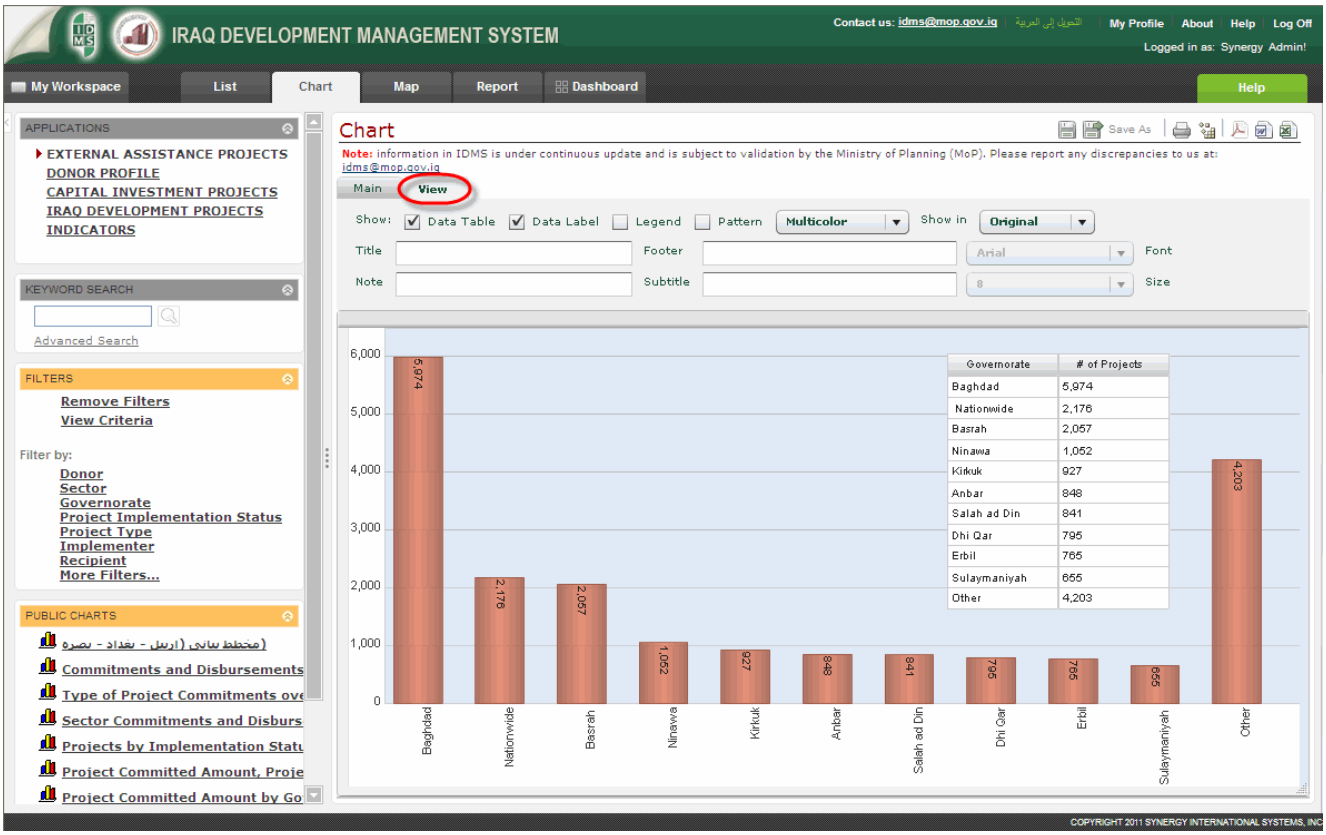


Figure 31: View Screen of the Chart Module

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.
   - ***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.

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.

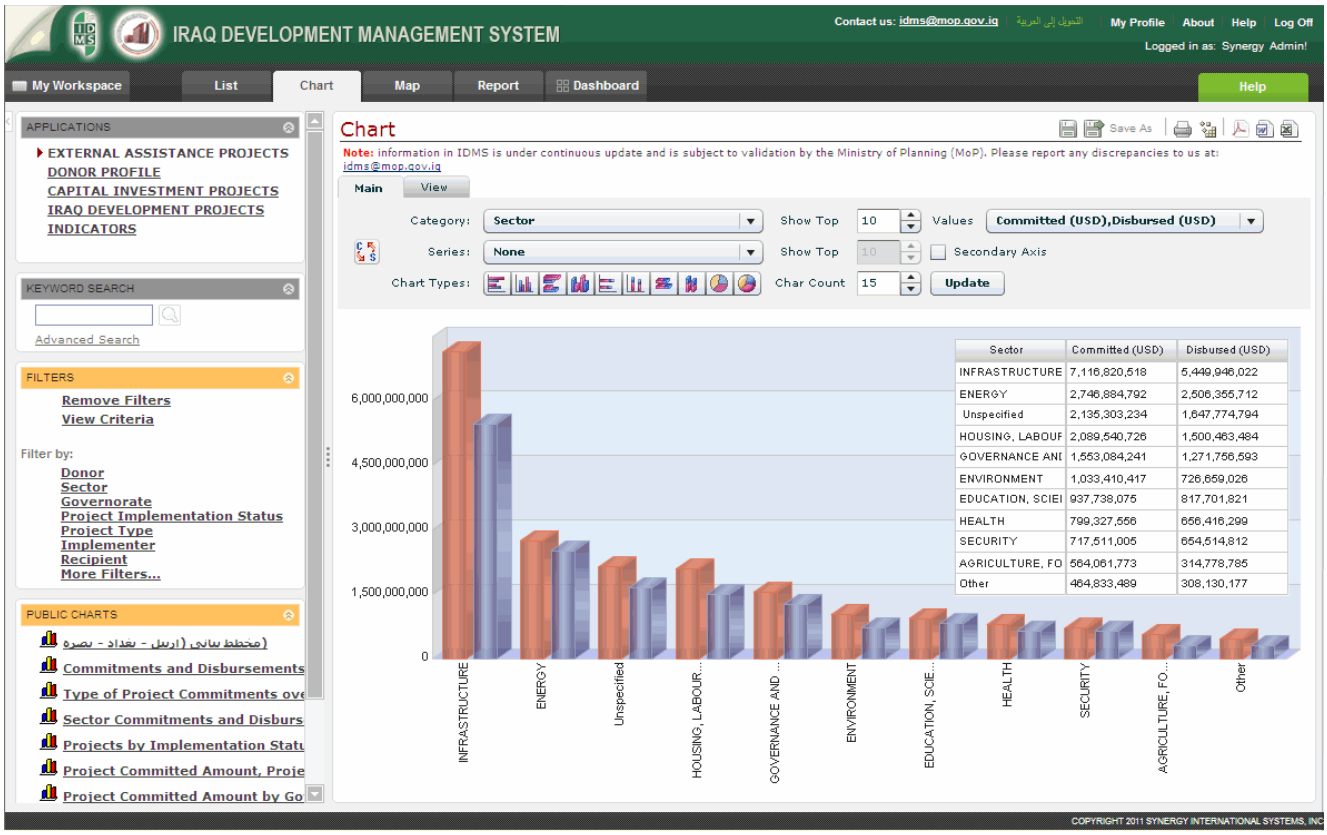
8. ***Workspace -*** the main working area in the *Chart* module where the chart designed is displayed.

8.5 Sample Chart Reports

In the following chapters you can see several samples on charts.

8.5.1 Sample Chart Report 1: Commitments and Disbursements Distribution by Top 10 Sectors

If you select the “Sector” as a chart Category, and “Committed (USD) / Disbursed (USD)” as values to be shown on the chart, and click on the **3D Column** chart button to specify the chart type and activate the **Data Table** option in the *View* window, the following chart report will appear (Figure 32):



Sector	Committed (USD)	Disbursed (USD)
INFRASTRUCTURE	7,116,820,518	5,449,946,022
ENERGY	2,746,884,792	2,506,355,712
Unspecified	2,135,303,234	1,647,774,794
HOUSING, LABOUF	2,089,540,726	1,500,463,484
GOVERNANCE ANI	1,553,084,241	1,271,756,593
ENVIRONMENT	1,033,410,417	726,659,026
EDUCATION, SCIEI	937,738,075	817,701,821
HEALTH	799,327,556	656,416,299
SECURITY	717,511,005	654,514,812
AGRICULTURE, FO	564,061,773	314,778,785
Other	464,833,489	308,130,177

Figure 32: Sample Chart Report 1

8.5.2 Sample Chart Report 2: Total Commitments, Disbursements, and Expenditures Distribution by Governorate

If you select the “Governorate” as a chart category, and “Committed (USD) / Disbursed (USD) / Expended (USD)” as values to be shown on the chart, and click on the **3D Pie** chart button to specify the chart type and activate the **Data Table** and **Legend** options in the *View* window, the following chart report will appear (Figure 33):

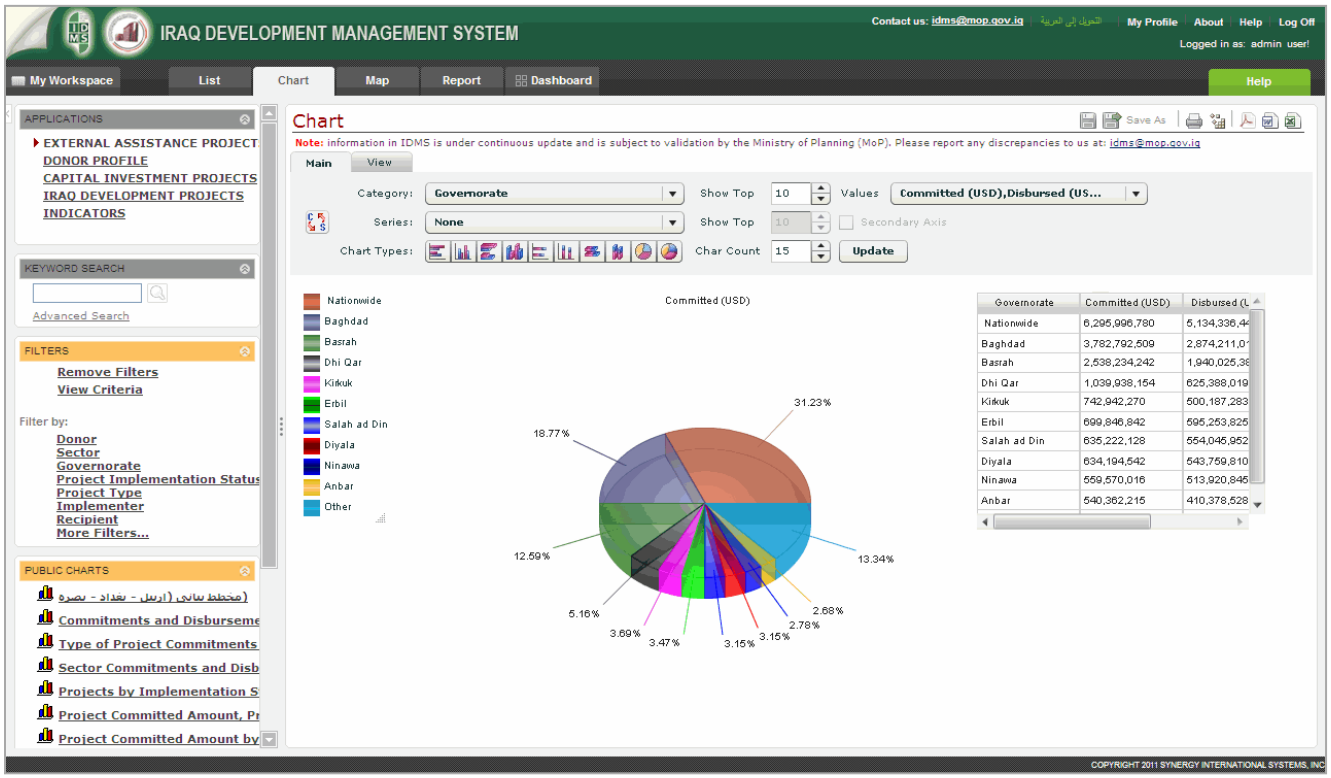


Figure 33: Sample Chart Report 2

9. MAP MODULE

In the *Map* module of *IDMS*, you can make use of an advanced GIS tool for data visualization, mapping and analysis.

In this module, you can plot data directly on a map and then access that data through the map. You can also query, aggregate, disaggregate, filter, and edit data on a map, visually capture data at any desired level, from the most general to the most detailed, down to the district level.

Moreover, the GIS tool offers an impressive array of state-of-the-art, advanced GIS features, such as the ability to zoom freely; to select a point on a map and ask the system to display any category of data within a given radius ("buffer zone querying").

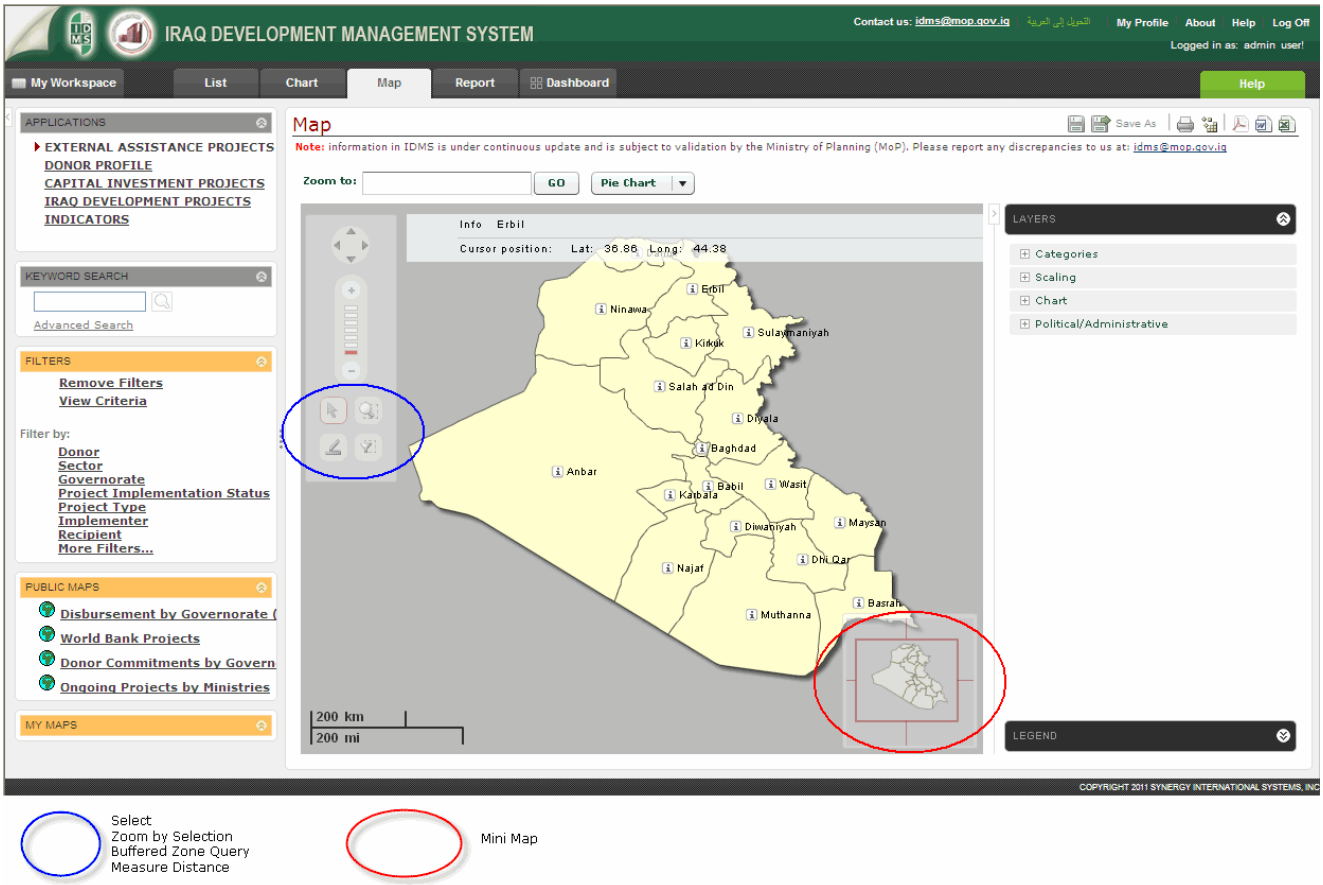


Figure 34: Map Module

9.1 Key Features of the GIS Tool

Below are the key features of the GIS tool in the *IDMS* application:

- Vector-based platform
- Multi-layer mapping
  - Dynamic number of administrative territorial units

- Category or Indicator data
- Static Data (Borders, Cities, Rivers, Roads, Construction Sites, etc.)
- Names and Labels
- Any other type of layer

- Data visualization features
  - Plotting Category or Indicator Data as icons/images/flags
  - Plotting data based on GPS coordinates
  - Any layer which contains data associated to a precise GPS coordinate can be plotted on the map.
  - Coloring administrative territories based on dynamic scaling (e.g. level of certain pollution)
  - Plotting graphs on maps
  - Attaching photo images to GPS locations (or conditional locations)

- Reference features
  - Legend
  - Dynamic legends are displayed depending on the selection of layer(s).
  - Tooltips
  - Details of an administrative territories
  - Details on plotted categories and indicators

- Navigation features
  - Free zoom-in/zoom-out
  - Mouse wheel-based zoom-in/zoom-out
  - Scaled zoom-in/zoom-out
  - Map Panning (mouse drag and buttons)
  - Mini Map Preview
    The preview displays a small window of the entire world or country and is used for quick navigation to a desired location with one click without having to zoom out, find the new location and zoom in again.

- GIS specific features
  - Distance Measurement
  - Buffer Zone Querying
  - Geocoding
- Internationalization features
  - User interface multi-lingual capability
  - Map multi-lingual capability

- Export & Print
  - Export to PDF, Word, or Excel
  - Print

- Interoperability
  - Map retrieval via web services

9.2 Accessing the Map Module

The system provides for the opportunity to present data on the map of the country. In order to access the *Map* module of the system, click on the **Map** tab. You will be navigated to the *Map* module where the map of the country is displayed.

In the *Map* module, you can choose to view different data sets displayed on the map, create and display reports, save them as pre-defined reports, arrange them in the desired way, print them, etc.

9.3 The Map Module Screen Components

The following figure describes some of the features available in the main screen of the *Map* module (Figure 34):

1. ***Zoom to panel -*** allows free zooming to the desired administrative unit (governorate or district).

2. ***Chart type selector -*** allows defining whether the data should be presented in form of a pie chart or a bar chart when plotting graphs on the map.

3. ***Navigation controls -*** a set of tools that provide common navigation functions, such as panning and zooming.

4. ***Map -*** the map of the country.

5. ***Scale Bar -*** allows you to work out the distances on the map. The distances are expressed both in the metric and English units of measure.

6. ***Mini Map -*** an overview map of the entire country displayed in a small window allowing quick navigation to a desired location with one click without having to zoom out, find the new location and zoom in again.

7. ***Layers Panel -*** provides a variety of data to choose to display on the map.

8. ***Legend Panel -*** explains the categories and data series displayed on the map.

9. ***Location information section -*** displays the name of the administrative unit when it is pointed on the map.

10. ***Cursor position section -*** displays the geographic coordinates (expressed as latitude and longitude) for any point on the map.

9.4 Working in the Map Module

9.4.1 Zooming in / Zooming out

The GIS tool is equipped with the advanced zooming capabilities used to enlarge or reduce the view of the map on the screen. The following zooming options are available:

Free zoom in / zoom out

This option allows you to easily explore the data through Intelligent Searching. You can enter any combination of letters in the *Zoom to* panel and select the administrative territory (district) to navigate to from the list containing the search results (Figure 35). The selected item will be magnified and displayed in the main screen.

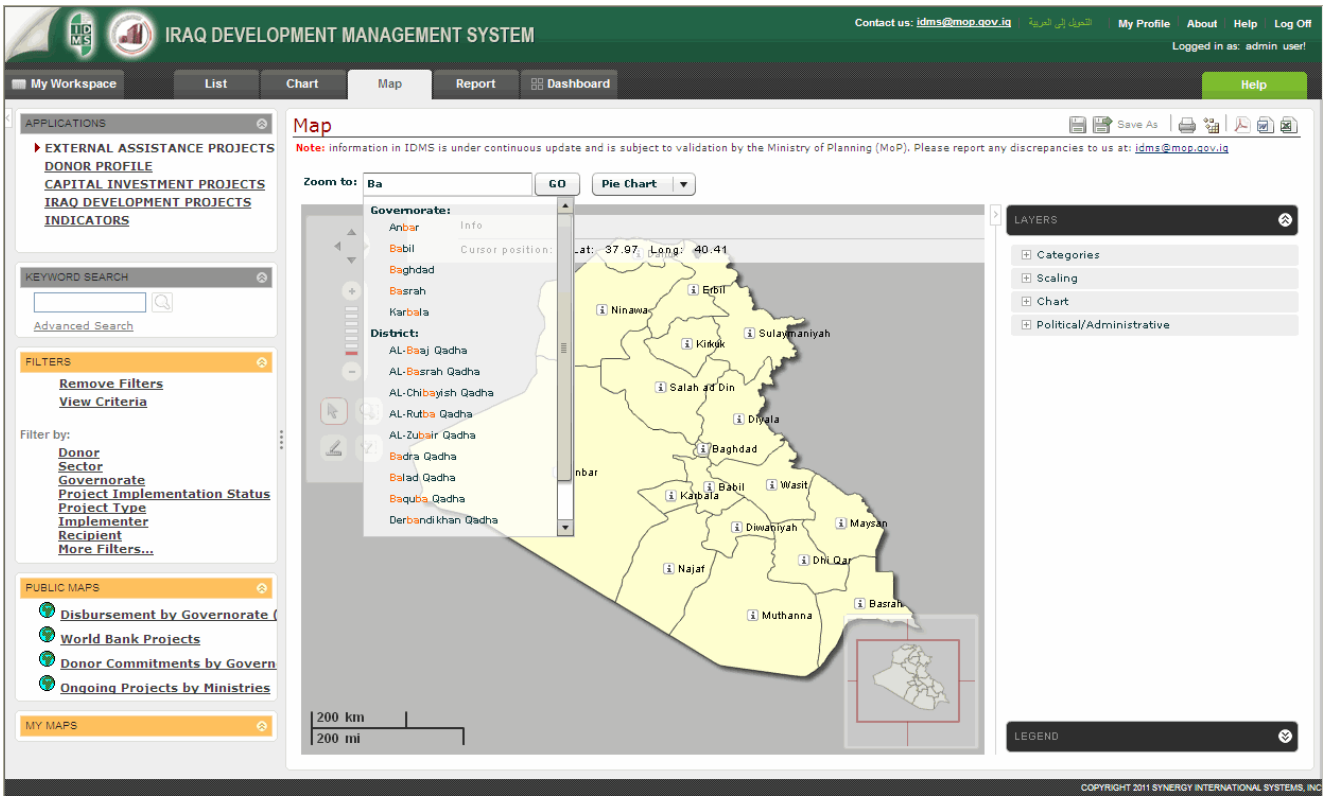


Figure 35: Intelligent Searching

Scaled zoom in / zoom out

This option allows zooming in / zooming out using the scale tool available in the Advanced GIS.

This means that when changing the zoom scales by clicking either on + or −, you can magnify or reduce the viewport according to the scale value.

Mouse wheel-based zoom-in / zoom-out

This option supports mouse wheel-based zooming in / zooming out. In order to enlarge or reduce the viewport using the scroll wheel button of the mouse, you should click anywhere on the map and use the wheel button in the backward motion to zoom in and in the forward motion to zoom out.

Zoom by Selection

This option allows magnifying the original viewport or a portion of it using the mouse. To be able to enlarge an area on the map, you should activate the *Zoom by Selection* option by clicking the button then select a region on the map to magnify.

9.4.2 Measuring Distance

In the Map module, you can measure the distance between two points on the map.

To do this, click button, select the point on the map and drag the mouse to the second point to trace a path to measure (Figure 36). The measured distance will be expressed both in metric and English units of measure.

Note: Measuring is calculated using the latitude and longitude coordinates from point to point and does not consider elevation.

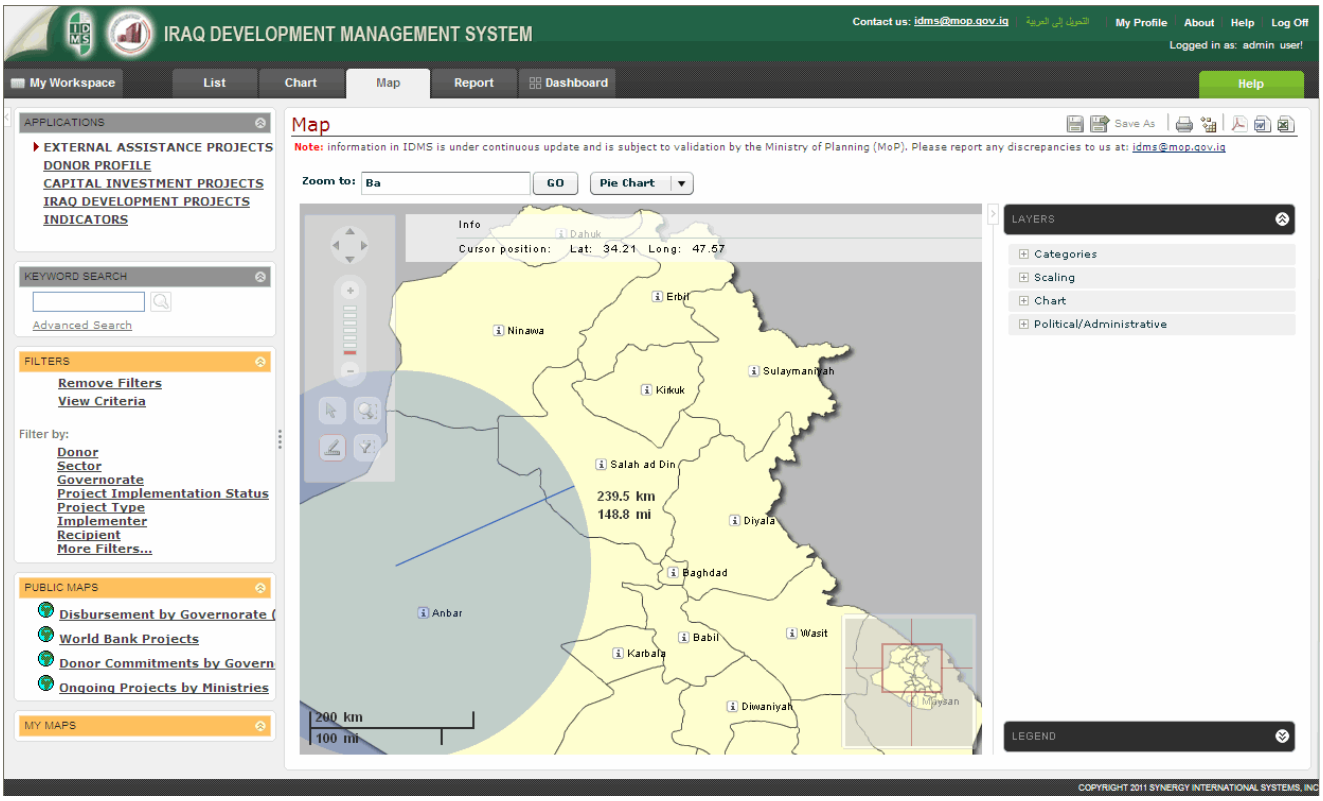


Figure 36: Measuring Distance

9.4.3 Buffer Zone Querying

This feature in the Advanced GIS tool is used to select a point on a map and display any type of data within a given radius. In addition, the tool is easily navigable through a Mini Map, Navigation Bar and Intelligent Search Tools.

To be able to create a buffer zone to view data for, select the button, and then select the region on the map to highlight. The selected area will be activated while the rest of the screen will be disabled (Figure 37). This tool may be useful for presentations on screenshots to mark the selected area on the map.

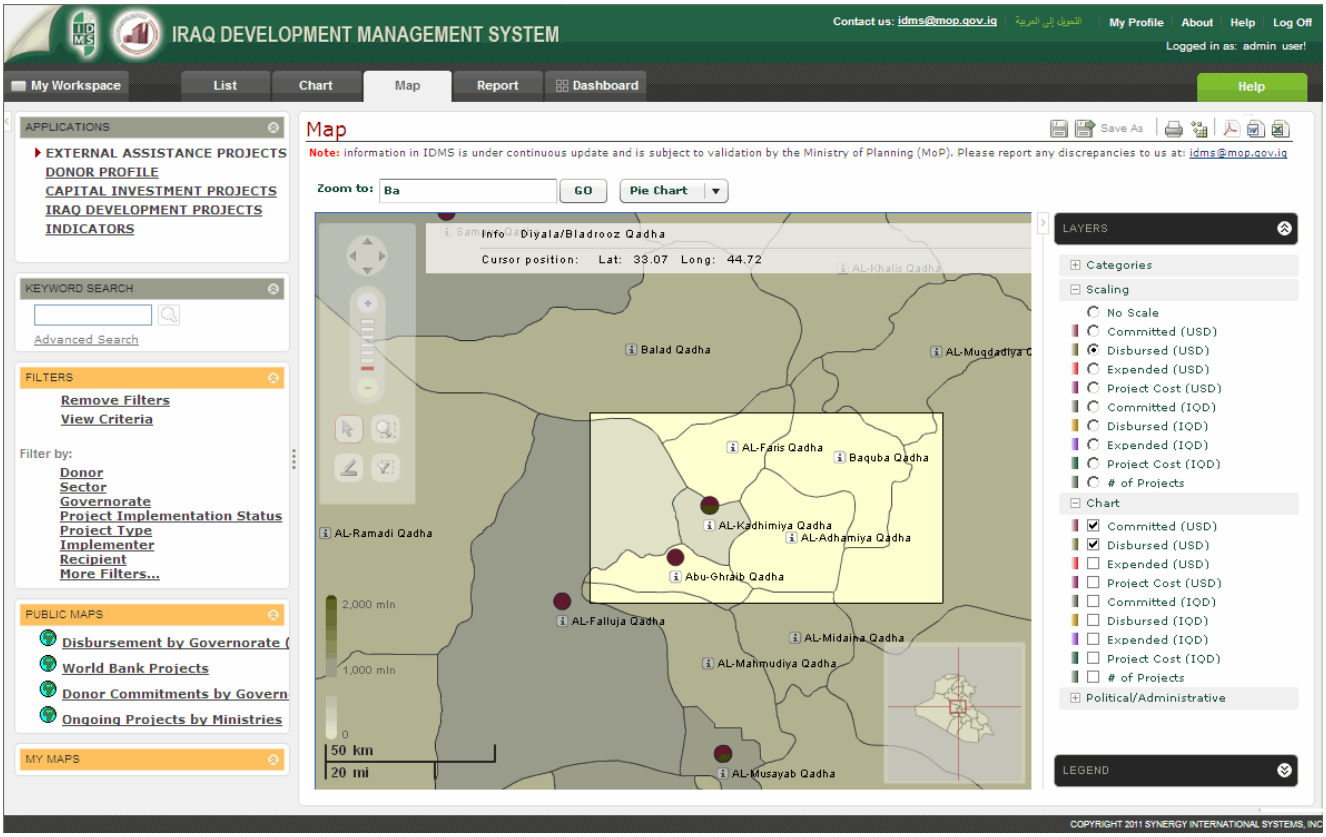


Figure 37: Buffer Zone Querying

9.4.4 Using Layers

The Layers feature in the *Map Module* provides a variety of data to select to display over the viewing area. You can use the Layers feature to display the following information:

- Display categories;
- Choose to view data on a scaling map;
- Plot data in the form of different graphs (pie chart or bar chart);
- Display map features such as department or commune borders.

The following layers can be applied in *IDMS*:

Categories

This option is used to plot category data on the map and to view them in form of different icons / images. To enable this option, expand the *Category* section and selecting the category(ies) listed.

Note: When pointing the mouse cursor on a respective icon/image on the map, you can view the details for the selected category.

Scaling

This option is used to view the data on a scaling map. This means that the selected data series will not be displayed in form of graphs, but the administrative territories will be colored according to the selected scaling category instead. The scaling legend at the bottom left side of the map prompts on the coloring pattern used.

To enable this option, expand the *Scaling* section in the Layers panel and select one of the possible alternatives listed.

Chart

You can plot different data series on a map and view them in the form of different graphs, such as pie charts or bar charts. You can turn on this option by expanding the *Chart* section in the Layers panel and selecting the chart category(-ies) to be displayed on the map. By default, the selected category(-ies) will appear in the form of a pie chart. However, you can choose the view the data in the form of a bar chart by selecting the appropriate option from the **Chart Type** drop-down (Figure 38).

Note: When pointing the mouse cursor on any of the chart constituents, you can view the data that stands behind it. The details on plotted chart categories are displayed when clicking the button.

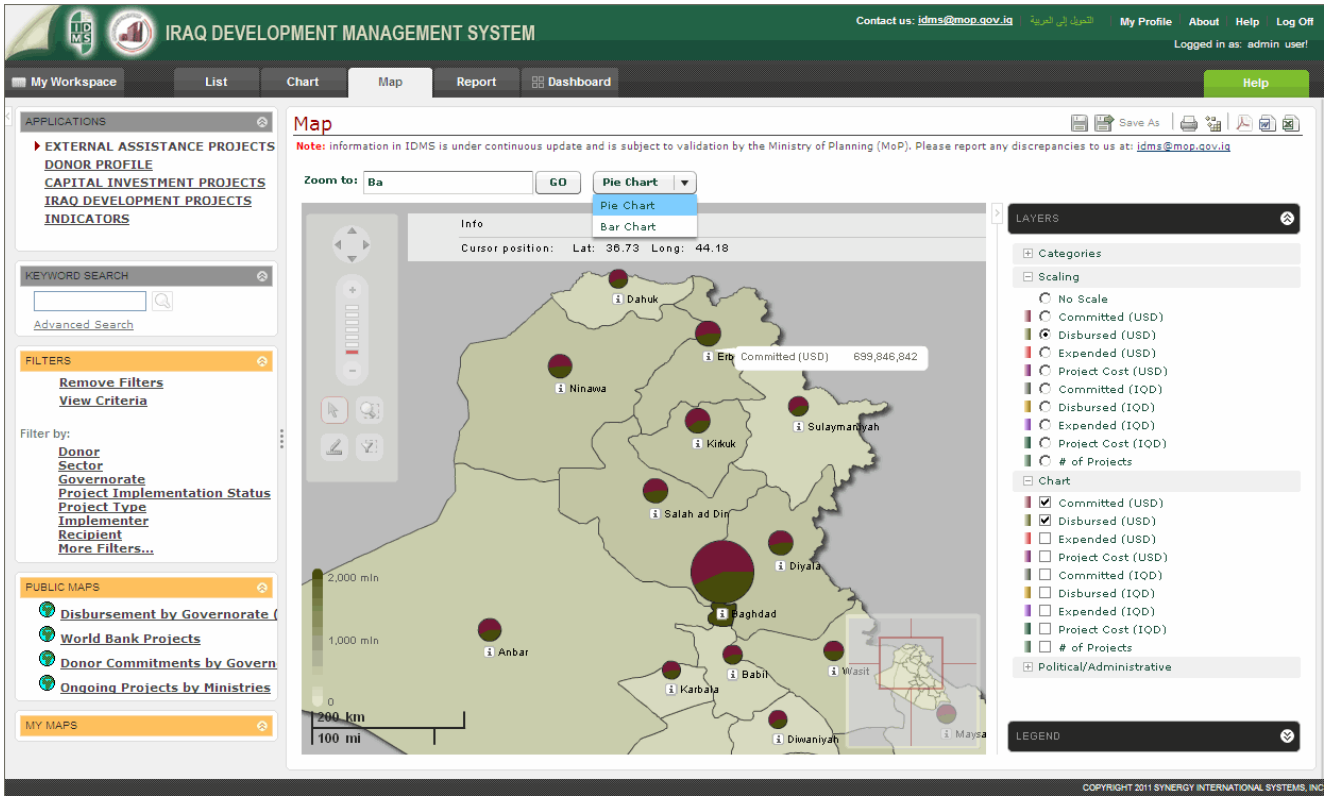


Figure 38: Selecting Chart Type

Borders

You can turn on border information by expanding the *Borders* section in the Layers panel and selecting one of the following options:

- **Auto -** displays border information for all territorial units when the zoom in is selected. For example, if you zoom in to district level, the border information for both governorates and district will be displayed on the map.
- **Governorate -** displays the border information for all governorates.
- **District–** displays the border information for all districts.

9.4.5 Viewing Legend

To explain the data series or categories on the map, the legend is used to identify the patterns or colors that are assigned to the selected categories (Figure 39). It is worth mentioning that each data series or category is represented by a unique pattern or color in the map legend, which is displayed in the following ways:

- In the *Legend* section if you have chosen to apply any category to the map.
- At the bottom left side of the map if you have selected to view data on the scaling map.

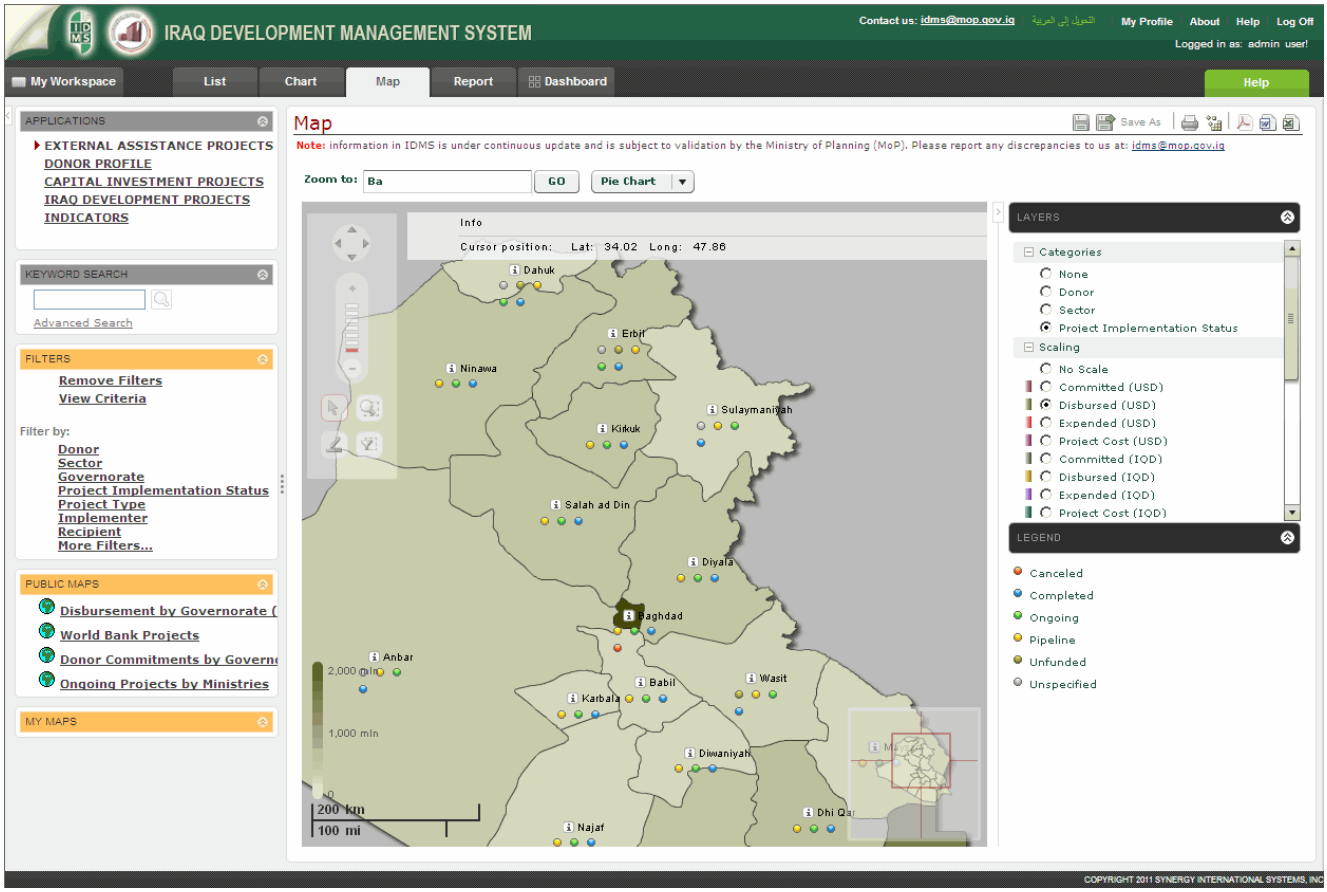


Figure 39: Viewing Chart Legend

9.4.6 Using Mini Map

The Mini Map window feature displays an additional view of the country map with a position indicator that corresponds to the current view inside the main screen (Figure 40). One of the main features of the Mini Map is that while the Mini Map window responds to position adjustments in the main screen, you can also interact directly with it. Double-clicking any area within the window or dragging the position cursor to the desired place will adjust position both in the Mini Map and in the main screen to the point in the Mini Map window that the user selects.

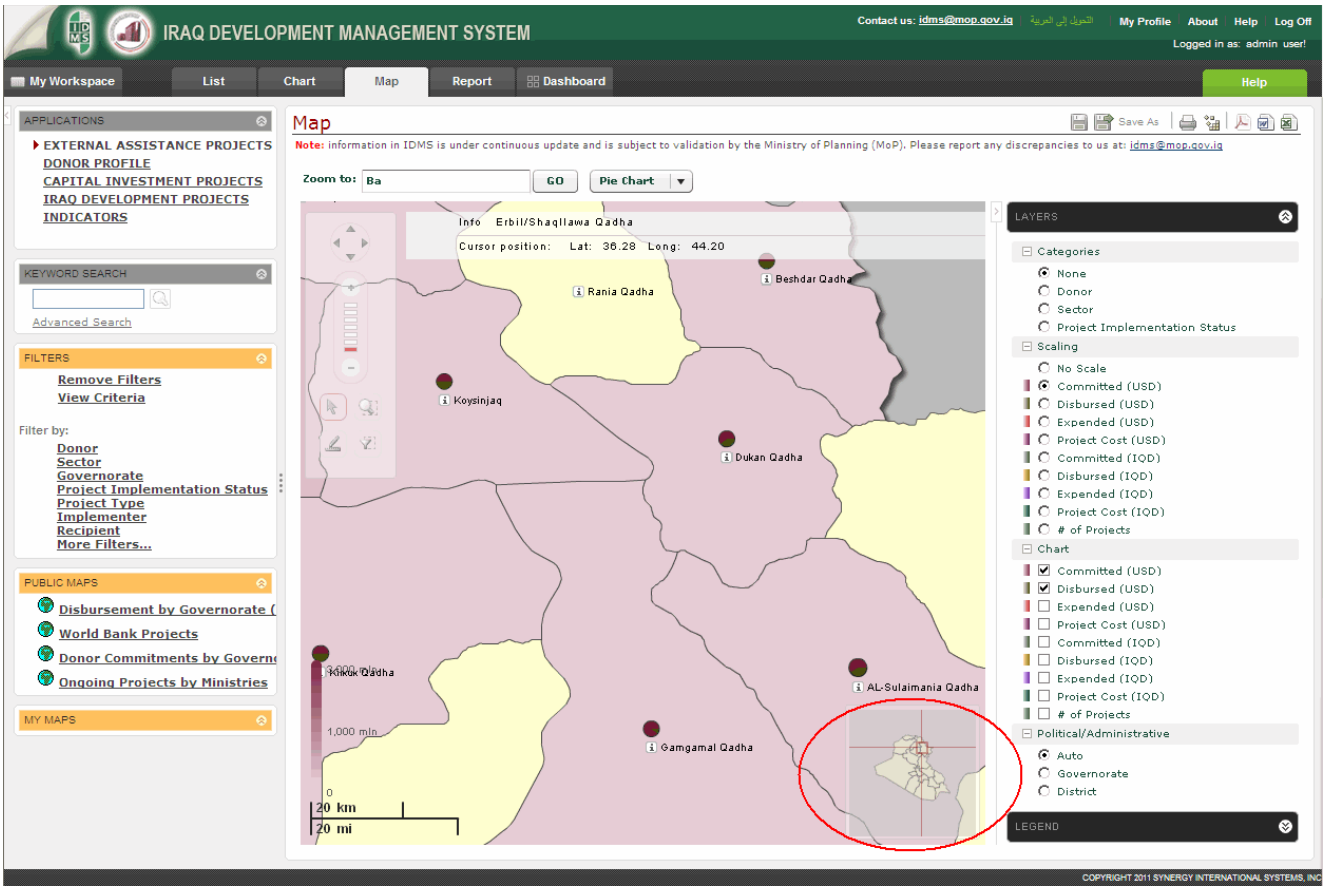


Figure 40: Using Mini Map

9.5 Viewing the Data Displayed on the Map

The Advanced GIS tool is used to view the data referring to definite territorial units – governorates and/or cities/villages when zoomed in to this level. In order to access the data for a specific territorial unit, point the mouse cursor on the ℹ button (Figure 41). The information that is displayed in the information window includes but is not limited to # of people in need of shelter, # of houses totally destroyed, estimate # of households, etc. If you have plotted any chart category on the map, the chart category details appear in the information window as well.

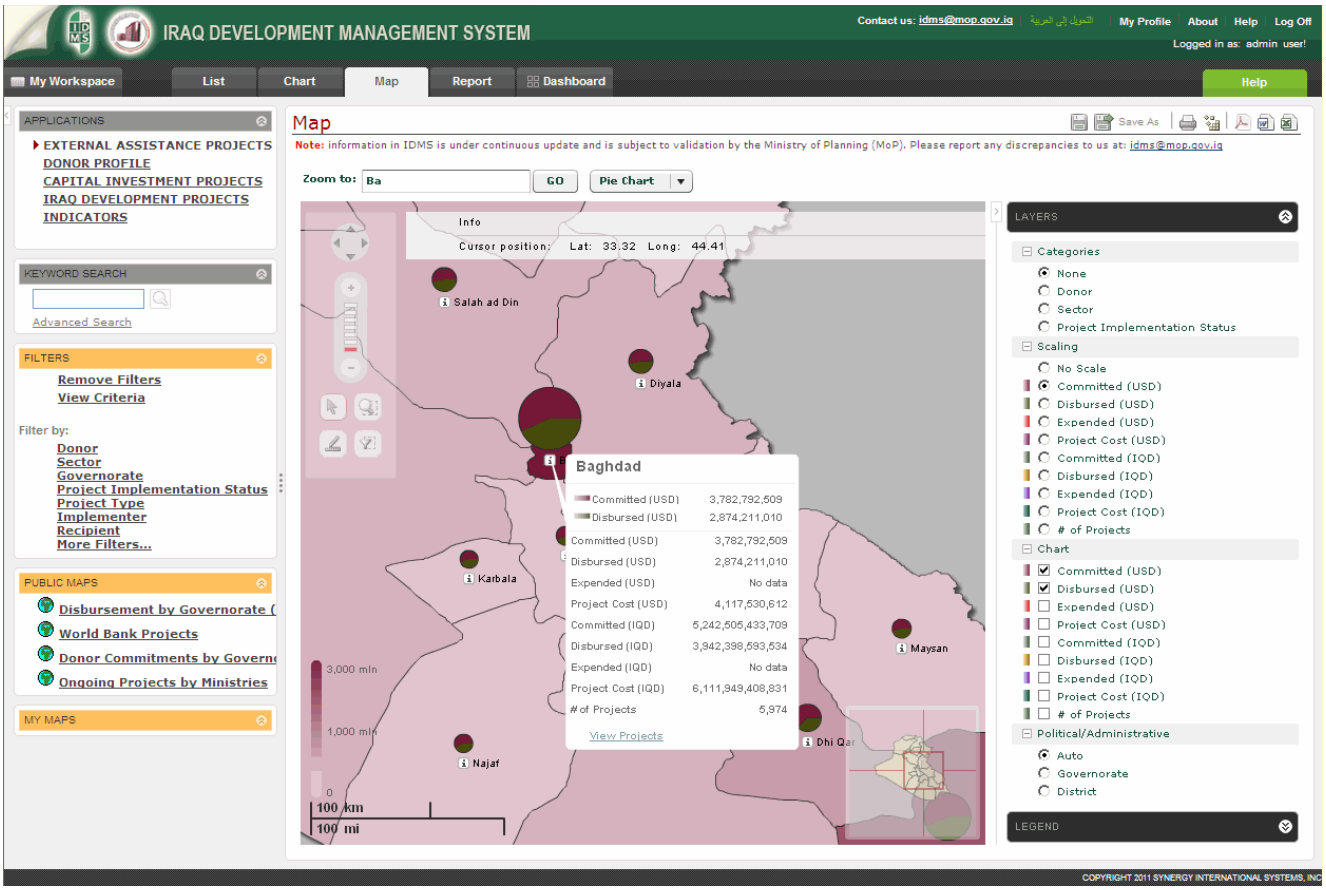


Figure 41: Viewing the Data Displayed on the Map

9.6 Sample Map Reports

In the following chapters you can see several samples on maps.

9.6.1 Sample Map Report 1: Projects Distribution by Implementation Status

You will get the following map report if you have selected the “Project Implementation Status” as a map **Category** and open the **Legend** panel (Figure 42):

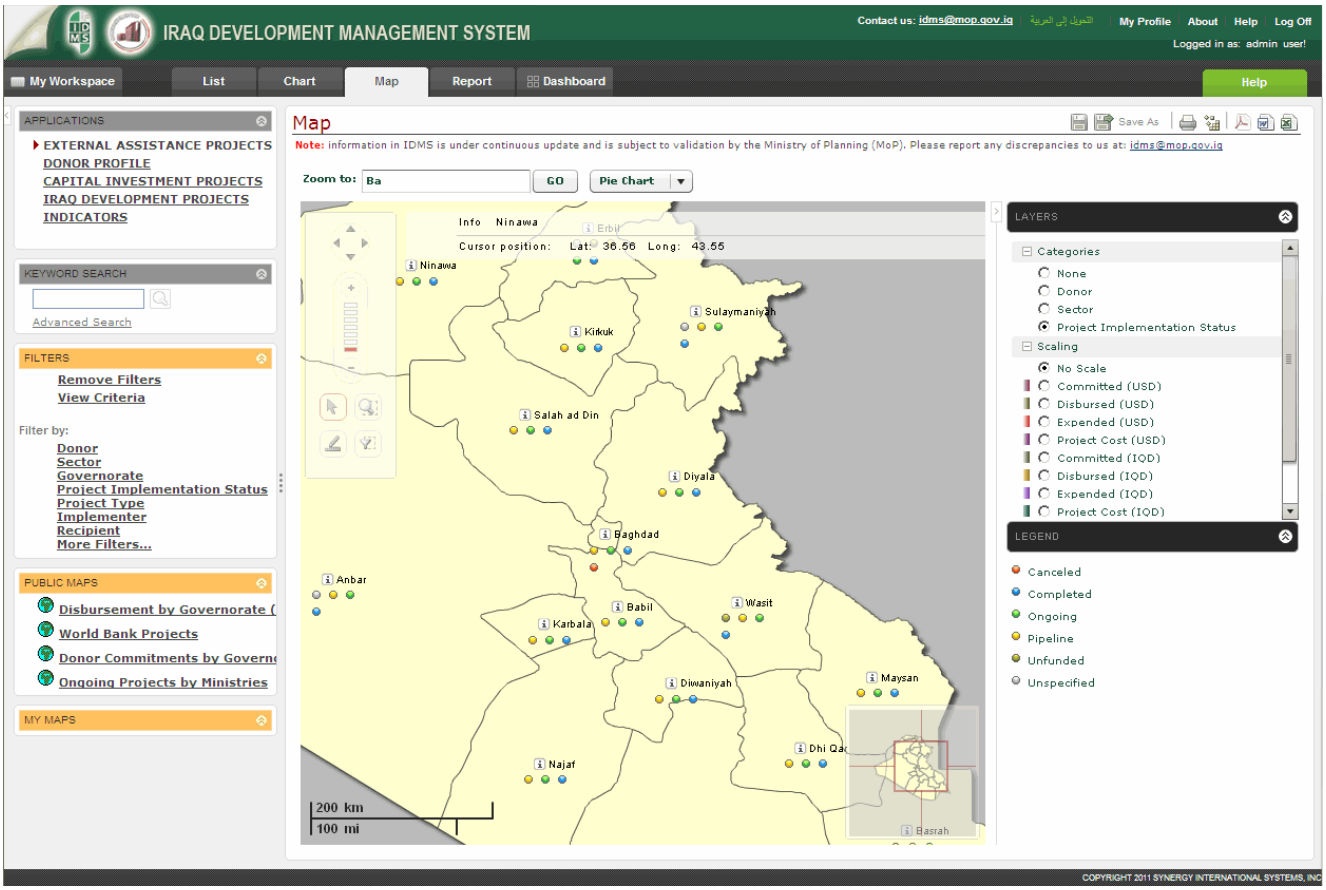


Figure 42: Sample Map Report 1

9.6.2 Sample Map Report 2: Projects Cost by District

If you have selected the "Project cost (USD)" as a map **Scale**, the following map report will appear (Figure 43):

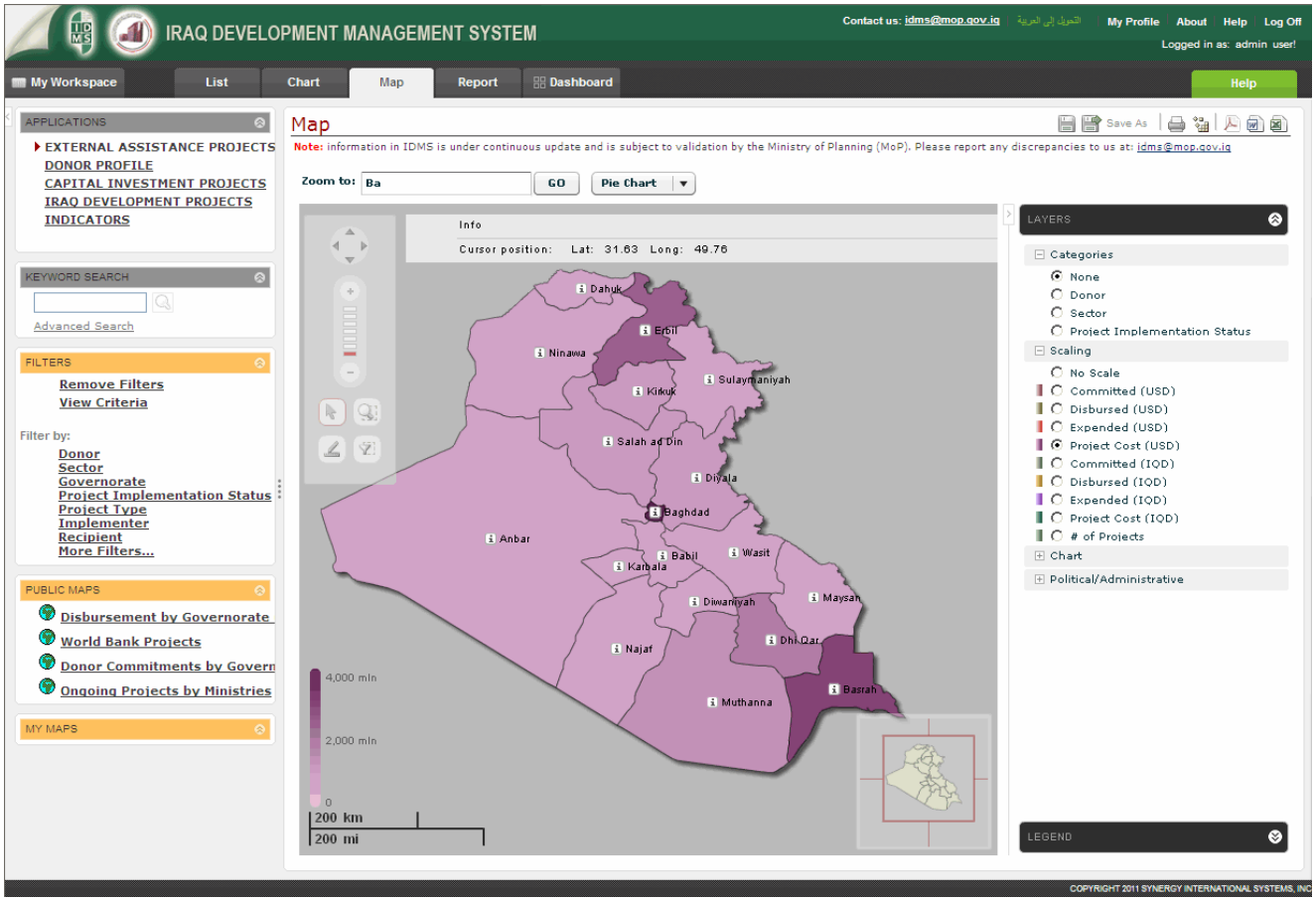


Figure 43: Sample Map Report 2

10. REPORT MODULE

In the *Report* module of the *IDMS* application, you can create and execute ad-hoc queries on the data, and acquire results in the form of different reports.

10.1 Accessing the Report Module

As it has been stated above, the system provides for the opportunity to create different sorts of list reports. In order to access the *Report* module of the system, click on the **Report** tab. You will be navigated to the Report module of the application where the *Report Designer* (Figure 44) will open.

In this module, you can create list reports, save them as predefined reports, arrange them in the desired way, print them, etc.

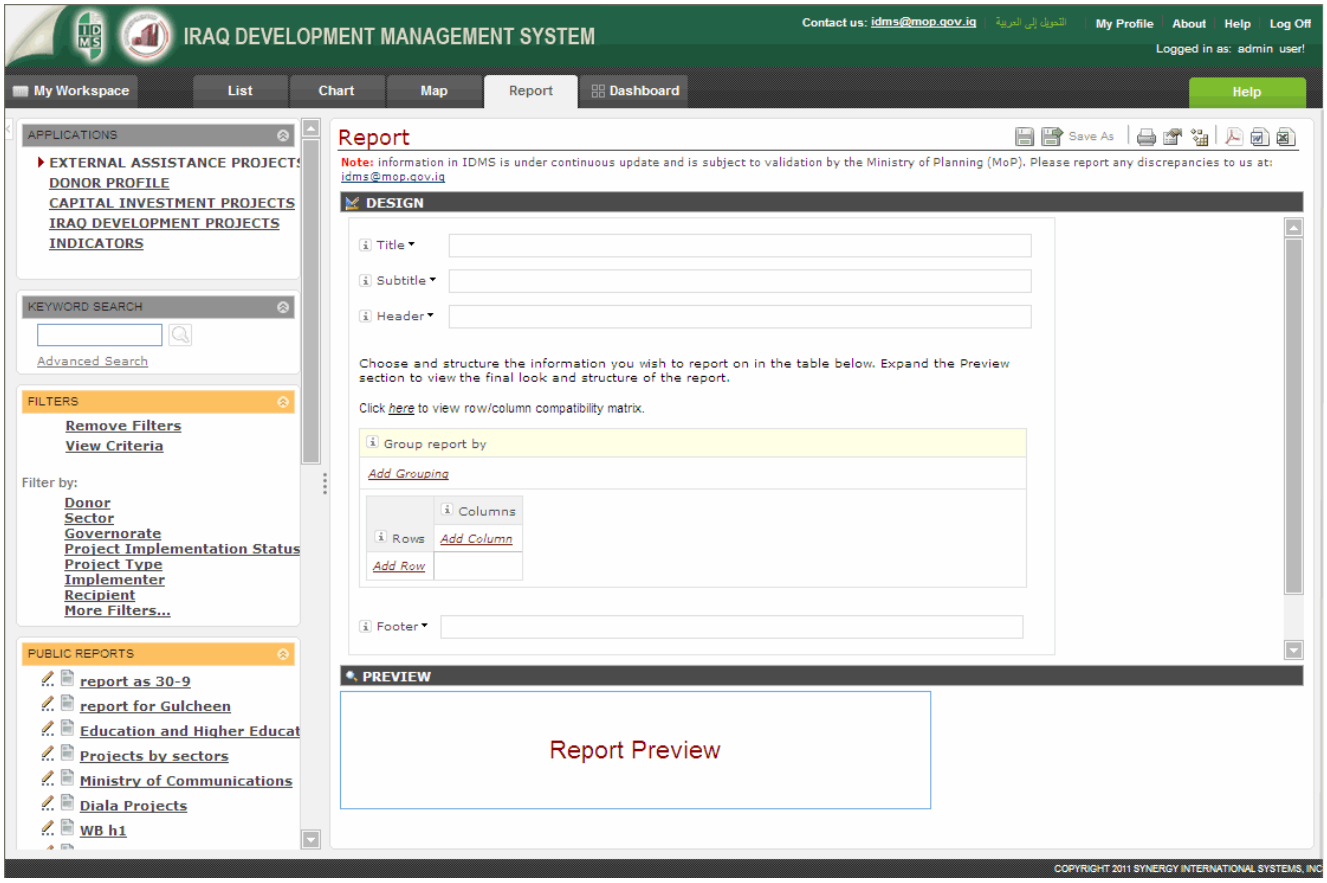


Figure 44: IDMS Application Report Module

10.2 Creating a Report

In order to create a report, i.e. to structure the report table and choose what information should appear in the rows and columns of the table, add report components, which are:

- **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. They provide instructions on how to compose and submit queries.

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 45).
   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 the report column is selected, 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.

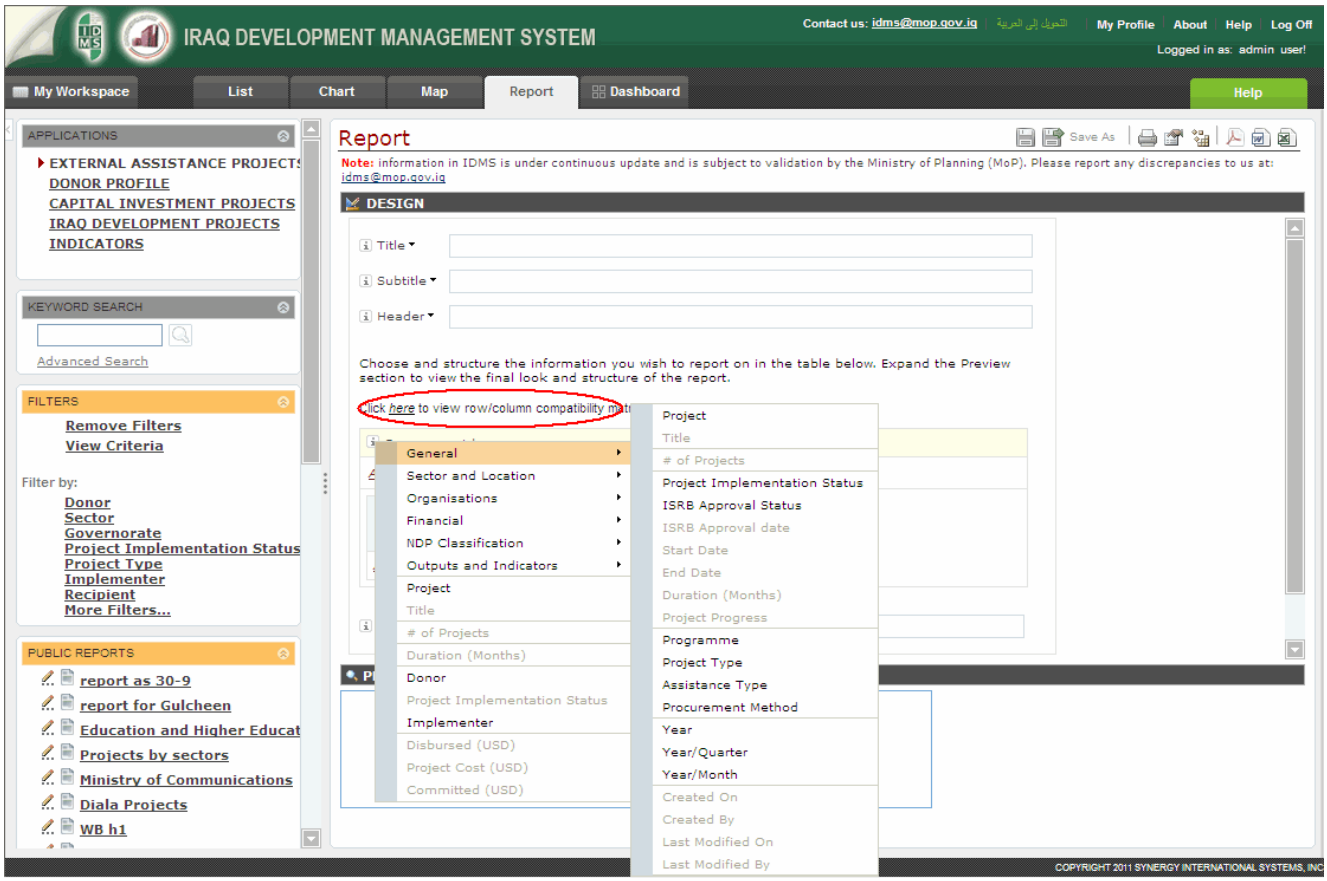


Figure 45: Selecting a Grouping for a Report

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 **(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 45) to open the Compatibility Matrix table (Figure 46). 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	Committed (IQD)	Committed (USD)	Contributions to UNDG.ITF (IQD)	Contributions to UNDG.ITF (USD)	Contributions to UNDP.TTF (IQD)	Contributions to UNDP.TTF (USD)	Contributions to WBJ.ITF (IQD)	Contributions to WBJ.ITF (USD)	Created By	Created On	Disbursed (IQD)	Disbursed (USD)	Duration (Months)	End Date	Expended (IQD)	Expended (USD)	ISRB Approval date	Jobs created after project	Jobs created during project	KPI Progress (# to date)	KPI Target (#)	Last Modified By	Last Modified On	Output Progress (# to date)	Output Target (#)	Project Cost (IQD)	Project Cost (USD)	Project Implementation Status	Project Progress	Project Ref. #	Start Date	Title
Assistance Type	•	•	•									•	•			•	•		•	•						•	•					
Beneficiary Type	•	•	•									•	•			•	•		•	•						•	•					
Direct/Indirect Beneficiaries	•	•	•									•	•			•	•		•	•						•	•					
Donor	•	•	•	•	•	•	•	•	•			•	•			•	•		•	•						•	•			•		
Donor Type	•	•	•									•	•			•	•		•	•						•	•					
Funding Type	•	•	•									•	•						•	•						•	•					
Governorate	•	•	•									•	•			•	•		•	•						•	•					
Implementer	•	•	•									•	•						•	•						•	•					
Implementer Type	•	•	•									•	•			•	•		•	•						•	•					
ISRB Approval Status	•	•	•									•	•			•	•		•	•						•	•					
Key Performance Indicator	•																				•	•										
Nahia	•	•	•									•	•			•	•		•	•						•	•					
NDP Objective	•	•	•									•	•			•	•		•	•						•	•					
NDP Sector	•	•	•									•	•			•	•		•	•						•	•					
Output	•																								•	•						
Procurement Method	•	•	•									•	•			•	•		•	•						•	•					
Programme	•	•	•									•	•			•	•		•	•						•	•					
Project		•	•							•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•		•	•
Project Implementation Status	•	•	•									•	•			•	•		•	•						•	•					
Project Type	•	•	•									•	•			•	•		•	•						•	•					
Qadha	•	•	•									•	•			•	•		•	•						•	•					
Recipient	•	•	•									•	•			•	•		•	•						•	•					
Sector	•	•	•									•	•			•	•		•	•						•	•					
Sub-Sector	•	•	•									•	•			•	•		•	•						•	•					
Year	•	•	•									•	•			•	•		•	•						•	•					
Year/Month	•	•	•									•	•						•	•												
Year/Quarter	•	•	•									•	•			•	•		•	•												

Figure 46: Compatibility Matrix

10.3 Previewing a Report

At any time during the process of creating a report, look in the *Preview* section at the bottom of the page, in order to view the final structure of the report (Figure 47). The Preview will not be ready for viewing unless there is at least one table row defined.

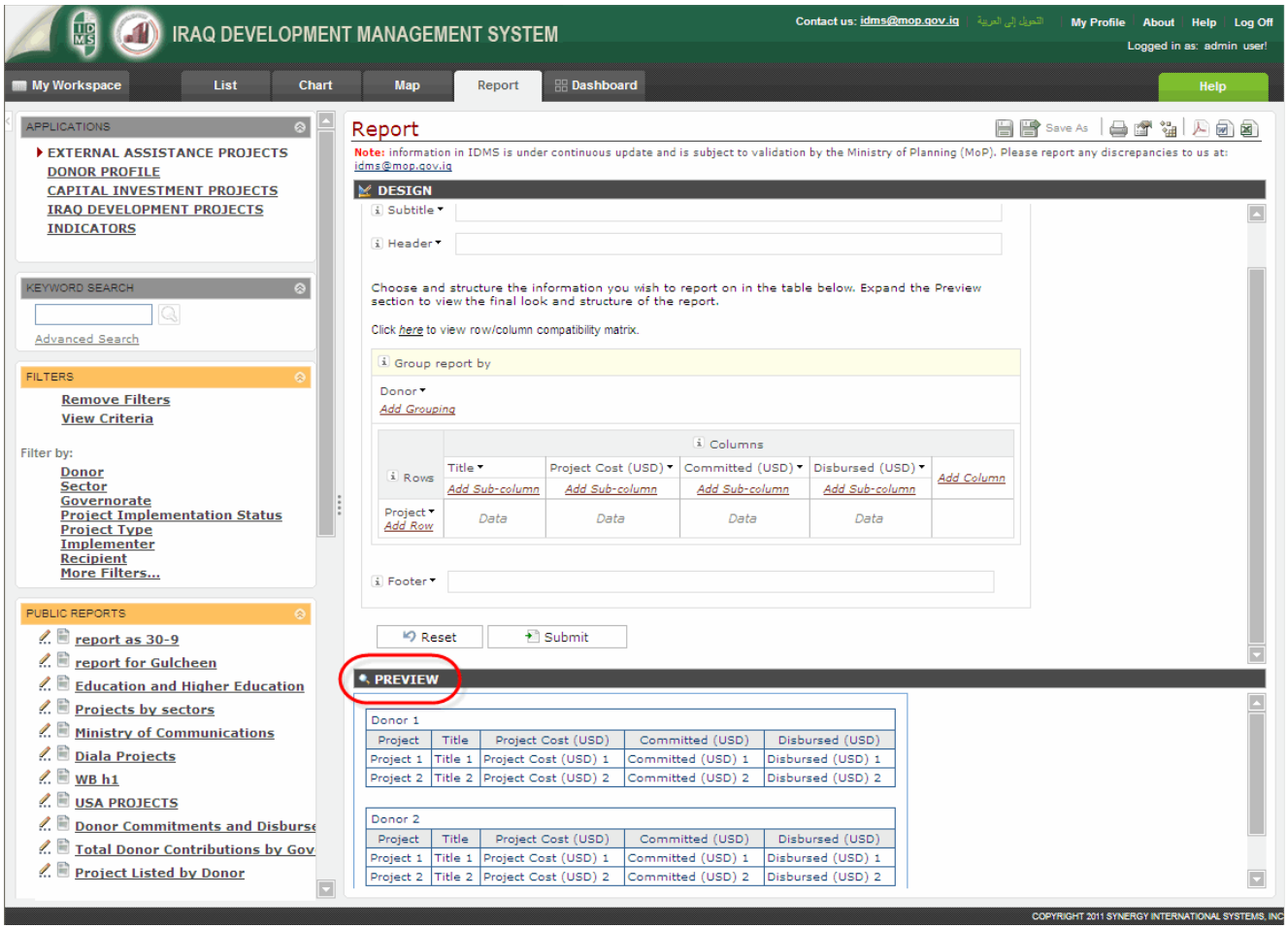


Figure 47: Previewing the Report

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. This section can be expanded in order to display whole of the information.

10.4 Generating a Report

The final step in the process of creating a report is report generation. By clicking the Submit **(Submit)** button, a request to the Reporting Engine is submitted 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.

10.5 Sample Reports

In the following chapters you can see several samples on reports.

10.5.1 Sample Report 1: Projects Listed by Donor

If you have indicated:

- "Donor" as the report table grouping;
- "Project" as the row;
- "Title" , "Project Cost (USD)", "Committed (USD)" , "Disbursed (USD)" as columns (Figure 48);

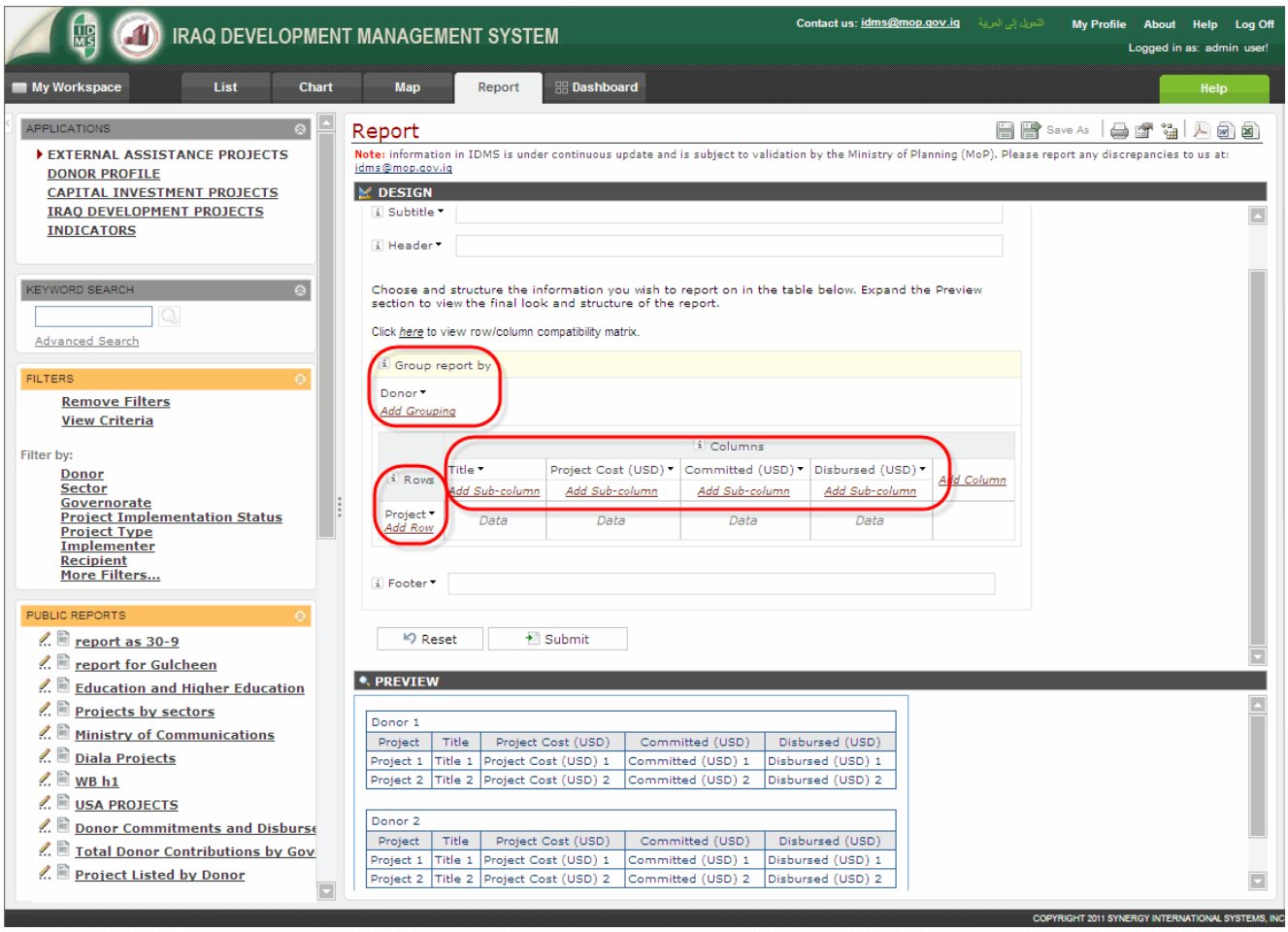


Figure 48: Creating a Report 1

You will have the following result (Figure 49):

IDMS - Windows Internet Explorer

File Edit View Favorites Tools Help SnagIt

Note: information in IDMS is under continuous update and is subject to validation by the Ministry of Planning (MoP). Please report any discrepancies to us at: idms@mop.gov.iq

Unspecified

Project	Title	Project Cost (USD)	Committed (USD)	Disbursed (USD)
IRQ/051121	Support to Ministry of Human Rights in Techniques for Mass Grave Excavation and Identification of Missing Persons	974,182		
OP/10596	Title International Employment Conference: "Employment for the Future of Iraq"	321,000		
OP/2456	Cultural heritage preservation	0		
OP/25913	Kerbala Area-Hay Al Gadeer Light Infrastructure & Community Cleanup	67,395		
OP/27813	Establishment of the Emergency Medical Center at the Rizgari Teaching Hospital in Erbil	0		
OP/27814	Establishment of the Emergency Medical Center at the Rizgari Teaching Hospital in Erbil	0		

Belgium

Project	Title	Project Cost (USD)	Committed (USD)	Disbursed (USD)
OP/10479	Provide rapid employment and income earning opportunities for unemployed workers in southern Iraq.	4,760,349	1,243,781	1,243,781
OP/2627	Technical Assistance and the Provision of Tools (Belgium Fund)	1,243,782	1,243,781	1,229,615

Bulgaria

Project	Title	Project Cost (USD)	Committed (USD)	Disbursed (USD)
IRQ/051158	test saif	1,000,000		

Canada

Project	Title	Project Cost (USD)	Committed (USD)	Disbursed (USD)
OP/10017	The Recovery of Iraq's Vital Social Sector	30,000,000	30,000,750	35,612,536
OP/10037	Rehabilitation of WATSAN, Health and Education Systems in Kerbala	3,750,000	3,750,094	4,262,211
OP/10039	Restoration of the Mesopotamia Marshes	2,250,000	2,250,056	1,931,434
OP/10041	Canadian Contribution to Security Sector Reform	12,500,000	15,580,484	15,580,484
OP/10043	Middle East Good Governance Fund	3,750,000	3,750,094	1,619,836
OP/10044	Civil Society Capacity Building Fund	7,500,000	7,500,188	2,853,966
OP/10045	Regional Human Security Center	356,250	281,250	
OP/10046	International Mission for Iraqi Elections	2,244,618	2,188,558	2,188,558
OP/10047	Democratic Governance	525,000	525,000	525,000
OP/10048	Iraq Governance Program	1,500,000	1,500,038	383,219
OP/10056	Governance in Iraq	1,500,000	1,500,038	1,024,359
OP/10058	Rapid Civil Deployment Mechanism	806,452	750,019	138,479
OP/10060	IMF Technical Assistance Fund	750,000	750,000	750,000
OP/27738	Humanitarian Assistance - WFP	17,350,427	17,304,578	17,304,578
OP/27739	Humanitarian Assistance - ICRC	2,991,453	2,983,548	2,983,548
OP/27740	Humanitarian Assistance- UNICEF	7,692,308	7,671,980	7,671,980
OP/27741	Humanitarian Assistance - UN MAS	4,273,504	4,262,211	4,262,211
OP/27742	Humanitarian Assistance - UNHCR	3,418,803	3,409,769	3,409,769
OP/27743	Humanitarian Assistance - OCHA	1,367,521	1,363,908	1,363,908
OP/27744	Humanitarian Assistance - IFRC	854,701	852,442	852,442

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Figure 49: Sample List Report 1

10.5.2 Sample Report 2: Projects by Location

If you have indicated:

- "Governorate" as the report table grouping;
- "Project" as the report row;
- "Title" and "Project Cost(USD)" as columns (Figure 50);

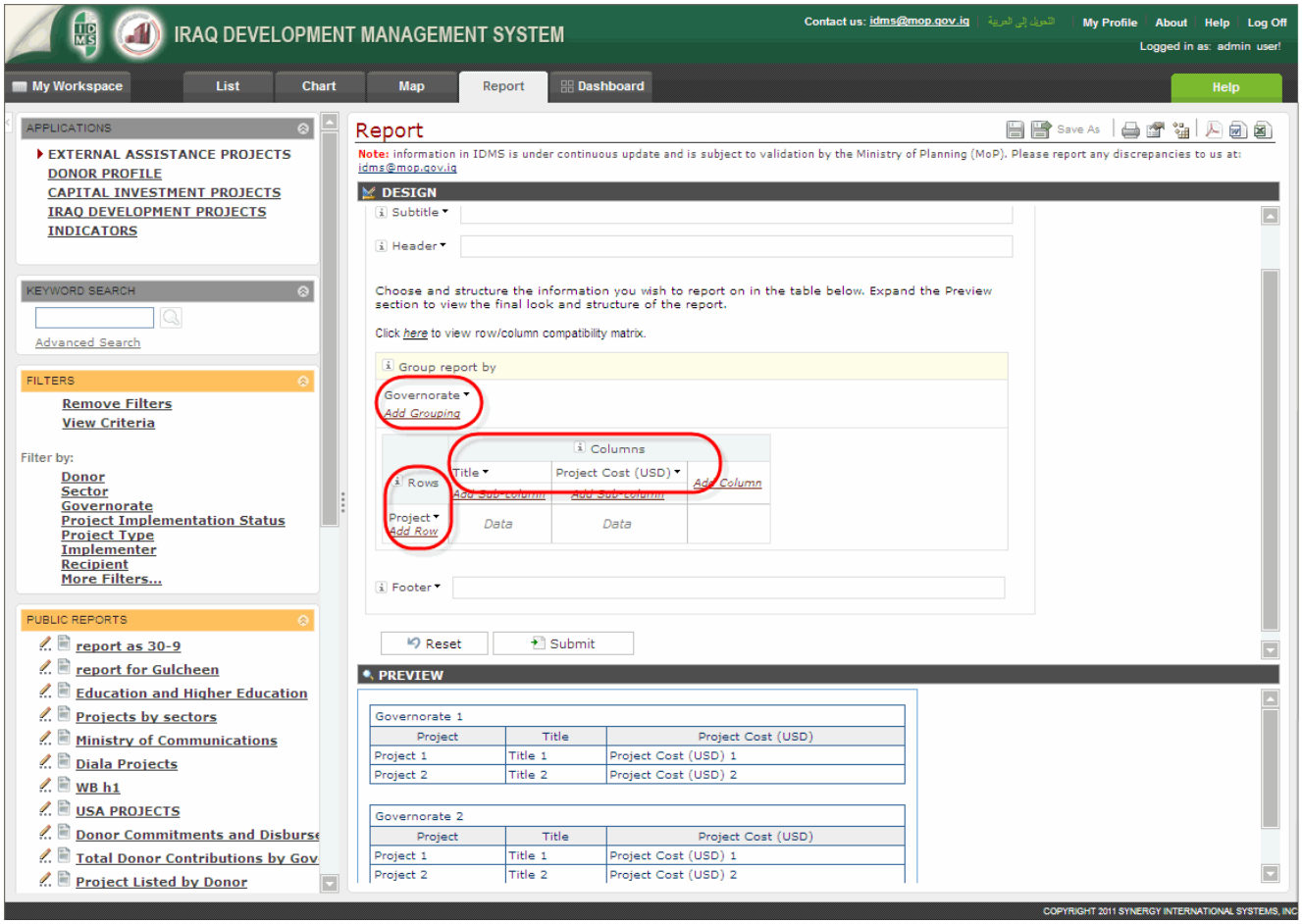

Figure 50: Creating a Report 2

You will have the following result (Figure 51):

IDMS - Windows Internet Explorer

File Edit View Favorites Tools Help

Note: information in IDMS is under continuous update and is subject to validation by the Ministry of Planning (MoP). Please report any discrepancies to us at: idms@mop.gov.iq

Unallocated

Project	Title	Project Cost (USD)
IRQ/0051237	Rule of Law	377,119
IRQ/051076	Construction 12 Room Secondary School , Saraway Khwarw -siad Sadiq	960,409
IRQ/051077	Reconstruction of zharawa Bridge	2,210,065
IRQ/051079	Malta City 12 Room Secondary school	896,950
IRQ/051081	Masik and Jemia Water quarter Water supply network	1,530,200
IRQ/051084	Construction of Zakho Emergency Hospital	2,621,687
IRQ/051085	Construction Shiindoka Secondary school	1,049,570
IRQ/051086	Construction zaryland Secondary School	1,000,629
IRQ/051087	Construction Zhaho primary School	669,966
IRQ/051088	Consruction Bamarny Secondary school	1,074,646
IRQ/051089	Construction Bjeel primary school	695,357
IRQ/051117	Support to Iraq's Preparations for the Universal Periodic Review (UPR)	1,700,000
IRQ/051120	Strengthen Protection and Justice for children and young People in Iraq	3,195,000
IRQ/051124	Budget Execution Support in the Kurdistan Region	950,000
IRQ/051155	Installation of Small Diesel Generators,O&M and Capacity Building at Health Care Facilities in Halabja	5,370,101
IRQ/051192	Construction of new Training Centre in Erbil Governorate	213,205
OP/10082	Provision of equipments for Erbil Governorate (OA Equipments, Heavy construction vehicles, passengers cars, Minivans, etc.)	25,497,925
OP/14017	POLICE STATION - NAJAF - NAJAF HQ	560,400
OP/2765	Iraq Civil Society Development	390,000
OP/3056	A-construction another side of arbil _Altunkopry road with (43)KmB-construction of tubular and boxer cross bridges (sluices)	46,000,000
OP/794	Restoration of veterinary services in Iraq	8,758,965

Unspecified

Project	Title	Project Cost (USD)
IRQ/050928	Training courses for Iraq Security Forces officers and agents	749,944
IRQ/050929	Italian component of EUJUST LEX training mission	192,975
IRQ/050930	Italian component of EUJUST LEX training mission	240,529
IRQ/050931	Training courses for Iraqi Archeological Guards	180,396
IRQ/050932	Capacity building on administrative transparency and corruption contrast	120,264
IRQ/050933	Seminar on Practical Federalism in Iraq in Erbil	373,443
IRQ/050934	Italian funds for PRT Dhi Qar executive expenses	7,858,145
IRQ/050935	Italian component of EUJUST LEX training mission	250,000
IRQ/050936	Capacity building for public managers in the Dhi Qar Province in governance field	1,913,509
IRQ/050942	Training courses for telecommunications engineers of the Iraqi Ministry of Communications	510,269

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Figure 51: Sample List Report 2

10.6 Customizing Reports

You can customize the reports by assigning font characteristics to report components, re-ordering rows and columns, etc. The sections below will describe the instructions to customize the reports.

10.6.1 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 on the report component that needs to be formatted / styled.
2. Select the **Properties** option from the actions list that appears (Figure 52).

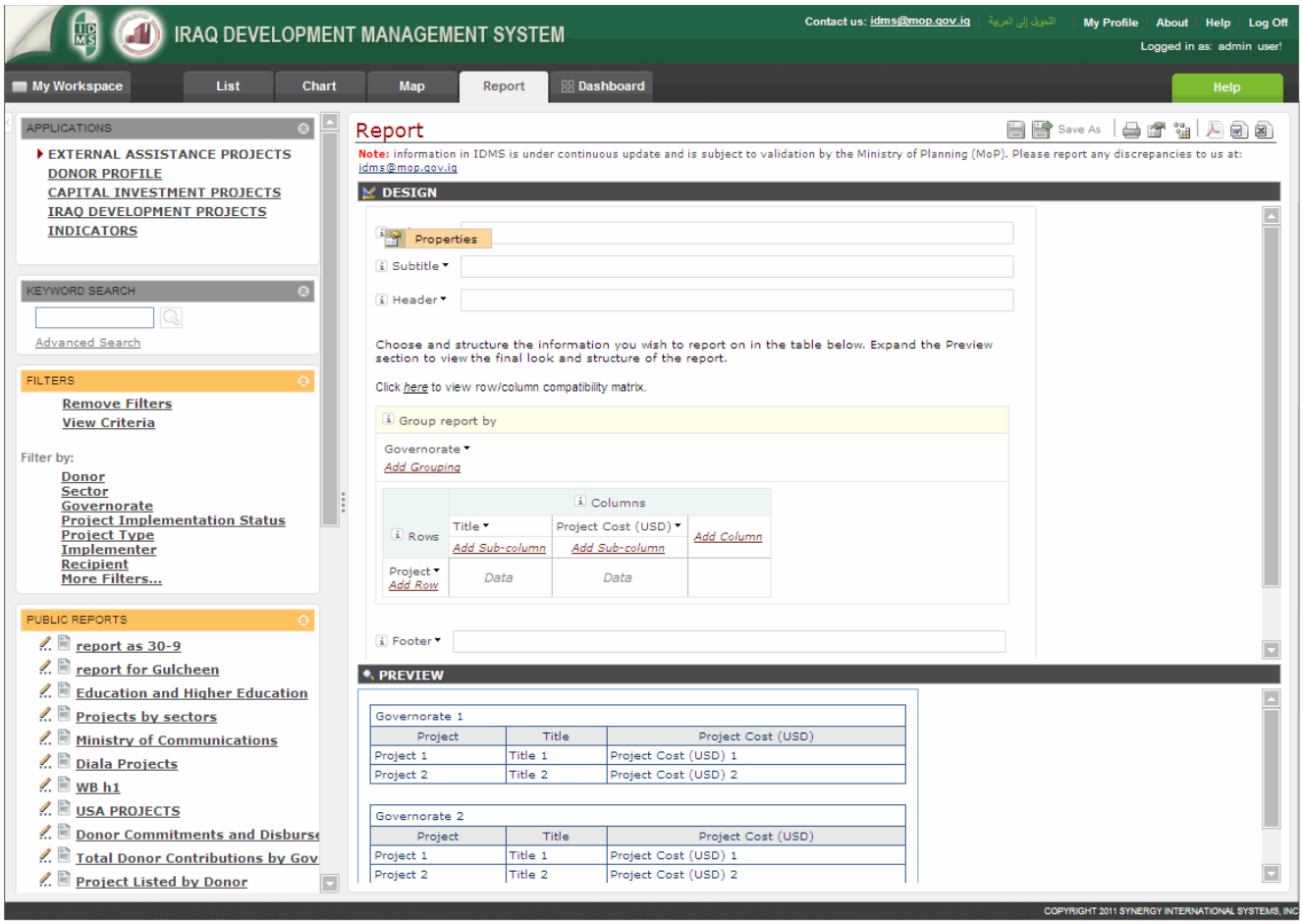


Figure 52: Reports Window with Properties Focus on the Title Field

The *Properties* window will appear. **Please note** that for text entries the *Properties* window includes text formatting buttons and a text area (Figure 53). For other report components, like rows, columns, etc., the *Properties* window also allows assigning additional characteristics, e.g. sorting order, reference text, etc. (Figure 55).

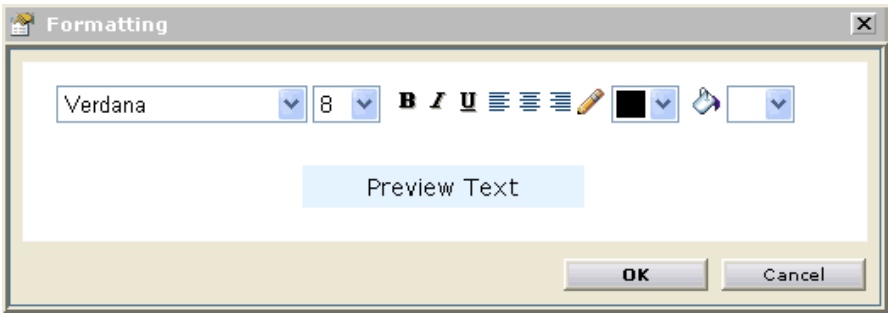


Figure 53: Formatting / Styling Text Entries

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.

4. 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.

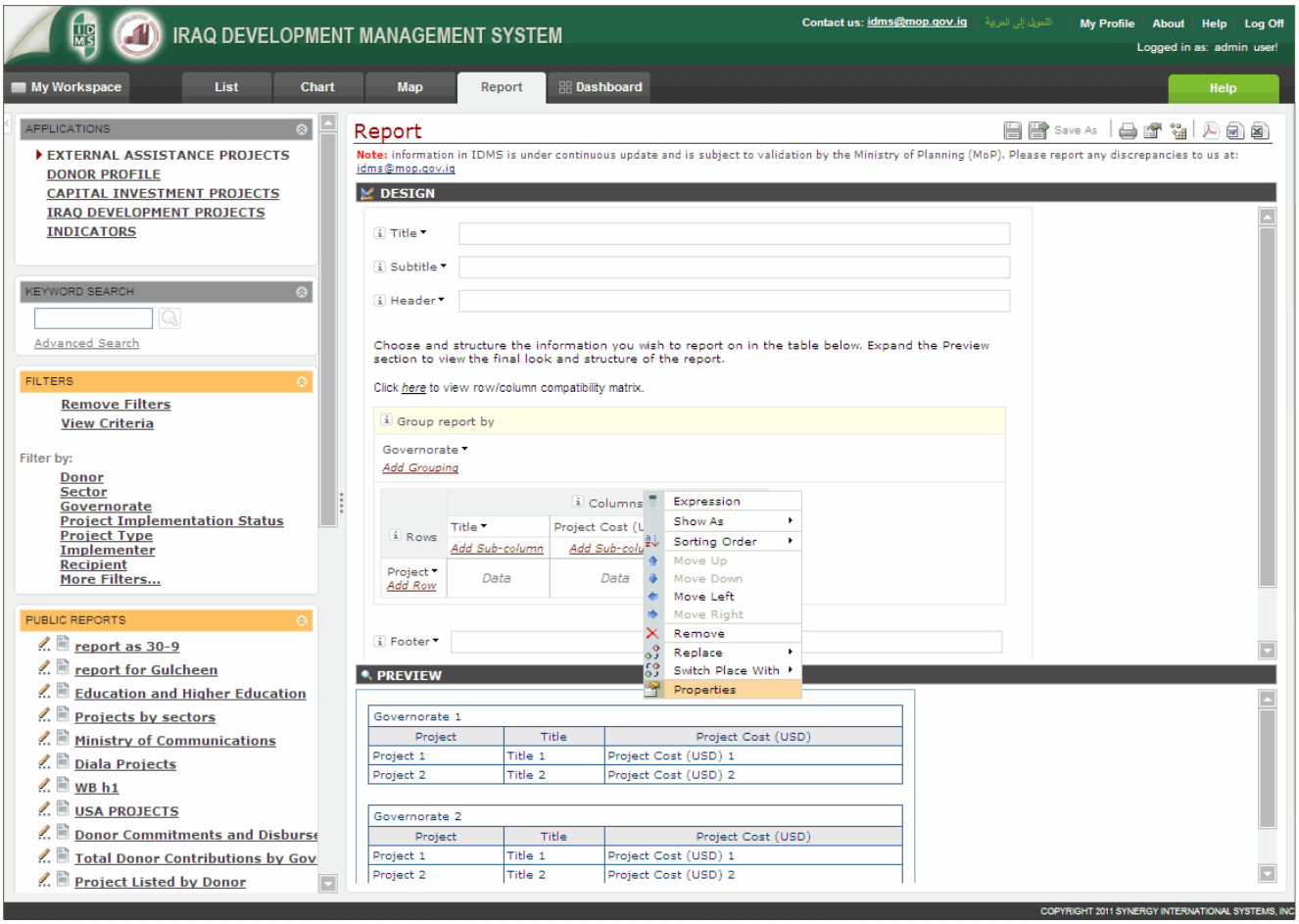


Figure 54: Reports Window with Properties Focus on the Column

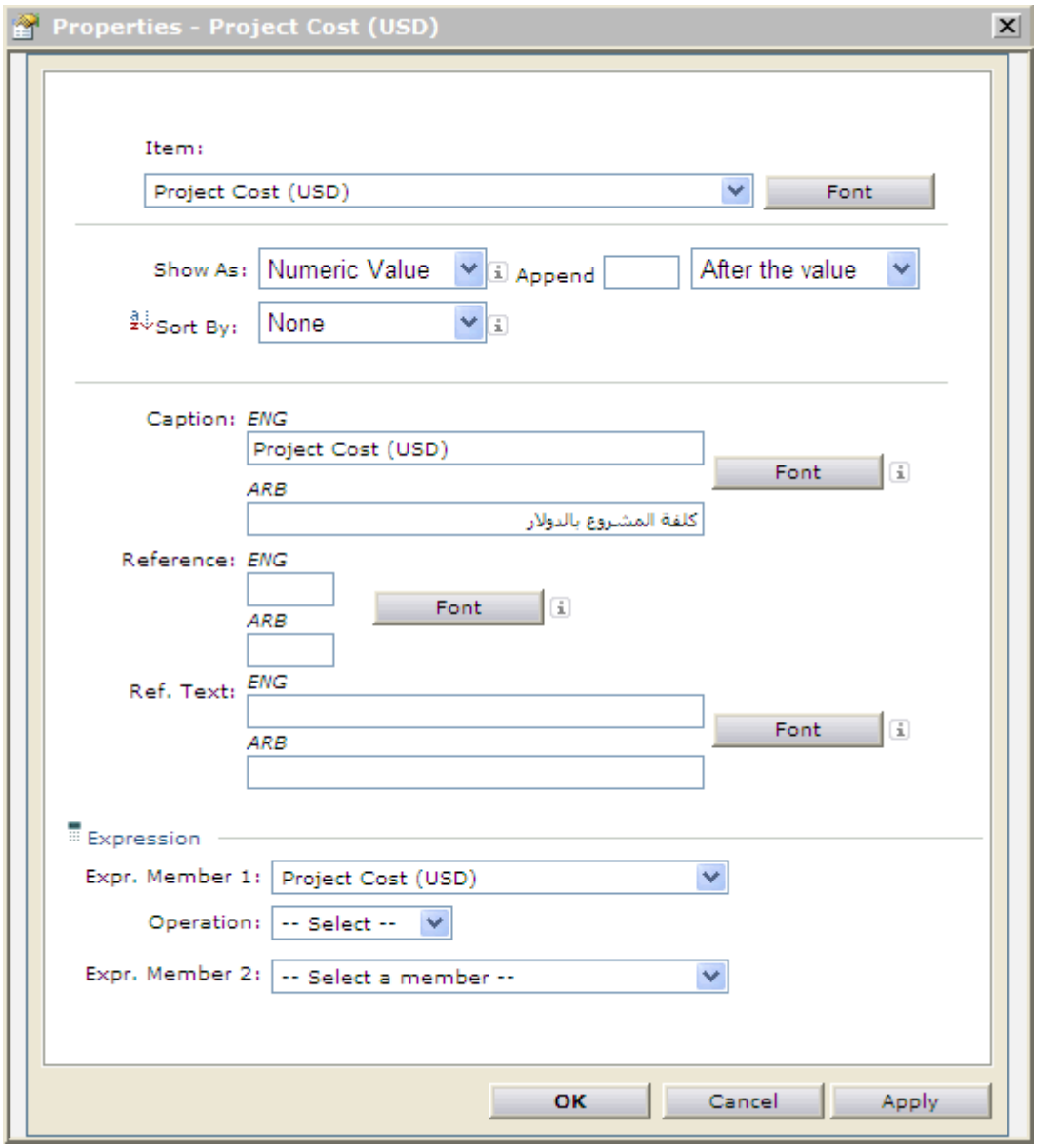


Figure 55: Assigning Properties to Report Table Components

10.6.2 Re-ordering Report Table Components

This option is used to establish and modify the order of the report table components, like rows, columns, etc. In order to re-order report table components, follow the steps below:

1. Click on 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 56).

Figure 56: Reordering Report Table Components

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

10.6.3 Sorting Report Table Components

You may change the order in which the table components will appear in the final report. The report table components can be sorted either in an *Ascending* (A-Z) or a *Descending (Z-A)* order. In order to alphabetically sort the report table components, follow the steps below:

1. Click on the component item for which the sorting order needs to be changed.
2. Select the **Sorting Order** option from the actions list (Figure 57).
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.

Note: The sorting order for the report components can also be defined from within the *Properties* window.

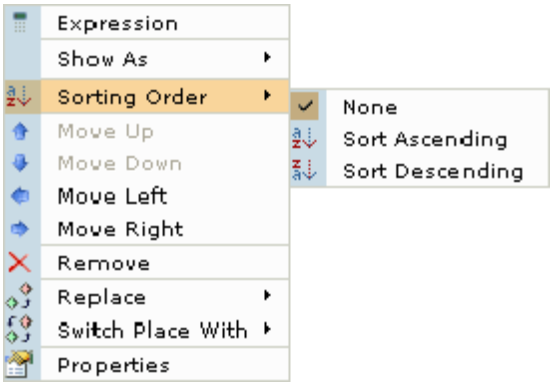


Figure 57: Defining the Sorting Order

10.6.4 Removing a Report Table Component

It is possible to remove a report table component from being included in the report, if this is necessary. 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.

10.6.5 Switching Report Table Components

The report table components may be switched between report grouping, rows and columns. If there are sub-columns selected, switching between table groupings / rows and columns is disabled. It is possible to switch between table groupings / rows and sub-columns.

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

1. Click on the component item that needs to be switched.
2. Select the **Switch Place with** option from the menu that appears (Figure 58).

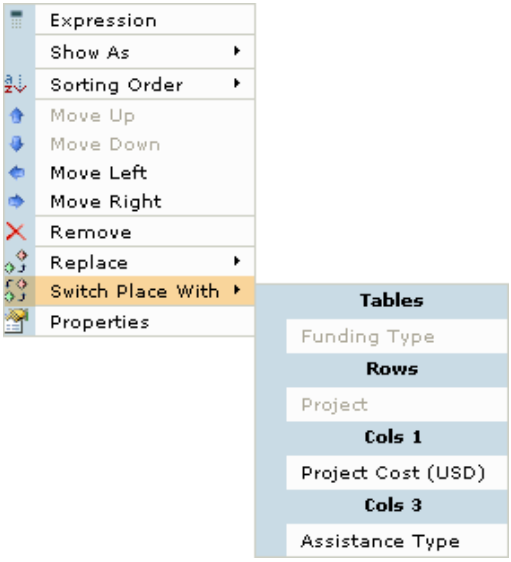


Figure 58: Switching Report Table Components

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. For instance, switching is selected between table grouping and row, the table grouping item will be removed from table grouping and added as the row item, while the row item will “trade” places with the table grouping item.

10.7 Sample Report Formatting

If you have indicated:

- “Projects Listed by Donor” as the report title;
- “Donor” as the report table grouping;
- “Project” as the report row;
- “Title” , “Project Cost (USD)”, “Committed (USD)” , “Disbursed (USD)” as columns;

and assign some value characteristics (e.g. font size, background color, etc.) (Figure 59):

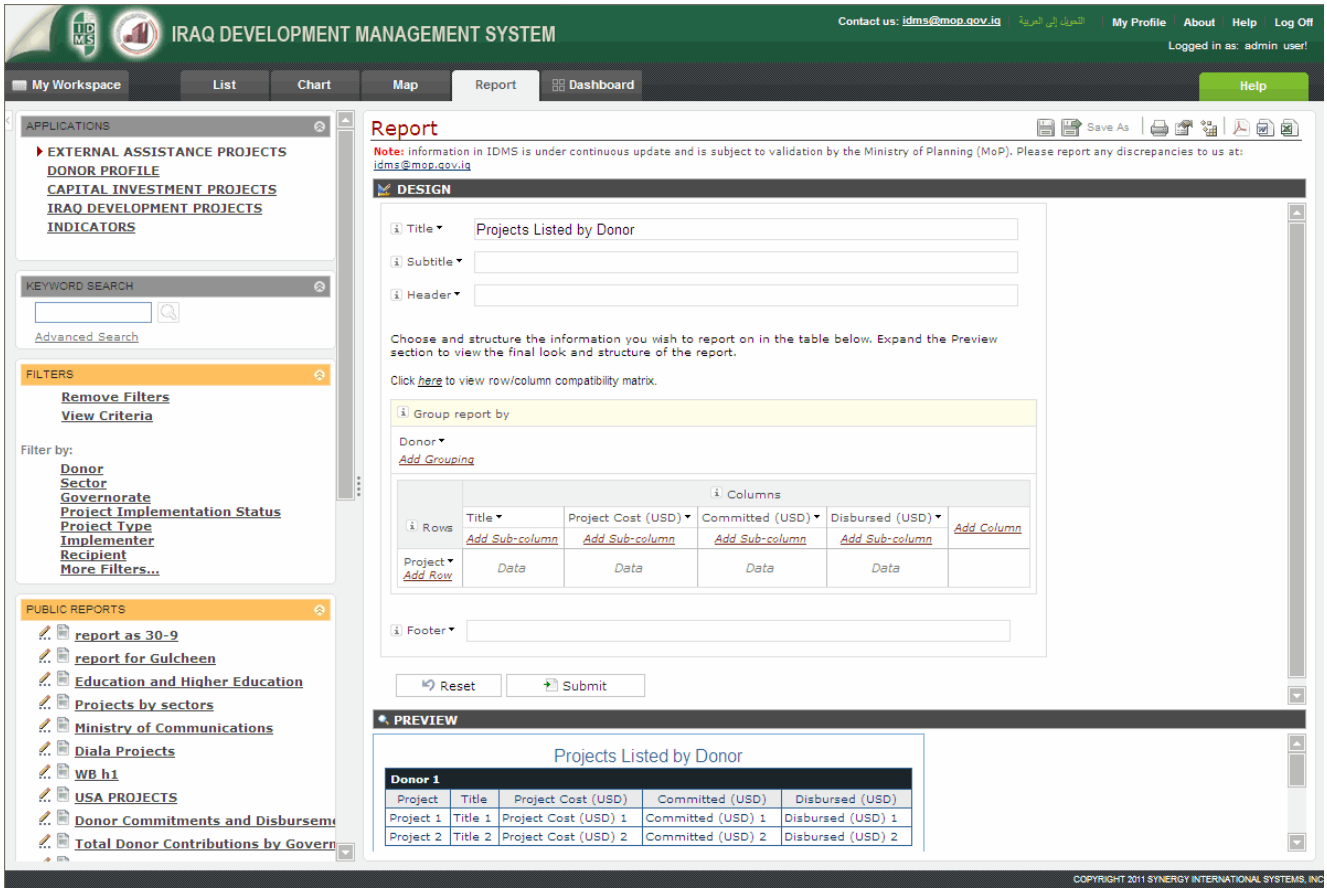


Figure 59: Creating and Formatting a Report

You will have the following result (Figure 60):

IDMS - Windows Internet Explorer

File Edit View Favorites Tools Help SnagIt

European Community

Project	Title	Project Cost (USD)	Committed (USD)	Disbursed (USD)
OP/10485	Watsan Facilities	1,607,283	1,607,283	1,607,283
OP/10486	IRQ95Z02	4,944	4,944	
OP/10487	Neighborhood Rehabilitation	276,411	197,252	
OP/10491	Improve Health & Sanitary Condit-Mosul Centre for Elderly	82,754	82,754	82,754
OP/10497	Rehab. Al-Ghazalia Sewage Trea. Plant	3,817,787	3,817,878	96,584

France

Project	Title	Project Cost (USD)	Committed (USD)	Disbursed (USD)
OP/2770	NHDR	32,288	32,288	

Germany

Project	Title	Project Cost (USD)	Committed (USD)	Disbursed (USD)
IRQ/051125	4. Promoting the sustainable socio-economic reintegration of returnees through the Programme for human security and stabilization (PHSS Phase II)	5,000,000		
OP/27769	Tech. Asist IECI OCV for Iraq	807,660	807,660	586,276

Italy

Project	Title	Project Cost (USD)	Committed (USD)	Disbursed (USD)
IRQ/050928	Training courses for Iraq Security Forces officers and agents	749,944	749,946	700,000
IRQ/050929	Italian component of EUJUST LEX training mission	192,975	192,975	178,465
IRQ/050930	Italian component of EUJUST LEX training mission	240,529	240,529	240,529
IRQ/050931	Training courses for Iraqi Archeological Guards	180,396	180,396	180,396
IRQ/050932	Capacity building on administrative transparency and corruption contrast	120,264	120,264	120,264
IRQ/050933	Seminar on Practical Federalism in Iraq in Erbil	373,443	373,443	373,443
IRQ/050934	Italian funds for PRT Dhi Qar executive expenses	7,858,145	7,858,145	7,858,145
IRQ/050935	Italian component of EUJUST LEX training mission	250,000	250,000	250,000
IRQ/050936	Capacity building for public managers in the Dhi Qar Province in governance field	1,913,509	1,913,509	1,913,509
IRQ/050940	Local Governance, micro development projects and international partnership	2,296,211	2,296,211	2,296,211
IRQ/050941	Seminar - DiverCities: Mixed Cities and Disputed Areas in Venice	344,431	344,431	344,431
IRQ/050942	Training courses for telecommunications engineers of the Iraqi Ministry of Communications	510,269	510,269	510,269
IRQ/050943	Seminar on Federalism in Iraq held in Venice	574,052	574,052	574,052
IRQ/050944	Marketing training course for strategic industry	180,000	180,000	180,000
IRQ/050945	Italian funds for PRT Dhi Qar executive expenses	5,590,000	5,590,000	5,590,000
IRQ/050946	Italian component of EUJUST LEX training mission	318,918	318,918	318,918
IRQ/050948	Conference on reconciliation and federalism in Southern Iraq	255,134	255,134	255,134
IRQ/050949	The Status of Armed Forces and groups in Iraq in Dokan	127,567	127,567	127,567
IRQ/050950	Italian contribution through NATO Training Mission	7,504,690	7,504,690	7,504,690
IRQ/050951	Italian contribution through NATO Training Mission	10,292,036	10,292,036	10,292,036
IRQ/050952	Italian contribution through NATO Training Mission	9,621,166	9,621,166	9,621,166
IRQ/050953	Italian contribution through NATO Training Mission	10,205,383	10,205,383	10,205,383
IRQ/050954	Italian contribution through NATO Training Mission	10,396,734	10,396,734	10,396,734
IRQ/050955	Seminars on fight against corruption and organized criminality	514,601	514,601	514,601

Done Local intranet 100%

Figure 60: Sample Formatted Report

11. DASHBOARD MODULE

Reporting requirements have changed dramatically over the past few years. Nowadays, it is not enough to be able to produce a report to analyze data, but it is more essential to have a reporting tool that will allow for a visual display of the most important information consolidated and arranged on a single screen so that real-time data can be monitored at a glance.

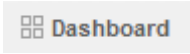
As a comprehensive reporting tool, IDMS removes the limitations on report development giving the possibility to view various types of reports such as lists, maps, and charts displayed in a user-friendly environment on a dashboard. Unlike “regular” reports, dashboards provide visual, at a glance insight into the data to be analyzed, thus giving the decision-makers the possibility to leverage information assets in real-time through visually rich, responsive and personalized business intelligence dashboards. This way, they will achieve better data interpretation and, as a result, more informed decision making.

11.1 Key Features

You can make use of the following key features of the *Dashboard* tool in *IDMS*:

- ✓ An intuitive drag-and-drop environment that turns adding reports to a dashboard into an easily manageable task.
- ✓ Fully resizable report windows.
- ✓ Better visualization of the information presented in graph reports.
- ✓ The ability to print reports for future reference.
- ✓ The ability to export reports on the dashboard in MS Word, MS Excel, and Adobe PDF formats.

11.2 Accessing the Dashboard Module

In order to access the *Dashboard* module of the system, you should click the **Dashboard** 

tab. This will navigate you to the Dashboard module. In this module, you can create dashboards, include reports under them, etc.

11.3 Main Screen and Its Components

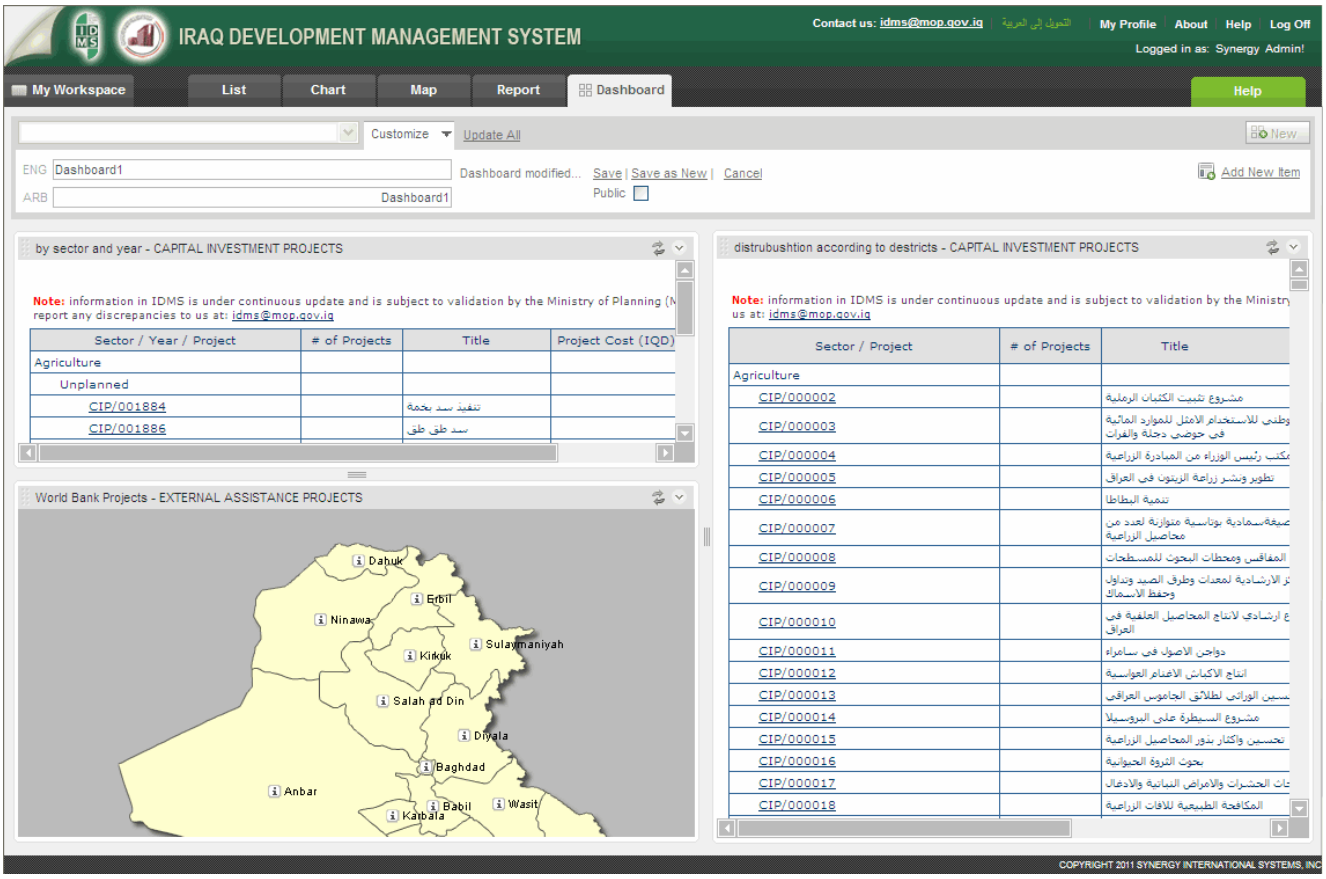


Figure 61: Dashboard Module

- ***Dashboard Selector -*** contains a list of pre-defined dashboards. By choosing a definite dashboard from this list, you can view the reports stored in the selected dashboard.

- ***Customize -*** allows performing the following operations:

  - **Name -** displays the dashboard name.
  - **Save -** saves a dashboard so that it can be shared with other users.
  - **Save as New -** saves a dashboard as a new one. This option is especially useful if you need to make modifications in a definite dashboard while keeping the source information intact. This way overwriting of the original dashboard is prevented.
  - **Remove -** deletes a dashboard together with its contents.
  - **Cancel -** discards the modifications made to the dashboard currently displayed on the screen.

- ***Update all -*** loads the latest data from the database.

- ***New -*** creates a new dashboard.

- ***Add New Item -*** adds a new report under the definite dashboard from the list of all pre-defined reports previously created.
- ***Dashboard Workspace -*** the main screen of the Dashboard module where the content of a definite dashboard is viewed.

11.4 Dashboard Management

11.4.1 Create a New Dashboard

In order to create a new dashboard, follow the steps below:

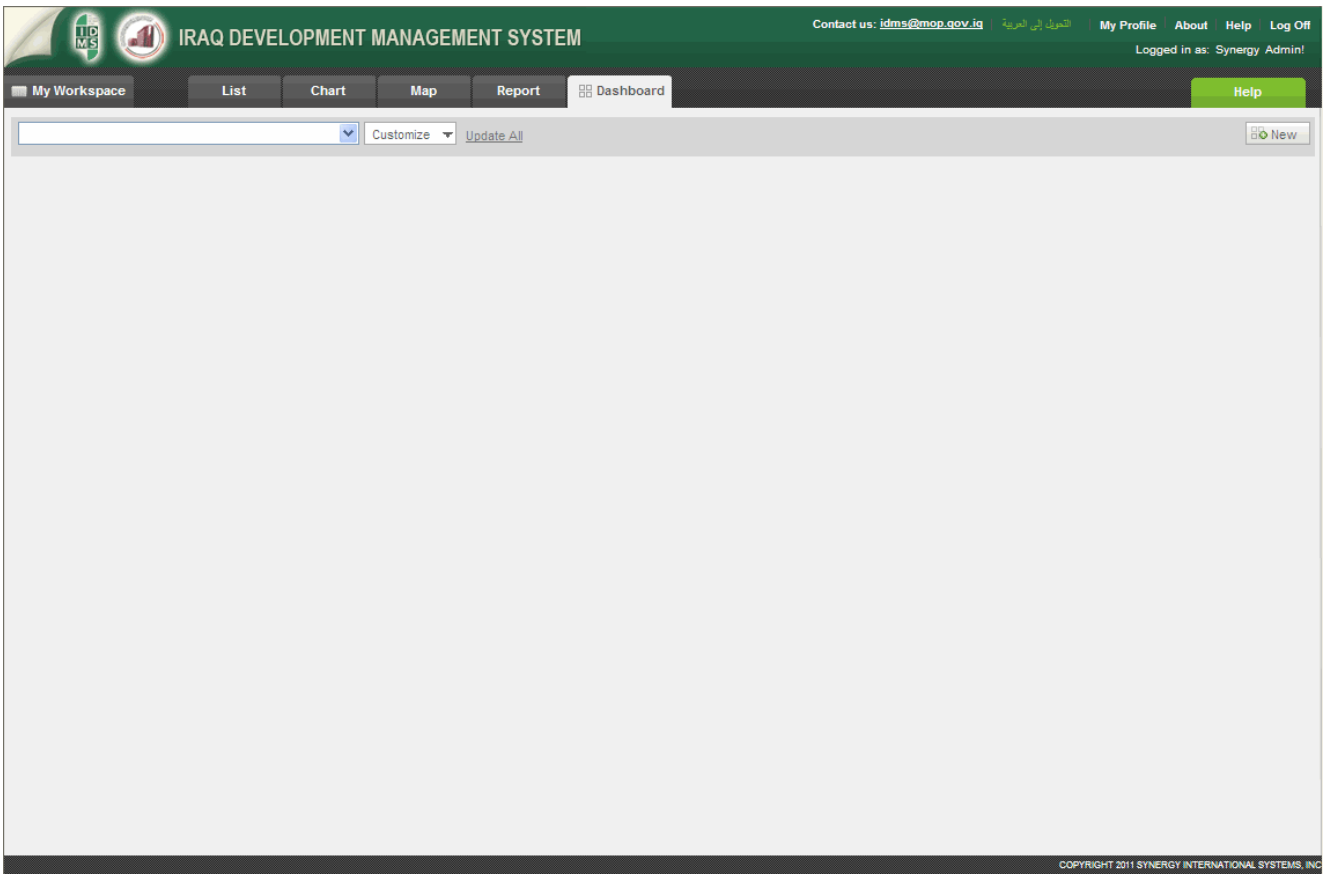


Figure 62: Adding a New Dashboard

1. Click the **Add New** button at the upper right corner of the screen. New field appears in the left part of the screen to give a name other than the default one to the dashboard and to save it. Also, the list of all existing pre-defined reports is used to add new items to the dashboard (Figure 62).
2. Give the desired name to the dashboard.
3. Add reports to the dashboard, see Add an Item to a Dashboard.
4. Save it.

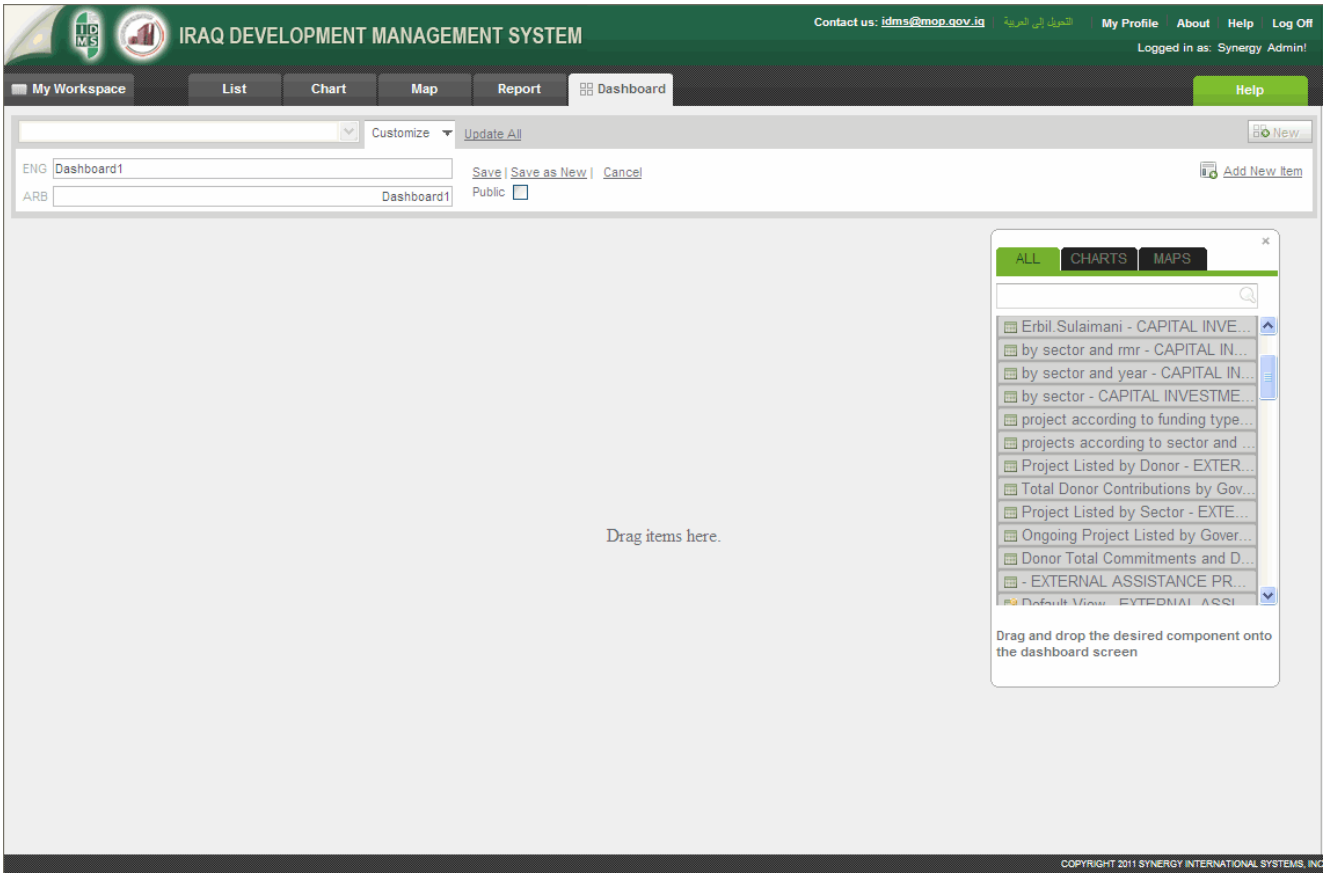


Figure 63: List of Pre-defined Reports

11.4.2 Add an Item to a Dashboard

In order to add a report to a dashboard, follow the steps described below:

1. Click the **Add New Item** link. The list of all reports previously saved reports will appear (Figure 63).
2. Select a report to add to a dashboard and drag-and-drop it onto the main screen.
3. If you want to add another report to the dashboard, select it in the list, drag it onto the main screen and hold the left mouse button until a green rectangle appears on the screen indicating an area where the new report can be placed (Figure 64).
4. You may add multiple reports to the dashboard.

Note: The reports can be arranged either in vertical or in horizontal order. Once the place for the report is selected, it cannot be changed.

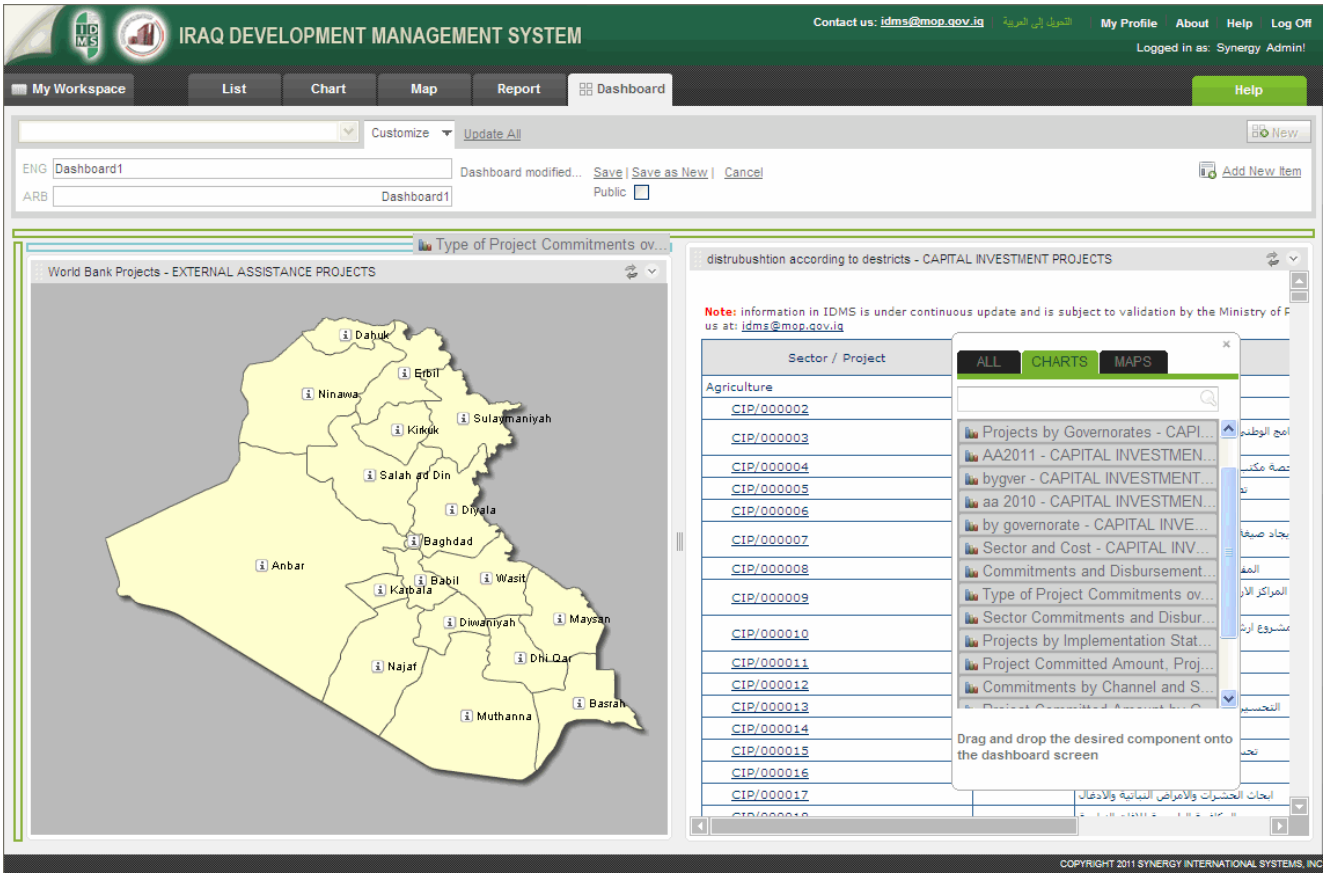


Figure 64: Adding a New Report

11.4.3 Customize a Dashboard

In the *Dashboard module*, you can customize any dashboard created, i.e. rename the dashboard, save the changes made to it, save a copy of the dashboard, delete a dashboard, and/or discard the changes made. For details, see below.

In order to customize a dashboard, follow the steps below:

1. Click the **Customize** button. A new section will appear displaying all customizable options in the *Dashboard* module (Figure 65).
2. Take the necessary action.
3. Save the changes.

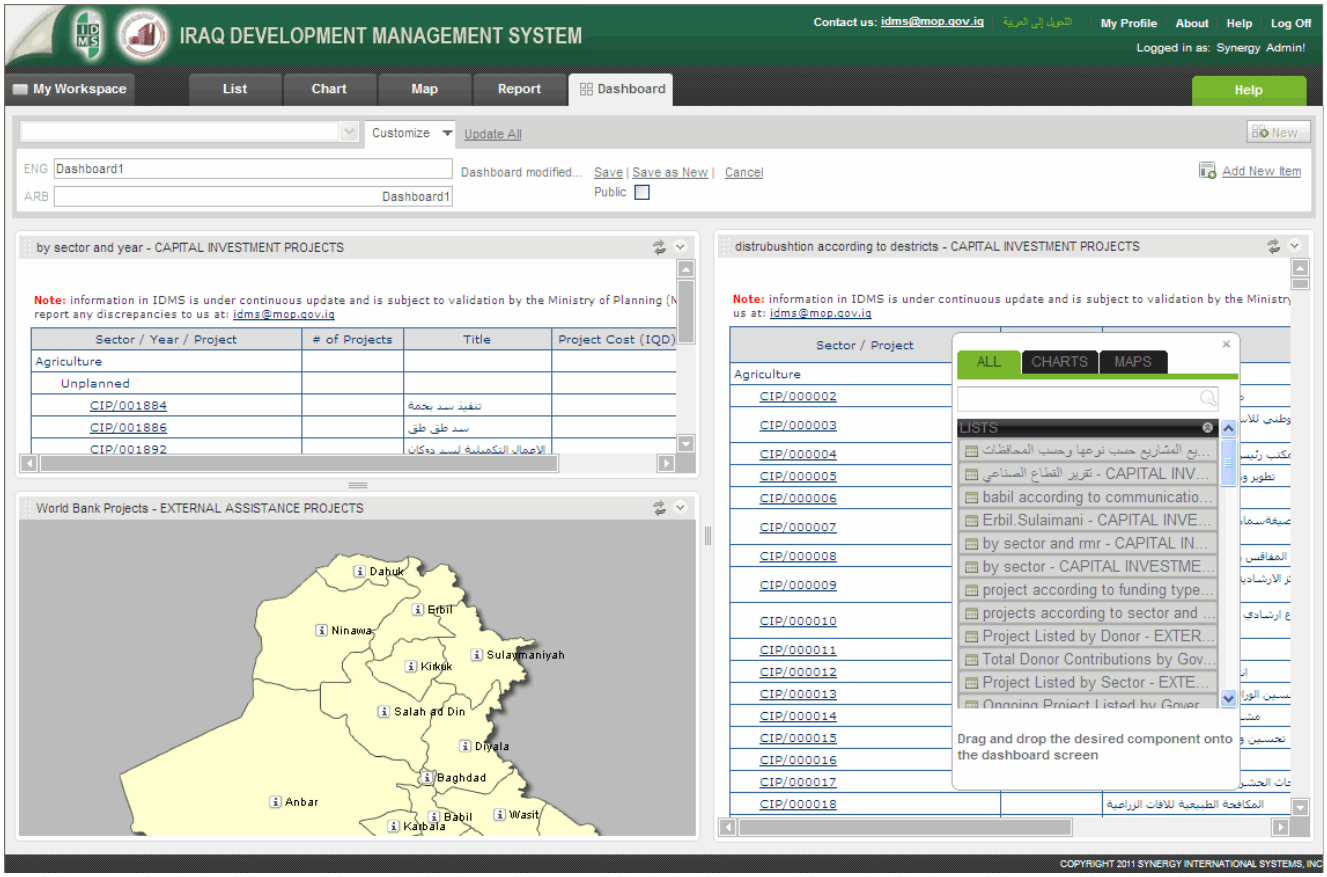


Figure 65: Customizing a Dashboard

11.4.4 Save a Dashboard

After the new dashboard has been created and items added to it, it is necessary to save it to be able to view it later on. It should be mentioned that there are two options for saving dashboards:

- ***Save:*** saves all modifications made to the dashboard.
- ***Save as***: saves a copy of a dashboard under a new name.

In order to save a dashboard / a copy of a dashboard, follow the steps below:

1. Select the respective **Save** or **Save as New** option.
2. Click **OK** in the message window indicating the dashboard / the changes to it have been saved successfully.

11.4.5 Delete a Dashboard

In order to delete a dashboard, follow the steps below:

1. Select the dashboard that you want to delete. Its contents will be displayed on the main screen.
2. Click the **Remove** link. The selected dashboard will be deleted.

11.4.6 Discard the Changes

In order to discard the changes made to the dashboard currently displayed on the screen, follow the steps below:

1. Click the **Cancel** link.
2. Confirm that you want to discard all changes made to the dashboard by clicking **OK** in the warning message window that appears.

11.4.7 Update Data

For decision makers, it is very important to have access to the latest data available. This is why the Dashboard module allows you to update all reports included in various dashboards. In order to load the latest data from the database, select the **Update All** option.

If you want to update the data in an individual report, click **Refresh** button in the top toolbar of the report screen. The latest data for the selected report will be loaded from the database.

12. DETAILS SECTION

The *IDMS* has a built-in *Details* section, where detailed project information can be viewed, e.g. project financial information, the sector(s) of economy it supports, the project location, etc.

The *Details* section can be accessed from the List, Chart, Map and My Workspace modules. In the *Details* section, the user can view detailed project information, browse among other projects listed under the same parent item, print project details, etc. Moreover, the user is able to modify an existing one. **Please note** that for modifying an existing project, special user permissions are required.

Figure 66: Details Section

12.1 Accessing the Details Section

In order to access the *Details* section, follow the steps below:

1. Access the *Details* section by clicking on the one of the following:
   - In the *My Workspace* module: Click the respective project. You will be directed to the **Details** section (Figure 66).
   - In the *List module*: Click the project for the details to be displayed. This will open the *Details* section of the application where more detailed information about the project will be displayed.
     Note: Depending on the list representation settings, additional expanding the list items may be required to reach the project.
   - In the *Chart* module: Click the chart for the details to be displayed (e.g., click on a relevant bar to see what it consists of). This will open the *Details* section of the application where all items matching the selection will be listed. The first item in the list will be displayed in an expanded mode.
   - In the *Map* module: Point the mouse cursor on the object on the map. The project information window will appear. In order to access the project details section select the View Projects link. This will open the *Details* section. The first item in the list will be displayed in an expanded mode.
     Note: You can also choose to view the detailed information on all the projects that are in progress in the given territorial unit by pointing the mouse cursor on the button.

2. Take the necessary actions (review the provided information, update and improve as needed). You may also want to print the project details, see Printing the Project Details for details. The **Close** button is used to return to the main screen.

12.2 Browsing among Projects

In the *Details* section, you can browse among the projects. To browse projects, use correspondingly **Previous** or **Next** buttons in the top of the *Details* window (Figure 66).

Note: In the Chart and Map modules, you can also scroll down to the bottom of the page, find the appropriate project in the list presented and click it for the details to be displayed.

12.3 Printing the Project Details

In the *Details* section, you can print out the details of the selected project. In order to print out the selected project details, follow the steps below:

1. Click the **(Print)** button in the top toolbar. A window with printer settings appears.
2. Choose the printer settings as needed and press **Print**.

12.4 Editing an Existing Project

In the *Details* section, you may also edit those existing projects that have been either created by yourself or you have permissions to manage.

In order to edit existing projects, follow the steps below:

1. Click the **Edit** button at the top of the *Details* window. The data input window appears which is described in the correspondent Application User Manual, see REFERENCES.
2. Make the appropriate changes in the input window and save.

13. CUSTOMISED REPORTING IN LIST, CHART, MAP AND REPORT MODULES

The IDMS is used to customize the already-created reports in the List, Chart, Map, and Reports 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 re-organise the reports in the desired way: include it into a group of reports or create a new report group for it, rename the report, etc. The IDMS also enables you to export the reports to the desired format (Word, Excel, etc.) or print them out.

13.1 Setting Report Options (List, Chart, Map and Report Modules)

In the *List, Chart, Map, and Report* modules, you can set the report options, i.e. define whether the numeric values should be displayed in thousands, millions, etc. In the *Chart* module, you can also indicate the number of items to be displayed on the chart.

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

1. Click the **(Set Options)** button in the top toolbars. An *Options* window (Figure 67) 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.
3. For charts, indicate the number of items to be displayed on the chart by selecting the appropriate value from the relevant pull-down list.

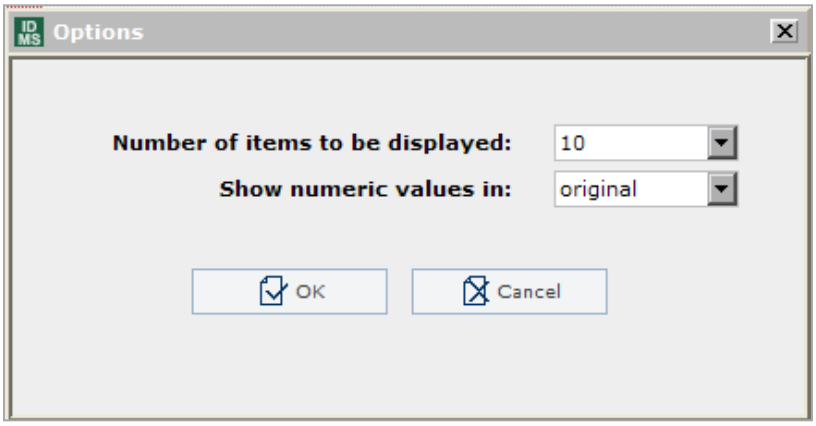


Figure 67: Setting the Chart Report Options

4. After finishing, click the **OK** button for the changes to take effect. Or, click the **Cancel** button to discard the changes made.

13.2 Saving reports (List, Chart, Map and Report Modules)

After creating reports of different types, you can memorize them as pre-defined reports and include them either in the *Public Reports* group and make them available for all users who access application or in the *My Reports* group available to you only.

There are two ways of saving a report in *IDMS* 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.

13.2.1 How to Save New Reports

From the *List*, *Report, Chart*, and *Map* modules, you can design an appropriate report and save it. In order to save the report created, follow the steps below:

1. Click on the **(Save)** button on the top right side of the screen. A *Memorize Report* window (Figure 68) will appear.
2. Define the report name in the *Memorized Name* field both in English and Arabic.

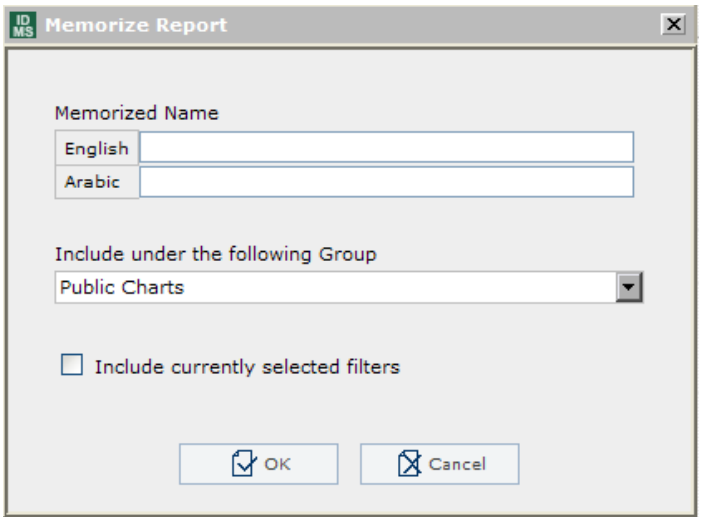


Figure 68: Memorizing a Report

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 or click **Cancel** to discard the changes made.

13.2.2 How to Save a Copy of the Report

In the *IDMS* application, you can save a copy of an existing report. The copy of the report can be saved in a different location, with a different name or edited content.

In order to save a copy of a 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 68) will appear.
2. Save the report by the steps described in the section above.

13.3 Re-organising Reports (List, Chart, Map and Report Modules)

You can organise the reports in the desired way, i.e. rename the reports, create groups to include reports under, etc.

From the *List*, *Chart, Map*, and *Report* modules, you can design appropriate reports and organize them in the preferred way. In order to organize the reports, follow the steps below:

1. Click on the respective **(Organise Views / Charts / Maps / Reports)** button at the top right side of the Screen. An *Organise Reports* window (Figure 69) will appear. You may perform the following actions:

   - Deleting Reports or Report Groups
   - Adding a Sub-group
   - Re-ordering Reports and Groups
   - Setting a Report as Default

Figure 69: Organizing the Reports

13.3.1 Renaming Reports and Report Groups

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.

13.3.2 Deleting Reports or Report Groups

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.

13.3.3 Adding 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.

13.3.4 Re-ordering Reports and Groups

1. Highlight the report / group the sorting order of which needs to be changed.
2. Click the **Move Up / Move Down** button.

13.3.5 Setting a Report as Default

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

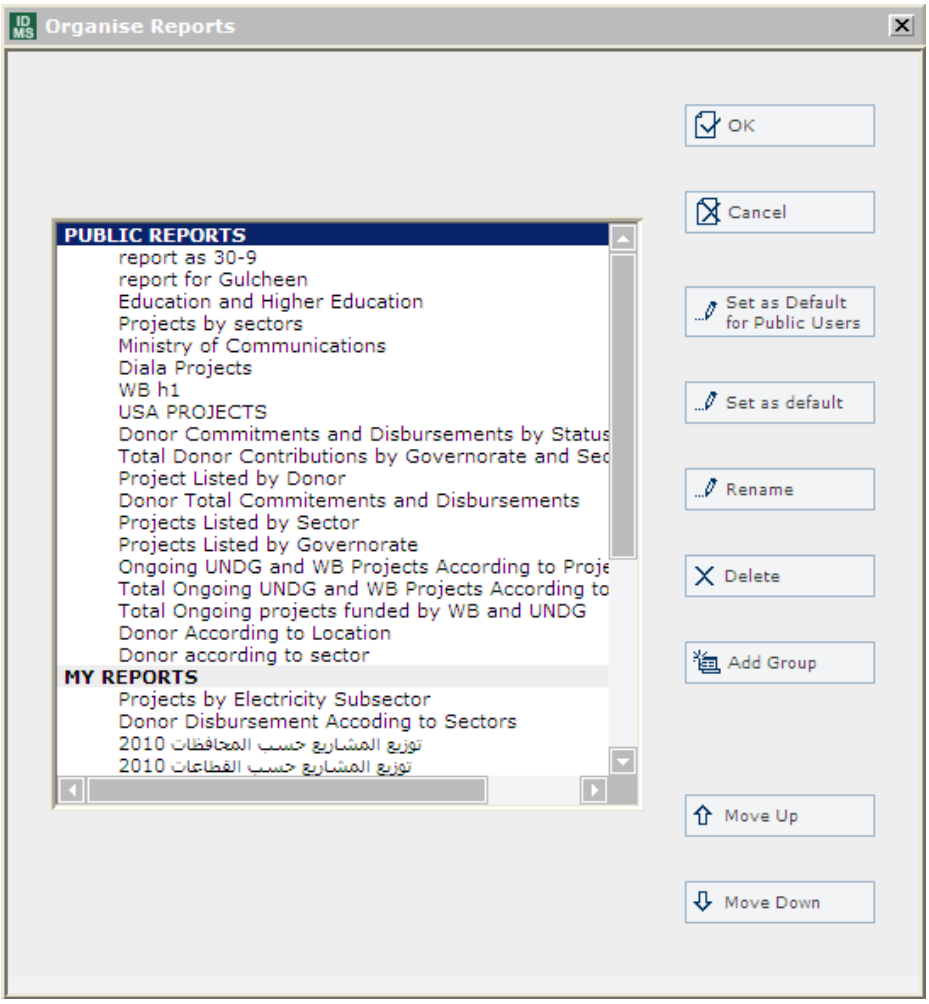


Figure 70: Organizing the Reports

13.4 Exporting Reports (Chart, Map and Report Modules)

From the *Chart, Map,* 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.

13.5 Printing Reports (Chart, Map and Report Modules)

From the *Chart, Map,* 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.

14. FILTERING

The system allows for data filtration. Filtering is used to narrow down the information displayed in the reports. The filtration works in the Step-by-Step technology, which enables to implement new filtering over the results of the previous one. This option reduces the size of reports and makes them easier to read. Filters can be added to new or existing reports. Defined filtering is applicable for list, reports, charts, and maps.

The list of the most frequently used filter categories is displayed under the *Filter By:* section. The list of all available filter categories is displayed when the *More Filters* section is accessed.

14.1 Creating Filtering Criteria

Follow the instructions below to create filtering criteria:

1. Click on the hyperlink under the *Filtering* section that represents the *Category* according to which the filtering will be carried out. A *Filters* window (Figure 71) 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 can 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”.
2. Select a *Category* item from the list in the first text area.
3. Click on the downward-pointing arrow button to add the item selected to the list in the second text area.
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, Chart, or Map). The system will regenerate and download, to the client’s side, an updated report that applies the updated filtering criteria.

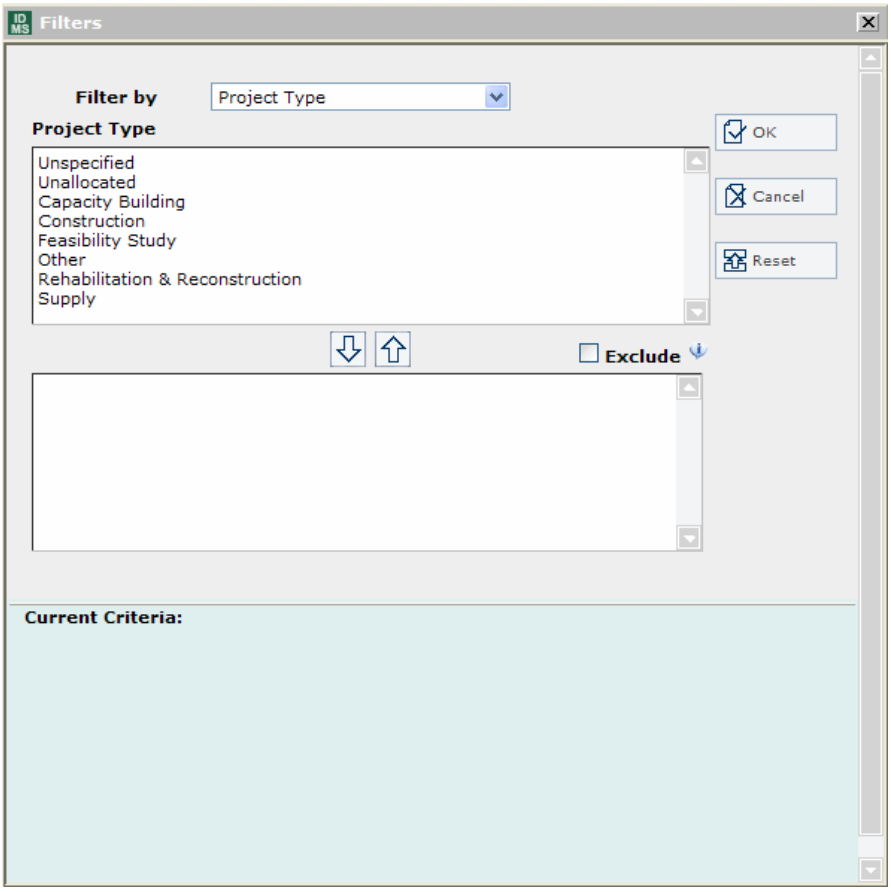


Figure 71: Creating a Filtering Criteria

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

14.2 Sample Filtering Criteria

If the following is selected for the initial view (Figure 72), and you have indicated:

- "Project Type" as a filtering category; and,
- "Capacity Building", "Rehabilitation & Reconstruction", and "Supply" as category items (Figure 73).

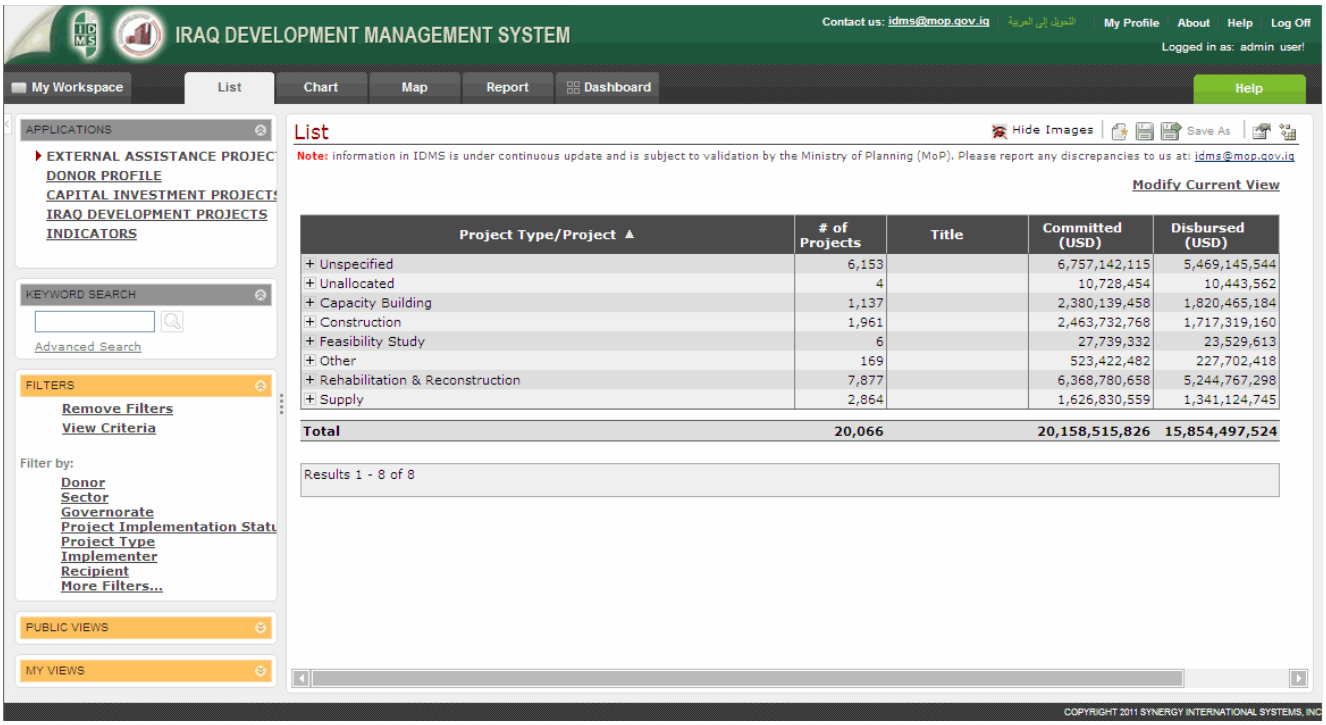


Figure 72: Initial View

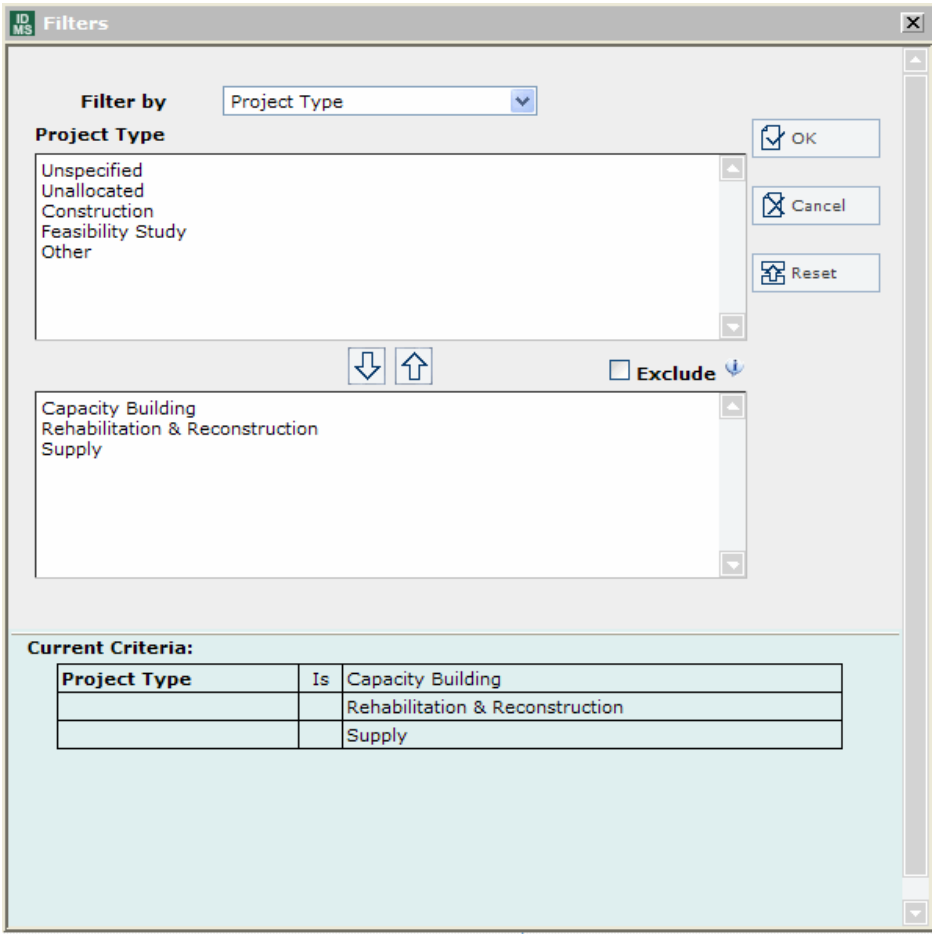


Figure 73: Sample Filtering Criteria

The following search result will appear (Figure 74):

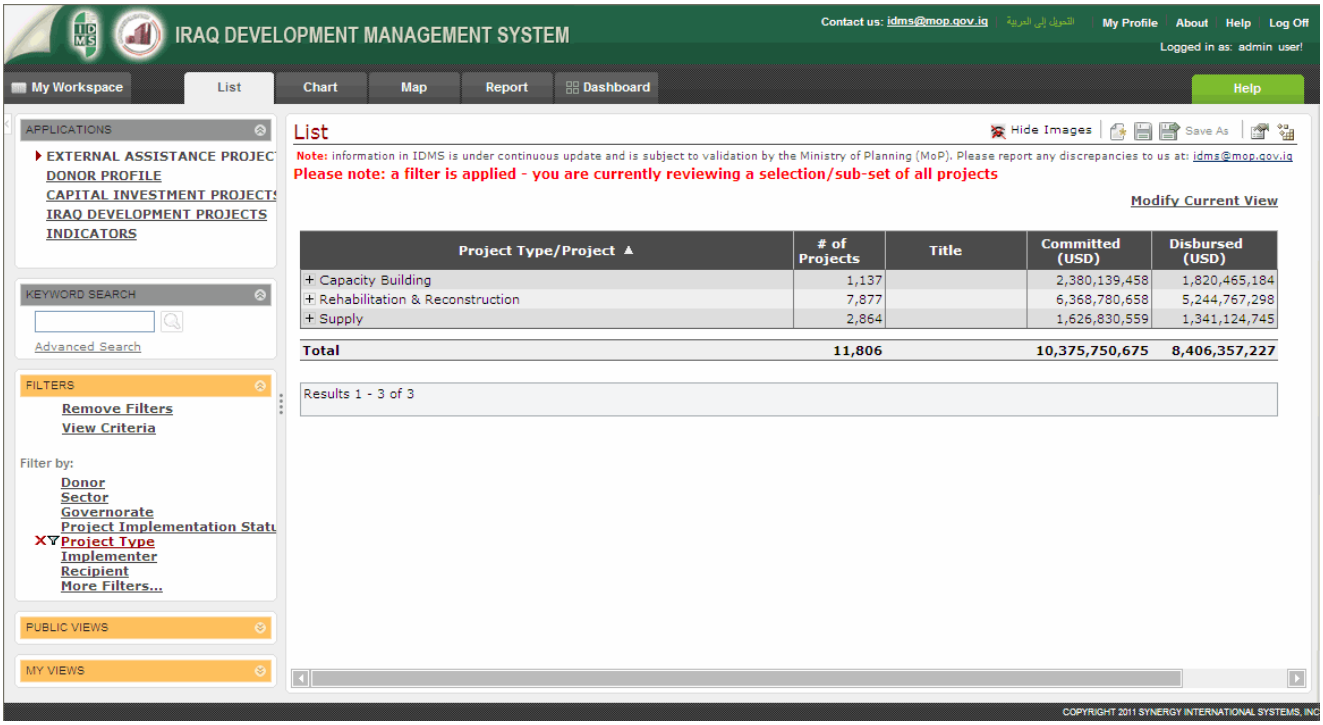


Figure 74: Filtered List

15. SEARCH

The *IDMS* is equipped with a comprehensive search mechanism, which allows searching for any relevant information.

15.1 Simple Search

The simple search interface is available to find any relevant information quickly and easily within the integrated *IDMS* content. Simple search implies that you can type search operators directly into the search box.

15.2 Advanced Search

In addition to providing easy access to the content, *IDMS* application has a number of specific features that is used to find exactly what is looked for. One of these features is advanced search that allows setting different complex conditions using the **Advanced Search Form**. It gives several additional fields which may be used to qualify searches by such criteria as district, sub-sector, project title, etc.

Follow the instructions below to create search criteria:

1. Click the **Advanced Search** link under the *Filters* section. You will then be redirected to the *Filters* section (Figure 75).

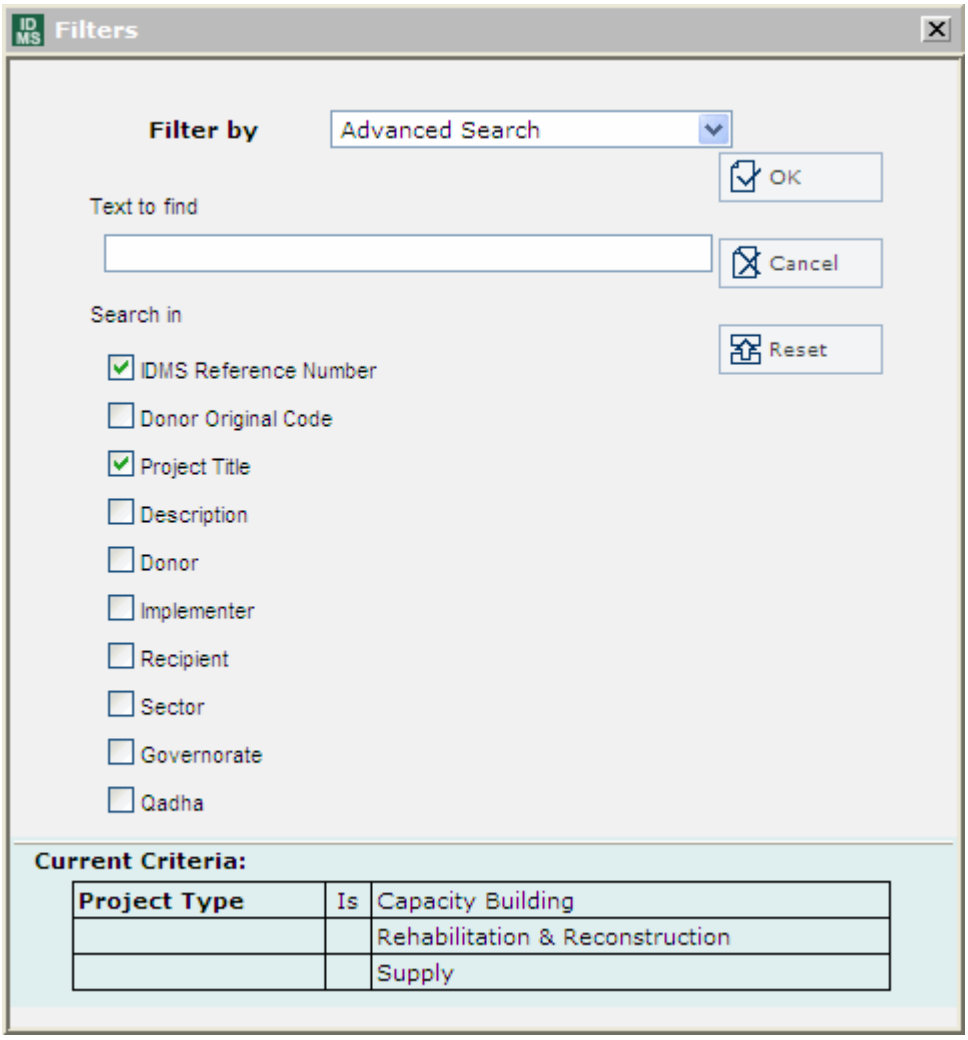


Figure 75: Creating a Search Criteria

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 on 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, Chart, or Map).

Note: The simple search (searching on all fields) is also available at the bottom of the *Filters* section.

15.3 Sample Search Criteria

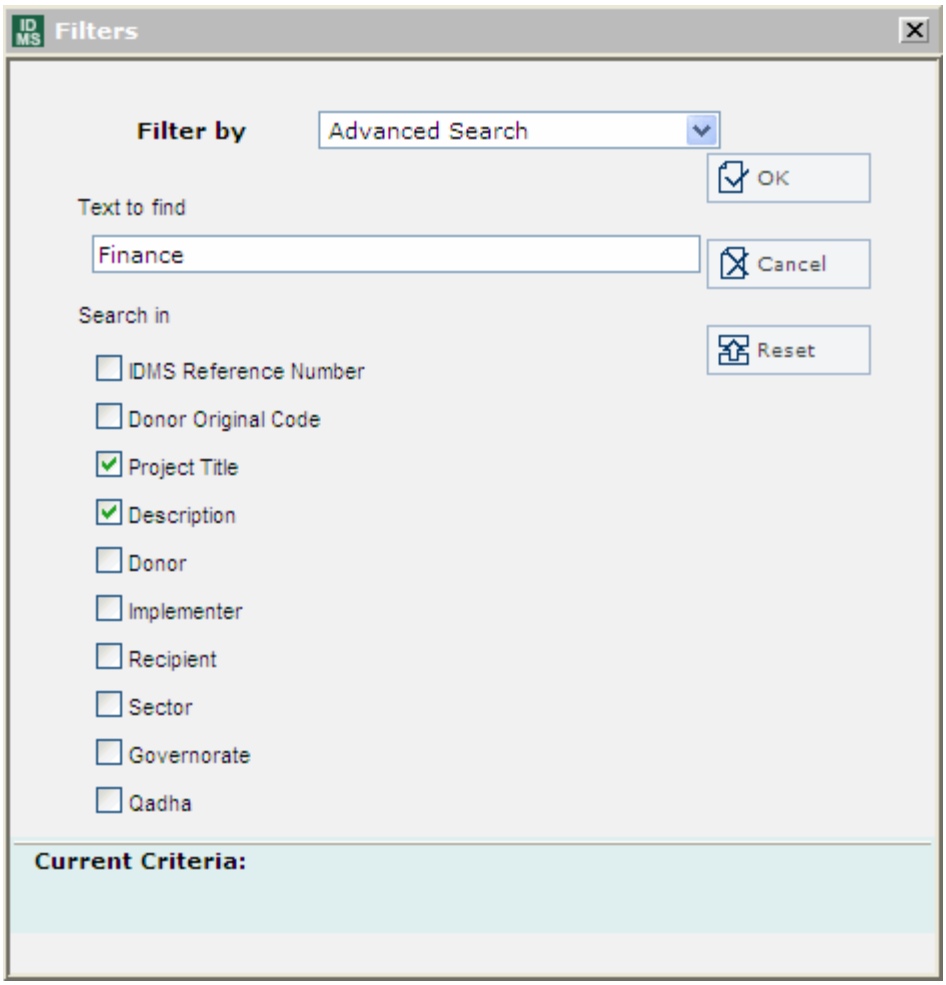


Figure 76: Defining Search Criteria

If you have selected to look for "Finance" among project titles and descriptions (Figure 76), the following search result (Figure 77) will appear.

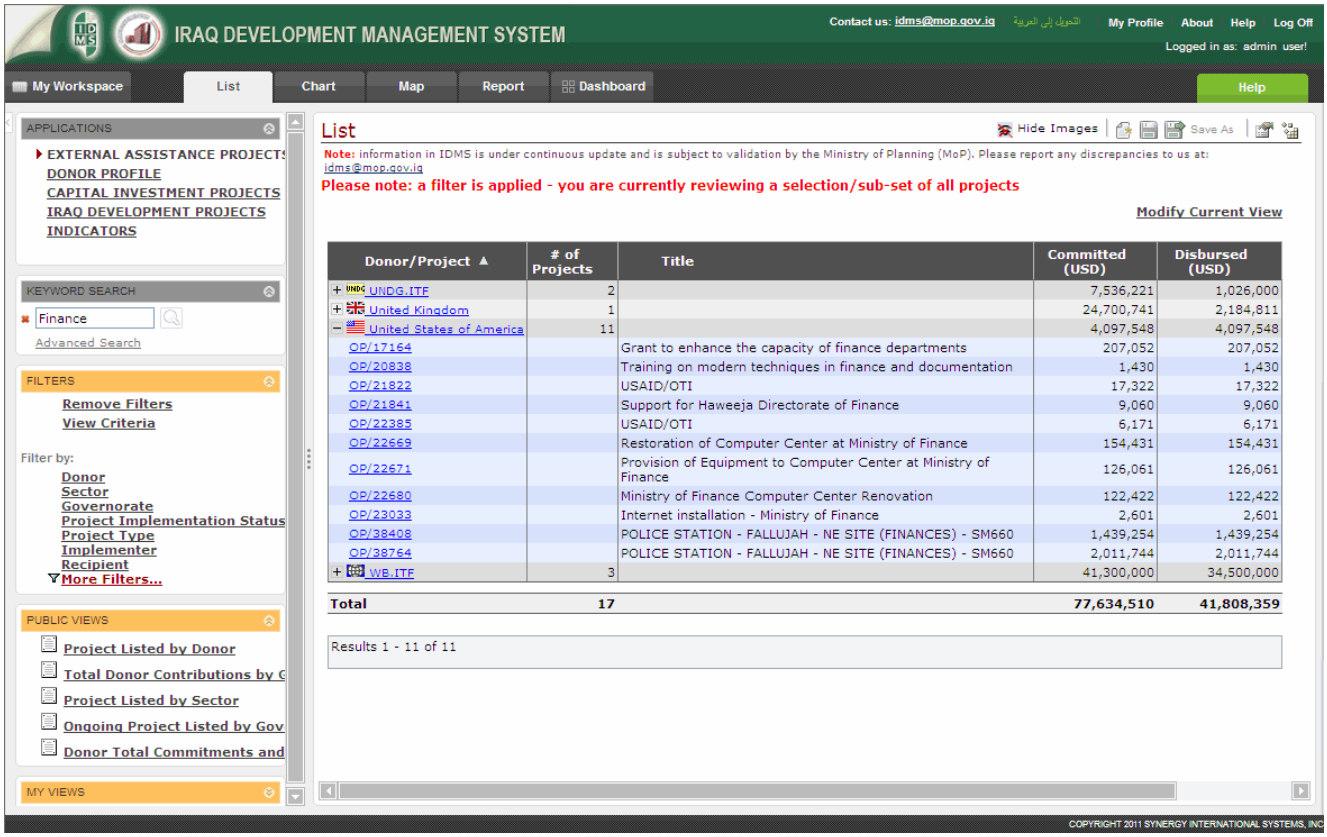


Figure 77: Search Results

16. LOGGING OUT

Once you have finished using the application it is necessary to log out. In order to log out from the application, select the *Log Off* option in the upper right corner of the application window.

17. REFERENCES

Please refer to the following *IDMS* related documents:

- IDMS External Assistance Projects Application User Manual
- IDMS Capital Investments Projects Application User Manual
- IDMS Donor Profile Application User Manual
- IDMS Indicator Application User Manual
- IDMS Administration Center User Manual

IRAQ DEVELOPMENT MANAGEMENT SYSTEM (IDMS)

CAPITAL INVESTMENTS PROJECT APPLCATION

USER MANUAL

Version 1.7

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1. INTRODUCTION

This document describes the *Online Data Entry* module for the *Capital Investment Projects* application of the *Iraq Development Management System (IDMS)*. It provides the necessary instructions to follow during the data entry process. The document is addressed to those who will use the *IDMS* application to add or modify project information.

2. OVERVIEW

The *Iraq Development Management System (IDMS)* is an automated information management system which is designed to improve efficiency and coordination of donor activities in Iraq. 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 aid data.

The main objectives of the *IDMS* is to serve as a reliable and credible source of information on overall donor contributions to Iraq's reconstruction, economic recovery and socio-economic development, as well as to support the Government in effectively managing development assistance and promoting the accountable and transparent use of resources.

In the following version of *IDMS*, the following applications are present:

- **External Assistance Projects**
- **Donor Profile**
- **Capital Investments Projects**
- **Iraq Development Projects**
- **Indicator**

The *Capital Investment Projects* application in the *IDMS* is designed to track the investment projects that comprise the Public Investment Portfolio (PIP) and are financed out of the national budget. Once you have accessed this application, you can view project details, track investment flows to the country, and create analytical reports in the forms of Lists, Charts, and Maps.

Moreover, the *Capital Investment Projects* application contains a built-in on-line data entry subsystem, which is designed to allow entering the project related data remotely via Internet. The *Online Data Entry* module allows for entering new and modifying the existing information.

The *Capital Investment Projects* application provides a web-based user interface and requires a web browser (Internet Explorer) pre-installed.

In the current design, the *Capital Investment Projects* application consists of the following sections:

- **General Information** section is used to provide general information on the project. This includes the title, the project sectors, the start and the end dates, project locations, executing body, project beneficiary, etc.

- **Financial Information** section is used to enter information related to the total project cost and contracts. All fund allocations by implementation year, location and type of expense should also be recorded here.

- **Procurement** section provides procurement related information on the project. This includes the procurement plans and contracts details.

- **Impact Analysis** section is used to provide information on competitive advantages, environmental impacts, social indicators and expected quantitative indicators.

- **Required Resources** section is used to add information related to constructive materials, as well as man-power and energy resources.

- **Monitoring and Evaluation** section is used to provide information on the work plan, key performance indicators and factors causing delays.

- **Notes and Attachments** section is used to enter additional notes and comments on the project as well as attach project documents such as the proposal and reports.

- **Project History** section is used to view statistical data on access to the given project.

To navigate from one section to another, use the respective tab controls found at the top of the screen. Also, click respective **Next / Previous** button at the bottom of the screen to go to the next / previous section.

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

3. GENERAL INFORMATION

In the *General Information* (Figure 1) section, you can provide general information on the project. This includes the title, the project sectors, the start and the end dates, project locations, executing body, project beneficiary, etc.

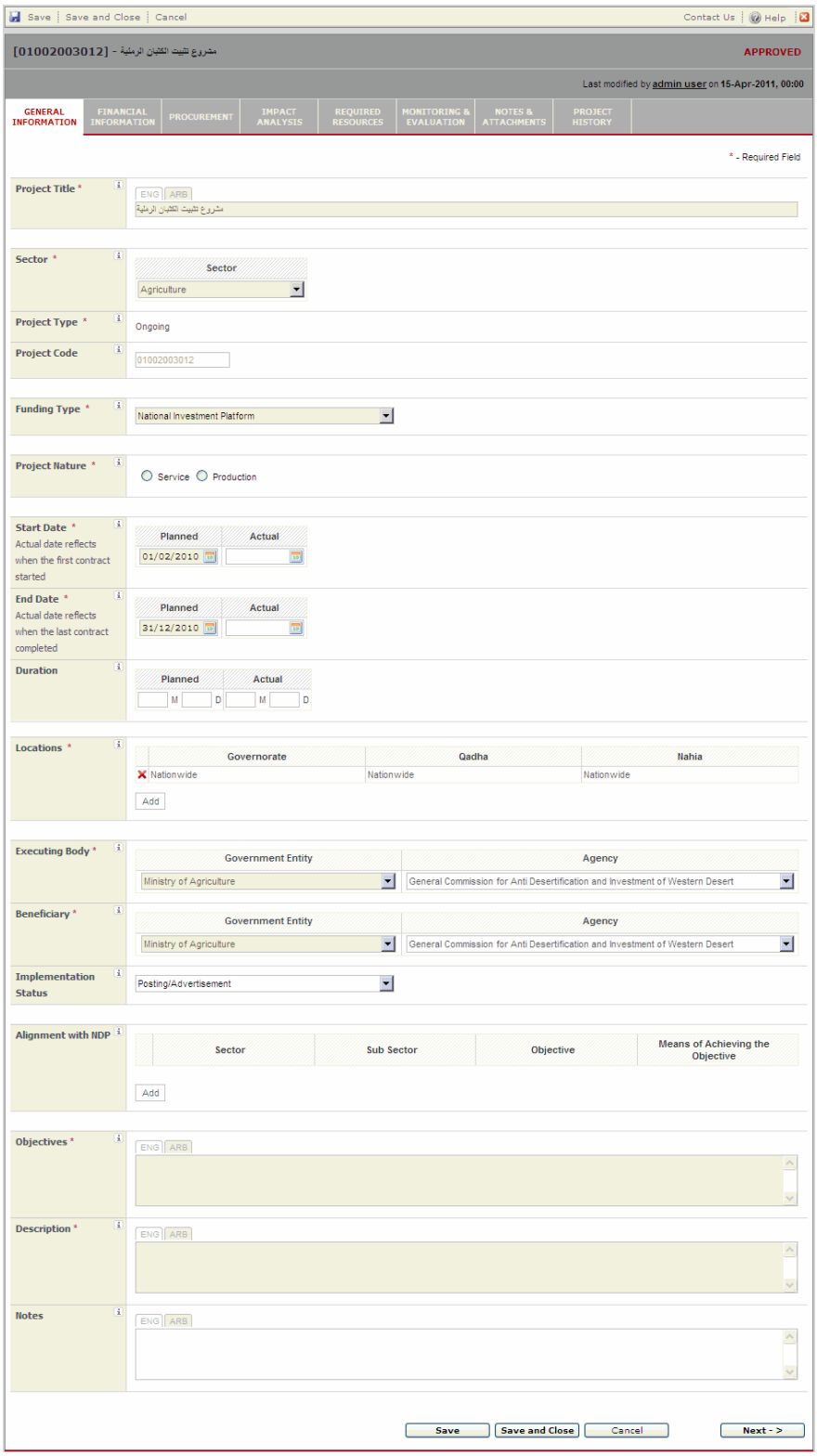

Figure 1: General Information Section

For more information on how to provide the information requested in the *General Information* section, refer to the table below:

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Project Title	Enter the official name of the project used in project documents and approved by the competent agency. In case that a pre-determined official title does not exist, please create a one-line synopsis of the project. Please note that the title is the information that users see when displaying the search results. *This field is mandatory*.
Sector	Indicate the sector of the economy to which the project contributes from the respective drop-down lists. *This field is mandatory*.
Project Type	This is an automatically generated field which may have values *New* or *Ongoing*. The project which is not yet started, i.e. not approved, or it is approved for the first year has a type *New*. When submitting the request of an existing project for the next year, the new request will have an *Ongoing* project type.
Project Code	The identification code of the project.
Funding Type	Provide information on the funding type. In order to do so, select the *Funding Type* from the respective drop-down list. *This field is mandatory*. Please note that depending on the funding type selected, the one or both of the **Partnership Details** and **Donors** fields may become available. ● Add partnership details in English and Arabic. ● Provide *Donor* details. For details on managing donor records, see Managing Donor Records.
Project Nature	Provide information about the project nature by specifying the respective radio button (Production or Service). *This field is mandatory*.
Start Date *Actual date reflects when the first contract started*	Define the date on which the implementation of project activities is supposed to begin (planned) and begins (actual). **Note:** Actual date reflects when the first contract started. Calendar popup is available for this input, see Figure 3: Calendar.
End Date *Actual date reflects when the last contract completed*	Indicate the date by which implementation of project activities were supposed to be completed (planned) and the actual date of completion (actual). **Note:** Actual date reflects when the last contract completed. Calendar popup is available for this input, see Figure 3: Calendar.

Duration	Indicate the planned and actual time-span for the project implementation. **Note:** If you specify the project end date, the project duration is automatically calculated by the system. If the project duration is provided first, the project end date is automatically calculated by the system as soon as you navigate away from the field.
Locations	Specify the geographic locations in the recipient country that are intended to benefit from the project activities. Please note that the selection of the project location is carried out in a Step-by-Step way. Once the appropriate governorate is selected, the list of all qadhas pertaining to the selected governorate becomes available in the *Qadha* fields. The same refers to the qadha/nahias selection*. This field is mandatory*. For details on managing locations, see Managing Locations.
Executing Body	Provide information about the executing body. In order to specify the executing body for the project, select the Sector/Section from the respective drop-down lists. Please note that the selection of the Government Entity/ Agency is carried out in a Step-by-Step way. Once appropriate Government Entity is selected, the list of all agencies pertaining to the selected entity becomes available in the Agency field. *This field is mandatory.*
Beneficiary	Add information about the beneficiary. In order to specify the beneficiary for the project, select the Sector/Section from the respective drop-down lists. Please note that the selection of the Government Entity/ Agency is carried out in a Step-by-Step way. Once appropriate Government Entity is selected, the list of all agencies pertaining to the selected entity becomes available in the Agency field. *This field is mandatory*.
Implementation Status	This field is available on the ongoing projects only and is used to identify the actual state of the project implementation. The following values are available: • Feasibility Study • Design • Posting/Advertisement • Contract • Referring • Accomplished • Not Implemented yet
Alignment with NDP	Indicate the alignment with the National Development Plan. For details on managing NDP records, see Managing NDP Records.
Objectives	Provide the description of the objectives that the project seeks to achieve.

Description	Provide the project description. This can be several paragraphs of a free text.
Notes	Provide project notes if necessary.

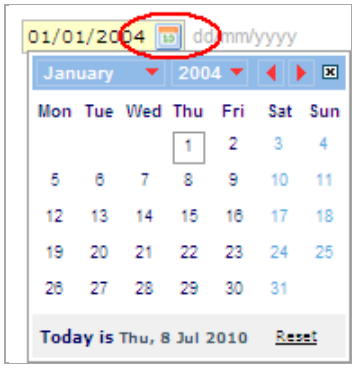

Figure 2: Calendar

3.1 Managing Donor Records

This chapter outlines how to add, edit and delete donor records.

3.1.1 Adding a Donor Record

In order to add a new record, follow the steps below:

1. Click the **Add** button. An empty record will appear (Figure 4).

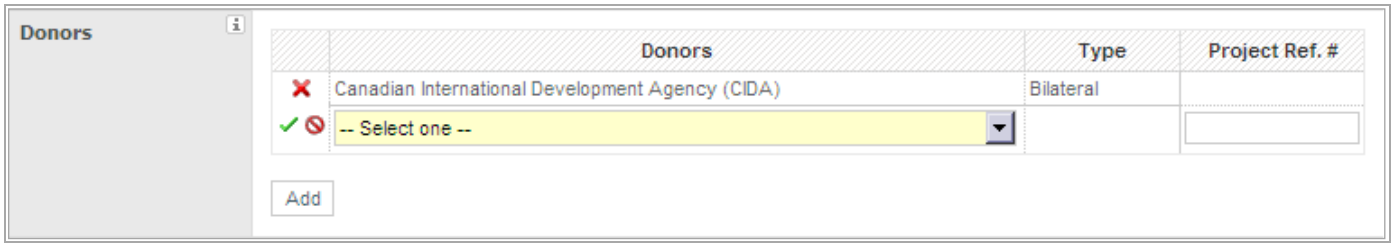

Figure 3: Adding a Donor Record

2. Select the **Donor** from the respective drop-down list. The **Type** field information will be automatically generated.
3. Provide the **Project Ref. #** (project reference number).
4. Click ✓ **(OK)** to the left of the respective row to confirm the information input. Or, click ⊘ **(Cancel)** to cancel the operation.

3.1.2 Editing a Donor Record

In order to edit an existing record, follow the steps below:

1. Click the record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click ✓ **(OK)** to the left of the respective row to confirm the changes made. Or, click ⊘ **(Cancel)** to cancel the operation.

3.1.3 Deleting a Donor Record

In order to delete an existing record, click ✖ **(Remove from the list)** to the left of the selected record.

3.2 Managing Locations

This chapter outlines how to add, edit and delete location records.

3.2.1 Adding a Location Record

In order to add a new location record for the project, follow the steps below:

1. Click the **Add** button at the bottom of the field. An empty record will appear (Figure 5).

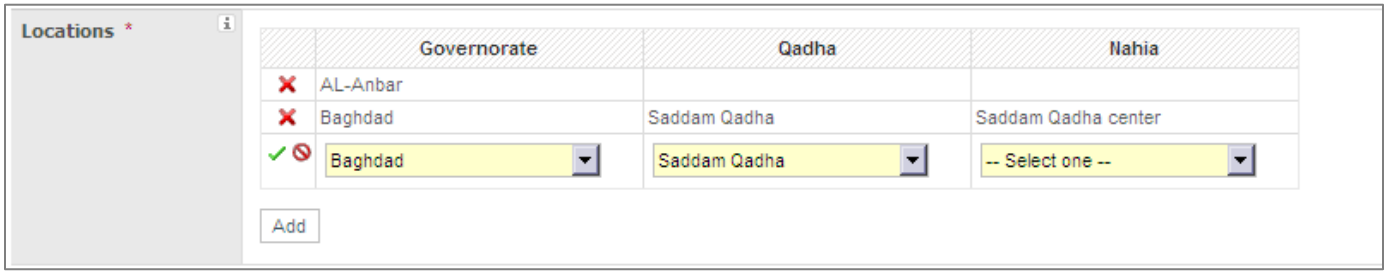

Figure 4: Adding a Location

2. Select the appropriate governorate from the *Governorate* drop-down list. This is required.
3. Indicate the appropriate qadha by selecting the respective instance from the *Qadha* drop-down list and nahia from the respective *Nahia* drop-down list.
4. Click ✓ **(OK)** to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to cancel the operation.

3.2.2 Editing a Location Record

In order to edit an existing location record, follow the steps below:

1. Click the location record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click ✓ **(OK)** to the left of the respective row to confirm the changes made. Or, click ⊘ **(Cancel)** to cancel the operation.

3.2.3 Deleting a Location Record

In order to delete an existing location record, click ✖ **(Remove from the list)** to the left of the selected record.

3.3 Managing NDP Records

This chapter outlines how to add, edit and delete NDP records.

3.3.1 Adding an NDP Record

In order to add a new record, follow the steps below:

1. Click the **Add** button at the bottom of the field. An empty record will appear (Figure 6).

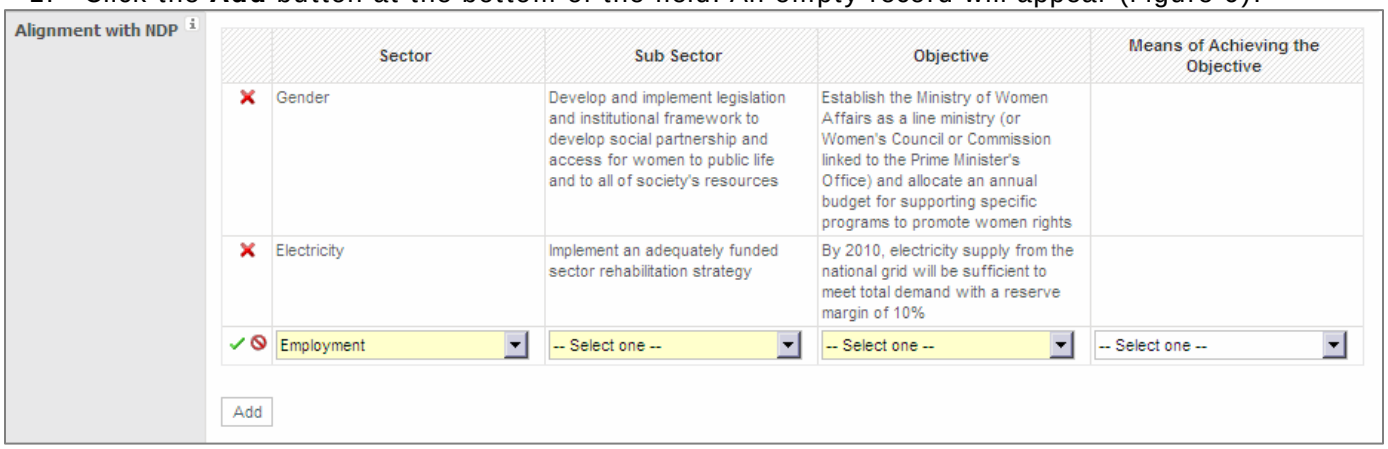

Figure 5: Specifying Alignment with NDP

2. Select the **Sector** and **Sub Sector** from the appropriate drop-down lists.
3. Select the appropriate **Objective**.
4. Select the appropriate **Means of Achieving the Objective**.
5. Click ✓ **(OK)** to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to cancel the operation.

3.3.2 Editing an NDP Record

In order to edit an existing record, follow the steps below:

1. Click the record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click ✓ **(OK)** to the left of the respective row to confirm the changes made. Or, click ⊘ **(Cancel)** to cancel the operation.

3.3.3 Deleting an NDP Record

In order to delete an existing record, click ✗ **(Remove from the list)** to the left of the selected record.

4. FINANCIAL INFORMATION

In the *Financial Information* section (Figure 7), you may enter information about project costs, allocations by implementation year, location and type of expense, contracts, etc.

Note: Some fields in this section are available for ongoing or approved projects only.

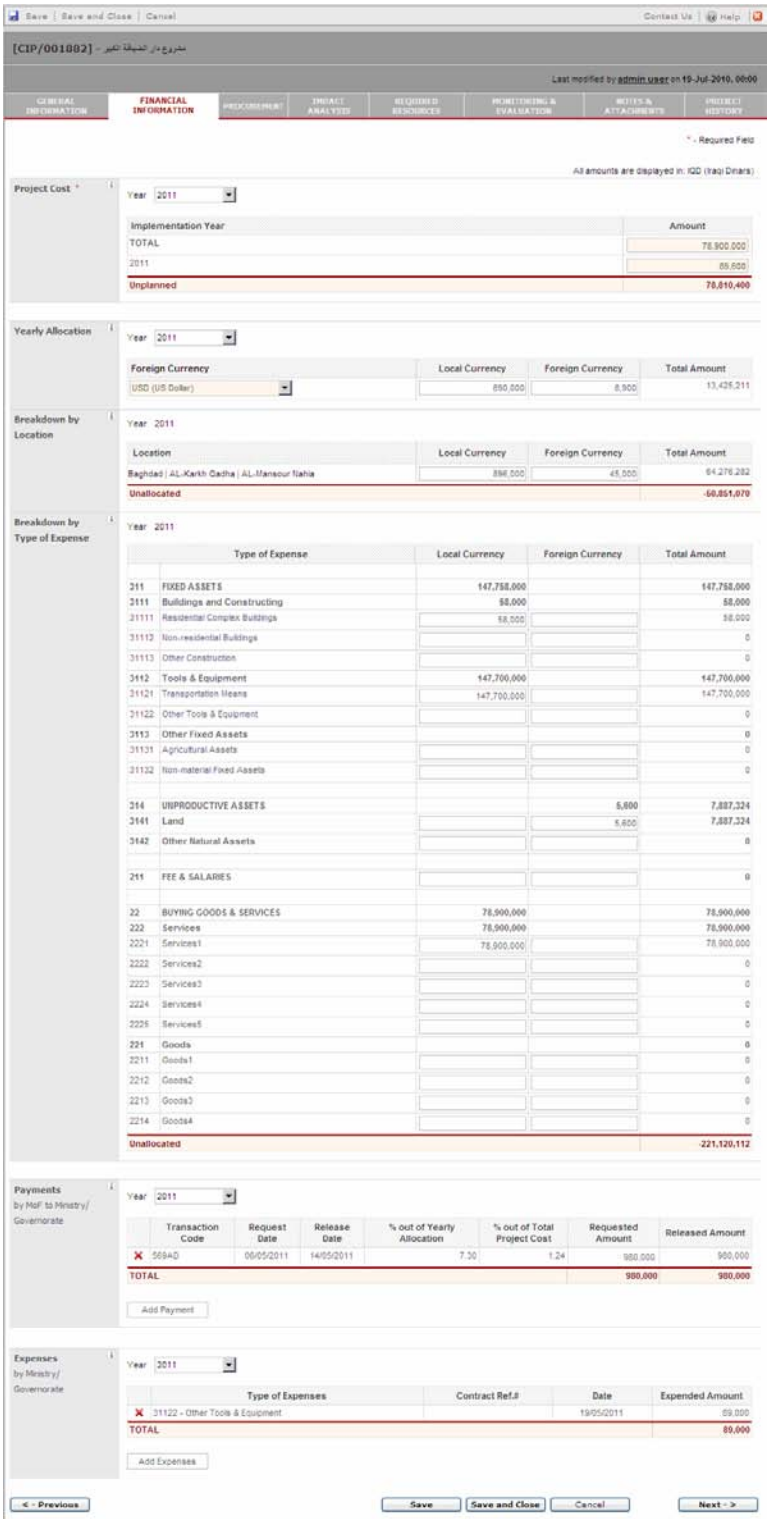

Figure 6: Financial Information Section

For more information on how to provide the information requested in the *Financial Information* section, refer to the table below.

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Project Cost	First, select the year for which the project cost should be defined. Then, define the amount requested for the project implementation in the selected year. *This field is mandatory*. **Note:** When accessing this section for a new project request, you may only provide the *Project Cost* for the current year only.
Yearly Allocation	First, select the year for which the project's yearly allocation should be defined. Then, select the **Foreign Currency** in which the foreign funds are defined in the corresponding field. **Note:** Once the appropriate currency is selected, the default exchange rate per 1 USD is provided in accordance with the project start date. However, you can change it, if this is necessary. The exchange rate is used when converting the amounts into USD. In the **Local Amount** field provide the project expenses made in the local currency and in the **Foreign Amount** field provide expenses made in the selected ***Foreign Currency***. The **Total Amount** field value will be calculated automatically based on the provided local and foreign amounts. **Note:** When accessing this section for a new project request, you may only provide the *Yearly Allocation* for the current year only.
Breakdown by Location	Specify how the recorded project cost allocated throughout all project implementation locations. Enter the allocated amount both local and foreign (it should be entered in the currency indicated). **Note:** You need to specify locations in the "General Information" tab before you can indicate the Breakdown by Location.
Breakdown by Type of Expense	Break down the allocated amount (both local and foreign) according to the type of expense. The **Total Amount** field value will be calculated automatically.
Payments *by MoF to Ministry/ Governorate*	Provide information about the transfer of funds from the Ministry of Finance to another Ministry or Governorate. Please note that the payment information should be provided for the budget year specified above. For details on managing payments, see Managing Payments.
Expenses *by Ministry/ Governorate*	Provide information about the transfer of funds from the Ministry or Governorate to the entity directly involved in the project implementation. Please note that the expense information should be provided for the budget year specified above. For details on managing expenses, see Managing Expenses.

4.1 Managing Payments

This chapter outlines how to add, edit and delete payment records.

4.1.1 Adding a Payment Record

In order to add a new payment record, follow the steps below:

1. Click the **Add Payment** button at the bottom of the field (Figure 10).

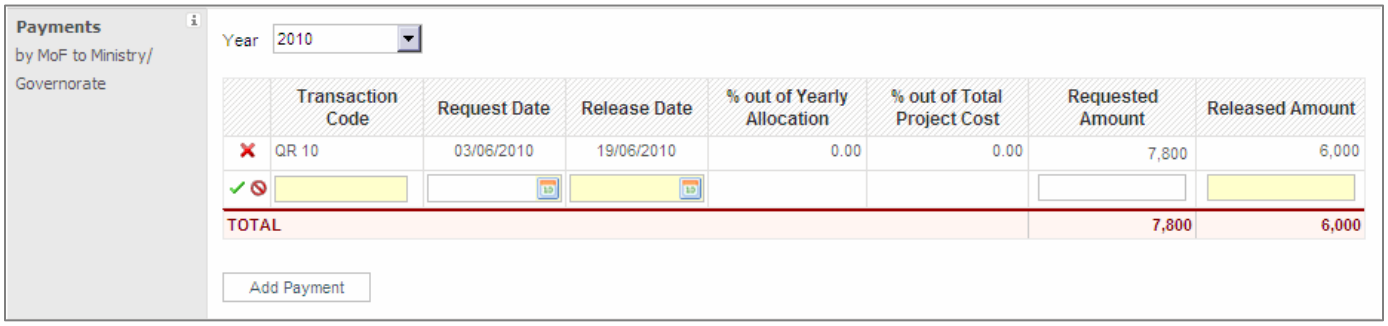

Figure 7: Adding a New Payment Record

2. Select the **Year** to display the payments for.
3. Type the **Transaction Code** in the respective field.
4. Specify the date when the ministry or governorate placed the request for payment in the **Request Date** field. Calendar popup is available for this input, see Figure 3: Calendar.
5. Indicate the date when the funds were released in the **Release Date** field. Calendar popup is available for this input, see Figure 3: Calendar.
6. Enter the **Requested Amount** and the **Released Amount** and the **% out of Yearly Allocation** and **% out of Total Project Cost** will be automatically calculated.
7. Click the **Add Payment** button to save the information input and to add a new payment record. Or, click **OK** to save the data and return to the *Financial Information* section.
8. The **TOTAL** field value will be automatically calculated.

Note: The new payment record appears under the project budget year when the money transfer was made. The information on the payment record becomes available when the appropriate year is selected.

4.1.2 Editing an Existing Payment Record

In order to edit an existing payment record, follow the steps below:

1. Click the record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click ✓ **(OK)** to confirm the changes made. Or, ⊘ **(Cancel)** to terminate the operation.

4.1.3 Deleting an Existing Payment Record

In order to delete an existing payment record, click ✖ **(Remove from the list)** to the left of the selected record.

4.2 Managing Expenses

This chapter outlines how to add, edit and delete expenses records.

4.2.1 Adding an Expense Record

In order to add a new expense record, follow the steps below:

1. Click the **Add Expenses** button at the bottom of the field (Figure 11).
2. Select the **Year** to display the expenses for.

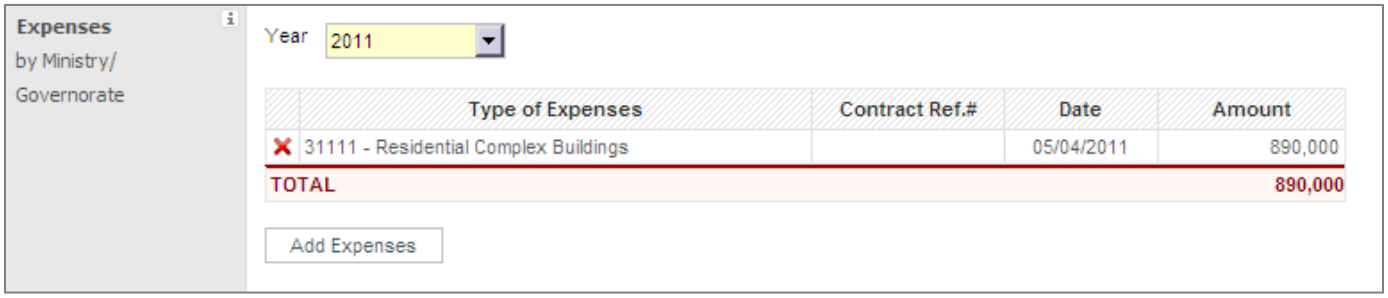

Figure 8: Adding a New Expense Record

3. Indicate the **Type of Expense** by selecting the appropriate instance from the drop-down list.
4. Select the **Contract Reference Number** from the drop-down list.
5. Indicate the **Date** when the expense was made.
6. Enter the **Amount** expend.
7. Click the **Add Expenses** button to save the information input and to add a new expense record. Or, click **OK** to save the data and return to the *Financial Information* section.
8. The **TOTAL** field value will be automatically calculated.

Note: The new expense record appears under the project budget year when the expense was made. The information on the expense record becomes available when the appropriate year is selected.

4.2.2 Editing an Expense Record

In order to edit an existing expense record, follow the steps below:

1. Click the record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click ✓ **(OK)** to confirm the changes made. Or, ⊘ **(Cancel)** to terminate the operation.

4.2.3 Deleting an Expense Record

In order to delete an existing expense record, click ✘ **(Remove from the list)** to the left of the selected record.

5. PROCUREMENT

In the *Procurement* (Figure 12) section, you can provide procurement related information on the project. This includes the procurement plans and contracts details.

Note: This section is available for ongoing and approved projects only.

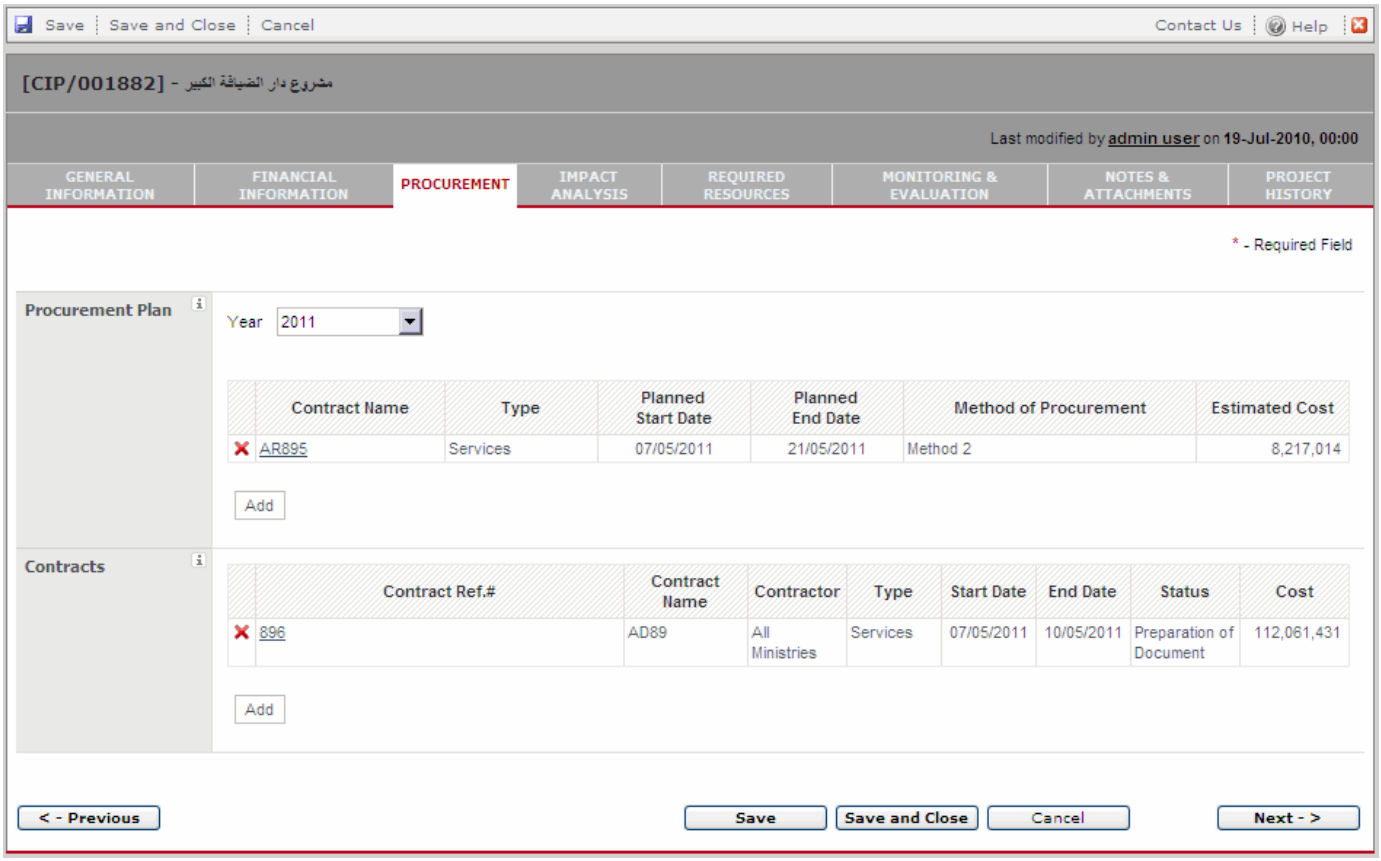

Figure 9: Procurement Section

For more information on how to provide the information requested in the *Procurement* section, refer to the table below:

Field Name	Instructions
Procurement Plan	Indicate here the detailed procurements plans for each selected year of the project activity. You should first select the **Year** to display the procurement plans for. For details on procurement plans, see Managing Procurement Plan Records. **Note:** This section is available for ongoing and approved projects only.
Contracts	Define here any project procurement related contracts for each selected year of the project activity. You should first select the **Year** in the *Procurement Plan* section to display the procurement contracts for. For details on managing contracts, see Managing Contracts. **Note:** This section is available for approved projects only.

5.2 Managing Procurement Plan Records

This chapter outlines how to add, edit and delete procurement plan records.

5.2.1 Adding a Procurement Record

1. Click the **Add** button in the *Procurement Plan* section. You will be redirected to the *Add / Edit Procurement Plan* form (Figure 13).

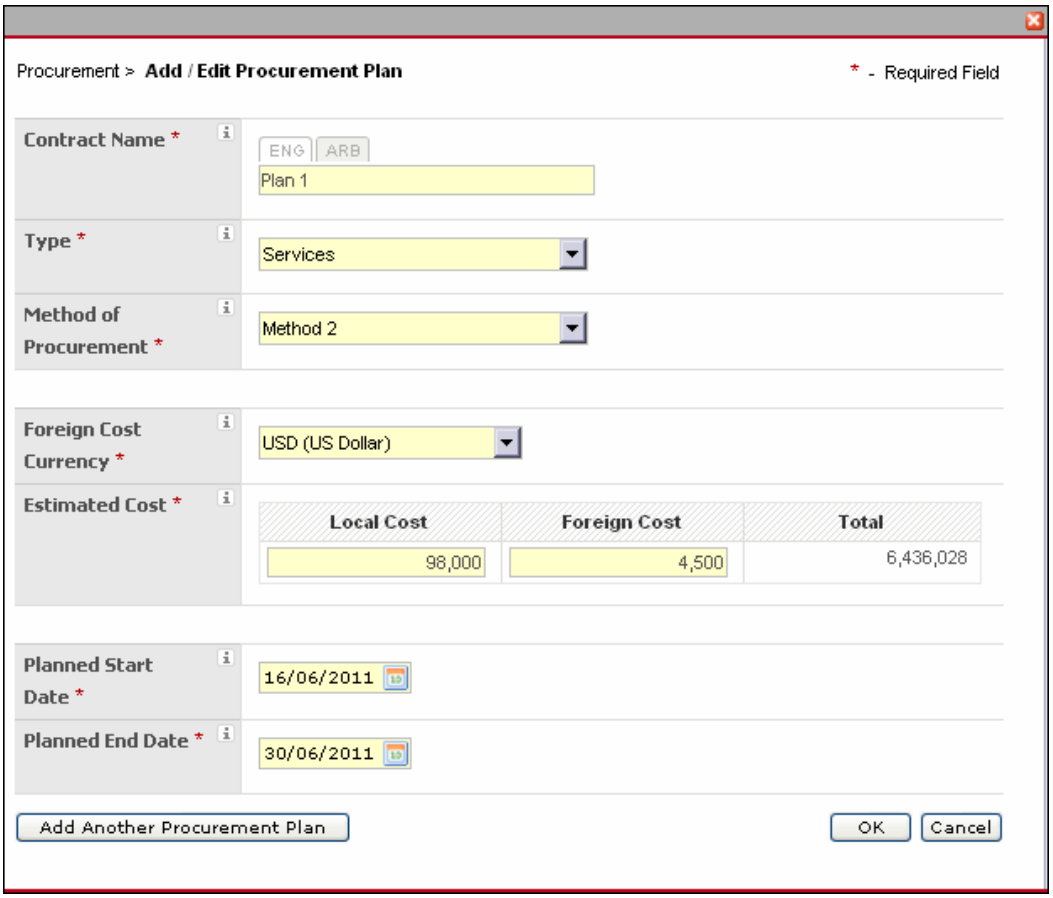

Figure 10: Add/ Edit Procurement Plan Form

The following information is required in the *Add/Edit Procurement Plan* form:

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Contract Name	Indicate the **Contract Name** both in English and Arabic languages. *This field is mandatory.*
Type	Indicate the **Type** by selecting the appropriate instance from the drop-down list. The following values are available: • Goods • Services • Works

	This field is mandatory.
Method of Procurement	Indicate the **Method of Procurement** by selecting the appropriate instance from the drop-down list. *This field is mandatory.*
Foreign Cost Currency	Indicate the **Foreign Cost Currency** by selecting the appropriate instance from the drop-down list. *This field is mandatory.* **Note:** Once the appropriate currency is selected, the default exchange rate per 1 USD is provided in accordance with the project start date. However, you can change it, if this is necessary. The exchange rate is used when converting the amounts into USD.
Cost	In the **Local Cost** field provide the procurement expenses made in the local currency and in the **Foreign Cost** field provide expenses made in the foreign currency. *This field is mandatory.*
Start Date	Indicate the procurement start date. Calendar popup is available for this input, see Figure 3: Calendar. *This field is mandatory.*
End Date	Indicate the procurement end date. Calendar popup is available for this input, see Figure 3: Calendar. *This field is mandatory.*

2. Click the **OK** button to confirm the information input. Or, **Cancel** to terminate the operation.

In order to add another procurement plan record click the **Add Another Procurement Plan** button and provide the information requested as described in the paragraphs above.

5.2.2 Editing a Procurement Record

In order to edit an existing contract record, follow the steps below:

1. Click the record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button to confirm the changes made. Or, **Cancel** to terminate the operation.

5.2.3 Deleting a Procurement Record

In order to delete an existing contract record, click ✖ **(Remove from the list)** to the left of the selected contract record.

5.3 Managing Contracts

This chapter outlines how to add, edit and delete the project contracts.

5.3.1 Adding a Contract

In order to add a new contract record, follow the steps below:

1. Click the **Add Contract** button in the *Contracts* section. You will be redirected to the *Add/Edit Contract* form (Figure 14).

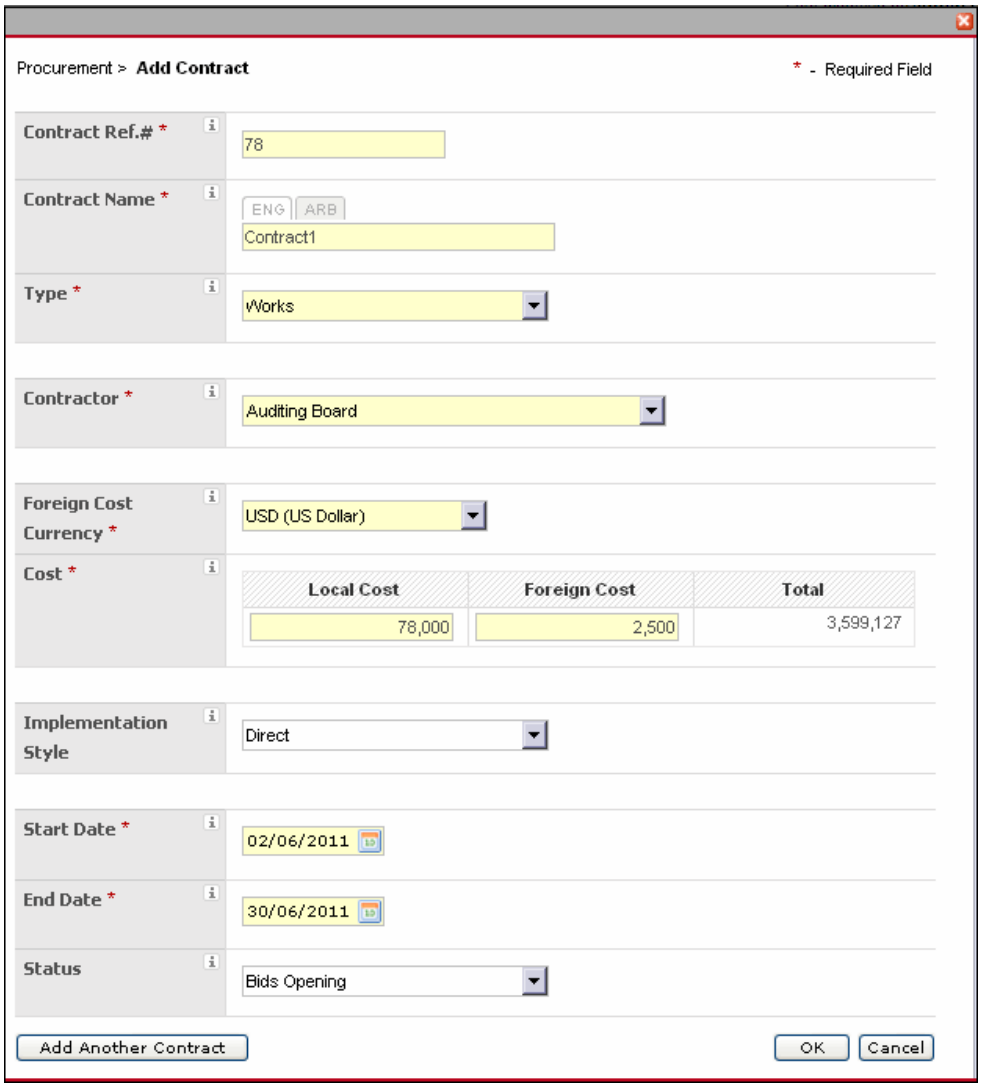

Figure 11: Add/ Edit Contract Form

The following information is required in the *Add/Edit Contract* form:

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Contract Ref. #	Indicate the **Contract Reference number**. *This field is mandatory.*
Contract Name	Indicate the **Contract Name** both in English and Arabic languages. *This field is mandatory.*
Type	Indicate the **Type** by selecting the appropriate instance from the drop-down list. The following values are available: • Goods • Services • Works *This field is mandatory.*

Contractor	Indicate the **Contractor** agency responsible for the procurement. *This field is mandatory.*
Foreign Cost Currency	Indicate the foreign currency in which the *Foreign Cost* below will be defined. *This field is mandatory.* **Note:** Once the appropriate currency is selected, the default exchange rate per 1 USD is provided in accordance with the project start date. However, you can change it, if this is necessary. The exchange rate is used when converting the amounts into USD.
Cost	In the **Local Cost** field provide the procurement expenses made in the local currency and in the **Foreign Cost** field provide expenses made in the foreign currency. *This field is mandatory.*
Implementation Style	Indicate the type of the implementation. The following values are available: • Contract • Direct • Final Hand-over • Secretariat
Start Date	Indicate the contract start date. Calendar popup is available for this input, see Figure 3: Calendar. *This field is mandatory.*
End Date	Indicate the contract end date. Calendar popup is available for this input, see Figure 3: Calendar. *This field is mandatory.*
Status	Indicate the contract status by selecting the appropriate instance from the drop-down list.

2. Click the **OK** button to confirm the information input. Or, **Cancel** to terminate the operation.

In order to add another contract record click the **Add Another Contract** button and provide the information requested as described in the paragraphs above.

5.3.2 Editing a Contract Record

In order to edit an existing contract record, follow the steps below:

1. Click the record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button to confirm the changes made. Or, **Cancel** to terminate the operation.

5.3.3 Deleting a Contract Record

In order to delete an existing contract record, click ✖ **(Remove from the list)** to the left of the selected contract record.

6. IMPACT ANALYSIS

In the *Impact Analysis* section (Figure 15), you can provide information on competitive advantages, environmental impacts, social indicators and expected quantitative indicators of the project.

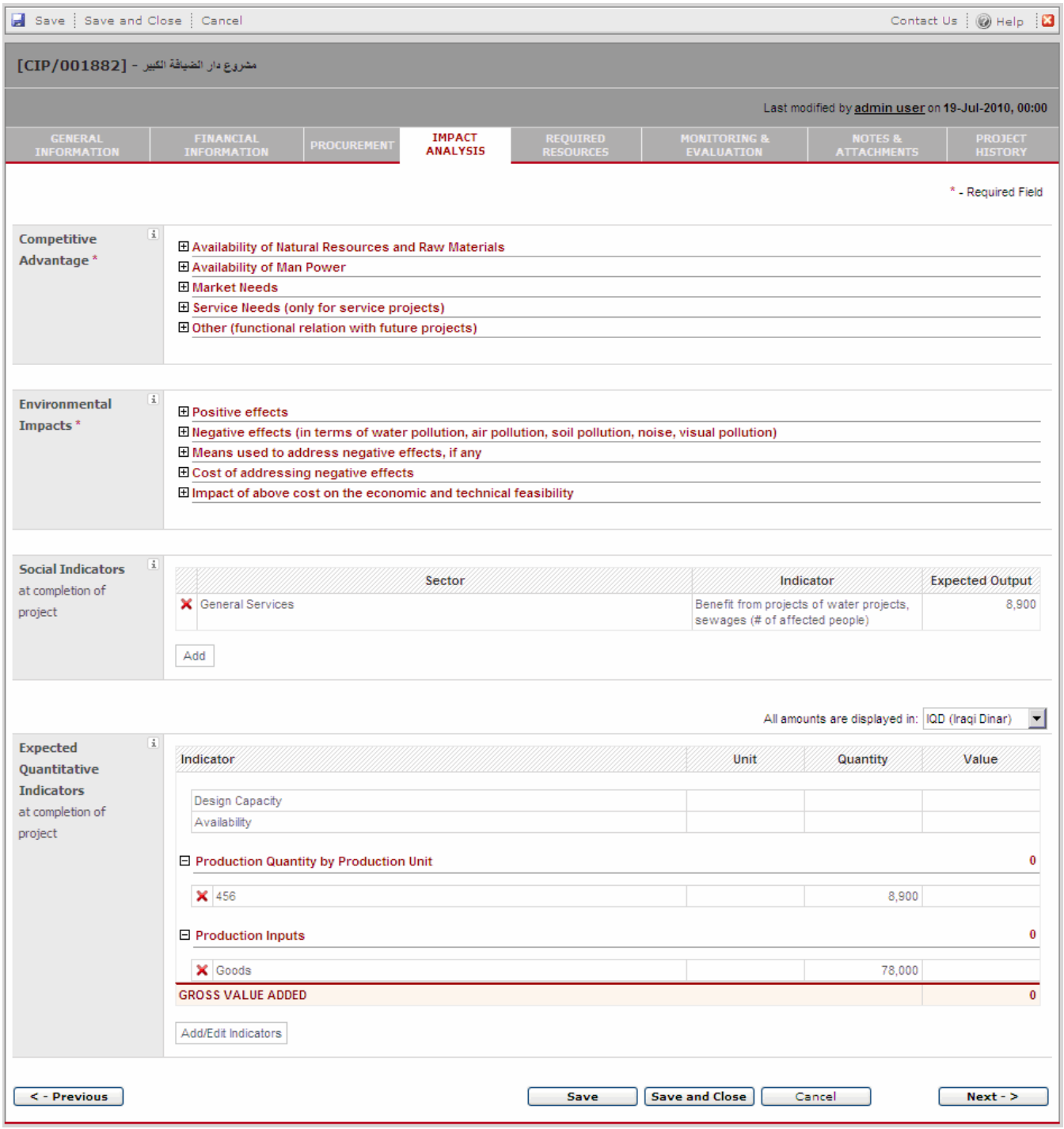

Figure 12: Impact Analysis Section

For more information on how to provide the information requested in the *Impact Analysis* section, refer to the table below.

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Competitive Advantage	Provide information about project competitive advantages. In order to do so, provide information about the availability of natural resources and raw materials, man-power, market needs, service needs (for service projects only) in two languages (English and Arabic). **Note:** At least one field should be provided.
Environmental Impacts	Provide information about project environmental impacts. In order to do so, provide information about the positive and negative environmental effects, means used to address negative effects, if such exist, their cost, and the effect of this cost on economic and technical feasibility in English and Arabic. **Note:** At least one field should be provided.
Social Indicators *at completion of project*	At completion of the project provide information about social indicators for the project. For details on managing social indicators, see Managing Social Indicators.
Expected Quantitative Indicators *at completion of project*	At completion of the project provide information about the expected quantitative indicators. For details on managing social indicators, see Managing Expected Quantitative Indicators.

6.1 Managing Social Indicators

This chapter outlines how to add, edit and delete social indicators records.

6.1.1 Adding a Social Indicator

In order to add a new indicator record, follow the steps below:

1. Click the **Add** in *Social Indicators* section. An empty record will appear (Figure 16).

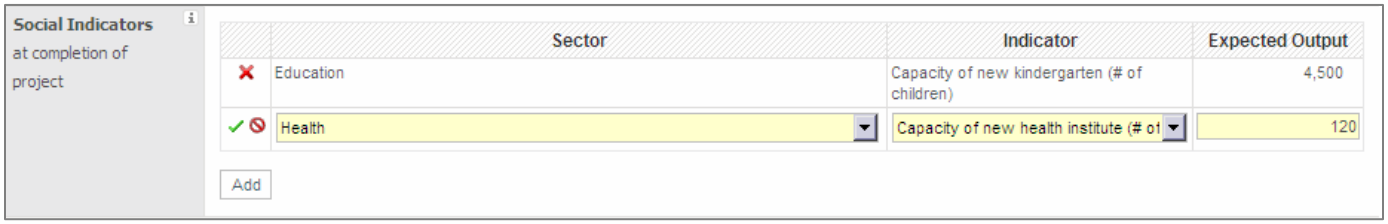

Figure 13: Adding a Social Indicator Record

2. Select the **Sector** and **Indicator** from the respective drop-down lists.

   Please note that the selection of the Social Indicators is carried out in a Step-by-Step way. Once the appropriate sector is selected, the list of all indicators pertaining to the selected sector becomes available in the *Indicator* field.

3. Specify the **Expected Output** for the Indicator selected.
4. Click ✓ **(OK)** to the left of the respective row to confirm the information input. Or, click ⊘ **(Cancel)** to cancel the operation.

6.1.2 Editing a Social Indicator

In order to edit an existing indicator record, follow the steps below:

1. Click the record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click ✓ **(OK)** to the left of the respective row to confirm the changes made. Or, click ⊘ **(Cancel)** to cancel the operation.

6.1.3 Deleting a Social Indicator

In order to delete an existing indicator record, click ✖ **(Remove from the list)** to the left of the selected record.

6.2 Managing Expected Quantitative Indicators

This chapter outlines how to add, edit and delete expected quantitative indicators.

6.2.1 Adding an Expected Quantitative Indicator

In order to add a new quantitative indicator record, follow the steps below:

1. Click the **Add/Edit Indicators** button at the bottom of the field. You will be redirected to *Add/Edit Expected Quantitative Indicator* form (Figure 17).

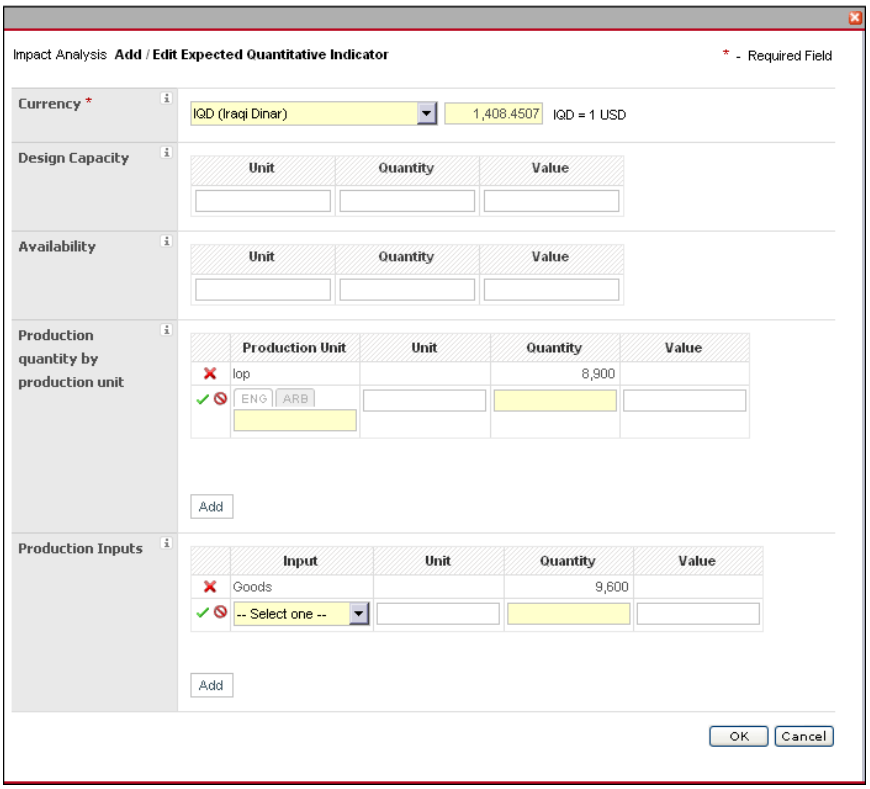

Figure 14: Add/Edit Expected Quantitative Indicator Form

The following information is required in the *Add/Edit Expected Quantitative Indicator* form:

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Currency	Specify the currency the indicator is expressed in by selecting the appropriate instance from the drop-down list. *This field is mandatory.* **Note:** Once the appropriate currency is selected, the default exchange rate per 1 USD is provided in accordance with the project start date. However, you can change it, if this is necessary. The exchange rate is used when converting the amounts into USD.
Design Capacity	Provide information about design capacity by filling in the **Unit**, **Quantity** and **Value** fields.
Availability	Provide information on the availability of the requested **Unit**, **Quantity** and **Value**.
Production quantity by production unit	Provide production quantity by production unit. For details on managing production quantity records, see Managing Production Quantity.
Production Inputs	Provide production inputs details. For details on managing production inputs, see Managing Production Inputs.

2. Click the **OK** button to confirm the information input. Or, **Cancel** to terminate the operation.

6.2.2 Editing a Quantitative Indicator

In order to edit an existing indicator record, follow the steps below:

1. Click the **Add/Edit Indicators** button at the bottom of the field. You will be redirected to *Add/Edit Expected Quantitative Indicator* form.
2. Make the necessary changes in the data displayed.
3. Click **OK** to save the changes made, or **Cancel** to discard them.

6.2.3 Deleting a Quantitative Indicator

In order to delete an existing indicator record, click ✖ **(Remove from the list)** to the left of the selected indicator record.

6.3 Managing Production Quantity

This chapter outlines how to add, edit and delete the production quantity records.

6.3.1 Adding a Production Quantity Record

In order to add a production quantity record, follow the steps below:

1. Click the **Add** button at the bottom of the field. An empty record will appear (Figure 18).

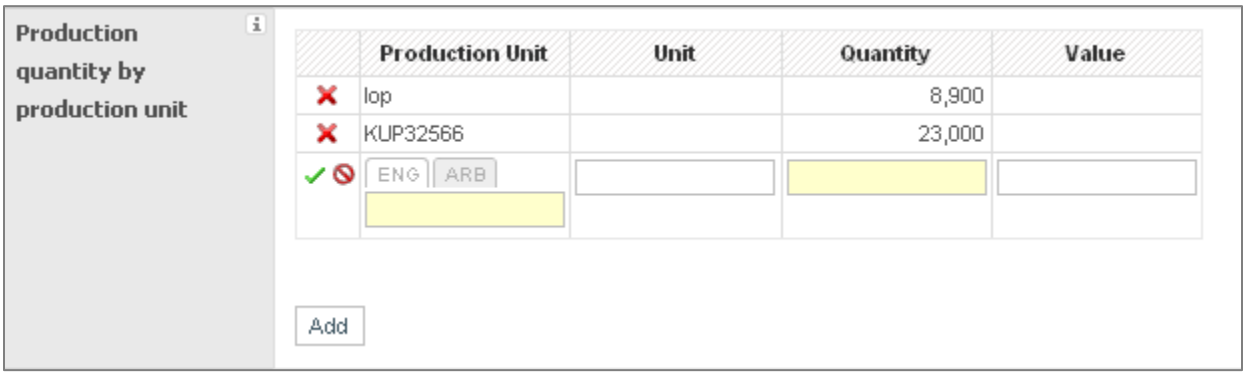

Figure 15: Adding a New Production Quantity Record

2. Add the **Production Unit** in English and Arabic.
3. Specify the **Unit**, **Quantity** and **Value**.
4. Click ✓ **(OK)** to the left of the respective row to confirm the information input. Or, click ⊘ **(Cancel)** to cancel the operation.

6.3.2 Editing a Production Quantity Record

In order to edit an existing production quantity record, follow the steps below:

1. Click the record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click ✓ **(OK)** to the left of the respective row to confirm the changes made. Or, click ⊘ **(Cancel)** to cancel the operation.

6.3.3 Deleting a Production Quantity Record

In order to delete an existing production quantity record, click ✖ **(Remove from the list)** to the left of the selected record.

6.4 Managing Production Inputs

This chapter outlines how to add, edit and delete the production input records.

6.4.1 Adding a Production Input Record

In order to add a production input record, follow the steps below:

1. Click the **Add** button at the bottom of the field. An empty record will appear (Figure 19).

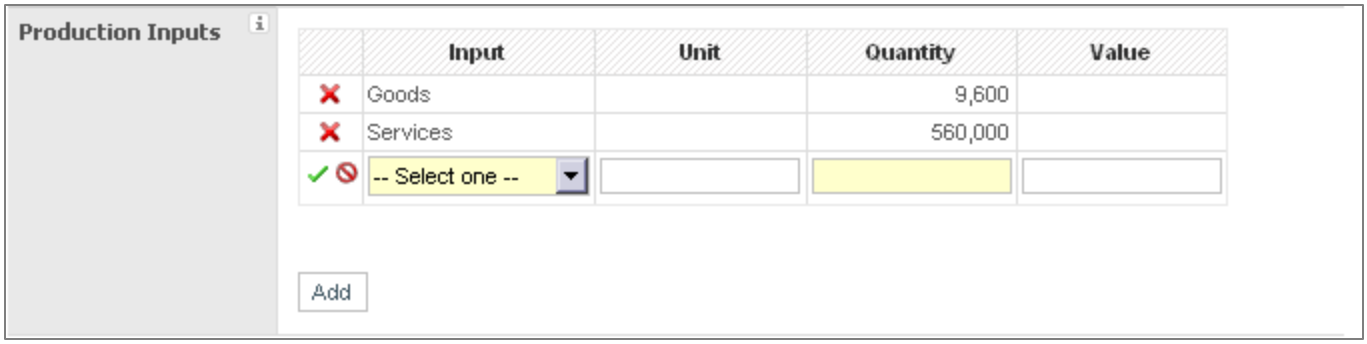

Figure 16: Adding a New Production Input Record

2. Select the **Input** from the respective drop-down list.
3. Specify the **Unit, Quantity** and **Value** for the selected input.
4. Click ✓ **(OK)** to the left of the respective row to confirm the information input. Or, click ⊘ **(Cancel)** to cancel the operation.

6.4.2 Editing a Production Input Record

In order to edit an existing production input record, follow the steps below:

1. Click the record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click ✓ **(OK)** to the left of the respective row to confirm the changes made. Or, click ⊘ **(Cancel)** to cancel the operation.

6.4.3 Deleting a Production Input Record

In order to delete an existing production input record, click ✗ **(Remove from the list)** to the left of the selected record.

7. REQUIRED RESOURCES

In the *Required Resources* section (Figure 20), you can provide information about constructive materials, as well as man-power and energy resources.

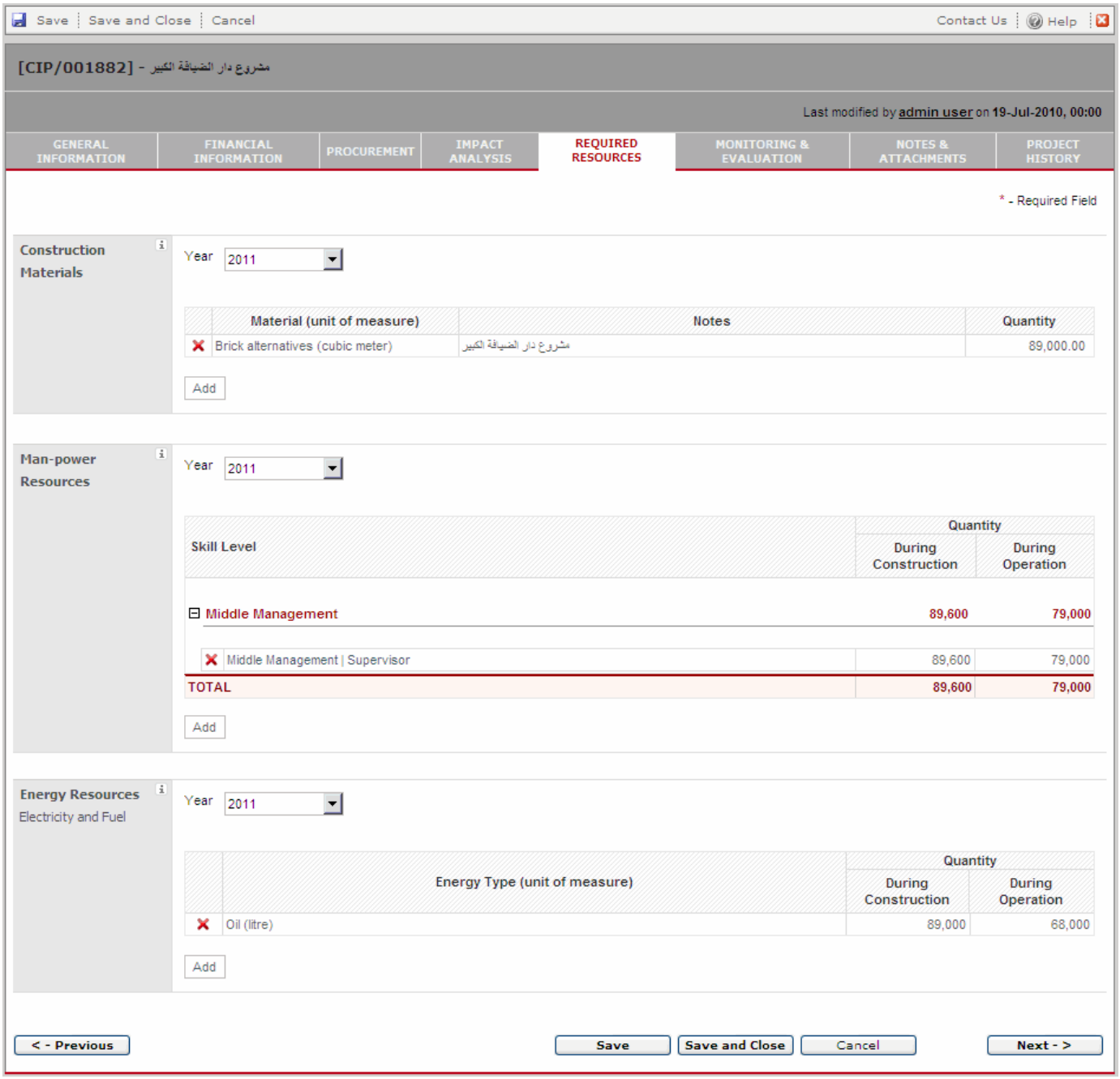

Figure 17: Required Resources Section

For more information on how to provide the information requested in the *Required Resources* section, refer to the table below.

Field Name	Instructions
Construction Materials	Provide information about the required constructive materials. For details on managing construction materials, see Managing Construction Materials.
Man-power Resources	Provide detailed information about the man-power resources. For details on managing man-power resources, see Managing Man-power Resources.
Energy Resources *Electricity and Fuel*	Provide detailed information about the energy resources. For details on managing energy resources, see Managing Energy Resources.

8.1 *Managing Construction Materials*

This chapter outlines how to add, edit and delete construction material records.

8.1.1 Adding a Material Record

In order to add a new material record for the project, follow the steps below:

1. Click the **Add** button at the bottom of the field. An empty record will appear (Figure 21).

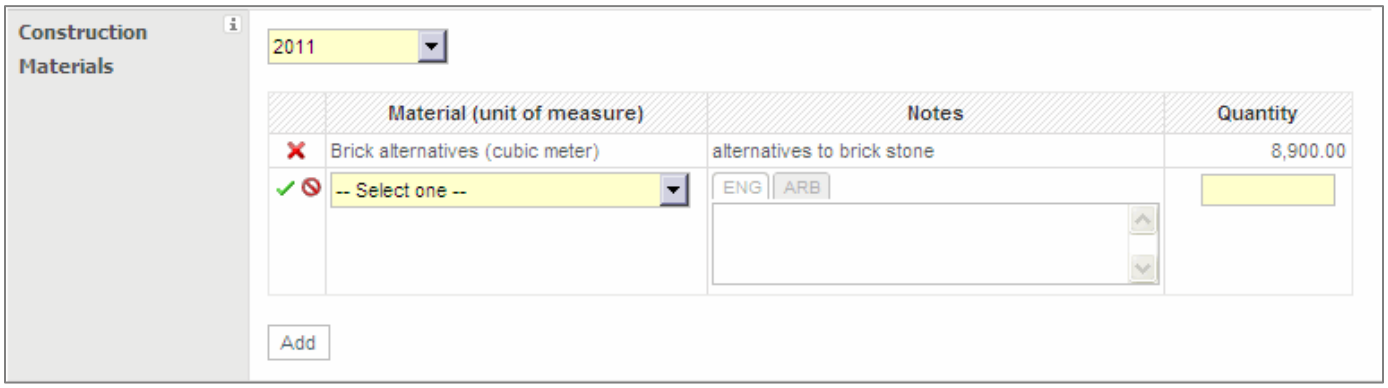

Figure 18: Adding Constructive Materials Record

2. Select the **Year** to display the construction materials for.
3. Select the **Material (unit of measure)** from the respective drop-down list.
4. Add **Notes** in English and Arabic.
5. Specify the **Quantity** of the selected material.
6. Click ✓ **(OK)** to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to cancel the operation.

8.1.2 Editing an Existing Material Record

In order to edit an existing material record, follow the steps below:

1. Click the record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click ✓ **(OK)** to the left of the respective row to confirm the changes made. Or, click ⊘ **(Cancel)** to cancel the operation.

8.1.3 Deleting an Existing Material Record

In order to delete an existing material record, click ✖ **(Remove from the list)** to the left of the selected record.

8.2 Managing Man-power Resources

This chapter outlines how to add, edit and delete man-power resources records.

8.2.1 Adding a Man-power Resource

In order to add a new man-power resource record, follow the steps below:

1. Click the **Add** button at the bottom of the field. You will be redirected to the *Man-power Resources* form (Figure 22).

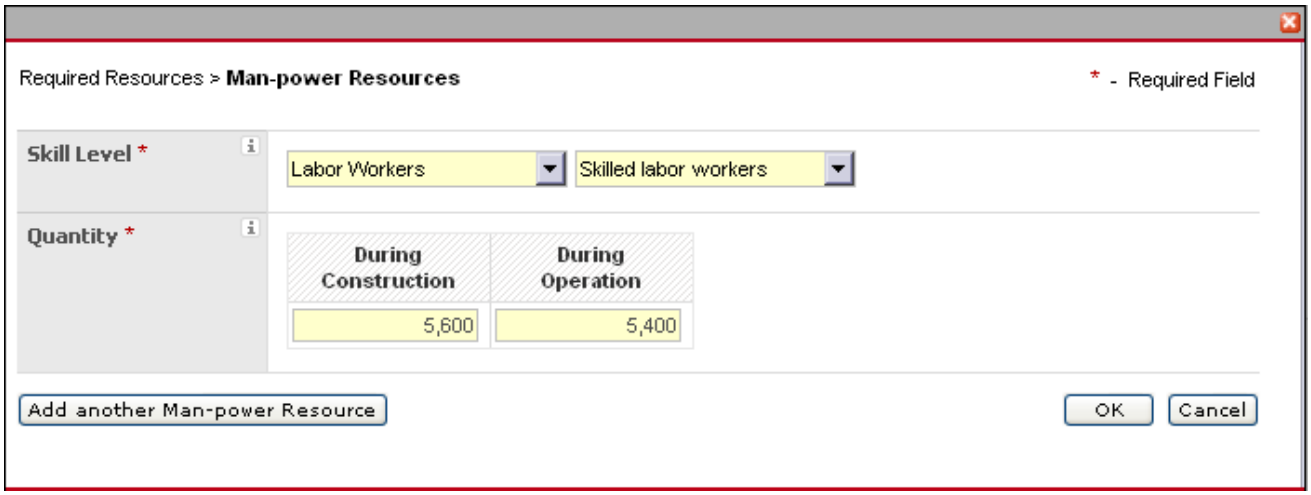

Figure 19: Man-power Resources Form

2. Specify the **Skill Level** of the man-power resource by selecting it from the respective drop-down lists. This field is mandatory to be filled in.
3. Specify the man-power resources **Quantity** during the construction and during operation. This field is mandatory to be filled in.
4. Click **OK** to add the information input, or **Cancel** to cancel the operation.

In order to add another man-power resource record, click the **Add another Man-power Resource** button at the bottom of the page.

8.2.2 Editing a Man-Power Resource

In order to edit an existing man-power resource record, follow the steps below:

1. Click the man-power resource record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click **OK** to add the information input, or **Cancel** to cancel the operation.

8.2.3 Deleting a Man-Power Resource

In order to delete an existing man-power resource record, click ✘ (**Remove from the list**) to the left of the selected record.

8.3 Managing Energy Resources

This chapter outlines how to add, edit and delete energy resources records.

8.3.1 Adding an Energy Resource

In order to add a new energy resources record for the project, follow the steps below:

1. Click the **Add** button at the bottom of the field. An empty record will appear (Figure 23).

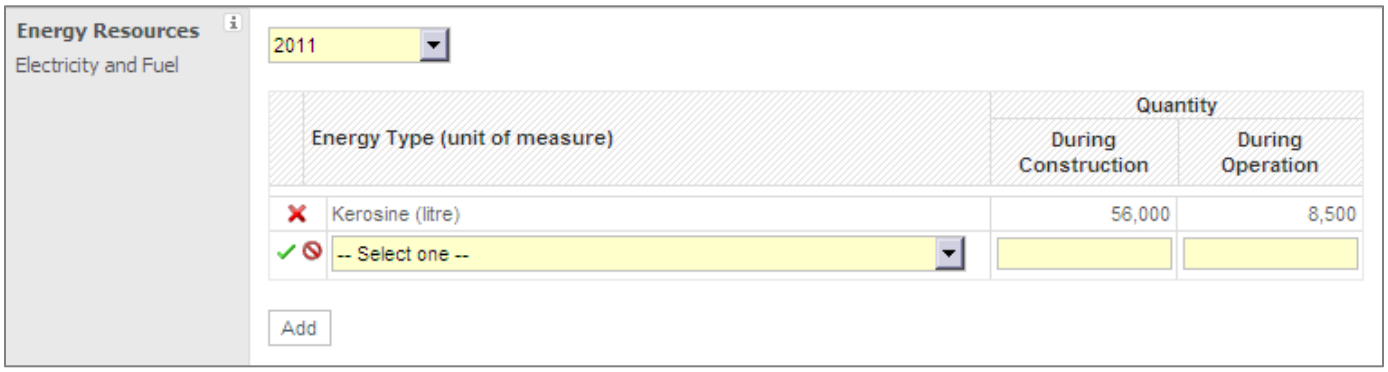

Figure 20: Adding Energy Resources

2. Select the **Year** to display the energy resources for.
3. Select the **Energy Type (unit of measure)** from the respective drop-down list.
4. Specify the **Quantity** of the selected energy resource during construction and operation.
5. Click ✓ **(OK)** to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to cancel the operation.

8.3.2 Editing an Energy Resource

In order to edit an existing energy resources record, follow the steps below:

1. Click the energy resources record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click ✓ **(OK)** to the left of the respective row to confirm the changes made. Or, click ⊘ **(Cancel)** to cancel the operation.

8.3.3 Deleting an Energy Resource

In order to delete an existing energy resources record, click ✘ **(Remove from the list)** to the left of the selected record.

8. MONITORING AND EVALUATION

In the *Monitoring & Evaluation* section (Figure 24), you should provide information on the target and progress of the project, the key performance indicators of the project, factors that may be delaying the project implementation.

Note: This section is available for approved projects only.

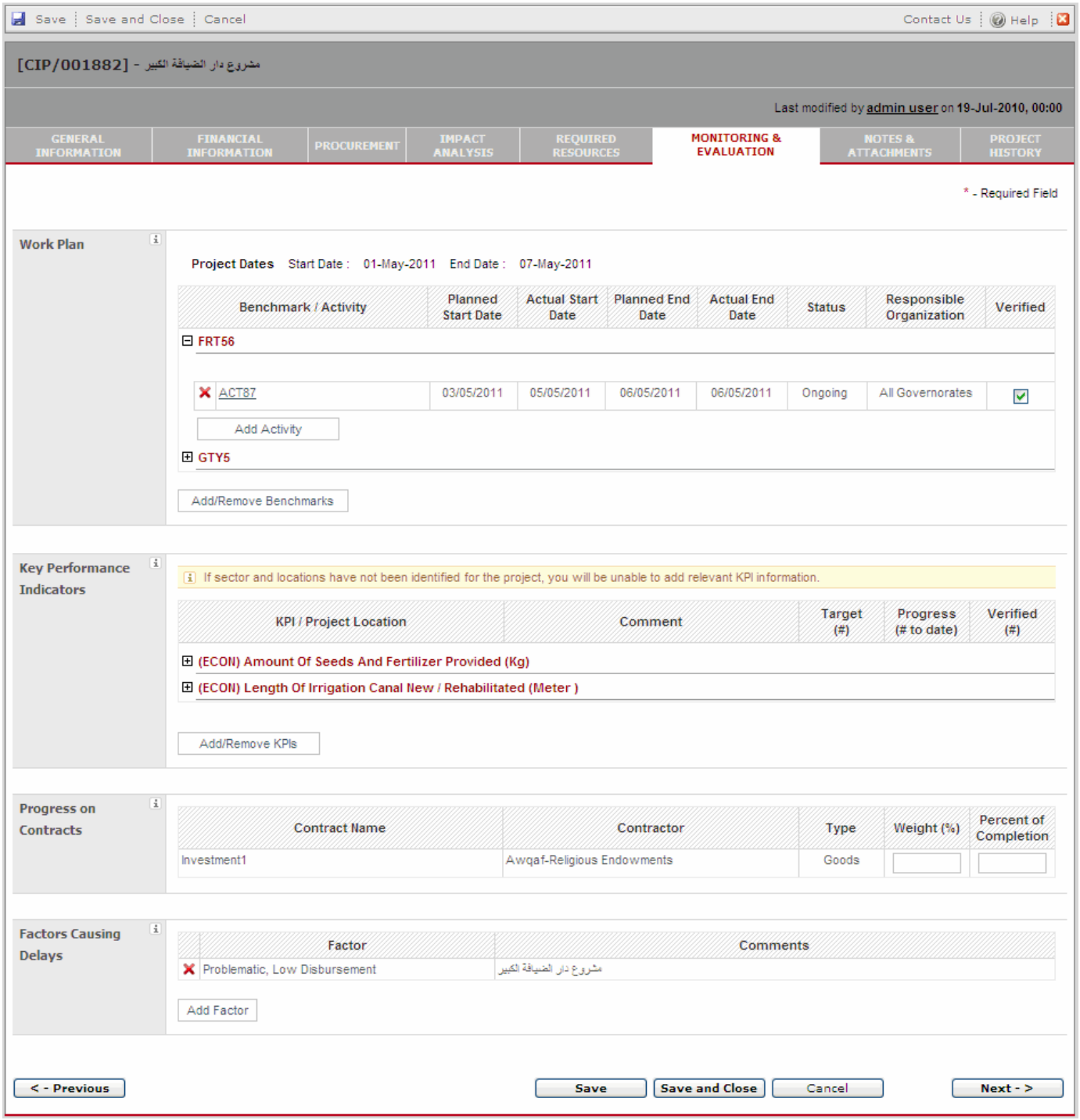

Figure 21: Monitoring & Evaluation Section

For more information on how to provide the information requested in the *Monitoring & Evaluation* section, refer to the table below.

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Work Plan	Provide information about the project activities and benchmarks. For details, see Managing Work Plan Records.
Key Performance Indicators	Provide information about performance indicators used to evaluate and monitor the progress of the project. For details, see Managing Key Performance Indicators.
Progress on Contracts	The information in this section is generated according to the procurement plan and contract records defined in the *Procurement* section.
Factors Causing Delays	Provide information about factors causing delays in the project implementation. For details, see Managing Delay Factors.

8.1 Managing Work Plan Records

This chapter outlines how to manage benchmark and assign activity(ies) to each benchmark created.

8.1.1 Adding a Benchmark

1. Click the **Add/Remove Benchmarks** button at the bottom of the field. You will be redirected to *Add/Remove Benchmarks* form (Figure 25).

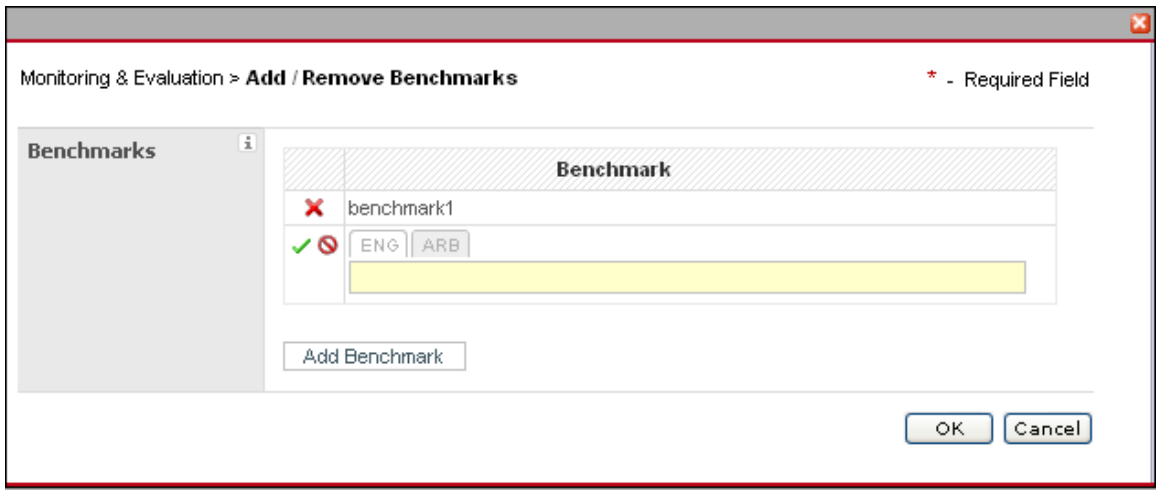

Figure 22: Add/ Remove Benchmarks Form

2. Insert a **Benchmark** both in English and Arabic languages. This field is mandatory.
3. Click ✓ **(OK)** to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to cancel the operation.
4. The **Verified** checkbox is set when the project manager approves all the data provided for the benchmark to be correct.

Click the **Add Benchmark** button to save the information input and to add a new benchmark. Or, click **OK** to save the data and return to the *Monitoring and Evaluation* section.

8.1.2 Editing a Benchmark

In order to edit an existing work plan record, follow the steps below:

1. Click the benchmark record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click **OK** to confirm the changes made. Or, click **Cancel** to cancel the operation.

8.1.3 Deleting a Benchmark

In order to delete an existing benchmark record, click ✖ **(Remove from the list)** to the left of the selected record.

8.2 Managing Activity Records

This chapter outlines how to add, edit and delete activity records.

8.2.1 Adding an Activity Record

1. Click the **Add Activity** button at the bottom of the field. You will be redirected to *Add/Edit Activity* form (Figure 26).

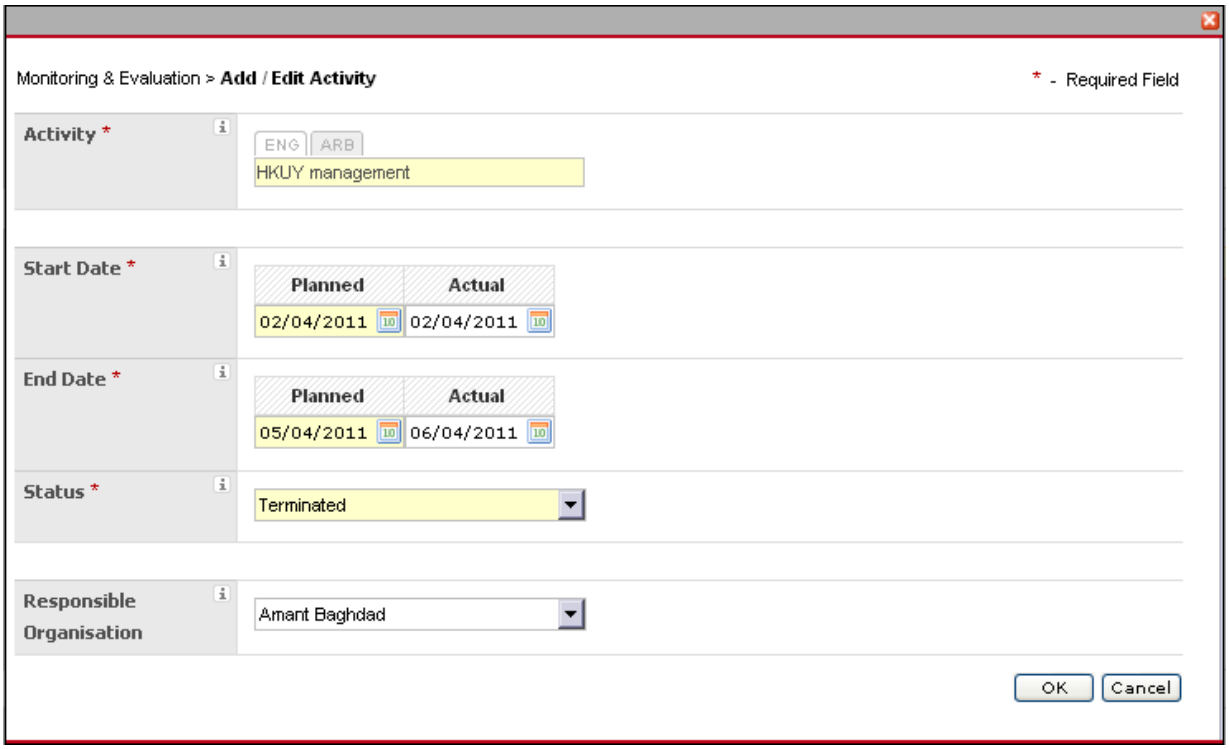

Figure 23: Add/Edit Activity Form

The following information is required in the *Add/Edit Activity* form:

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Activity	Insert the **Activity** both in English and Arabic languages. *This field is mandatory.*
Start Date	Indicate the activity start date. Calendar popup is available for this input, see Figure 3: Calendar. *This field is mandatory.*
End Date	Indicate the activity end date. Calendar popup is available for this input, see Figure 3: Calendar. *This field is mandatory.*
Status	Indicate the activity **Status** by selecting the appropriate instance from the drop-down list. The following values are available: • Completed • Ongoing • Pipelined • Stalled • Suspended • Terminated *This field is mandatory.*
Responsible Organisation	Indicate the organisation responsible for the activity from **Responsible Organisation** drop-down list.

2. Click **OK** to add the information input, or **Cancel** to cancel the operation.
3. In the MONITORING AND EVALUATION section, the **Verified** checkbox is set when the project manager approves all the data provided for the benchmark to be correct.

8.2.2 Editing an Activity Record

In order to edit an existing work plan record, follow the steps below:

1. Click the activity record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click **OK** to confirm the changes made. Or, click **Cancel** to cancel the operation.

8.2.3 Deleting an Activity Record

In order to delete an existing activity record, click ✖ **(Remove from the list)** to the left of the selected record.

8.3 Managing Key Performance Indicators

This chapter outlines how to add, edit and delete Key Performance Indicators (KPI).

8.3.1 Adding KPI

In order to add a new KPI record, follow the steps below:

1. Click the **Add/Remove KPIs** button at the bottom of the field. You will be redirected to the *Add / Remove KPIs* from (Figure 27).

Note: You must first add a sector and a location for the project, in order to be able to record relevant KPIs.

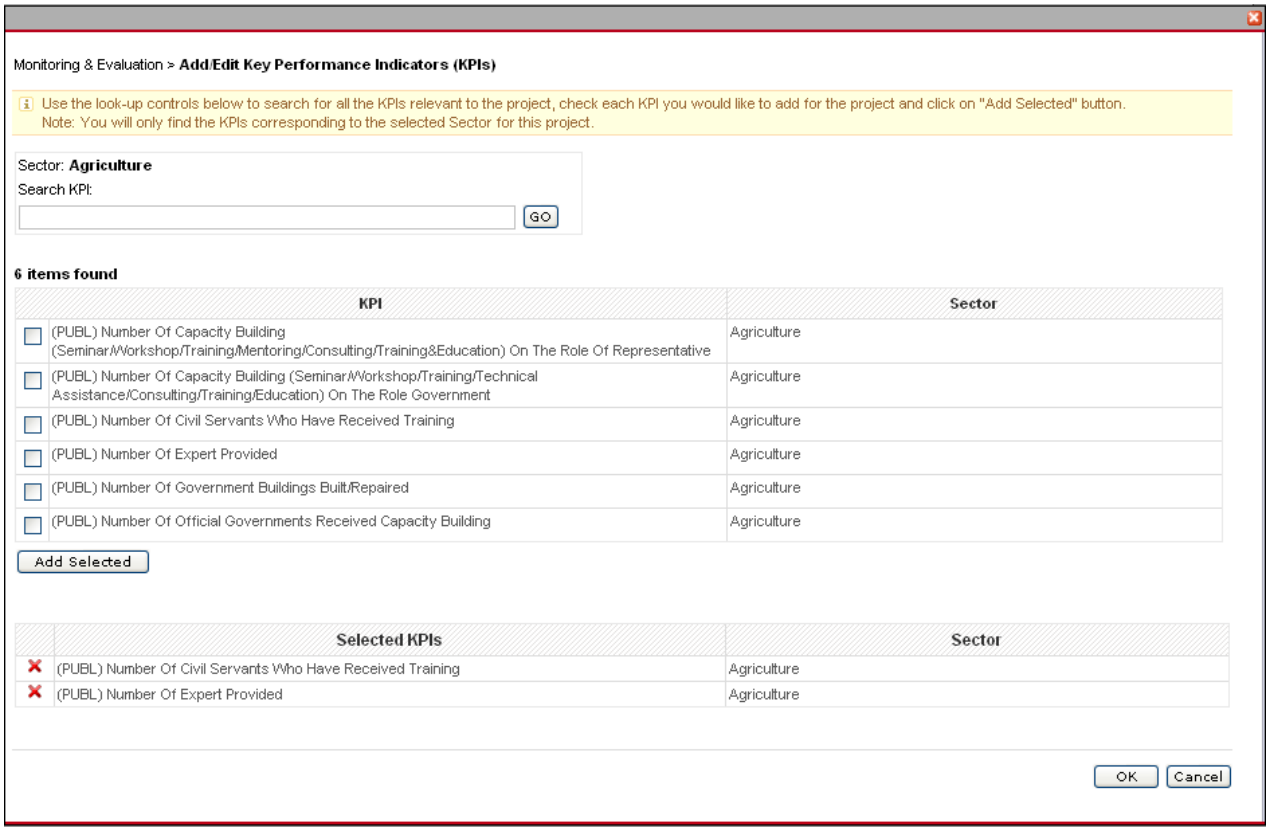

Figure 24: Add/Edit Key Performance Indicators Form

2. Search for the KPI to add to the project by entering the keyword in the search field and clicking the **GO** button. All the KPIs that match the search criteria will be displayed in the Key Performance Indicator table.
   Note: Selecting the appropriate instance from the *Sector* drop-down list in the *General Information* section will display only the KPIs that match the selection.
3. Specify the desired KPI(s) for the project by selecting the checkbox to the left of the respective KPI(s).
4. Click the **Add Selected** button. The selected KPI(s) will appear in the *Selected KPIs* table.
5. Click the **OK** button to return to the *Key Performance Indicators* section, where the selected KPI(s) will appear in the respective fields.
6. Provide information about the progress made by the project.

- Click the **Update KPI Progress** button at the bottom of the KPI record to add progress information to. You will be redirected to the *Update KPI Progress* form where the list of locations defined in the *General Information* section is displayed (Figure 28).

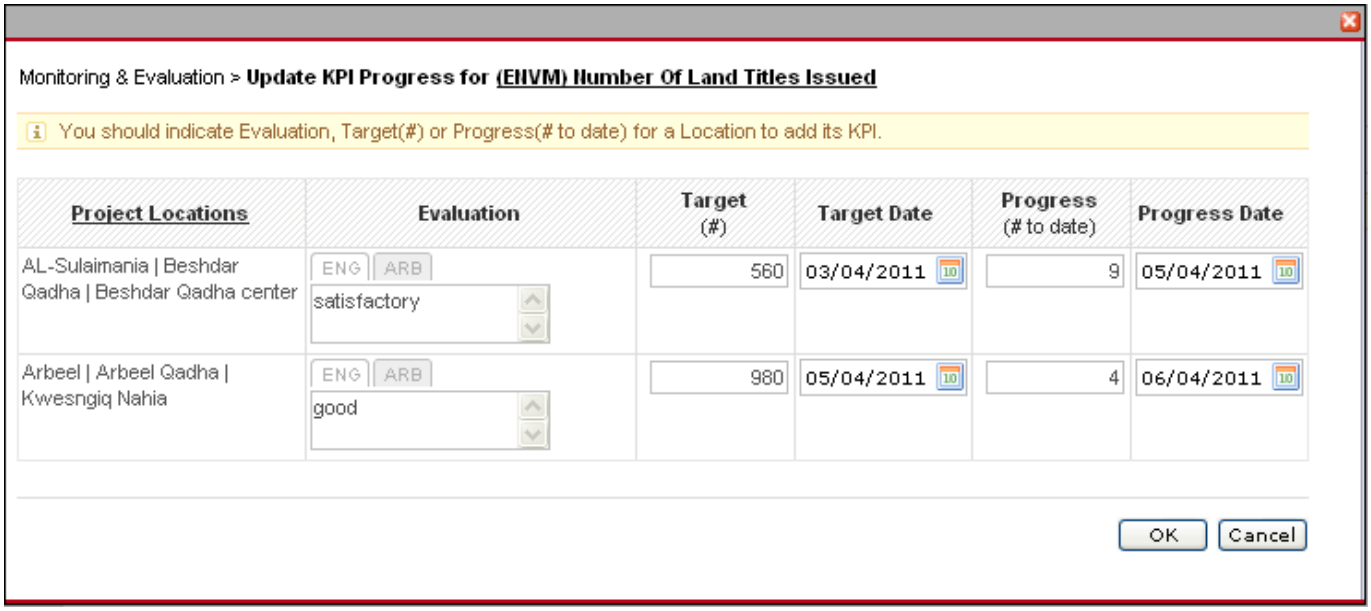

Figure 25: Update KPI Progress Form

- Provide the **Evaluation** in the respective field.
- Enter the total number of targets set by the project and target date.
- Indicate the number of targets reached as of the date.

  Note: In order to update project progress information, click the **Update KPI Progress** button at the bottom of the KPI record to modify information for. You will be redirected to the *Update KPI Progress* form where previously indicated information for the KPI is displayed. Make the necessary changes.

  Note: In order to delete project progress record, click ✖ **(Remove from the List)** to the left of the selected record.

8.3.2 Editing KPIs

In order to edit project progress information, follow the steps below:

1. Click the **Add/Remove KPI Progress** button in the *Key Performance Indicator* sector to modify information for. You will be redirected to the *Add/Remove KPIs* form where the information previously indicated for the KPI is displayed.
2. Make the necessary changes.
3. Press **OK** to submit the changes.

8.3.3 Deleting KPIs

In order to delete a KPI, click ✖ **(Remove from the list)** to the left of the selected record.

8.4 Managing Delay Factors

This chapter outlines how to add, edit and delete factors causing delays in the project schedule.

8.4.1 Adding Delay Factor

In order to add a new delay factor, follow the steps below:

1. Click the **Add Factor** button at the bottom of the field. An empty record will appear (Figure 29).

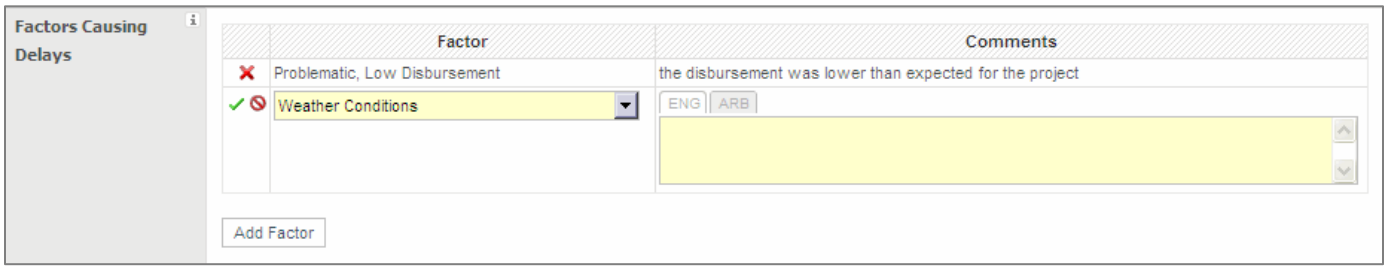

Figure 26: Adding Factors Causing Delays

2. Select the appropriate instance from the **Factor** drop-down list.
3. Provide additional **Comments** if it is necessary in the appropriate field.
4. Click ✓ **(OK)** to the left of the respective row to confirm the information input. Or, click ⊘ **(Cancel)** to cancel the operation.

8.4.2 Editing Delay Factors

In order to edit an existing delay factor record, follow the steps below:

1. Click the delay factor record that needs to be modified. This will activate the selected record.
2. Make the necessary changes.
3. Click ✓ **(OK)** to the left of the respective row to confirm the changes made. Or, click ⊘ **(Cancel)** to cancel the operation.

8.4.3 Deleting Delay Factors

In order to delete an existing delay factor record, click ✗ **(Remove from the list)** to the left of the selected record.

9. NOTES AND ATTACHMENTS

In the *Notes & Attachments* section (Figure 30), you can enter additional notes and comments on the project as well as attach project documents such as the proposal and reports.

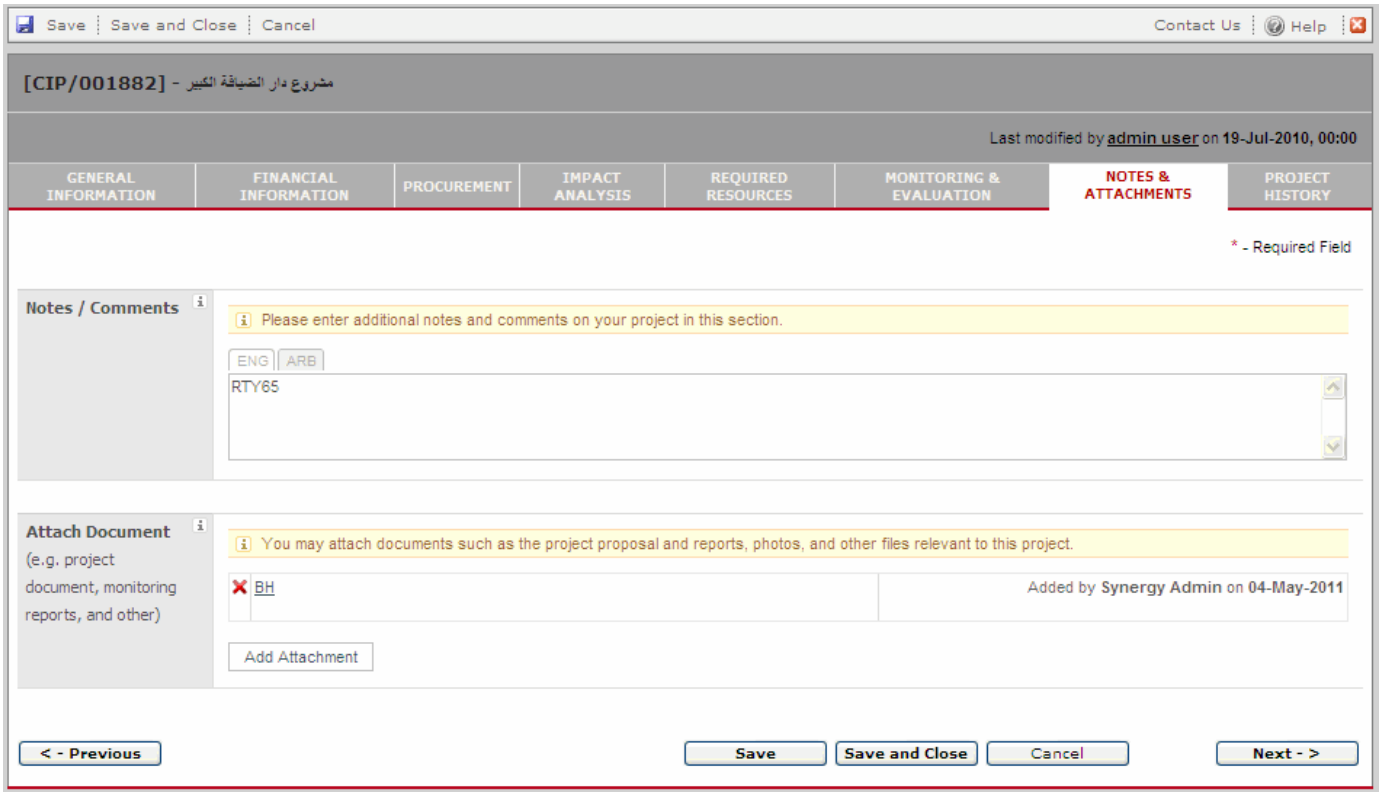

Figure 27: Notes and Attachments Section

For more information on how to provide the information requested in the *Notes and Attachments* section, refer to the table below.

Field Name	Instructions
Notes / Comments	Provide any additional comments that are relevant to the given project.
Attach Documents *(e.g. project document, monitoring reports, and other)*	Attach documents which may contain project-related information. For details on managing attachments, see Managing Attachments.

8.5 Managing Attachments

This chapter outlines how to add and delete the project attachments.

8.5.1 Adding an Attachment

In order to attach a document, follow the steps below:

1. Click the **Add Attachment** button. You will be redirected to the *Add Attachment* form (Figure 31).

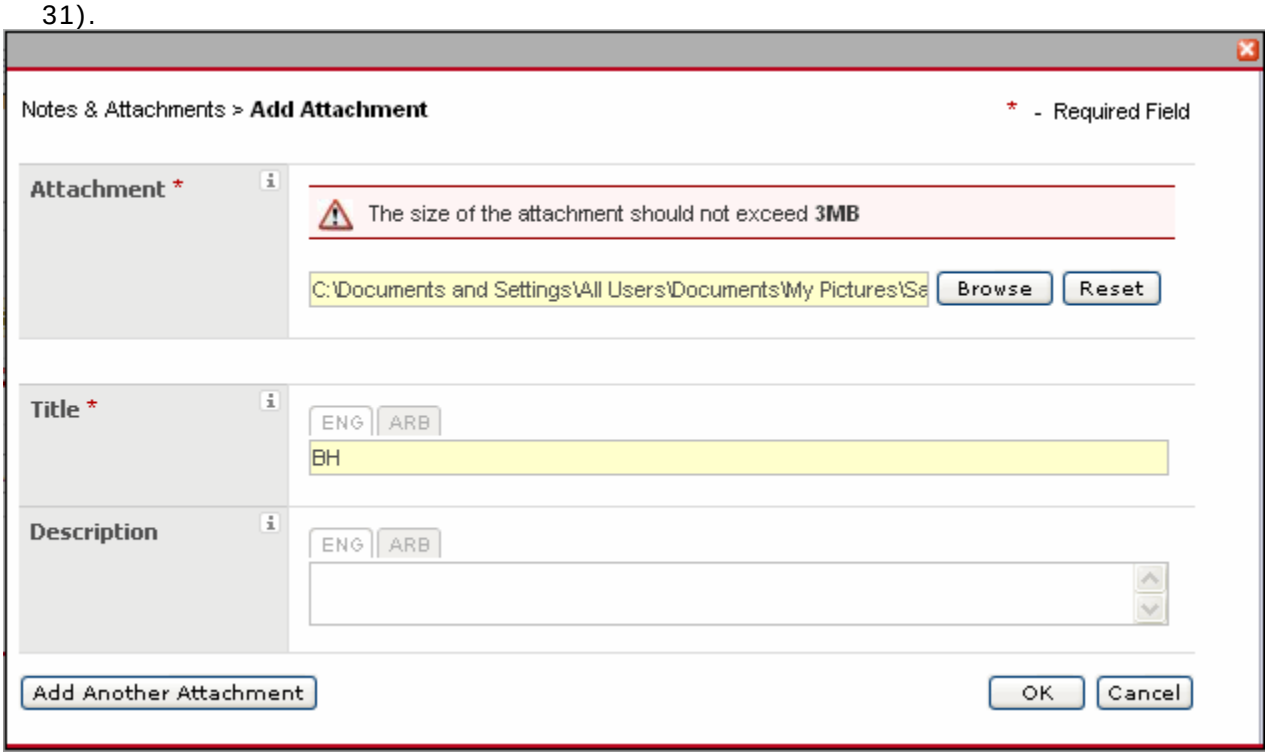

Figure 28: Add Attachment Form

2. Click the **Browse** button to locate the file that needs to be attached.

   Note: In order to remove a wrongly attached file, click the **Reset** button.

3. Enter the name for the document to be attached in the **Title** field both in English and Arabic languages. This is required.
4. Provide a brief **Description** for the document.
5. Click the **OK** button to attach the file. The attached file will appear in the respective table in the *Notes and Attachments* section.

In order to attach another file, please click the **Add Another Attachment** button and provide the information requested as described in the paragraphs above.

8.5.2 Viewing Attachment

Click on the title of the corresponding attachment. The attached file will be displayed in your browser.

8.5.3 Deleting an Attachment

In order to delete an existing attachment, click ✘ **(Remove from the list)** to the left of the selected attachment.

10. PROJECT HISTORY

In the *Project History* section (Figure 32), you can view statistical data on access to the given project.

For more information on what information you can view in the *Project History* section, refer to the table below.

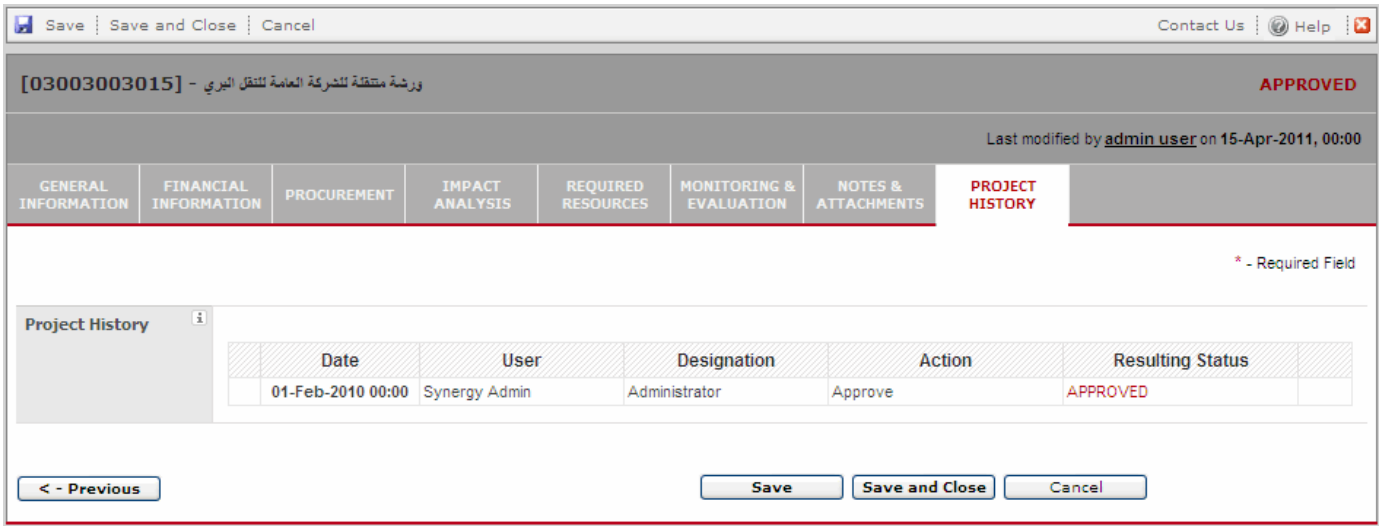

Figure 29: Project History Section

Field Name	Instructions
Project History	Provides information about the recent changes made to the corresponding project. Identifies the user who performed the changes and the date/time when the modifications were made.

11. PROJECT SUBMISSION

Depending on the user permissions, the *Project Form* provides specific actions to manage the request/project.

For details on the project revision cycle, see IDMS Analytics User Manual (REFERENCES).

Depending on the approval stage the project is in, and the permissions you have, the following actions may be available in the top toolbar of the *Project Form*:

- **Review** – The MoP Sectoral Unit takes this action when they are ready to review the submitted project request. At this stage the project request status in My Workspace of IDMS Analytics (see REFERENCES) will be marked as **UNDER PRIMARY REVIEW**. Upon completion of each review, the relevant MoP Sectoral Unit will need to provide revision related comments (see Managing Revision Comments).
- **Forward to Other Sectoral Unit for Review** - If a specialized review is necessary, the responsible MoP Sectoral Unit may take this action to forward the project request to another MoP Sectoral Unit for further advice. At this stage the project request status will be marked as **UNDER SPECIALISED REVIEW**.
- **Send Back to Primary Sectoral Unit** – The revising MoP Sectoral Unit sends back the project request to the Primary Sectoral Unit when the revision is made. Additional comments may be provided when taking this action (see Managing Revision Comments).
- **Verify** – Once the revision is done, this action verifies the project request internally within the MoP Sectoral Unit before it is gone for a negotiation with the relevant Line Ministry. Additional comments may be provided when taking this action (see Managing Revision Comments). At this stage the project request status in My Workspace will be marked as **VERIFICATION**.
- **Negotiate with Line Ministry** – This action sends the project to the negotiation with the relevant Line Ministry. Additional comments may be provided when taking this action (see Managing Revision Comments). At this stage the project request status in My Workspace will be marked as **NEGOTIATION**.
- **Accept** – This action is used to accept the project in case it was fully revised and agreed with the MoP Sectoral Unit. At this stage the project request status in My Workspace of IDMS Analytics (see REFERENCES) will be marked as **PROCESSED**, if there are enough funds for the project (as defined in the Budget Ceilings for the corresponding Executing Body, see IDMS Analytics User Manual in REFERENCES), and will be marked as **REQUIRING FUNDING** if no enough funds are available for the project.
- **Reject** – This action rejects the project request. Additional comments may be provided when taking this action (see Managing Revision Comments). At this stage the project request status in My Workspace will be marked as **REJECTED**.
- **Request Revisions** – When during negotiation additional information is required, this action is used to send the project request back for an additional revision to the MoP Sectoral Unit. Additional comments may be provided when taking this action (see Managing Revision Comments). At this stage the project request status in My Workspace will be marked as **UNDERGOING REVISIONS**.
- **Check for Funding** – This action is available when the funds requested in the project are more than those dedicated to the corresponding Executing Body. With this action, the project will be sent to the revision of the requested funds. At this stage the project request status in My Workspace will be marked as **REQUIRING FUNDING**.

- **Abandon** – This action is used in case the project needs to be abandoned due to other allocation adjustments made at any stage by either the Council of Ministers or the Parliament. For such a scenario, the system will send an email notification to the user submitting the request notifying about the project request status.
- **Approve** – This action is used to approve the submitted projects in case it was fully approved in full by the Council of Ministers and the Parliament. For such a scenario, the system will send an email notification to the user submitting the request notifying about the approval. At this stage the project request status in My Workspace of IDMS Analytics (see REFERENCES) will be marked as **APPROVED**.
- **Update Financial Progress** – This action appears for approved projects only and is used to update the project's financial progress, i.e. **Payments** and **Expenses** fields in the FINANCIAL INFORMATION section.
- **Update Physical Progress** - This action appears for approved projects only and is used to update the project's physical progress data in the MONITORING AND EVALUATION section.

11.1 Managing Revision Comments

This chapter outlines how to add, edit and delete comments made during the revision of the capital investment projects/requests. The *Comments Form* appears automatically when selecting the certain actions in the toolbar of the *Project Form* (see PROJECT SUBMISSION).

11.1.1 Adding Comment

In order to add a project/request revision comment, follow the steps below:

1. Click the **Add Comment** button at the bottom of the *Comments* form. An empty record will appear (Figure 32).

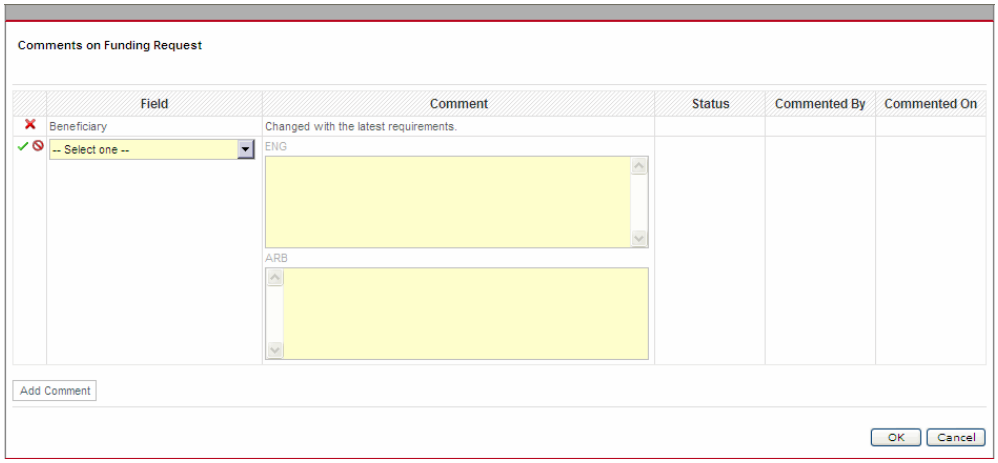

Figure 30: Adding Revision Comments

2. Select the field the revision was made on from the **Field** drop-down list. This list contains all fields available in the *Project Form*.
3. Provide **Comments** in English and Arabic languages.
4. Click ✓ **(OK)** to the left of the respective row to confirm the information input. Or, click ⊘ **(Cancel)** to cancel the operation.

11.1.2 Editing Comments

Note: Only comments made before submitting the *Comments* form can be edited. Once the revision comments are submitted, they cannot be edited again.

In order to edit an existing comment, follow the steps below:

1. Click the comment that needs to be modified. This will activate the selected record.
2. Make the necessary changes.
3. Click ✓ **(OK)** to the left of the respective row to confirm the changes made. Or, click ⊘ **(Cancel)** to cancel the operation.

11.1.3 Deleting Comments

Note: Only comments made before submitting the *Comments* form can be deleted. Once the revision comments are submitted, they cannot be deleted.

In order to delete an added comment, click ✖ **(Remove from the list)** to the left of the selected record.

12. SAVING DATA

When you have finished with data input or modification you should save your changes before you leave the page. Following options for saving the data are available both on the top and on the bottom of the page:

- **Save** - to save the data entered and to remain on the opened page.
  Note: In forms and sub-forms, clicking the **OK** button saves the changes made and navigates you to the previous screen.
- **Save and Close** - to save the information input and leave the opened page.

If you wish to cancel your changes, use the **Cancel** button.

13. REFERENCES

Please refer to the following *IDMS* related document:

- IDMS External Assistance Projects Application User Manual
- IDMS Donor Profile Application User Manual
- IDMS Indicator Application User Manual
- IDMS Analytics User Manual
- IDMS Administration Center User Manual

IRAQ DEVELOPMENT MANAGEMENT SYSTEM (IDMS)

DONOR PROFILE APPLICATION

USER MANUAL

Version 1.3

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1. INTRODUCTION

This document describes the *Donor Profile* application of the *Iraq Development Management System (IDMS)*. It provides the necessary instructions to follow during the data entry process. The document is addressed to those who will use the *IDMS* application to add or modify donor profile information.

2. OVERVIEW

The *Iraq Development Management System (IDMS)* is an automated information management system which is designed to improve efficiency and coordination of donor activities in Iraq. 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 aid data.

The main objectives of the *IDMS* is to serve as a reliable and credible source of information on overall donor contributions to Iraq's reconstruction, economic recovery and socio-economic development, as well as to support the Government in effectively managing development assistance and promoting the accountable and transparent use of resources.

In the following version of *IDMS*, the following applications are present:

- **External Assistance Projects**
- **Donor Profile**
- **Capital Investments Projects**
- **Iraq Development Projects**
- **Indicator**

The *Donor Profile* application in the *IDMS* is designed to track the information on donor organizations providing assistance to the country. Once you have accessed this application, you are able to view donor profile information and create analytical reports in the forms of Lists and Charts.

Moreover, the *Donor Profile* application contains a built-in on-line data entry subsystem, which is designed to allow managing the donors profile information filled in by the IDMS administrator remotely via Internet.

This *Donor Profile* application provides a web-based user interface and requires a web browser (Internet Explorer) pre-installed.

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

3. DONOR PROFILE DATA ENTRY FORM

In the *Donor Profile* application (Figure 1), you can provide key information about a donor organisation that acts as an originator of funds for the project. The information to be provided includes the donor organisation / agency name, points of contact within the agency, donor's funding policy, the pledges, etc.

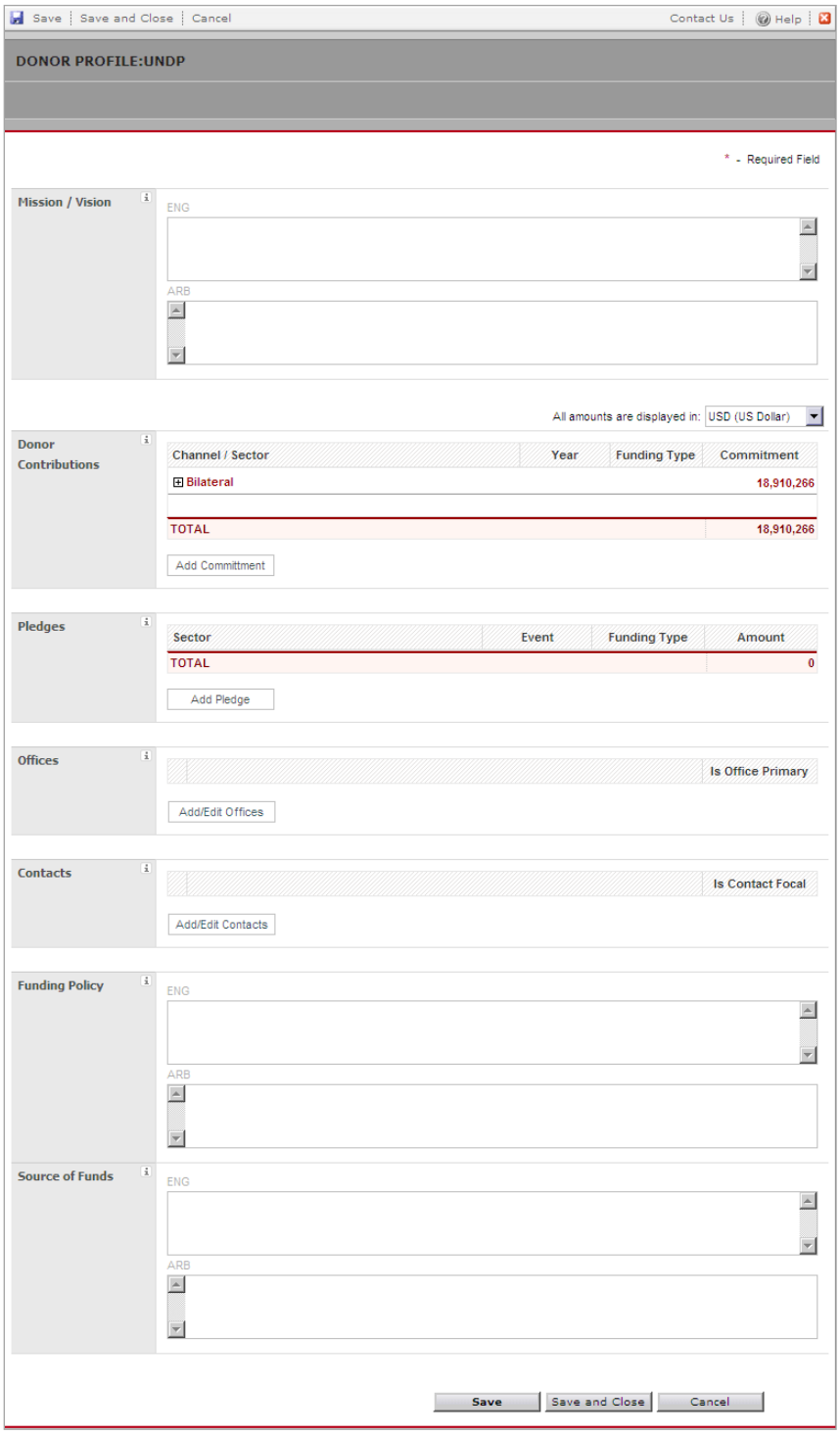

Figure 1: Donor Profile Data Entry Form

For more information on how to provide the information requested, refer to the table below:

Field Name	Instructions
Mission / Vision	Provide information about the donor organisation / agency mission and/or vision.
Donor Contributions	Provide financial information on the donor commitments. For details on managing donor contributions, see Managing Donor Contributions.
Pledges	Provide information about the pledges. For details on pledges management, see Managing Pledge Records.
Offices	Provide information about the different offices of the selected donor organisation / agency. For details on office records management, see Managing Office Records.
Contacts	Indicated the contacts for the donor organization / agency. They will be contacted with questions, suggestion, and/or comments. For details on contacts management, see Managing Contacts.
Funding Policy	Describe the funding policy of the donor organization / agency.
Source of Funds	Provide information about the source of funds of the donor organization / agency.

3.1 Managing Donor Contributions

This chapter outlines how to add, edit and delete donor contribution records.

3.1.1 Adding a Contribution Record

In order to add a commitment record, follow the steps below:

1. Click the **Add Commitment** button at the bottom of the field. You will be directed to the *Donor Contributions* form (Figure 2).

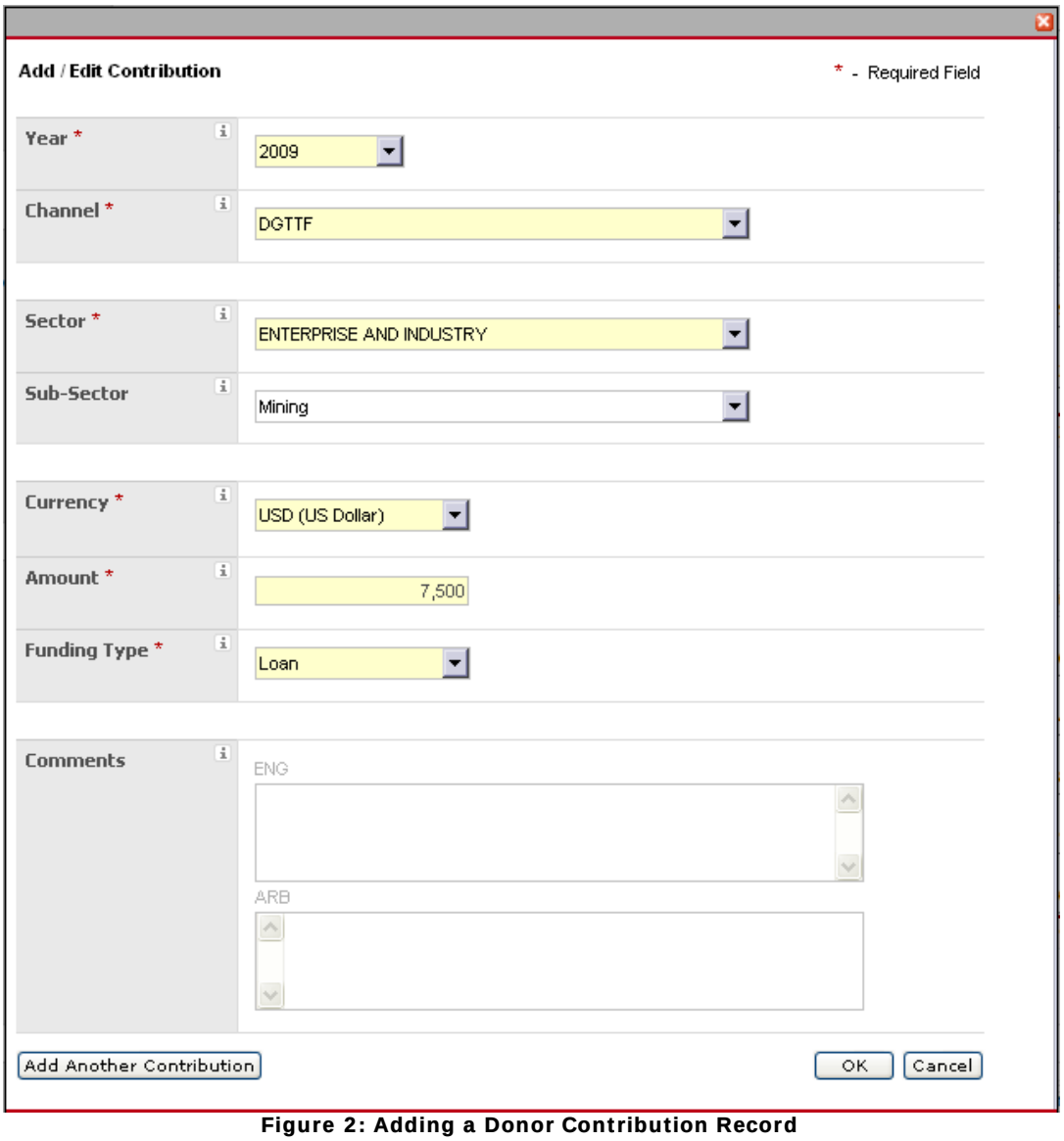

Figure 2: Adding a Donor Contribution Record

2. Provide the information requested in the form.

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Year	The year when the commitment is made. *This field is mandatory*.
Channel	The channel to which the commitment was made. *This field is mandatory*.
Sector	The sector of economy the financial means are intended for. *This field is mandatory*.
Sub-Sector	The sub-sector of economy the financial means are intended for. Please note that once you have selected the appropriate sector, the list of sub-sectors pertaining to the selected sector will appear in the **Sub-Sector** field.

Currency	The currency in which the commitment was made. *This field is mandatory*.
Amount	The commitment amount. The selected foreign currency's rate towards USD will be displayed automatically. *This field is mandatory*.
Funding Type	The type of the funding. *This field is mandatory*.
Comments	Provide optional comments both in English and Arabic, if needed.

1. Click the **OK** button to confirm the information input. Or, **Cancel** to terminate the operation.

In order to add another commitment, please click the **Add Another Contribution** button and provide the information requested as described in the paragraphs above.

3.1.2 Editing Contribution Record

In order to edit an existing record, follow the steps below:

1. Click the record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button to confirm the changes made. Or, **Cancel** to terminate the operation.

3.1.3 Deleting Contribution Record

In order to delete an existing record, click ✖ **(Remove from the list)** to the left of the selected record.

3.2 Managing Pledge Records

This chapter outlines how to add, edit and delete pledge records.

3.2.1 Adding a Pledge Record

In order to add a new pledge record, follow the steps below:

1. Click the respective **Add Pledge** button at the bottom of the field. You will be directed to the **Pledges** sub-section (Figure 3).

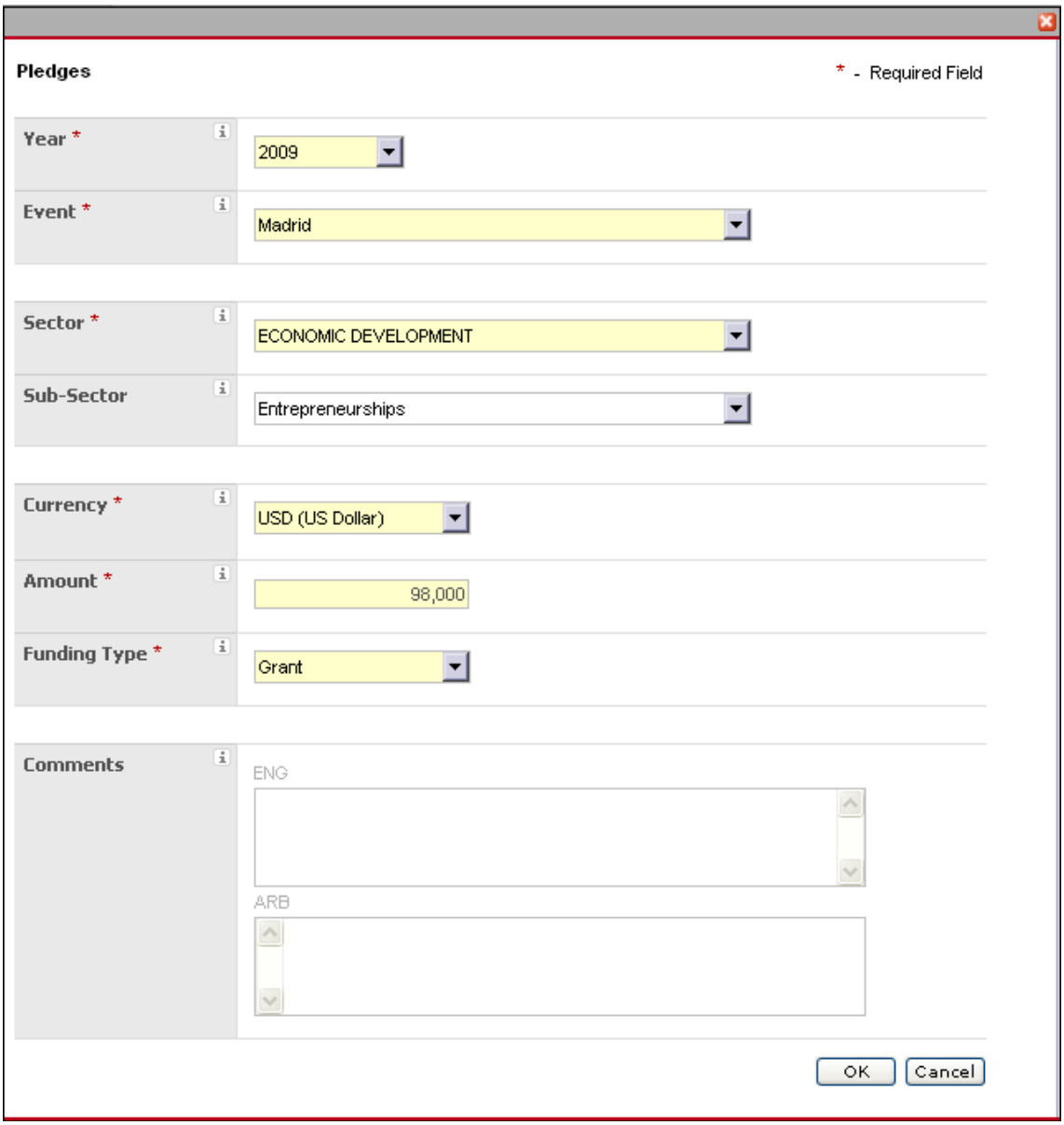

Figure 3: Adding a New Pledge Record

2. Provide the information requested in the form.

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Year	The year when the pledge is made. *This field is mandatory*.
Event	Select the event during which the pledge was made. *This field is mandatory*.
Sector	The sector of economy the financial means are intended for. *This field is mandatory*.
Sub-Sector	The sub-sector of economy the financial means are intended for. Please note that once you have selected the appropriate sector, the

	list of sub-sectors pertaining to the selected sector will appear in the **Sub-Sector** field.
Currency	The currency in which the pledge was made. *This field is mandatory*.
Amount	The pledge amount. The selected foreign currency's rate towards USD will be displayed automatically. *This field is mandatory*.
Funding Type	The type of the funding. *This field is mandatory*.
Comments	Provide optional comments both in English and Arabic, if needed.

3. Click the **OK** button to confirm the information input. Or, **Cancel** to terminate the operation.

3.2.2 Editing Pledge Record

In order to edit an existing pledge record, follow the steps below:

1. Click the pledge record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button to confirm the changes made. Or, **Cancel** to terminate the operation.

3.2.3 Deleting Pledge Record

In order to delete an existing pledge record, should click ✘ **(Remove from the list)** to the left of the selected record.

3.3 Managing Office Records

This chapter outlines how to add, edit and delete office records.

3.3.1 Adding an Office Record

In order to add a new office record, follow the steps below:

1. Click the **Add/Edit Offices** button at the bottom of the field. You will be directed to the **Add/Edit Offices** sub-section (Figure 4).
2. Specify the **Office Name** both in English and Arabic in the respective fields.
3. Provide the postal address for the office both in English and Arabic in the **Address** field.
4. Indicate the **Phone Number** of the office in the respective field.
5. Specify the e-mail address of the office in the **E-mail** field.
6. Click the **OK** button to confirm the information input. Or, **Cancel** to terminate the operation.

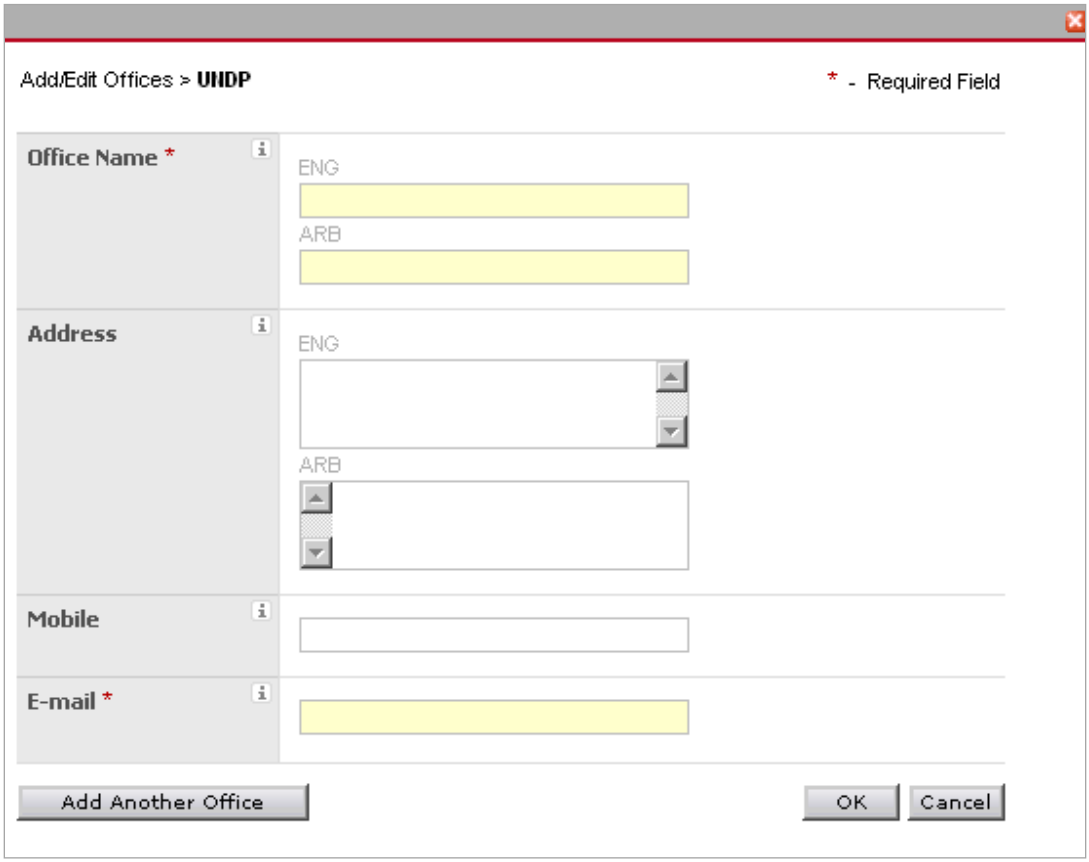

Figure 4: Adding a New Office Record

In order to add another office record, please click the **Add Another Office** button and provide the information requested as described in the paragraphs above.

3.3.2 Editing Office Record

In order to edit an existing office record, follow the steps below:

1. Click the donor organization office record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button to confirm the changes made. Or, **Cancel** to terminate the operation.

3.3.3 Deleting Office Record

In order to delete an existing office record, click ✘ **(Remove from the list)** to the left of the selected record.

3.4 Managing Contacts

This chapter outlines how to add, edit and delete contacts.

3.4.1 Adding an Contact

In order to add a donor organisation contact record, follow the steps below:

1. Click the **Add/Edit Contacts** button at the bottom of the field. You will be directed to the *Add/Edit Contacts* form (Figure 5).

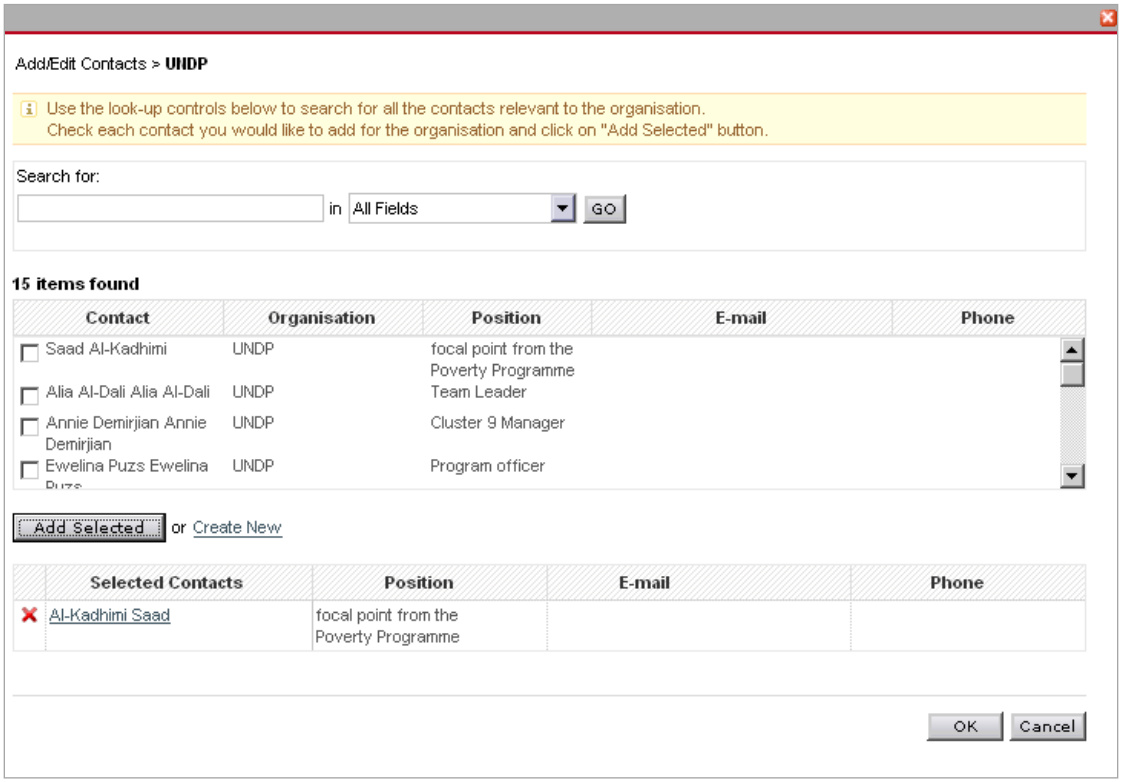

Figure 5: Contacts sub-section

2. Use the look-up controls to search for all the contacts relevant to the organisation.
3. Add the selected contact(s) by ticking the check-box to the left of the contact name and clicking the **Add Selected** button. The selected contact(s) will appear in the *Selected Contacts* table.

   Note: If the desired contact does not exist, you can create a new contact record. For details, see Creating a New Contact.
4. In the DONOR PROFILE DATA ENTRY FORM specify which contact(s) serves as the focal point for the donor organisations. The data will be added to the records of the donor organisation(s) that the focal point(s) represent.

3.4.2 Creating a New Contact

In order to add a new contact, follow the steps below:

1. Click the **Create New** link at the bottom of the *Contacts* table. A new window will appear (Figure 6).

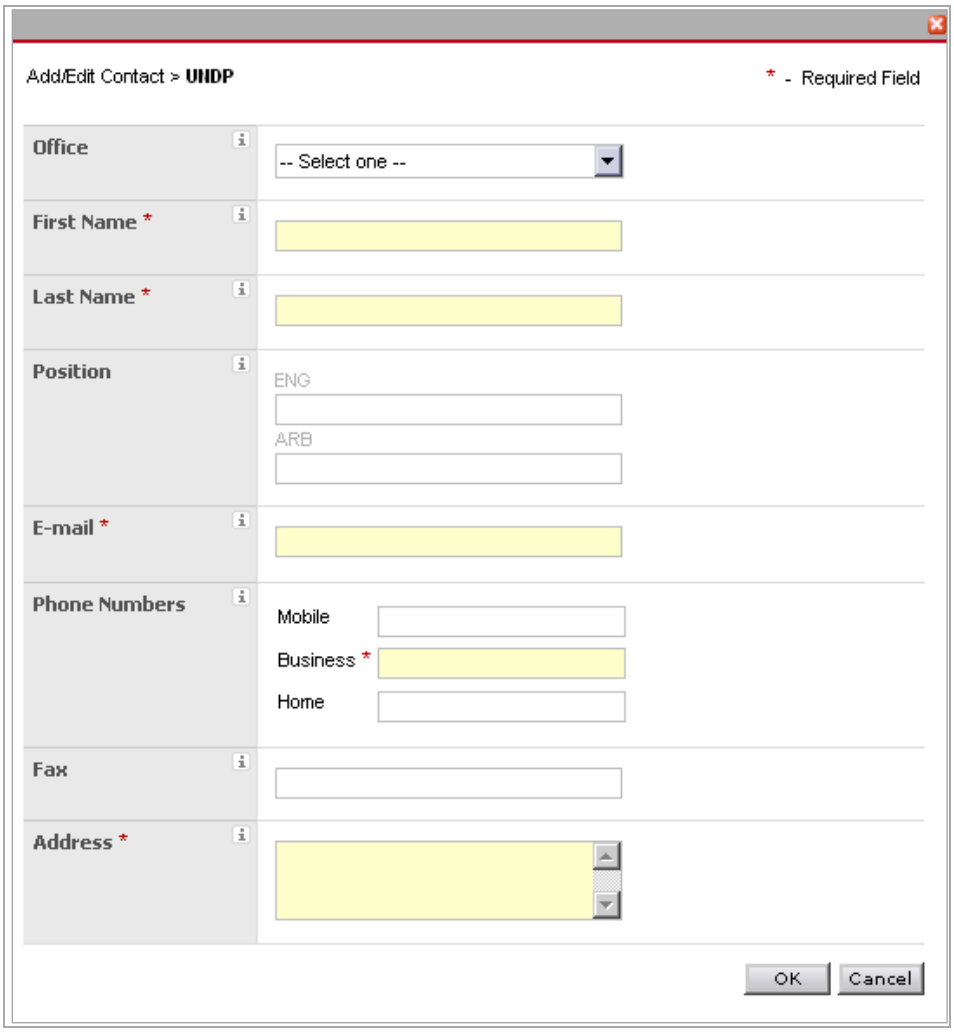

Figure 6: Adding a New Contact Record

2. Indicate the donor organisation **Office** the contact refers to.
3. Fill in the contact's **First Name** and **Last Name** in the respective fields.
4. Specify the contact's position, **E-mail** address in the appropriate field.
5. Indicate the contact's **Phone Number** (mobile, business, and home) and **Fax** number in the respective fields.
6. Provide the contact's address in the **Address** field.
7. Click the **OK** button to confirm the information input. Or, **Cancel** to terminate the operation.

3.4.3 Editing Contact Record

In order to edit an existing donor organisation contact record, follow the steps below:

1. Click the contact record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button to confirm the changes made. Or, **Cancel** to terminate the operation.

3.4.4 Deleting Contact Record

In order to delete an existing donor organisation contact record, should click ✖ **(Remove from the list)** to the left of the selected record.

4. SAVING DATA

When you have finished with data input or modification you should save your changes before you leave the page. Following options for saving the data are available both on the top and on the bottom of the page:

- **Save** - to save the data entered and to remain on the opened page.
  Note: In sub-sections, clicking the **OK** button will save the changes made and to navigate you to the previous screen.
- **Save and Close** - to save the information input and leave the opened page.

If you wish to cancel your changes, use the **Cancel** button.

5. REFERENCES

Please refer to the following *IDMS* related documents:

- IDMS External Assistance Projects Application User Manual
- IDMS Capital Investments Projects Application User Manual
- IDMS Indicator Application User Manual
- IDMS Analytics User Manual
- IDMS Administration Center User Manual

IRAQ DEVELOPMENT MANAGEMENT SYSTEM (IDMS)

EXTERNAL ASSISTANCE PROJECTS APPLICATION

USER MANUAL

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1. INTRODUCTION

This document describes the *External Assistance Projects* application of the *Iraq Development Management System (IDMS).* It provides the necessary instructions to follow during the data entry process. The document is addressed to those who will use the *IMDS* application to add or modify project information.

2. OVERVIEW

The *Iraq Development Management System (IDMS)* is an automated information management system which is designed to improve efficiency and coordination of donor activities in Iraq. 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 aid data.

The main objectives of the *IDMS* is to serve as a reliable and credible source of information on overall donor contributions to Iraq's reconstruction, economic recovery and socio-economic development, as well as to support the Government in effectively managing development assistance and promoting the accountable and transparent use of resources.

In the following version of *IDMS*, the following applications are present:

- **External Assistance Projects**
- **Donor Profile**
- **Capital Investments Projects**
- **Iraq Development Projects**
- **Indicator**

The *External Assistance Projects* application in the *IDMS* is designed to track the projects that have been approved for the implementation and the projects that are currently being implemented. 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 forms of Lists, Charts, and Maps.

Moreover, the *External Assistance Projects* application contains a built-in on-line data entry subsystem, which is designed to allow entering the project related data remotely via Internet. The online data entry form allows for entering new and modifying the existing information.

The *External Assistance Projects* application provides a web-based user interface and requires a web browser (Internet Explorer) pre-installed.

In the current design, the *External Assistance Projects* application consists of the following sections:

- **General Information** section requires general information on the project in this section. This includes the title; the project description; the start date; the end date; the duration. Additionally, information about sector(s) and sub-sector(s) that best describe the project and the location(s) of the project are defined here.

- **Organisations and Contacts** section requires information about the entity(ies) in the recipient country with overall responsibility for the implementation of the given project. Additionally, contacts within the selected organisations that serve as focal points for the project are defined here.

- **Financial Information** section requires information about the project costs and funding. The expected costs over time using the selected currency should be defined. All financial

transactions are also to be recorded here.

- **Project Outputs** section requires information about the key performance indicators, factors that may cause the delay in the project implementation, etc.

- **Paris Declaration Indicators** section requires information related to the Paris Declaration on Aid Effectiveness so that the commitments of both the Government and its partners to ensure more effective aid management can be monitored in line with the indicators included in the Declaration.

- **Notes and Attachments** section requires additional comments / notes about the project. You may also attach project documents, monitoring reports and other relevant documentation.

- **Project History** section displays statistical data on access to the given project.

To navigate from one section to another, use of the respective tab controls found at the top of the screen. Also, click the respective **Next / Previous** button at the bottom of the screen to go to the next / previous section.

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

3. GENERAL INFORMATION

In the *General Information* section (Figure 1), you can access general information about the project. This includes the project title, description, start date and end date or duration, the implementation status of the project, etc.

Figure 1: General Information Section

For more information on how to provide the information requested in the *General Information* section, see the table below:

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Title	Enter the official name of the project used in project documents and approved by the competent agency. In case that a pre-determined official title does not exist, please create a one-line synopsis of the project. Please note that the title is the information that users see when displaying the search results. *This field is mandatory.*
Description	Provide a short overview of the project, understandable for the general public. It may include objectives of the project, mention of the main project activities, and rationale behind needs, activities, outputs and outcomes. The project description, should preferably consist of: ● Contexts/background, ● Goals/objectives, ● Key activities/components.
Alignment with NDP	Indicate the alignment with NDP. For details on how to manage alignments, see Managing Alignments with NDP.
Justification / Rationale	Reasoning that justifies the implementation of the project.
Programme	Select the appropriate instance for the umbrella program (Grant in Kinds, Project Aid, NGO Support Program, etc.) under which the project falls from the drop-down list.
ISRB Approval Status	Specify the status of the project approval (e.g. submitted, under review, sent back for resubmission, etc.) by selecting the appropriate instance from the drop-down list.
Implementation Status	Specify the implementation (e.g. ongoing, completed, etc.) status of the project by selecting the appropriate instance from the drop-down list.
Start Date	Define the date on which the implementation of project activities begins or is supposed to begin. Calendar popup is available for this field, see Figure 2: Calendar.
Original End Date	Indicate the date by which implementation of project activities is to be completed according to the approved project document. Calendar popup is available for this field, see Figure 2: Calendar.
Extended End Date	Indicate the date by which implementation of project activities is to be completed. Calendar popup is available for this field, see Figure 2: Calendar. **Note:** If the project end date is provided, the project duration is automatically calculated by the system as soon as you navigate away from the field.

Duration	Indicate the actual or planned time-span for the project implementation. **Note:** If the project duration is provided, the project end date is automatically calculated by the system as soon as you navigate away from the field.
Progress	Indicate the approximate percentage of the progress made for the implementation of the project.
Comment on Progress	Add comments on the status of project implementation.
Sectors *% distribution of funds*	Indicate the Sectors/Sub-sectors of the economy to which the project contributes. Also, specify the portion (in %) of the total project cost that will be contributed to support the current sector/sub-sector. **Note:** When indicating what % of the total project cost will be spent in a definite sector/sub-sector, choose between two options: • Enter the approximate project cost distribution across Sectors/Sub-sectors. • Choose to evenly distribute the project cost across all Sectors/Sub-sectors. Please note that the selection of the Sectors/Sub-sectors is carried out in a Step-by-Step way. Once the appropriate sector of economy is selected, the list of all sub-sectors pertaining to the selected sector becomes available in the *Sub-sector* field. For details on sectors management, see Managing Sectors.
Locations *% distribution of funds*	Specify the geographic locations in the recipient country that are intended to benefit from the project activities. Also, specify the portion (in %) of the total project cost that will be contributed to support the current location. **Note:** When indicating what % of the total project cost will be spent in a definite location, choose between two options: • Enter the approximate project cost distribution across Governorates/Qadhas/Nahias. • Choose to evenly distribute the project cost across all Governorates/Qadhas/Nahias. Please note that the selection of the project location is carried out in a Step-by-Step way. Once the appropriate governorates are selected, the list of all qadhas pertaining to the selected governorate becomes available in the *Qadha* field. For details on locations management, see Managing Locations.
Assistance Types	Indicate the type of the assistance offered by selecting the appropriate instance from *Available* panel. Please, note that it is possible to select several available instances (Figure 3). Click the **(Select)** button. The selected instances will appear in the *Selected* panel. In order to remove the selected instances, select the instance that needs to be removed from the *Selected* panel. Click the **(Unselect)** button. The selected instance will be removed from the *Selected* panel.

Procurement Methods	Procurement methods refer to the kind of assistance offered by the assistance type. Indicate the procurement methods offered by selecting the appropriate instance from *Available* panel. Please, note that it is possible to select several available instances (Figure 4). Click the **(Select)** button. The selected instances will appear in the *Selected* panel. In order to remove the selected instances, select the instance that needs to be removed from the *Selected* panel. Click the **(Unselect)** button. The selected instance will be removed from the *Selected* panel.
Project Types	Indicate the project type (e.g. capacity building, construction, etc.) the given project falls under. **Note:** When indicating what % of funds will be spent on a definite project type, choose between two options: • Enter the approximate funds distribution across the project types. • Choose to evenly distribute funds across all project types. For details on project types' management, see Managing Project Types.

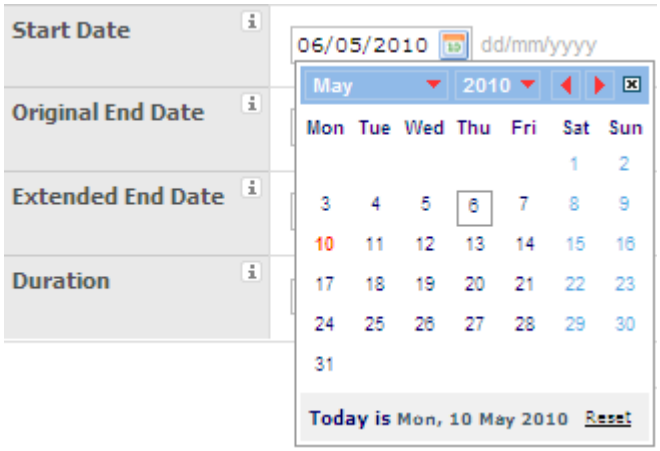

Figure 2: Calendar

Figure 3: Selecting Type of Assistance

Figure 4: Selecting Procurement Methods

3.1 Managing Alignments with NDP

This chapter outlines how to add, edit and delete alignments with NDP.

3.1.1 Adding an Alignment

In order to add a new record, follow the steps below:

1. Click the **Add** button at the bottom of the field. An empty record will appear (Figure 5).

Figure 5: Adding Alignment with NDP

2. Select the appropriate sector from the *Sector* drop-down list.
3. Select the appropriate objective from the *Objective* drop-down list.
4. Select the appropriate means from the *Means of Achieving the Objective* drop-down list.
5. Click ✓ **(OK)** to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to cancel the operation.

3.1.2 Editing Alignments

In order to edit an existing record, follow the steps below:

1. Click the record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click ✓ **(OK)** to the left of the respective row to confirm the changes made. Or, click ⊘ **(Cancel)** to cancel the operation.

3.1.3 Deleting Alignments

In order to delete an existing record, click ✖ **(Remove from the list)** to the left of the selected record.

3.2 Managing Sectors

This chapter outlines how to add, edit and delete sectors/sub-sectors.

3.2.1 Adding a Sector / Sub-sector

In order to add a new sector/sub-sector record, follow the steps below:

1. Click the **Add** button at the bottom of the field. An empty record will appear (Figure 6).

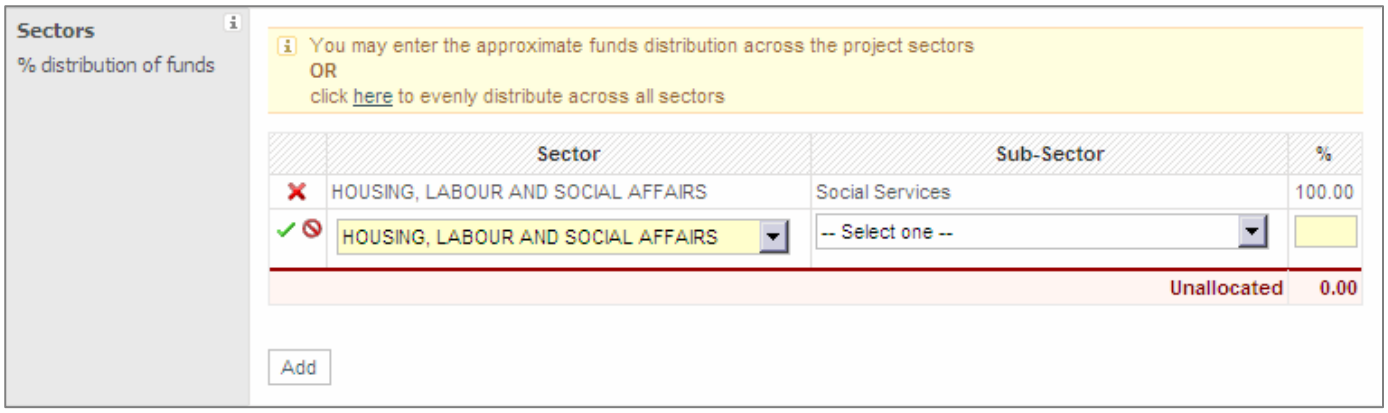

Figure 6: Adding Sectors

2. Select the appropriate sector from the **Sector** drop-down list containing all sectors stored in the database.
3. Select the appropriate sub-sector from the **Sub-Sector** drop-down list. This is optional.
4. Define what % of the total cost will be spent in the particular sector/sub-sector.
5. Click ✓ **(OK)** to the left of the record to confirm the information input. Or, click the ⊘ **(Cancel)** to cancel the operation.

3.2.2 Editing Sectors / Sub-sectors

In order to edit an existing sector/sub-sector record, follow the steps below:

1. Click the sector/sub-sector record that needs to be modified. This will activate the selected

record.

2. Make the appropriate changes in the data displayed.
3. Click ✓ **(OK)** to the left of the respective row to confirm the changes made. Or, click ⊘ **(Cancel)** to cancel the operation.

3.2.3 Deleting Sectors/Sub-sectors

In order to delete an existing sector/sub-sector record, click ✖ **(Remove from the list)** to the left of the selected record.

3.3 Managing Locations

This chapter outlines how to add, edit and delete locations.

3.3.1 Adding a Location

In order to add a new location record for the project, follow the steps below:

1. Click the **Add** button at the bottom of the field. An empty record will appear (Figure 7).

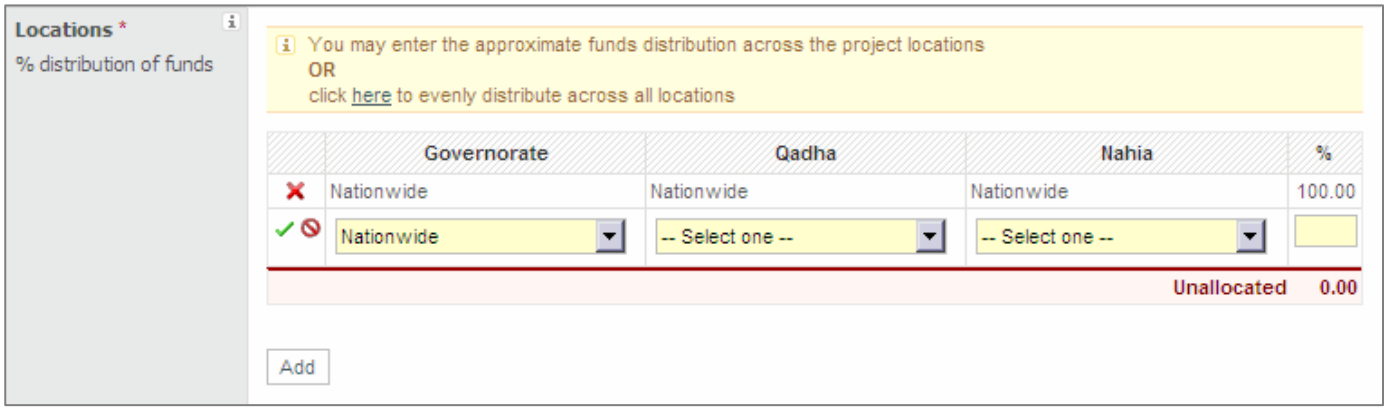

Figure 7: Adding Locations

2. Select the appropriate governorate from the **Governorate** drop-down list. Indicate the appropriate qadha by selecting the respective instance from the **Qadhas** drop-down list. Specify the nahia by selecting the respective instance from the **Nahias** drop-down list.
3. Define what % of the total cost will be spent in the particular location.
4. Click ✓ **(OK)** to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to cancel the operation.

3.3.2 Editing Locations

In order to edit an existing location record, follow the steps below:

1. Click the location record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click ✓ **(OK)** to the left of the respective row to confirm the changes made. Or, click ⊘ **(Cancel)** to cancel the operation.

3.3.3 Deleting Locations

In order to delete an existing location record, click ✖ **(Remove from the list)** to the left of the selected record.

3.4 Managing Project Types

This chapter outlines how to add, edit and delete project types.

3.4.1 Adding a Project Type

In order to add a new project type record, follow the steps below:

1. Click the **Add** button at the bottom of the field. An empty record will appear (Figure 8).

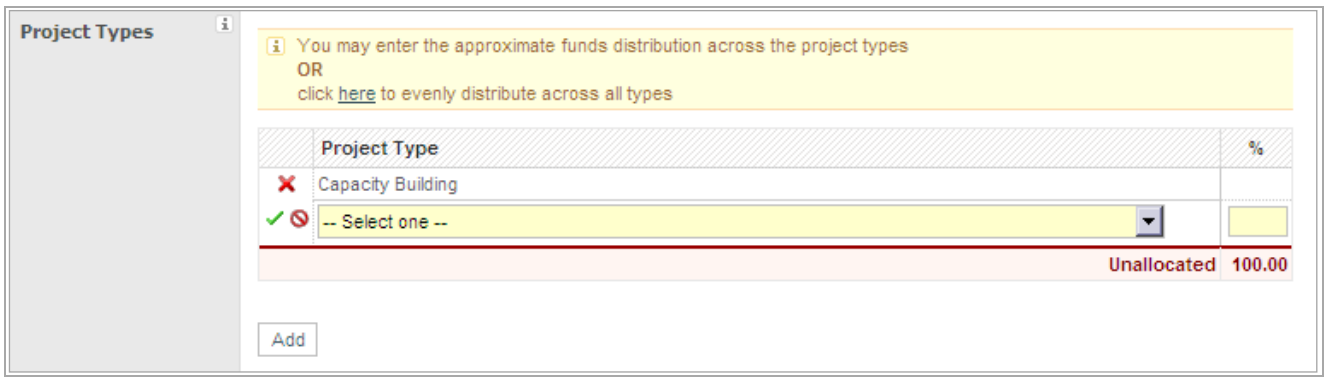

Figure 8: Selecting Project Types

2. Select the appropriate **Project type**.
3. Define what % of the funds will be distributed to the particular project type.
4. Click ✓ **(OK)** button to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to cancel the operation.

3.4.2 Editing Project Types

In order to edit an existing project type record, follow the steps below:

1. Click the record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click ✓ **(OK)** to the left of the respective row to confirm the changes made. Or, click ⊘ **(Cancel)** to cancel the operation.

3.4.3 Deleting Project Types

In order to delete an existing project type record, ✖ **(Remove from the list)** to the left of the selected record.

4. ORGANISATIONS & CONTACTS

In the *Organisations & Contacts* section (Figure 9), you can provide information about the entity(ies) in the recipient country with overall responsibility for the implementation of the given project. Additionally, you should specify the contacts within the selected organisations that serve as focal points for the project.

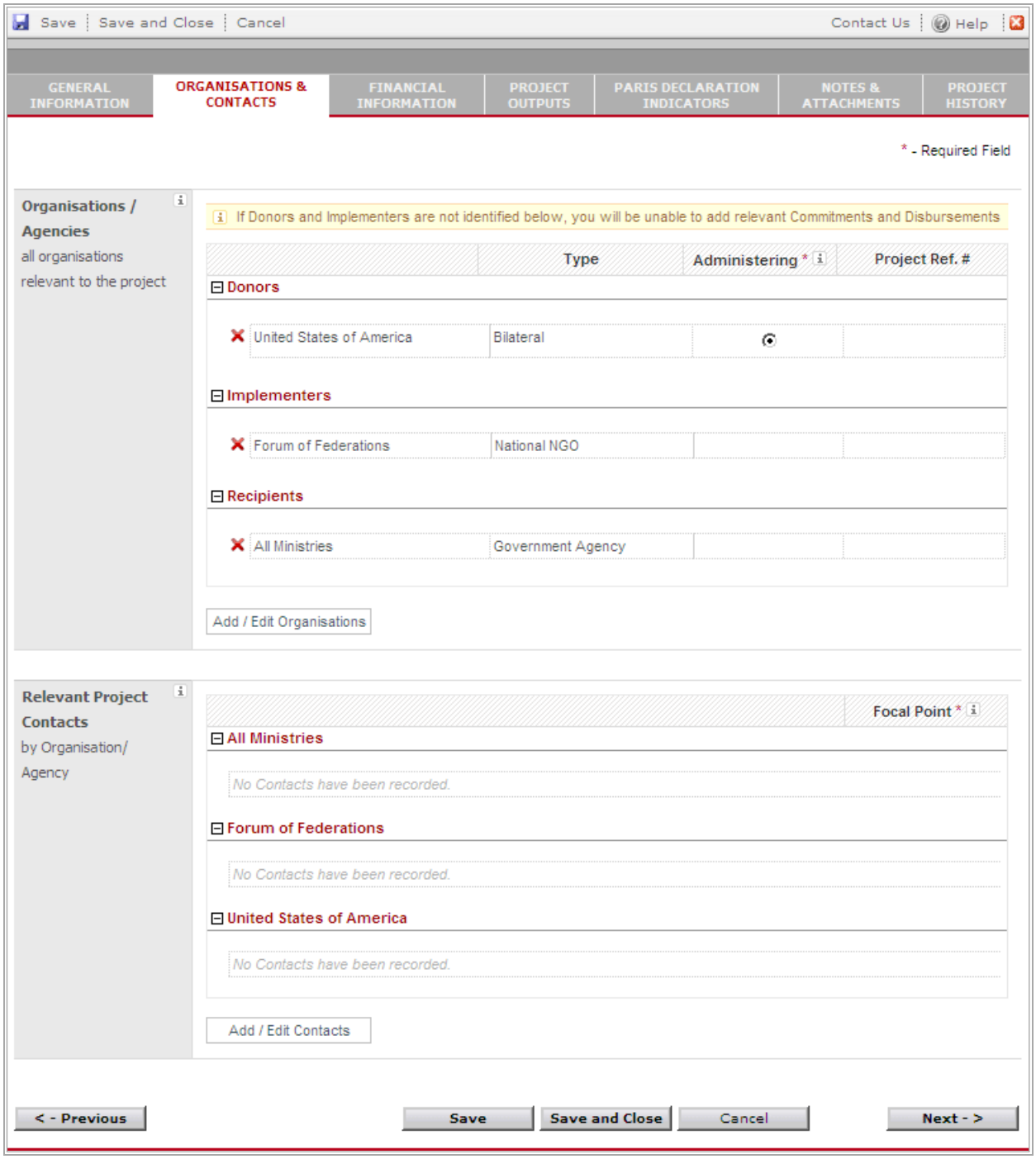

Figure 9: Organisations & Contacts Section

For more information on how to provide the information requested in the *Organisations & Contacts* section, see the table below:

Field Name	Instructions
Organisations / Agencies *all organisations relevant to the project*	Specify all the organisations that are relevant to the project according to the role they play in the project implementation. For details on how to manage organisation, see Managing Organisations.
Relevant Project Contacts *by Organisation/Agency*	Specify the contact for the Project per Organisation/Agency that is relevant to the project (as selected before). **Note:** You will not be able to add a project contact unless at least one organisation record is indicated. For details on how to manage a contact, see Managing Contacts.

4.1 Managing Organisations

This chapter outlines how to add, edit and delete organisation records.

4.1.1 Adding an Organisation Record

In order to add an organisation record, follow the steps below:

1. Click the **Add/Edit Organisations** button at the bottom of the field. You will be redirected to the *Add/Edit Organisations* form (Figure 10).

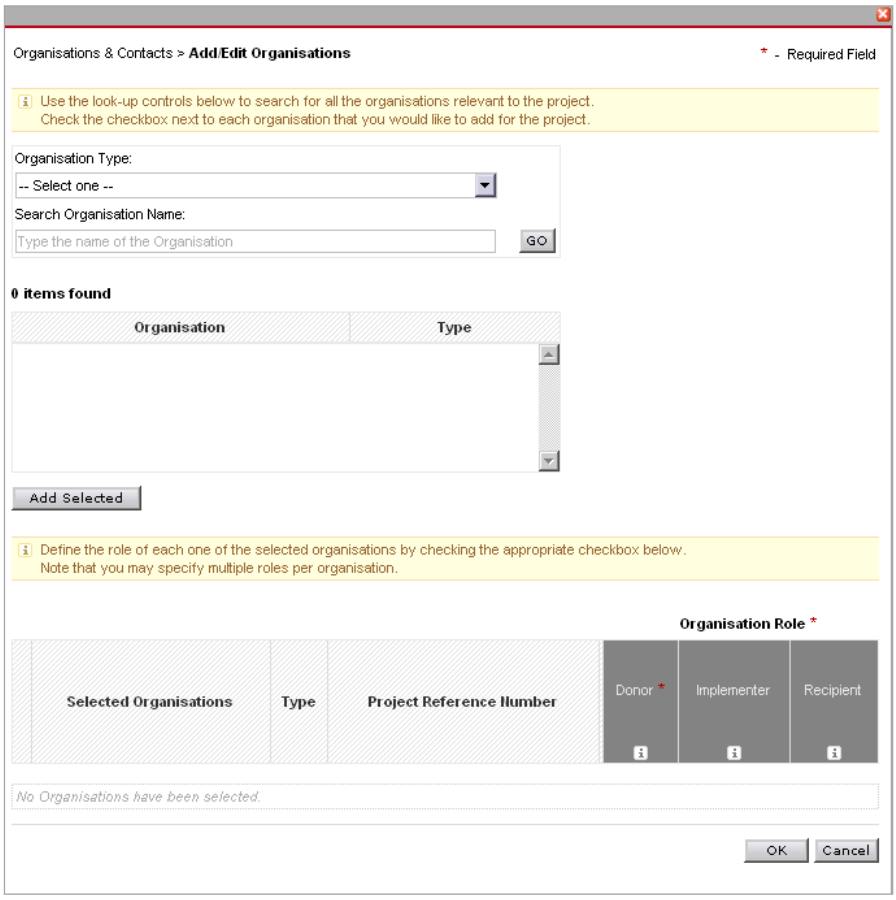

Figure 10: Add/Edit Organisations sub-section

2. Indicate the type (Academic Institutions, Bilateral, Government Agency, etc.) of the organisation being added by selecting the appropriate instance from the drop-down list (Figure 11). All the organisations matching the selection will be displayed in the *Organisations* table.

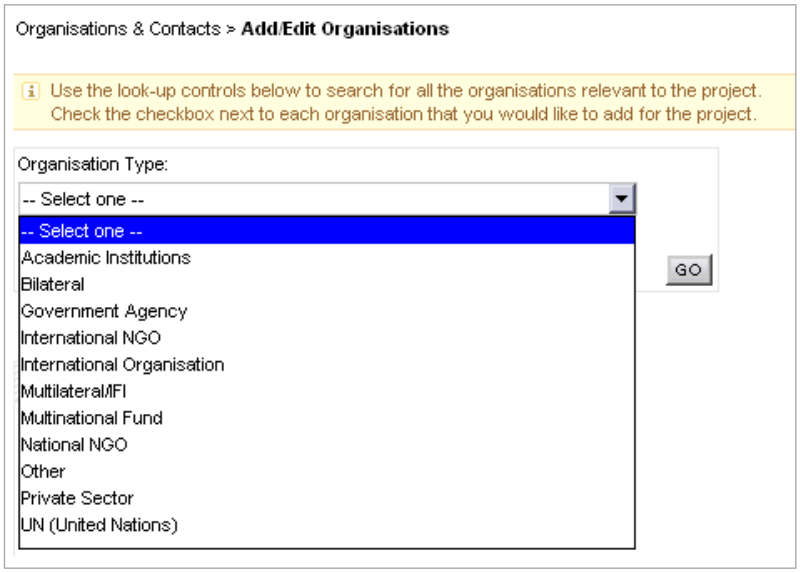

Figure 11: Displaying the List of Organisations

Note: To make it easier to locate the appropriate organisation in the long list, the system has a search capability. To find the relevant organisation, enter the organisation name in the *Search Organisation Name* field and click the **GO** button. The list of all organisations matching the criteria will be displayed in the *Organisations* table.

3. Add the selected organisation(s) as one(s) relevant to the project by ticking the check-box to the left of the organisation name and clicking the **Add Selected** button. The selected organisation(s) will appear in the *Selected Organisations* table (Figure 12).

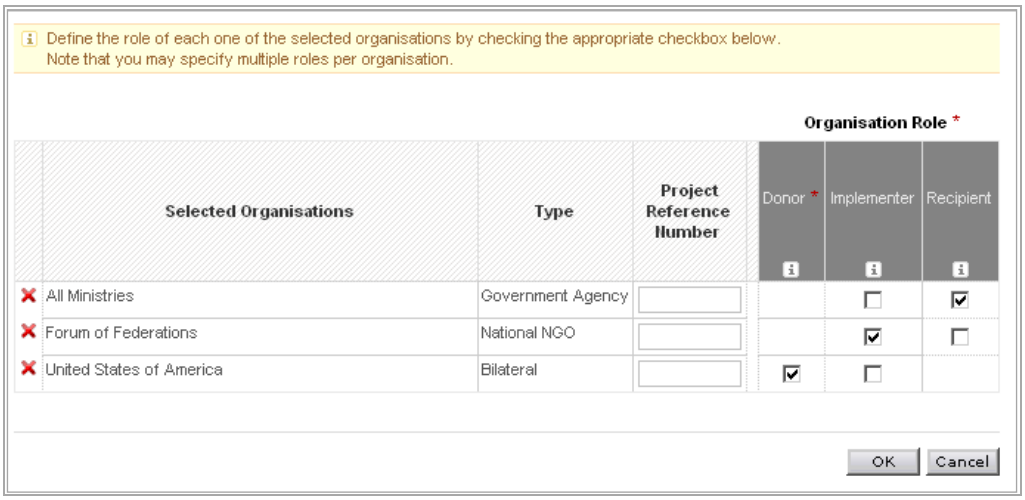

Figure 12: Selecting Organisations for the Project

4. For each of the selected organisation provide additional information (reference number assigned to the project by the given organisation, whether the selected organisation is the funding agency for the project or its Implementer, etc.) as applicable.

5. Click the **OK** button to return to the *Organisations & Contacts* section, where the selected

organisations will appear in the respective fields according to their roles. Or, click **Cancel** to discard the changes.

4.1.2 Editing Organisation Records

In order to edit the information provided for each of the selected organisations, follow the steps below:

- Click the **Add/Edit Organisations** button at the bottom of the field. You will be redirected to the *Add/Edit Organisations* sub-section where the provided information for the selected organisation(s) can be edited.
- Make the appropriate changes.

4.1.3 Deleting Organisation Records

In order to remove an organisation, click ✘ **(Remove from the list)** to the left of the organisation name.

4.2 Managing Contacts

This chapter outlines how to add, edit and delete contacts in the organisations.

4.2.1 Adding a Contact

In order to specify a contact within the organisation, follow the steps below:

1. Click the **Add/Edit Contacts** button at the bottom of the field. You will be redirected to the *Contacts* form (Figure 13).

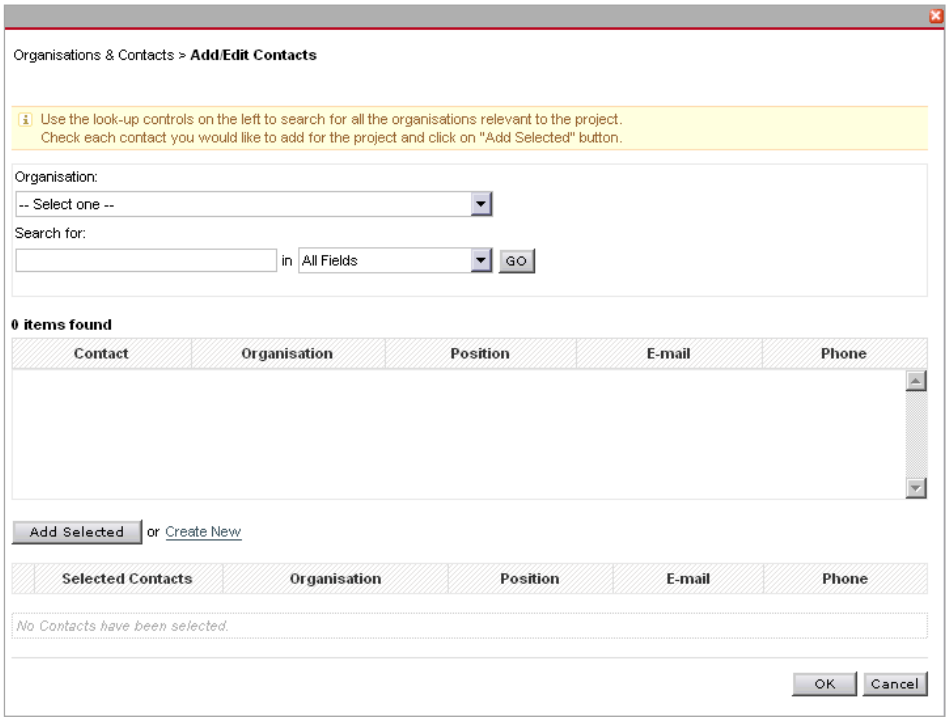

Figure 13: Project Contacts Sub-section

2. Select the organisation/agency to add a contact record for from the *Organisation* drop-down list. Please note that the list contains only those organisations that have been specified in the previous section. The list of all existing contacts within the selected organisation will be displayed in the *Contacts* table.
3. Locate the appropriate contact(s) in the list displayed.

   Note: To make it easier to locate the appropriate contact in the long list, the system has a search capability. To find the relevant contact, enter the search criteria in the respective field and define what field to look in. Then click the **GO** button. The list of all contacts matching the criteria will be displayed in the *Contacts* table.
4. Add the selected contact(s) by ticking the check-box to the left of the contact name and clicking the **Add Selected** button. The selected contact(s) will appear in the *Selected Contacts* table.

   Note: If the desired contact does not exist, you can create a new contact record.

4.2.2 Creating a New Contact

In order to add a new contact, follow the steps below:

1. Click the **Create New** link at the bottom of the *Contacts* table. A new window will appear (Figure 14).

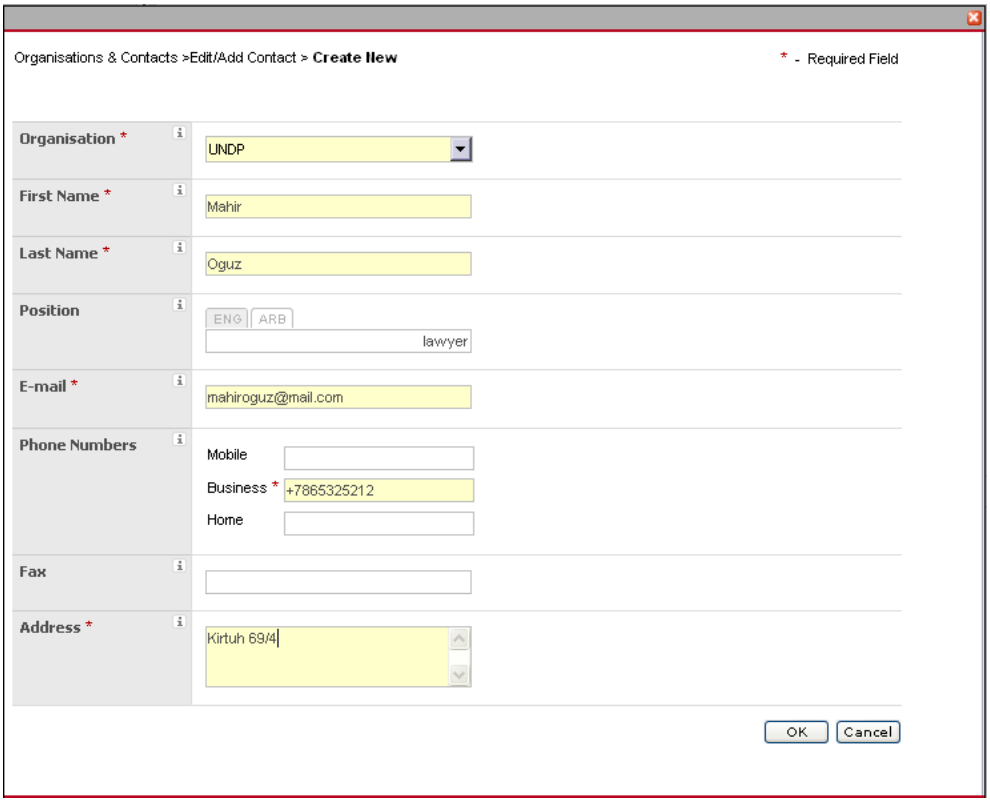

Figure 14: Creating a New Contact

2. Indicate the organisation the contact represents by selecting the appropriate instance from the *Organisation* drop-down list. Please note that the list contains only those organisations that have been specified in the previous section.
3. Fill in the contact's first name and last name in the respective fields.
4. Indicate the position the contact occupies in the organisation in the *Position* title field.

5. Specify the contact's e-mail address in the appropriate field.
6. Indicate the contact's phone (mobile, business, and home) and fax numbers in the respective fields.
7. Provide the contact's address in the *Address* field.
8. Click the **OK** button to return to the *Organisations & Contacts* section, where the selected contacts will appear in the respective fields according to the organisations they represent.
9. Specify which contact(s) serves as the focal point for the organisations. The data will be added to the records of the organisation(s) that the focal point(s) represent.

4.2.3 Editing Contacts

In order to edit the information provided for each of the selected contacts, follow the steps below:

1. Click the **Add /Edit Contact** button at the bottom of the field. You will be redirected to the *Contacts* sub-section information provided for the selected contact(s) is provided.
2. Make the appropriate changes.

4.2.4 Deleting Contacts

In order to delete a contact, click ✘ **(Remove from the list)** to the left of the selected contact record.

5. FINANCIAL INFORMATION

In the *Financial Information* section (Figure 15), information about project costs, commitments and disbursements and funds contributed by Iraq Regional Government can be defined. Additionally, here you may provide expected costs over time using the selected currency and the information for each funding agency – implementer combination and for funds committed and disbursed.

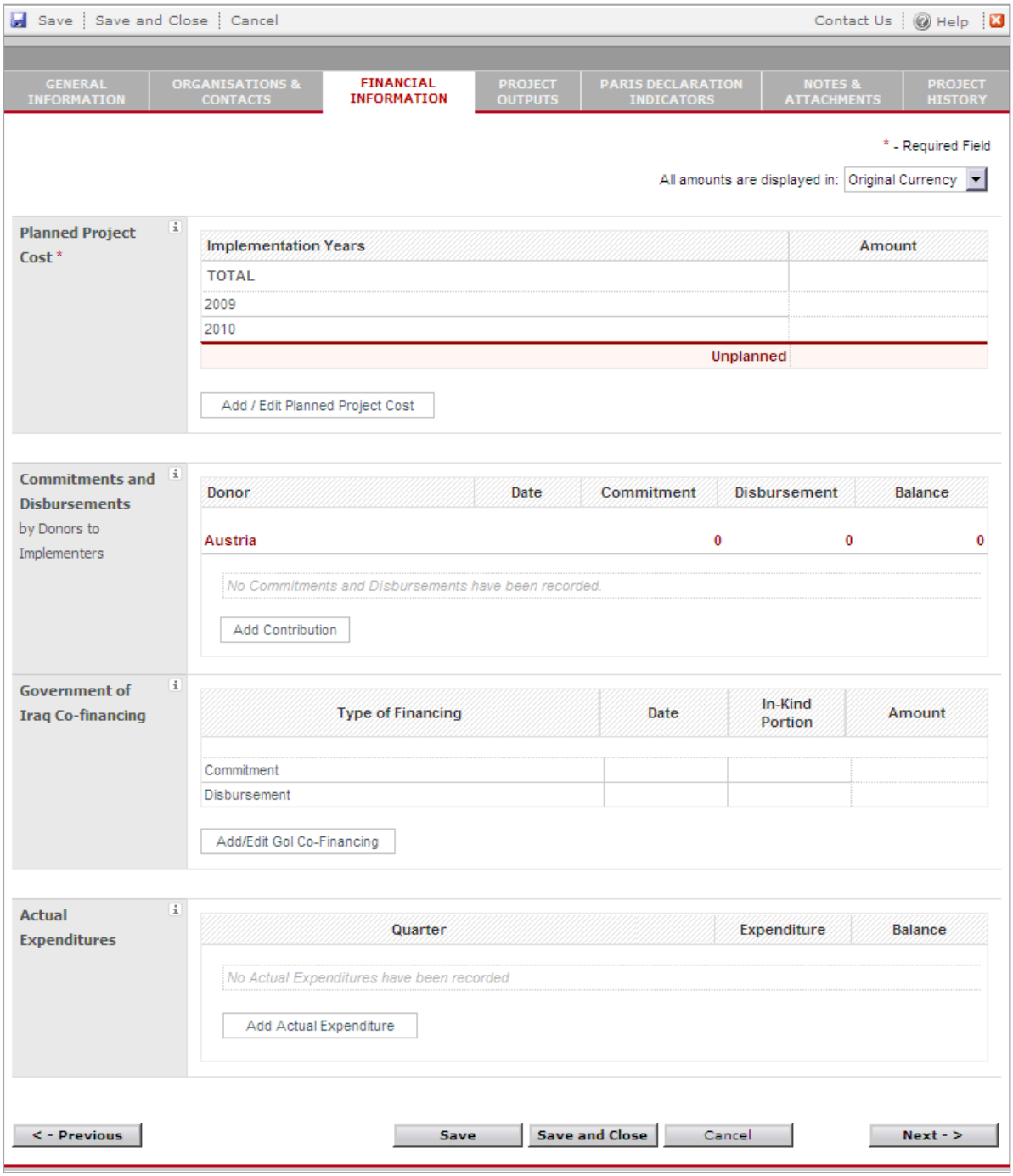

Figure 15: The Financial Information Section

For more information on how to provide the information requested in the *Financial Information* section, see the table below:

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Planned Project Cost	Specify the amount requested for the project implementation. This should include contributions of all parties, i.e. Funding Agencies, Government Bodies, etc. For details on project cost management, see Managing Project Costs. *This field is mandatory.*
Commitments and Disbursements *by Donors to Implementers*	Provide detailed financial information on the project commitments and disbursements grouped by each Donor that was selected for the project. For details on funding records management, see Managing Commitments and Disbursements.
Government of Iraq Co-Financing	Provide detailed information on funds contributed by the Government of Iraq for the project implementation. For details on co-financings management, see Managing Co-Financing Records.
Actual Expenditures	Provide information about the funds expended. For details on expenditures management, see Managing Expenditure Records.

5.1 Managing Project Costs

This chapter outlines how to add and edit the project costs.

5.1.1 Adding a Project Cost

In order to add a project cost record, follow the steps below:

1. Click the **Add/Edit Planned Project Cost** button at the bottom of the field. You will be redirected to the Add/*Edit Project Cost* form (Figure 16).

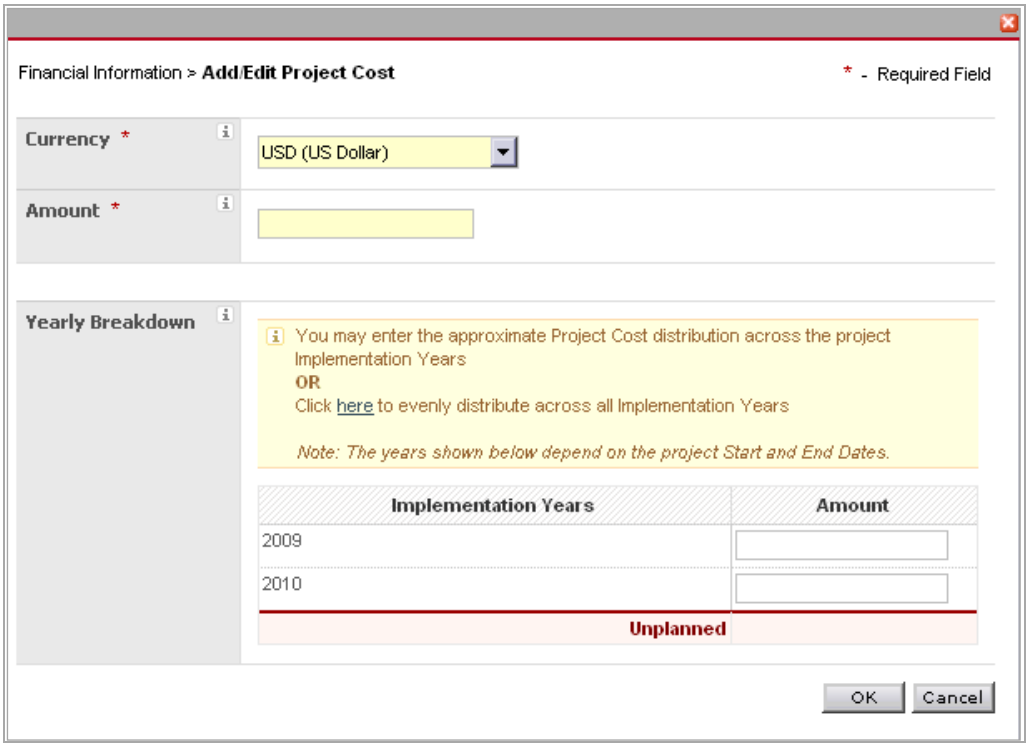

Figure 16: Edit Project Cost sub-section

2. Specify the currency the project cost is expressed in by selecting the appropriate instance from the **Currency** drop-down list.

   Note: By selecting an appropriate currency, the default exchange rate per 1 USD is provided in accordance with the project start date. However, you can change it, if this is necessary. The exchange rate is used when converting the amounts into USD.

3. Enter the project cost **Amount**. It should be entered in the currency indicated. Specify how the recorded project cost is planned to be expended throughout the project duration, which depends on the Project Start and End Dates.

   Note: When indicating the yearly project cost breakdown, choose between two options:

   - Enter the approximate project cost distribution across the project implementation years.
   - Choose to evenly distribute the project cost across all project implementation years.

5.1.2 Editing a Project Cost Record

In order to edit a project cost record, follow the steps below:

1. Click the **Add/Edit Planned Project Cost** button at the bottom of the field. You will be redirected to the *Add/Edit Project Cost* form, where the provided project cost information can be edited.
2. Make changes in the data displayed.

5.2 Managing Commitments and Disbursements

This chapter outlines how to add, edit and delete project funding records, i.e. commitments and disbursements.

5.2.1 Adding an Project Funding Record

In order to add a project funding record, follow the steps below:

1. Click the **Add Contribution** button at the bottom the field representing the Donor Agency that provides the financial means for the project.
2. Indicate whether the new record will be for a commitment or a disbursement. The appropriate window will open in accordance with the selection.

   Note: You will not be able to add a disbursement record unless there is at least one commitment record added.
3. If the commitment was selected, the following information should be provided (Figure 17):

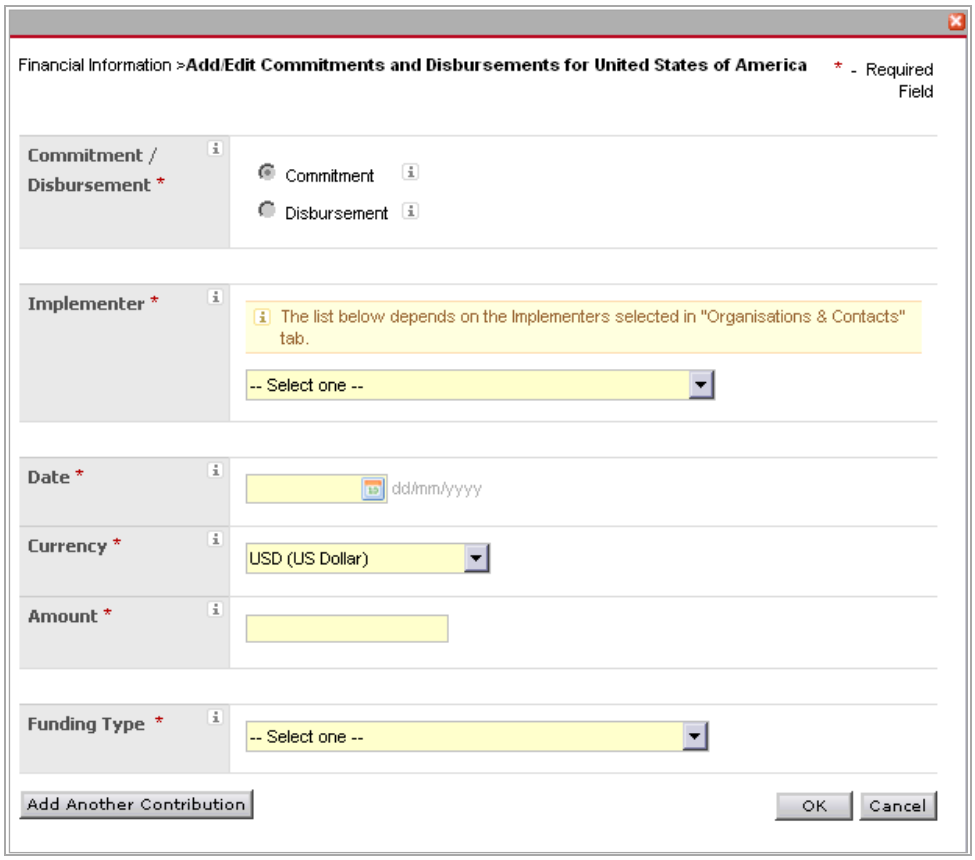

Figure 17: Commitments Sub-section

- Specify the Implementer to which the commitment is made. Select the appropriate instance from the drop-down list containing the Implementers selected in the *Organisations and Contacts* section.
- Date when the commitment took place.
- Currency in which the commitment was made.
- Commitment amount.
- Funding type (grant or loan).

4. If the disbursement was selected, indicate the following information (Figure 18):

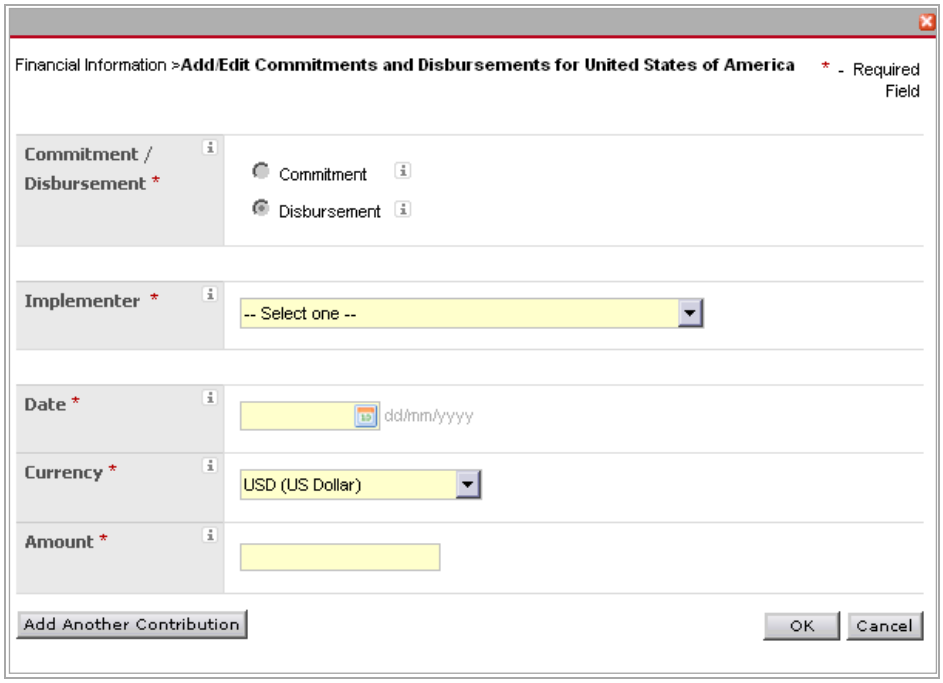

Figure 18: Disbursements Sub-section

- The combination of Implementer – Funding Type that link the disbursement to a set of valid (recorded) commitments.
- Date when the disbursement took place.
- Currency in which the disbursement was made.
- Disbursement amount.

In order to add a new project funding record, please click the **Add Another Contribution** button and provide the information requested as described in the paragraphs above.

5.2.2 Editing Project Funding Records

In order to edit an existing project funding record, follow the steps below:

1. Click the project funding (commitment or disbursement) record that needs to be edited. You will be redirected to the respective sub-section where the details of the selected record can be edited.
2. Make the changes in the data displayed.
3. Click **OK** to confirm the action. Or, **Cancel** to avoid the changes.

5.2.3 Deleting Project Funding Records

In order to delete an existing project funding record, click ✖ **(Remove from the list)** to the left of the selected record.

5.3 Managing Co-Financing Records

This chapter outlines how to add, edit and delete GoI co-financing records.

5.3.1 Adding a Financing Record

In order to add a GoI Co-Financing record, follow the steps below:

1. Click the **Add/Edit GoI Co-Financing** button at the bottom of the field.
2. Indicate whether the new record will be for a commitment or a disbursement. The appropriate window will open in accordance with the selection.

   Note: You will not be able provide any disbursement record unless there is at least one commitment record added.
3. If the commitment was selected, indicate the following information (Figure 19):
   - Date when the commitment took place.
   - Currency in which the commitment was made.
   - Commitment amount.
   - Value of in-kind goods or services.

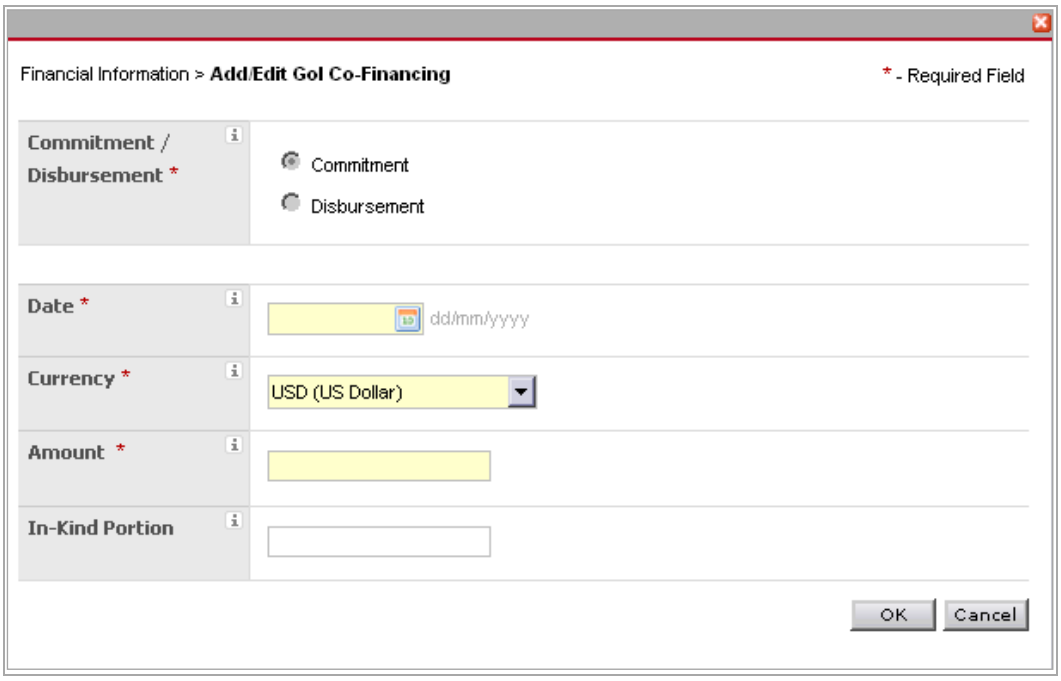

Figure 19: Commitments GoI Sub-section

4. If the disbursement was selected, indicate the following information (Figure 20):
   - Date when the disbursement took place.
   - Currency in which the disbursement was made.
   - Disbursement Amount.
   - Value of in-kind goods or services.

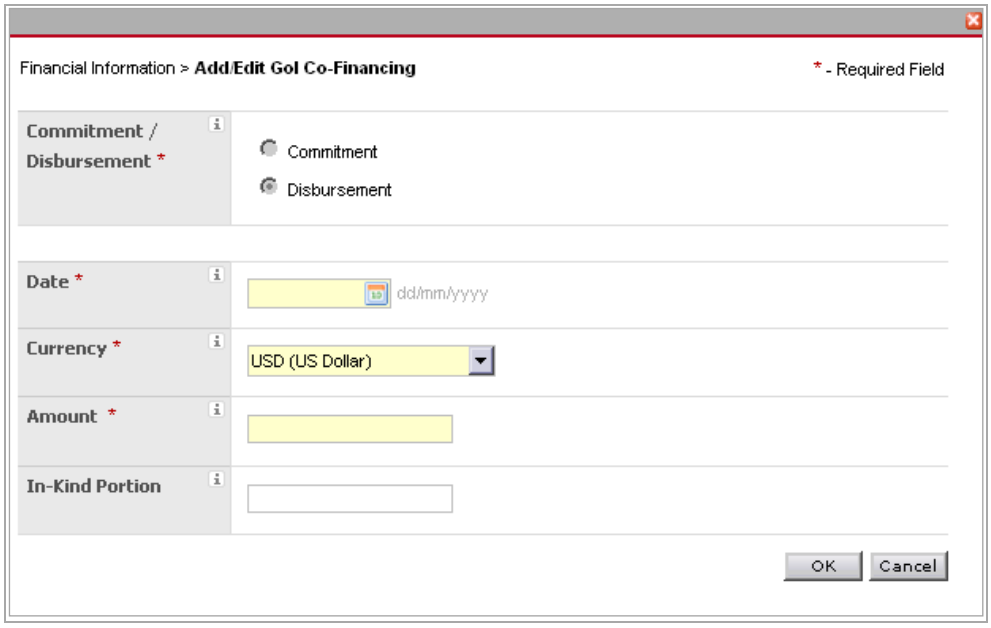

Figure 20: Disbursements GoI Sub-section

5.3.2 Editing Financing Records

In order to edit an existing GoI Co-Financing record, follow the steps below:

1. Click the GoI Co-Financing (commitment or disbursement) record that needs to be edited. You will be redirected to the respective sub-section where the details of the selected record can be edited.
2. Make the changes in the data displayed.

5.3.3 Deleting Financing Records

In order to delete an existing GoI Co-Financing record, click ✖ **(Remove from the list)** to the left of the selected record.

5.4 Managing Expenditure Records

This chapter outlines how to add, edit and delete expenditures.

5.4.1 Adding an Expenditure

In order to add an expenditure record, follow the steps below:

1. Click the **Add Actual Expenditure** button at the bottom of the field. You will be redirected to the *Add/Edit Actual Expenditure* form (Figure 21).

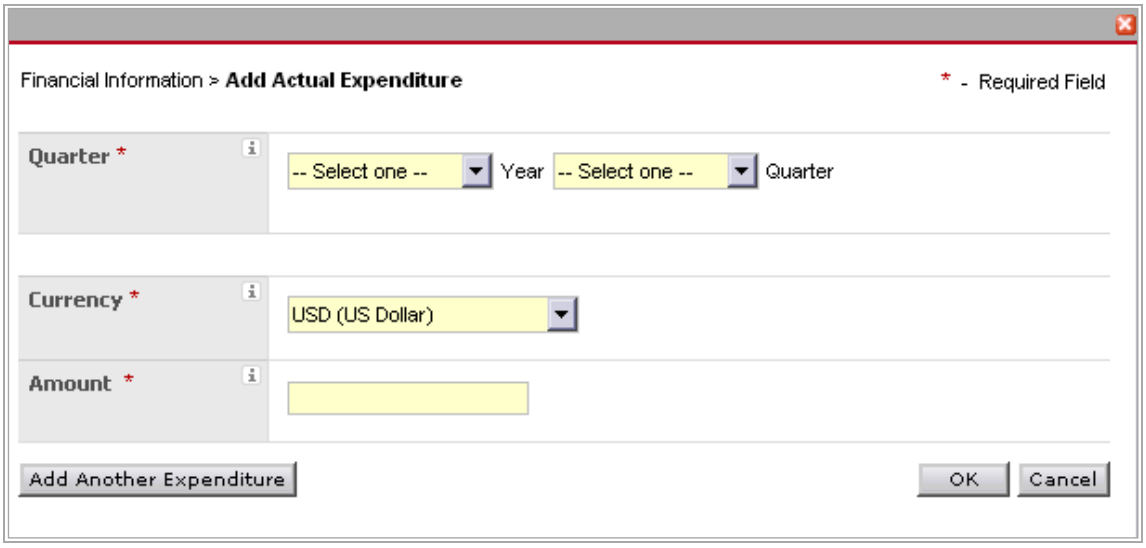

Figure 21: Adding an Expenditure Record

2. Specify the time period the information pertains to by selecting the appropriate year and quarter from the respective drop-down lists.
3. Specify the **Currency** by selecting the appropriate instance from the drop-down list.

   Note: When the appropriate currency is selected, the default exchange rate per 1 USD is provided in accordance with the project approval date. You may change it however, if this is necessary. The exchange rate is used when converting the amounts into USD.
4. Enter the expenditure **Amount**. It should be entered in the currency indicated.

In order to add a new expenditure record, please click the **Add Another Expenditure** button and provide the information requested as described in the paragraphs above.

5.4.2 Editing Expenditure Records

In order to edit an expenditure record, follow the steps below:

1. Select the record that needs to be edited. You will be redirected to the *Add/Edit Actual Expenditure* form.
2. Make changes in the data displayed.
3. Click **OK** to confirm the action. Or, **Cancel** to avoid the changes.

5.4.3 Deleting Expenditure Records

In order to delete an existing expenditure record, click ✘ **(Remove from the list)** to the left of the selected record.

6. PROJECT OUTPUTS

In the *Project Outputs* section (Figure 22), you should enter information about the key performance indicators, factors that may cause the delay in the project implementation, etc.

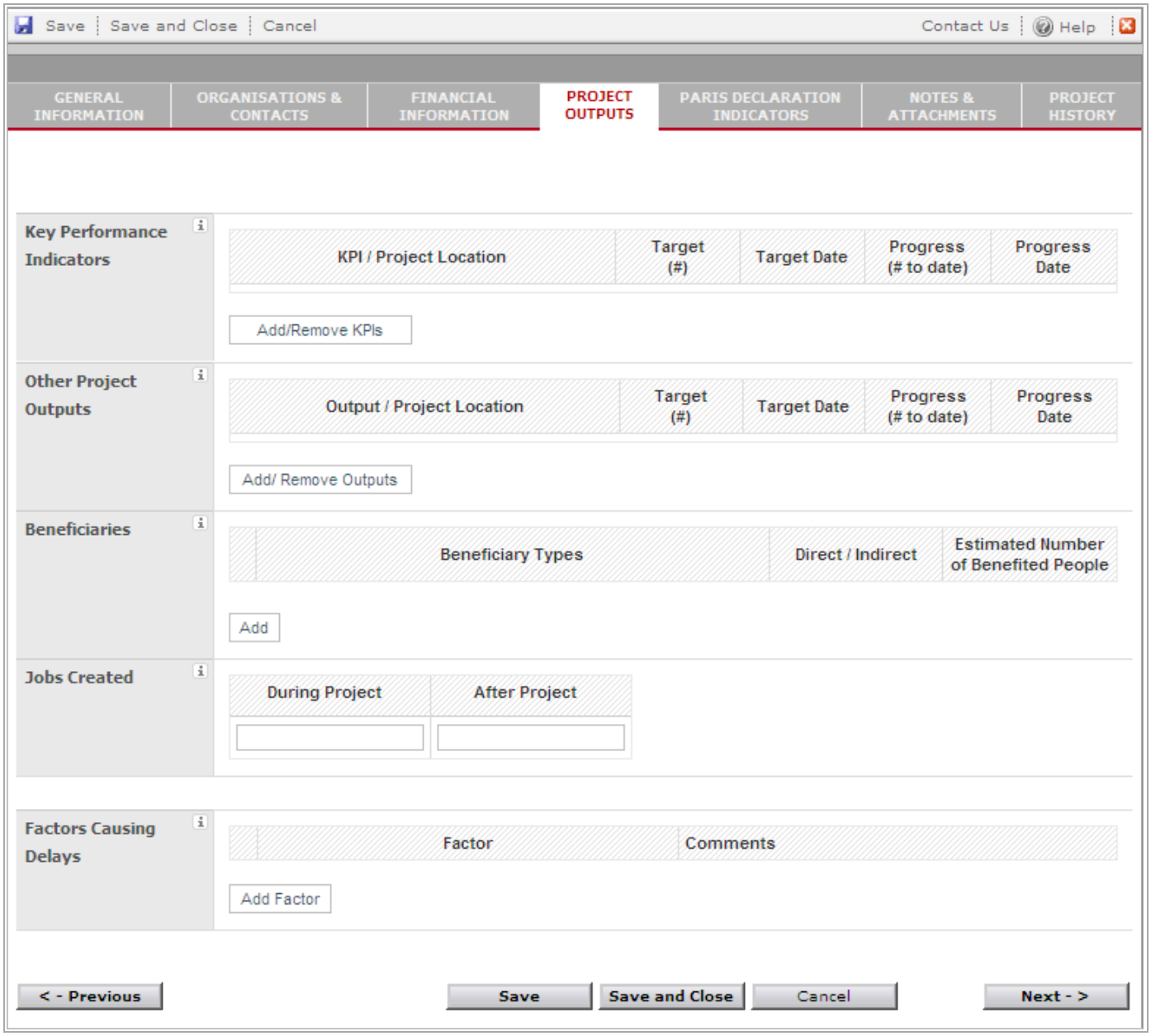

Figure 22: The Project Outputs Section

For more information on how to provide the information requested in the *Project Outputs* section, see the table below:

Field Name	Instructions
Key Performance Indicators	Indicate the key performance indicators used to measure the project performance.

	For details on KPI management, see Managing KPI Records.
Other Project Outputs	Provide information about other outputs expected from the project. For details on project outputs management, see Managing Project Outputs.
Beneficiaries	Provide information about the individuals or groups that will directly or indirectly benefit after the completion of the project. For details on beneficiaries management, see Managing Beneficiaries.
Jobs Created	Indicate the number of job openings created during project implementation. Also, Indicate the number of job openings that are or will be created after the completion of the project.
Factors Causing Delays	Provide information about factors that may be delaying the progress of the project implementation. For details on delays management, see Managing Delays.

6.1 Managing KPI Records

This chapter outlines how to add, edit and delete project related KPI records.

6.1.1 Adding KPI(s) to the project

In order to add a new KPI record, follow the steps below:

1. Click the **Add/Remove KPIs** button at the bottom of the field. You will be redirected to the *KPIs* sub-section (Figure 23).

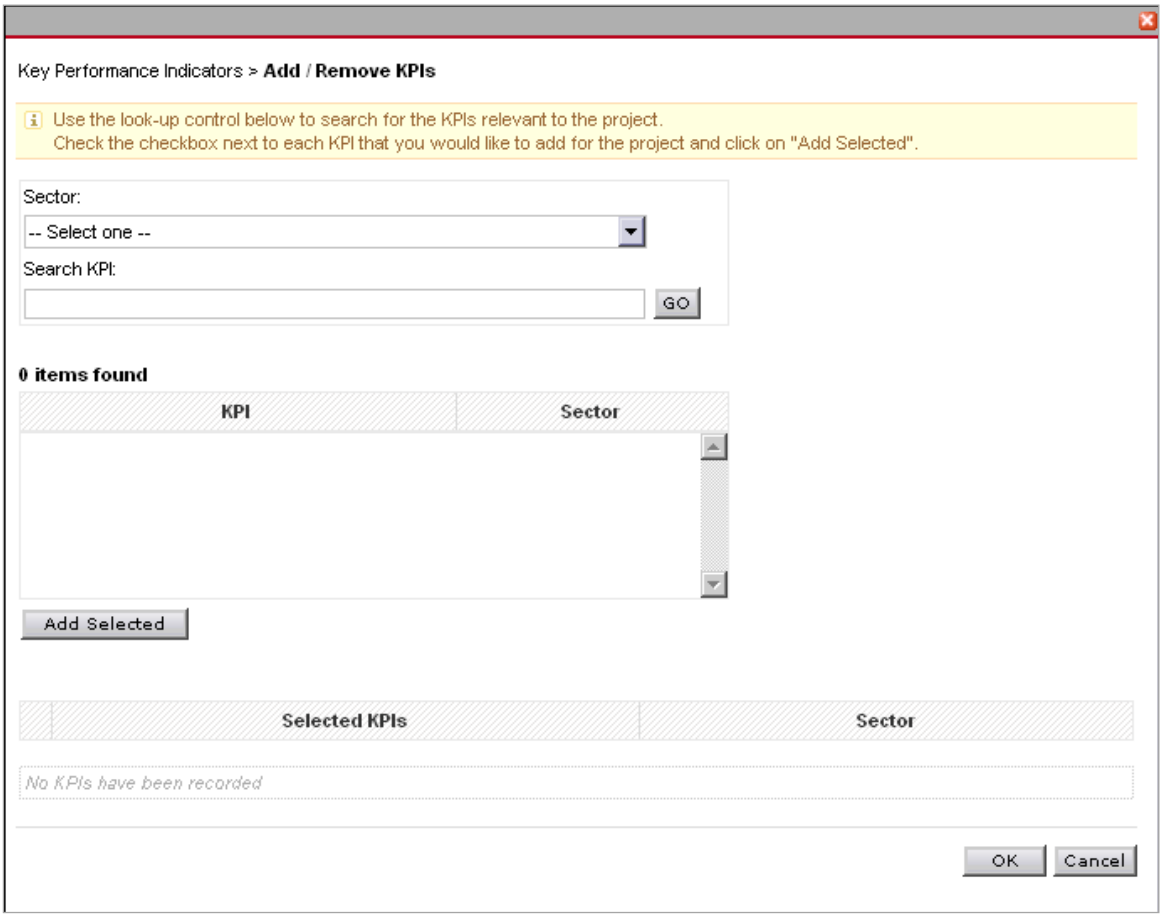

Figure 23: KPIs sub-section

2. Select the KPI to add to the project by entering the keyword in the search field and clicking the **GO** button. All the KPIs that match the search criteria will be displayed in the *Key Performance Indicator* table.

   Note: Selecting the appropriate instance from the *Sector* drop-down list will display only the KPIs that match the selection.

3. Specify the desired KPI(s) for the project by ticking the check-box to the left of the respective KPI(s).

4. Click the **Add Selected** button. The selected KPI(s) will appear in the *Selected Key Performance Indicators* table (Figure 24).

5. Click the **OK** button to return to the *Key Performance Indicators* section, where the selected KPI(s) will appear in the respective fields.

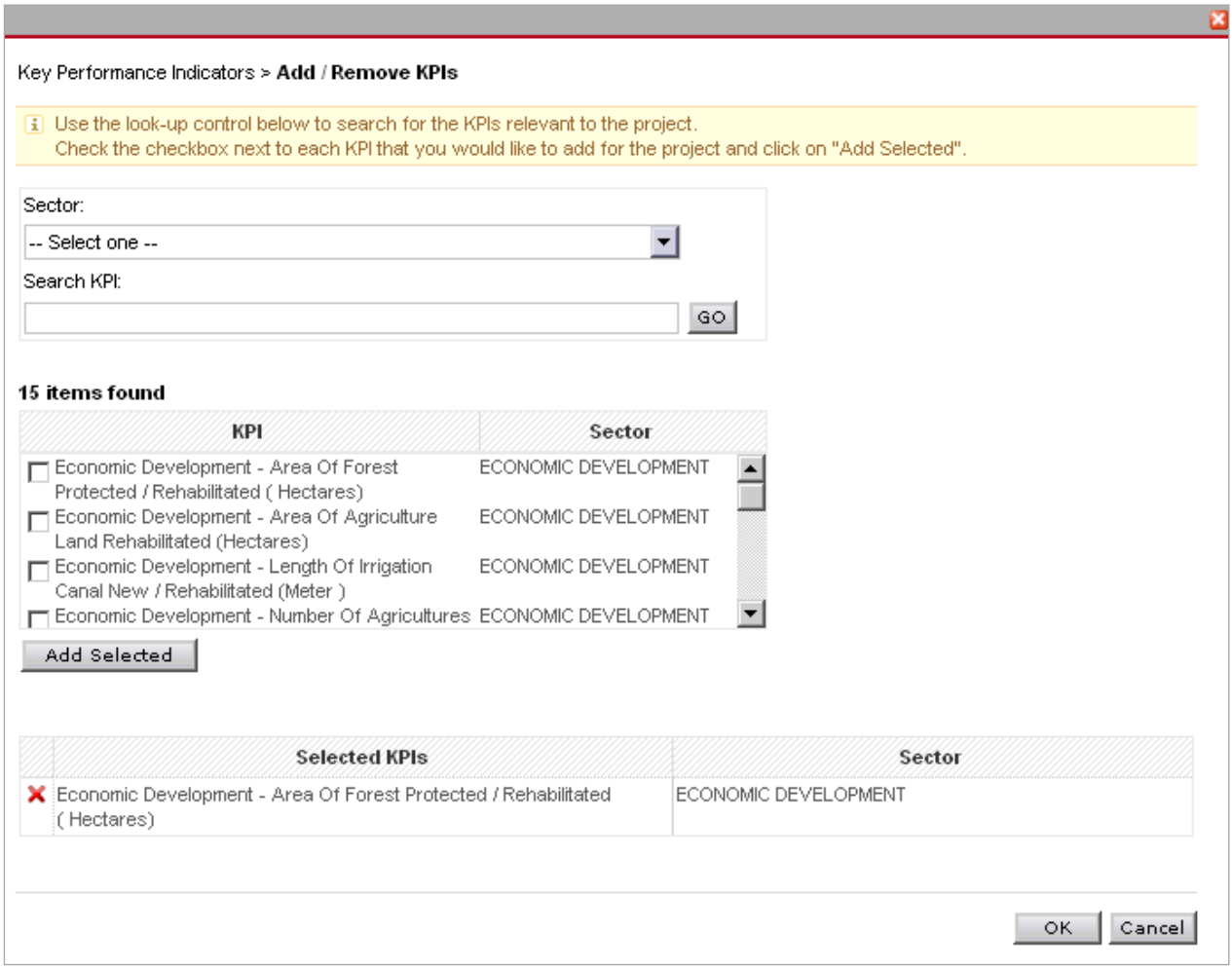

Figure 24: Selecting Project KPIs

6.1.2 Providing KPI Details

In order to provide the information requested, follow the steps below:

1. Click the **Update KPI Progress** button at the bottom of the KPI record to add progress information to. You will be redirected to the *Update KPI Progress* sub-section where the list of locations defined in the *General Information* section is displayed (Figure 25).

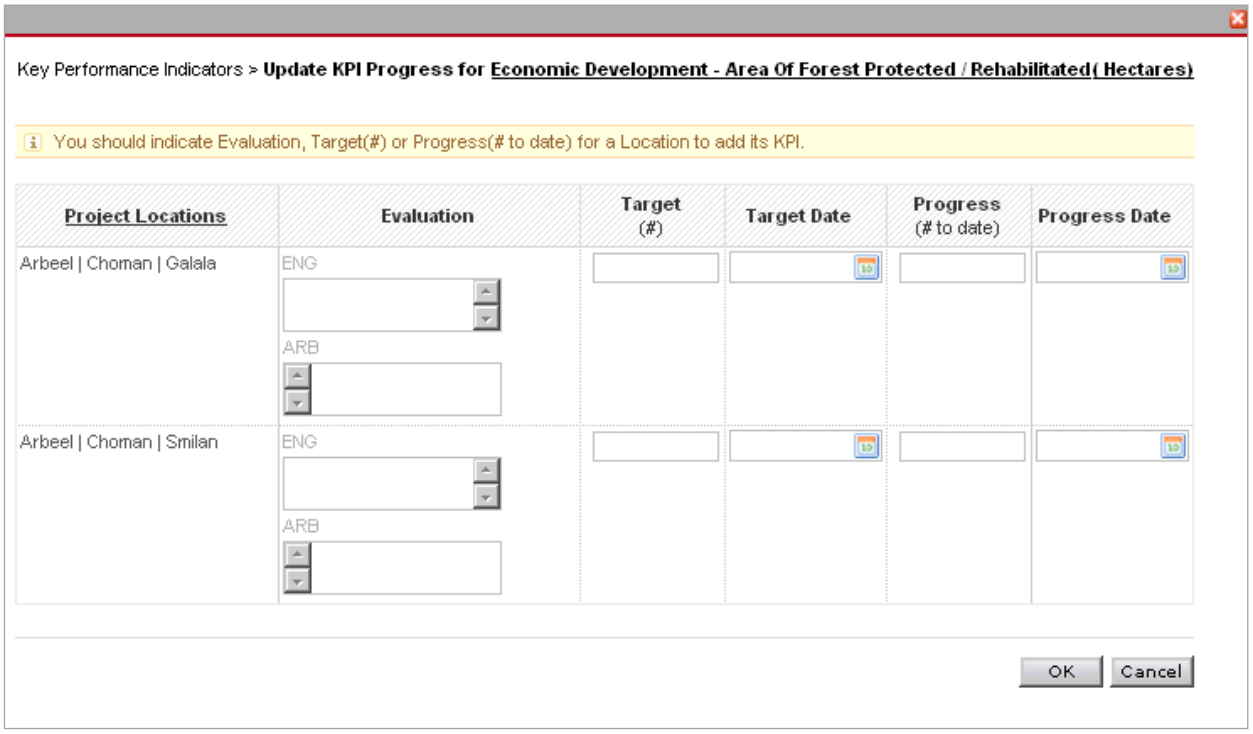

Figure 25: Updating KPI Progress

2. Provide comments on how the output progress is evaluated in the *Evaluation* field.
3. Enter the total number of targets set by the project in the respective field.
4. Indicate the date when the project targets were expected to be reached.
5. Indicate the number of targets reached as of the date in the *Progress (# to date)* field.
6. Indicate the date when the progress information is provided.

6.1.3 Editing KPI Progress Information

In order to edit KPI progress information, follow the steps below:

1. Click the **Update KPI Progress** button at the bottom of the KPI record to modify information for. You will be redirected to the *Update KPI Progress* sub-section where the information previously indicated for the KPI is displayed.
2. Make the appropriate changes in the data displayed.
3. Click **OK** to confirm the action. Or, **Cancel** to avoid the changes.

6.1.4 Deleting KPI Progress Information

In order to delete KPI progress information, click ✘ **(Remove from the list)** to the left of the selected record.

6.2 *Managing Project Outputs*

This chapter outlines how to add, edit and delete project outputs.

6.2.1 Adding Project Output

In order to add a new output record, follow the steps below:

1. Click the **Add/Remove Outputs** button at the bottom of the field. You will be redirected to the *Add/Remove Outputs* form (Figure 26).

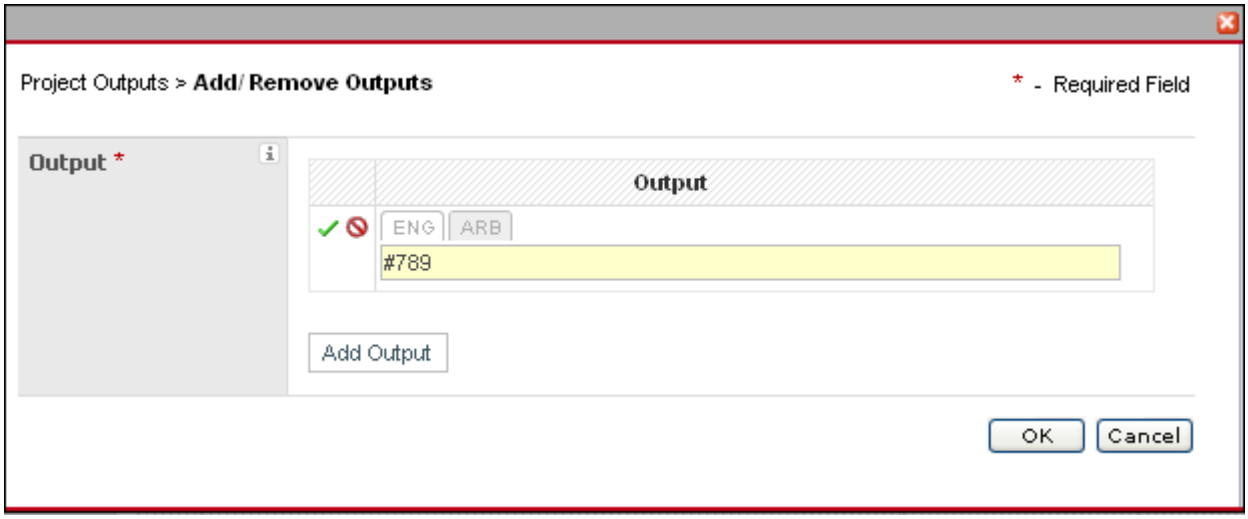

Figure 26: Outputs sub-section

2. Specify the output for the project.
3. Click the **Add Output** button to add a new output.
4. Click the **OK** button to return to the P*roject Outputs* section, where the selected output(s) will appear in the respective fields.
5. Expand the added output to provide information about the project output progress.
6. Click the **Update Output Progress** button at the bottom of the output record to add progress information to. You will be redirected to the *Update Output Progress* sub-section where the list of locations defined in the *General Information* section is displayed.
7. Provide comments on how the output progress is evaluated in the **Evaluation** field.
8. Enter the total number of **Targets** set by the project in the respective field.
9. Indicate the date when the project targets were expected to be reached in the **Target Date** field. Calendar popup is available for this field, see Figure 2: Calendar.
10. Indicate the number of targets reached as of the date in the **Progress** *(# to date)* field.
11. Indicate the date when the progress information is provided in the **Progress Date** field. Calendar popup is available for this field, see Figure 2: Calendar.

6.2.2 Editing Project Outputs

In order to edit project output progress information, follow the steps below:

1. Click the **Update Output Progress** button at the bottom of the output record to modify information for. You will be redirected to the *Update Output Progress* sub-section where the

information previously indicated for the output is displayed.

2. Make the appropriate changes in the data displayed.
3. Click **OK** to confirm the action. Or, **Cancel** to avoid the changes.

6.2.3 Deleting Project Outputs

In order to delete project output progress information, click ✖ **(Remove from the list)** to the left of the selected record.

6.3 Managing Beneficiaries

This chapter outlines how to add, edit and delete beneficiary records.

6.3.1 Adding a Beneficiary Record

In order to add a project beneficiary record, follow the steps below:

1. Click the **Add** button at the bottom of the field. An empty record will appear (Figure 27).

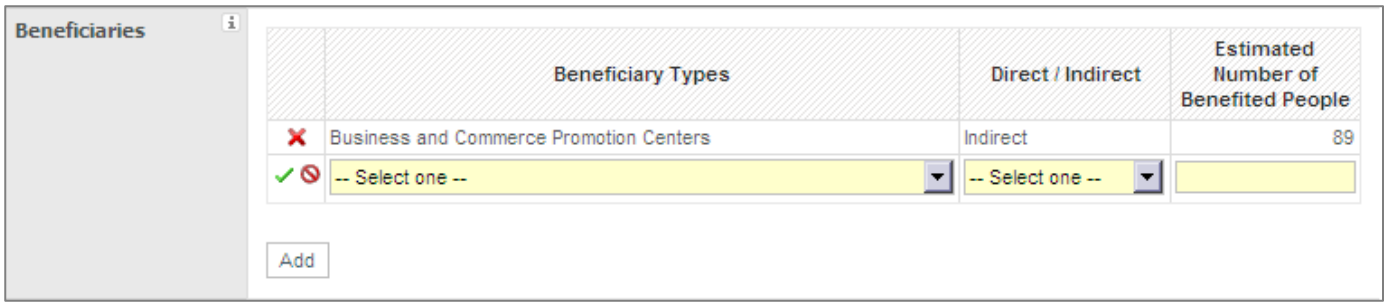

Figure 27: Project Beneficiary sub-section

2. Specify the type of organizations or individuals to be benefited from the project.
3. Indicate whether the selected entity will benefit directly or indirectly.
4. Enter the estimated number of people benefited.
5. Click ✔ **(OK)** to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to cancel the operation.

6.3.2 Editing Beneficiary Records

In order to edit an existing beneficiary record, follow the steps below:

1. Click the beneficiary record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click ✔ **(OK)** to the left of the respective row to confirm the changes made. Or, click ⊘ **(Cancel)** to cancel the operation.

6.3.3 Deleting Beneficiary Records

In order to delete an existing beneficiary record, click ✖ **(Remove from the list)** to the left of the

selected record.

6.4 Managing Delays

This chapter outlines how to add, edit and delete project related delays.

6.4.1 Adding a Delay

In order to add a delay factor record, follow the steps below:

1. Click the **Add Factor** button at the bottom of the field. An empty record will appear (Figure 28).

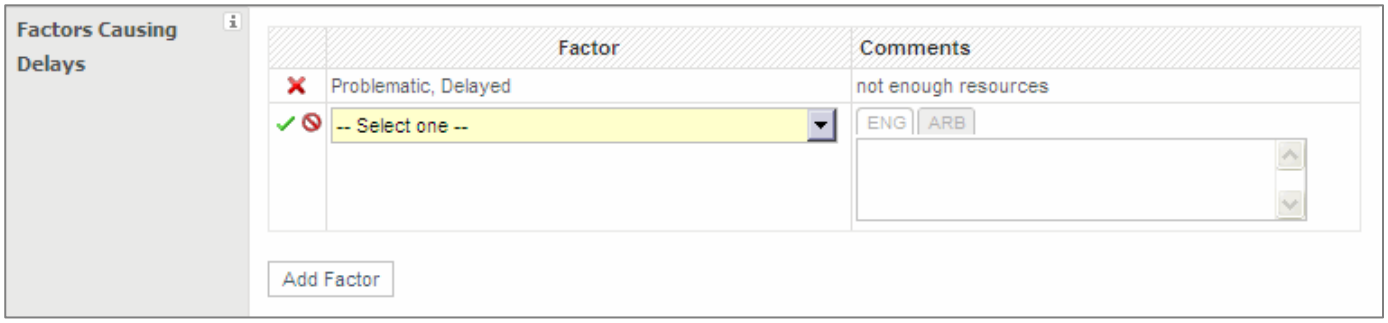

Figure 28: Factors Causing Delays sub-section

2. Select the appropriate instance from the *Factor* drop-down list.
3. Provide additional comments if it is necessary in the appropriate field.
4. Click ✓ **(OK)** to the left of the record to confirm the information input.

6.4.2 Editing Delays

In order to edit an existing delay factor record, follow the steps below:

1. Click the delay factor record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click ✓ **(OK)** to the left of the respective row to confirm the changes made. Or, click ⊘ **(Cancel)** to cancel the operation.

6.4.3 Deleting an Existing Delay Factor Record

In order to delete an existing delay factor record, click the ✘ **(Remove from the list)** button to the left of the selected record.

7. PARIS DECLARATION INDICATORS

In the *Paris Declaration Indicators* section (Figure 29), you can enter information related to the Paris Declaration on Aid Effectiveness so that the commitments of both the Government and its partners to ensure more effective aid management can be monitored in line with the indicators included in the Declaration.

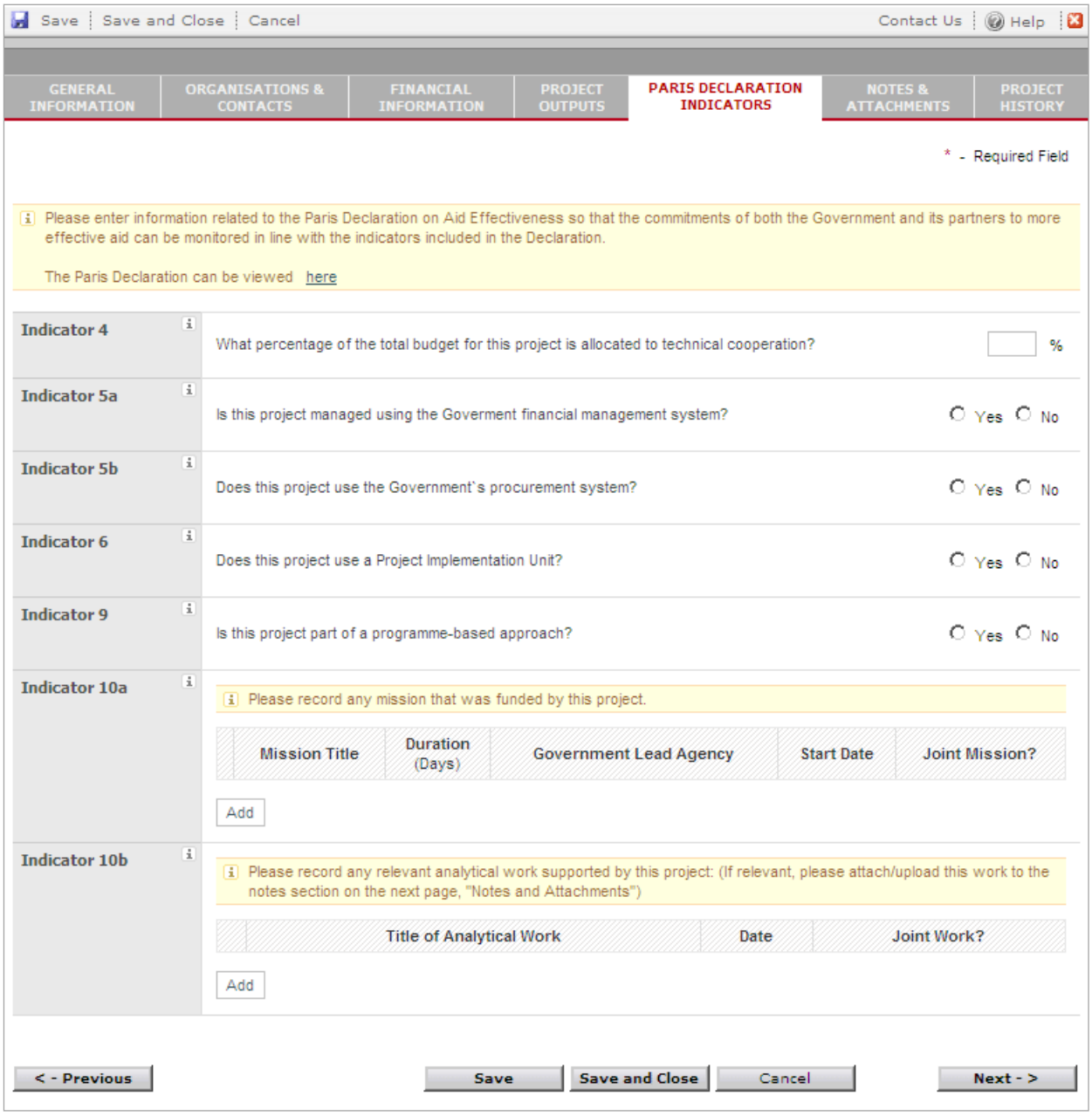

Figure 29: The Project Outputs Section

For more information on how to provide the information requested in the *Paris Declaration Indicators* section, see the table below:

Field Name	Instructions
Indicator 4	Indicate what percentage of the total budget of the project is allocated to technical cooperation.
Indicator 5a	Indicate whether the project is managed using the Government's financial management system. You can achieve this by activating the relevant radio button.
Indicator 5b	Indicate whether the project is managed using the Government's procurement system. You can achieve this by activating the relevant radio button.
Indicator 6	Indicate whether the project uses the Project Implementation Unit. You can achieve this by activating the relevant radio button.
Indicator 9	Indicate whether the project is part of a programme-based approach. You can achieve this by activating the relevant radio button.
Indicator 10a	Record any missions funded by the project. For details on missions' management, see Managing Mission Records.
Indicator 10b	Record any analytical works supported by the project. For details on analytical works management, see Managing Analytical Work Records.

7.1 Managing Mission Records

This chapter outlines how to add, edit and delete project missions.

7.1.1 Adding a Mission

In order to add a new mission record, follow the steps below:

1. Click the **Add** button at the bottom of the field. An empty record will appear (Figure 30).

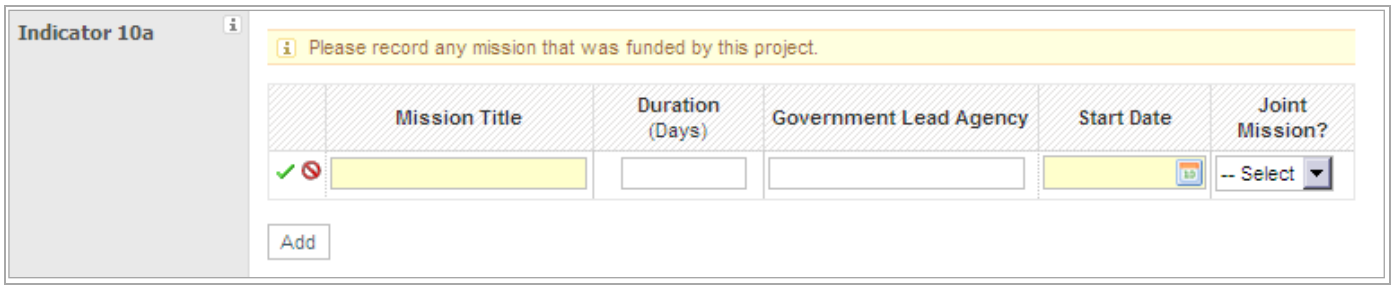

Figure 30: Adding a New Mission Record

2. Fill in the **Mission Title** in the respective field.
3. Indicate the duration for the mission in the **Duration (days)** field.
4. Type the name of the **Government Lead Agency** for the mission.
5. Indicate the **Start Date** for the mission. Calendar popup is available for this field, see Figure 2: Calendar.

6. Indicate whether this is a joint mission or not by selecting the appropriate instance from the drop-down list.
7. Click ✓ **(OK)** to the left of the respective row to confirm the information input. Or, click ⊘ **(Cancel)** to cancel the operation.

7.1.2 Editing Missions

In order to edit an existing mission record, follow the steps below:

1. Click the mission record that needs to be edited. This will activate the selected record.
2. Make the changes in the data displayed.
3. Click ✓ **(OK)** to the left of the respective row to confirm the changes made. Or, click ⊘ **(Cancel)** to cancel the operation.

7.1.3 Deleting Missions

In order to delete an existing mission record, click ✖ **(Remove from the list)** to the left of the selected record.

7.2 Managing Analytical Work Records

This chapter outlines how to add, edit and delete analytical work records.

7.2.1 Adding an Analytical Work Record

In order to add a new analytical work record, follow the steps below:

1. Click the **Add** button at the bottom of the field. An empty record will appear (Figure 31).

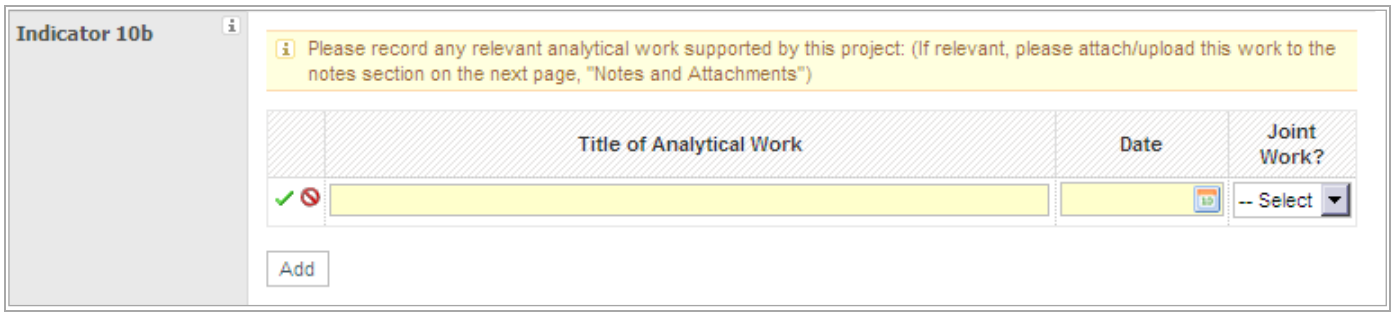

Figure 31: Adding a new Analytical Work Record

2. Fill in the analytical work title in the respective field.
3. Indicate the date when the analytical work was started.
4. Indicate whether this is a joint work or not by selecting the appropriate instance from the drop-down list.
5. Click ✓ **(OK)** to the left of the respective row to confirm the information input. Or, click ⊘ **(Cancel)** to cancel the operation.

7.2.2 Editing Analytical Work Records

In order to edit an existing analytical work record, follow the steps below:

1. Click the analytical work record that needs to be edited. This will activate the selected record.
2. Make the changes in the data displayed.
3. Click ✓ **(OK)** to the left of the respective row to confirm the changes made. Or, click ⊘ **(Cancel)** to cancel the operation.

7.2.3 Deleting Analytical Work Records

In order to delete an existing analytical work record, click ✘ **(Remove from the list)** to the left of the selected record.

8. NOTES AND ATTACHMENTS

In the *Notes and Attachments* section (Figure 32), you can provide additional comments / notes about the projects, attach project documents, monitoring reports and other relevant documentation.

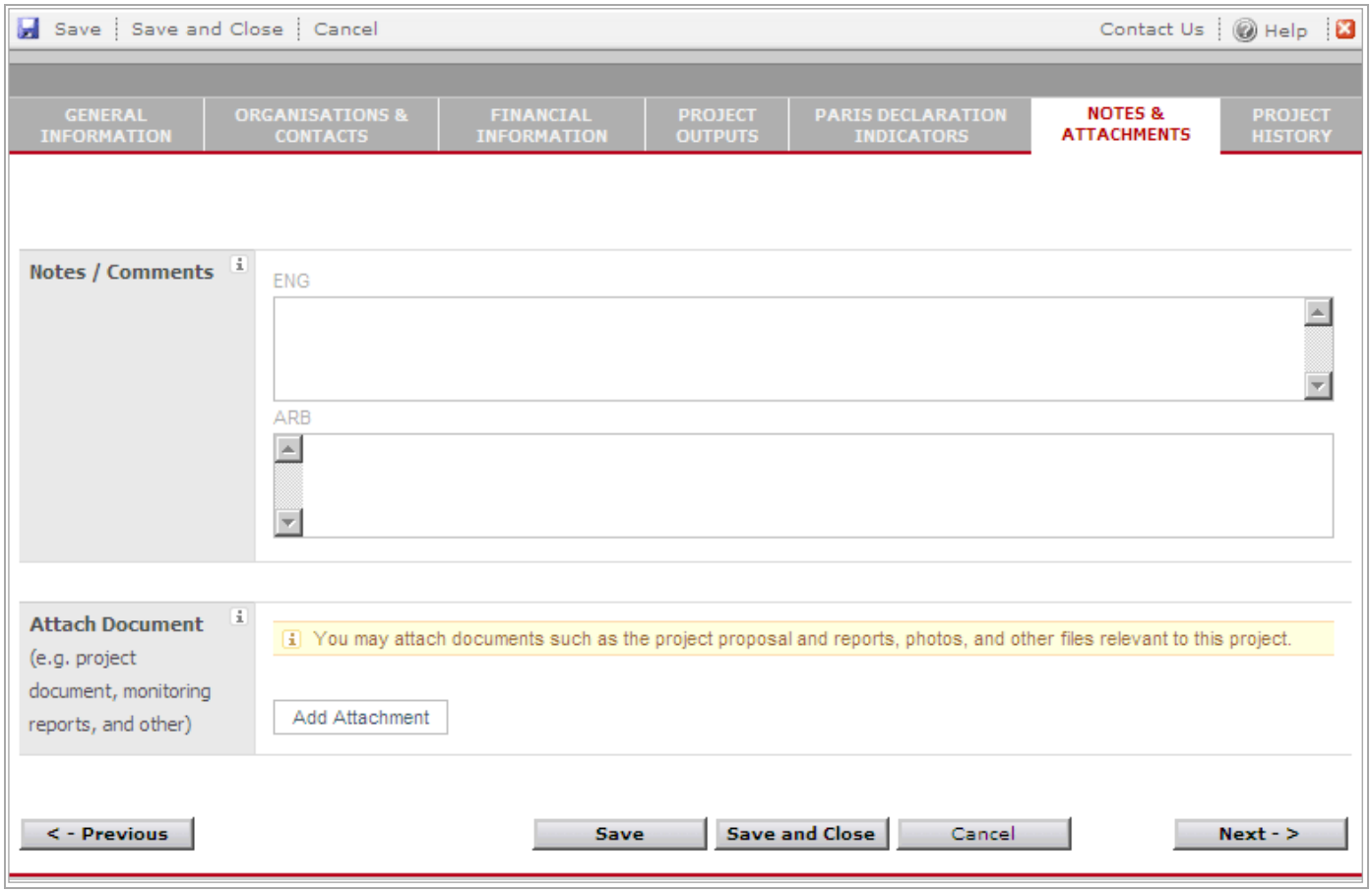

Figure 32: Notes and Attachments Section

For more information on how to provide the information requested in the *Notes and Attachments* section, see the table below:

Field Name	Instructions
Notes / Comments	Provide any additional comments that are relevant to the given project.
Attach Document (e.g. project document, monitoring reports, and other)	Attach documents which may contain project-related information. For details on managing attachments, see Managing Attachments.

8.1 Managing Attachments

This chapter outlines how to add, view and delete project related attachments.

8.1.1 Adding an Attachment

In order to attach a document, follow the steps below:

1. Click the **Add Attachment** button. You will be redirected to the *Attachments* form (Figure 33).

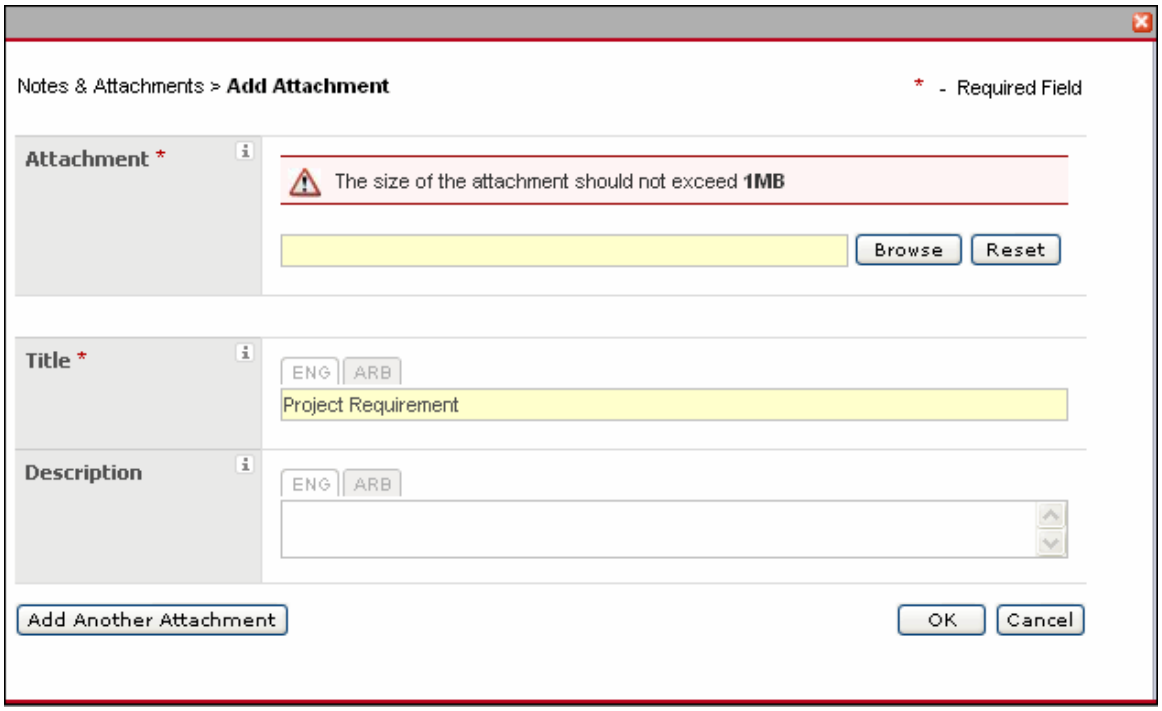

Figure 33: Adding an Attachment sub-section

2. Click the **Browse** button to locate the file that needs to be attached.

   Note: In order to reset a wrongly attached file, click the **Reset** button.

3. Enter the name for the document to be attached in the **Title** field.
4. Provide a brief description for the document in the **Description** field. This is optional.
5. Click the **OK** button to attach the file. The attached file will appear in the respective table in the *Notes and Attachments* section.

In order to attach another file, please click the **Add Another Attachment** button and provide the information requested as described in the paragraphs above.

8.1.2 Viewing Attachments

Click on the title of the corresponding attachment. The attached file will be displayed in your browser.

8.1.3 Deleting an Attachments

To remove the attachment from the list, use the ✖ **(Remove from the list)** button to the left of the attachment title.

9. PROJECT HISTORY

In the *Project History* section (Figure 34), you can view statistical data on access to the given project.

For more information on *Project History* section, see the table below:

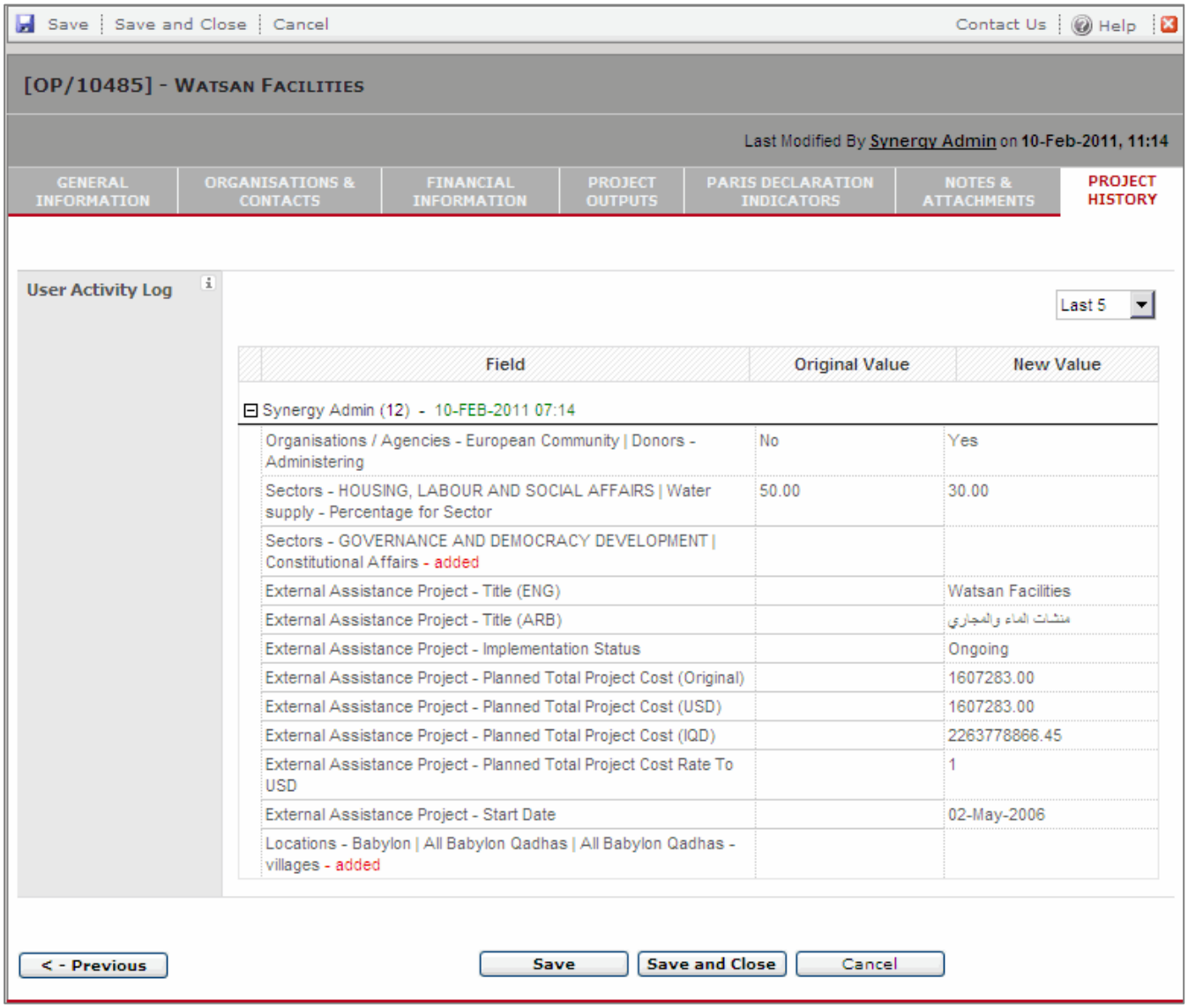

Figure 34: Project History Section

Field Name	Instructions
User Activity Log	Provides information about the recent changes made to the corresponding project. Identifies the user who performed the changes and the date/time when the modifications were made. **Note:** In the right side you may select the number of latest updates to be displayed or you may choose to display whole modification history on the particular project.

10. SAVING DATA

When you have finished with data input or modification you should save your changes before you leave the page. Following options for saving the data are available both on the top and on the bottom of the page:

- **Save** - to save the data entered and to remain on the opened page.
  Note: In sub-sections, clicking the **OK** button will save the changes made and to navigate you to the previous screen.
- **Save and Close** - to save the information input and leave the opened page.

If you wish to cancel your changes, use the **Cancel** button.

11. REFERENCES

Please refer to the following *IDMS* related documents:

- IDMS Capital Investments Projects Application User Manual
- IDMS Donor Profile Application User Manual
- IDMS Indicator Application User Manual
- IDMS Analytics User Manual
- IDMS Administration Center User Manual

IRAQ DEVELOPMENT MANAGEMENT SYSTEM (IDMS)

INDICATOR APPLICATION

USER MANUAL

Version 1.1

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1. INTRODUCTION

This document describes the *Online Data Entry* module for the *Indicator* application of the *Iraq Development Management System (IDMS)*. It provides the necessary instructions to follow during the data entry process. The document is addressed to those who will use the *IDMS* application to add or modify project information.

2. OVERVIEW

The *Iraq Development Management System (IDMS)* is an automated information management system which is designed to improve efficiency and coordination of donor activities in Iraq. 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 aid data.

The main objectives of the *IDMS* is to serve as a reliable and credible source of information on overall donor contributions to Iraq's reconstruction, economic recovery and socio-economic development, as well as to support the Government in effectively managing development assistance and promoting the accountable and transparent use of resources.

In the following version of *IDMS*, the following applications are present:

- **External Assistance Projects**
- **Donor Profile**
- **Capital Investments Projects**
- **Iraq Development Projects**
- **Indicator**

The *Indicators* application collects and displays all information relevant to a particular indicator. Each record will be representing one indicator.

The *Indicators* application provides a web-based user interface and requires a web browser (Internet Explorer) pre-installed.

In the current design, the *Indicators* application consists of the following sections:

- **General Information** section to provide information relevant to the indicator: its title and definition.
- **Progress** section to provide indicator progress details.

To navigate from one section to another, use the respective tab controls found at the top of the screen. Also, click respective **Next / Previous** button at the bottom of the screen to go to the next / previous section.

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

3. GENERAL INFORMATION

In the *General Information* (Figure 1) section, you can provide general information on the indicator. This includes the indicator name, unit, description, frequency, methodology, locations, etc.

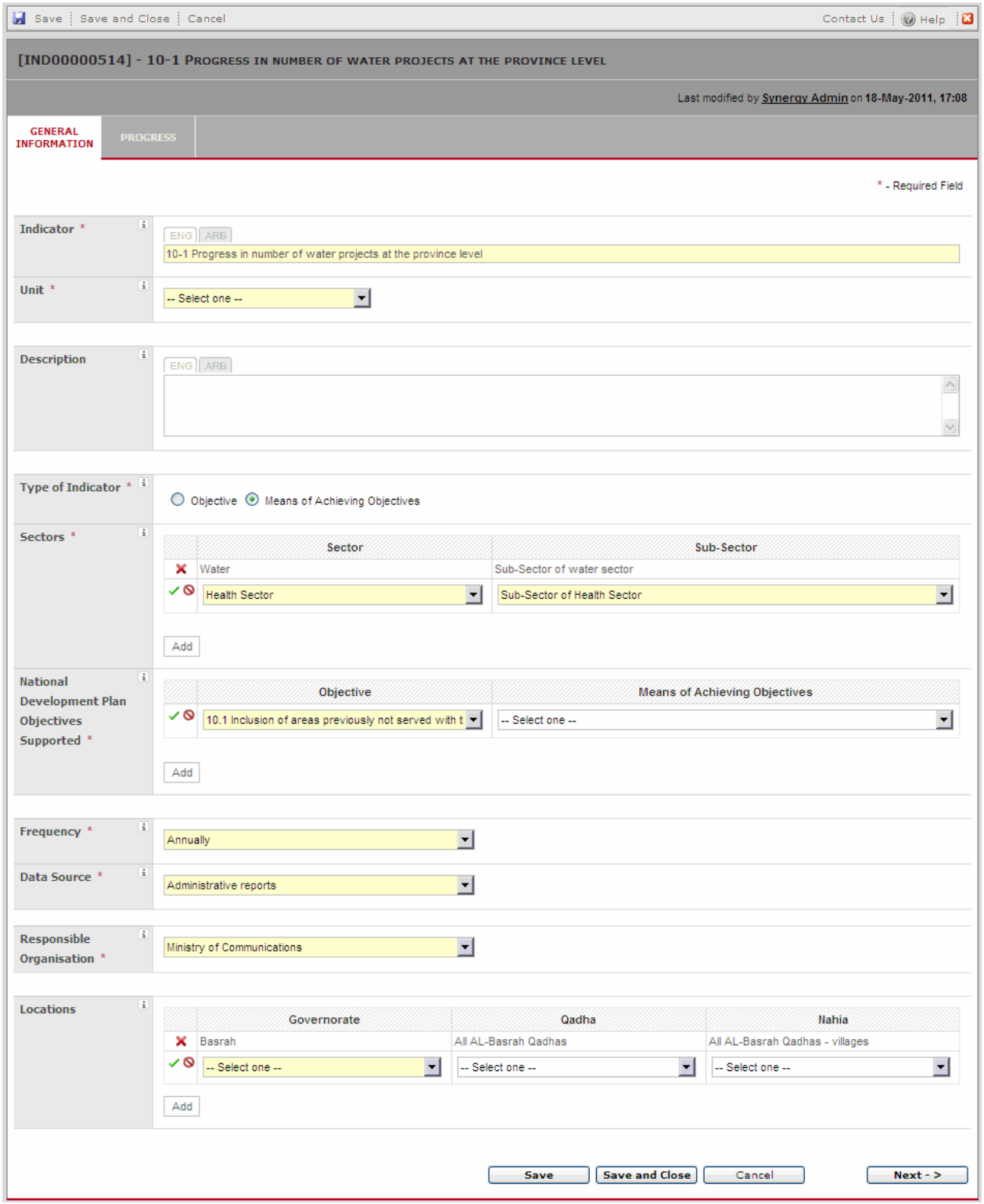

Figure 1: General Information Section

For more information on how to provide the information requested in the *General Information* section, refer to the table below:

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Indicator	Indicate the name of the indicator in English and Arabic languages. *This field is mandatory*.
Unit	Choose the unit of the indicator. The following values are available: • IQD (Iraqi Dinar) • Months • Number Count • Percentage • Ratio • USD (US Dollar) • kW (kilowatt) • km (kilometer) *This field is mandatory*.
Level of Indicator	Indicate whether this is an *Outcome* or an *Output* indicator. *This field is mandatory*.
Description	Indicate the indicator's description in English and Arabic languages.
Sectors	Indicate the sectors of economy where the indicator is implemented. For details on managing sectors, see Managing Sectors.
National Development Plan Objectives Supported	Indicate the objectives and the means of achieving them for the supported national development plan. For details on managing objectives, see Managing Objectives.
Responsible Organisation	Select the agency responsible for the implementation of the indicator. *This field is mandatory*.
Frequency	Select the frequency of the indicator: Annual, Monthly or Quarterly. *This field is mandatory*.
Methodology	Indicate the method the indicator information is collected. *This field is mandatory*.
Data Source	Indicate the data source information for the indicator. The following options are available: • Administrative Orders • Administrative Reports • GoI gazettes • Ministry Reports • Surveys *This field is mandatory*.

Locations	Specify the geographic locations in IRAQ where the indicator is implemented. *This field is mandatory*. For details on managing locations, see Managing Locations.

3.1 Managing Sectors

This chapter outlines how to add, edit and delete sector records.

3.1.1 Adding a Sector Record

In order to add a new sector record for the project, follow the steps below:

1. Click the **Add** button in the *Sectors* section. An empty record will appear (Figure 4).

Figure 2: Adding a Sector

2. Select a **Sector** and a related **Sub-Sector** where the indicator is implemented.
3. Click **(OK)** to the left of the record to confirm the information input. Or, click **(Cancel)** to cancel the operation.
4. Add another Sector details by pressing the **Add** button again.

3.1.2 Editing a Sector Record

In order to edit an existing sector record, follow the steps below:

1. Click the sector record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click **(OK)** to the left of the respective row to confirm the changes made. Or, click **(Cancel)** to cancel the operation.

3.1.3 Deleting a Sector Record

In order to delete an existing sector record, click **(Remove from the list)** to the left of the selected record.

3.2 Managing Objectives

This chapter outlines how to add, edit and delete National Development Plan objectives supported.

3.2.1 Adding an Objective

In order to add a new record, follow the steps below:

1. Click the **Add** button. An empty record will appear (Figure 3).

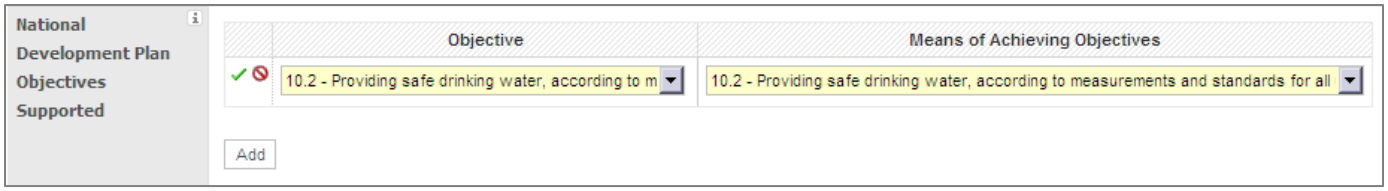

Figure 3: Adding an Objective Record

2. Select the **Objective** and the related **Means of Achieving Objectives** from the corresponding drop down lists.
3. Click ✓ **(OK)** to the left of the respective row to confirm the information input. Or, click ⊘ **(Cancel)** to cancel the operation.
4. Add another objective by pressing the **Add** button again.

3.2.2 Editing Objective Record

In order to edit an existing record, follow the steps below:

1. Click the record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click ✓ **(OK)** to the left of the respective row to confirm the changes made. Or, click ⊘ **(Cancel)** to cancel the operation.

3.2.3 Deleting Objective Record

In order to delete an existing record, click ✗ **(Remove from the list)** to the left of the selected record.

3.3 Managing Locations

This chapter outlines how to add, edit and delete location records.

3.3.1 Adding a Location Record

In order to add a new location record for the project, follow the steps below:

1. Click the **Add** button in the *Locations* section. An empty record will appear (Figure 4).

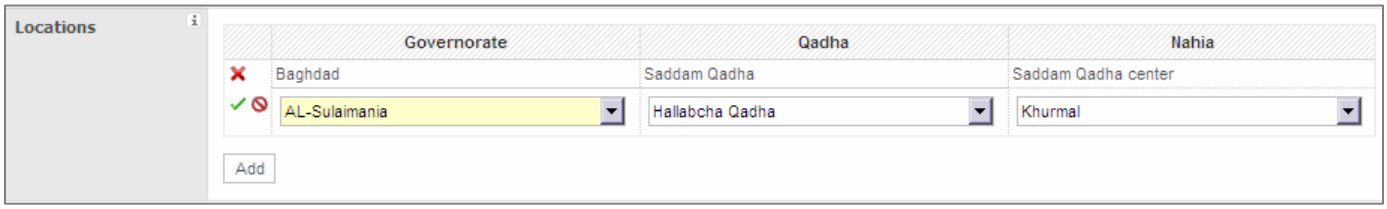

Figure 4: Adding a Location

2. Select the appropriate **Governorate** from the list. This is required.
3. Indicate the appropriate **Qadha** and **Nahia** by selecting them from the corresponding drop-down lists.

4. Click ✓ **(OK)** to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to cancel the operation.
5. Add another location record by pressing the **Add** button again, if needed.

3.3.2 Editing a Location Record

In order to edit an existing location record, follow the steps below:

1. Click the location record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click ✓ **(OK)** to the left of the respective row to confirm the changes made. Or, click ⊘ **(Cancel)** to cancel the operation.

3.3.3 Deleting a Location Record

In order to delete an existing location record, click ✖ **(Remove from the list)** to the left of the selected record.

4. PROGRESS

In the *Progress* section (Figure 5), you may enter information about indicator progress, its baseline and target values.

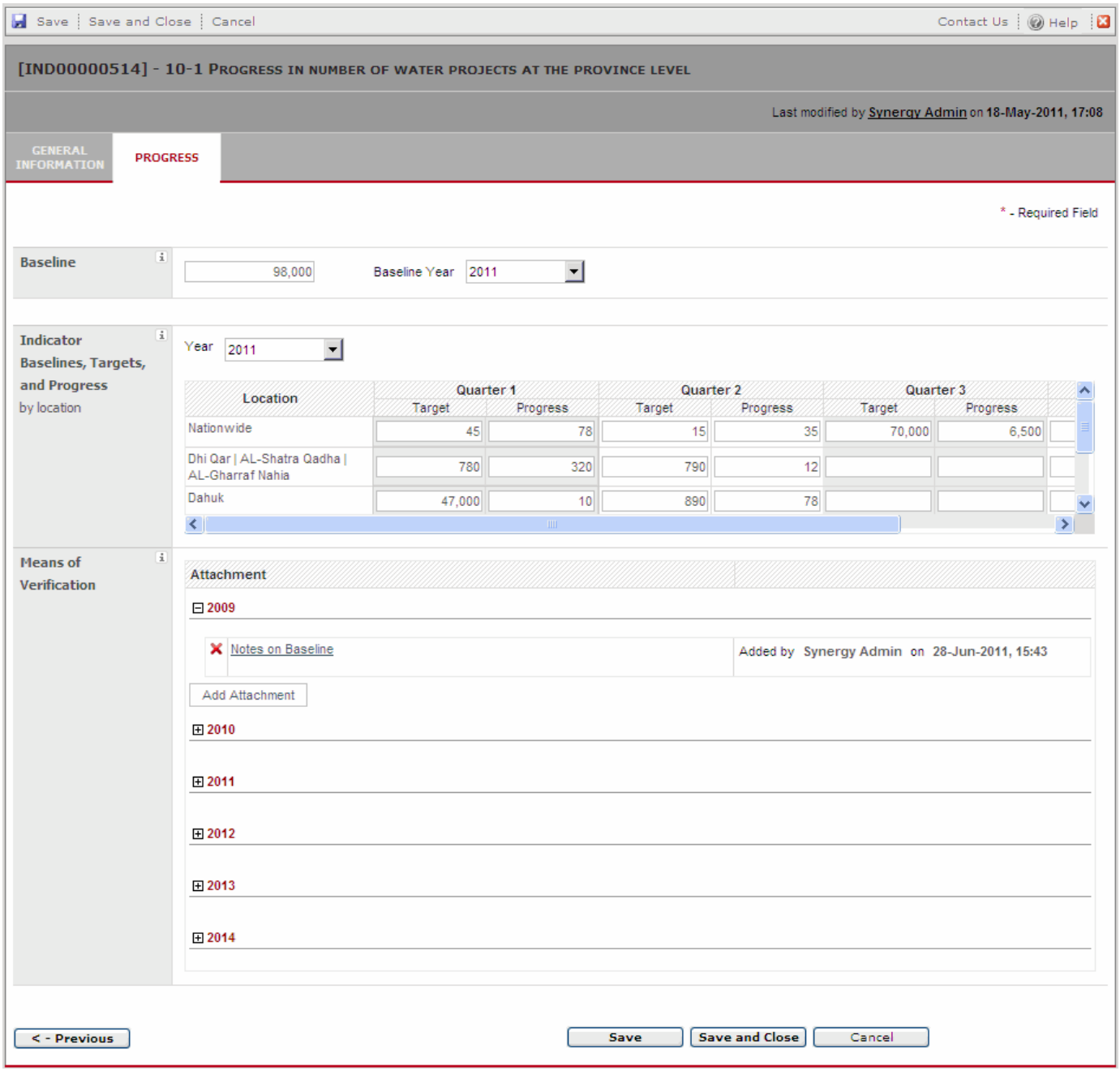

Figure 5: Progress Section

For more information on how to provide the information requested in the *Progress* section, refer to the table below.

Field Name	Instructions
Baseline	Choose the indicator's **Baseline Year** from the drop down list and then define indicator's **Baseline** value for that year.
Indicator Baselines, Targets, and Progress *by location*	Choose the **Year** from the drop down list and then define indicator's **Baseline** value for each location selected from the GENERAL INFORMATION. *Nationwide* location expresses a summary value of all selected locations. Besides this, the **Target** and the **Progress** values of the indicator should be defined for each location on the quarter basis of the selected year.
Means of Verification	Upload here all indicator related attachments on the yearly basis. For details on managing contracts, see Managing Attachments.

4.1 Managing Attachments

This chapter outlines how to add and delete the indicator attachments.

4.1.1 Adding an Attachment

In order to attach a document, follow the steps below:

1. Expand the **Year** for which the attachment should be added.
2. Click the **Add Attachment** button. You will be redirected to the *Add Attachment* form (Figure 6).

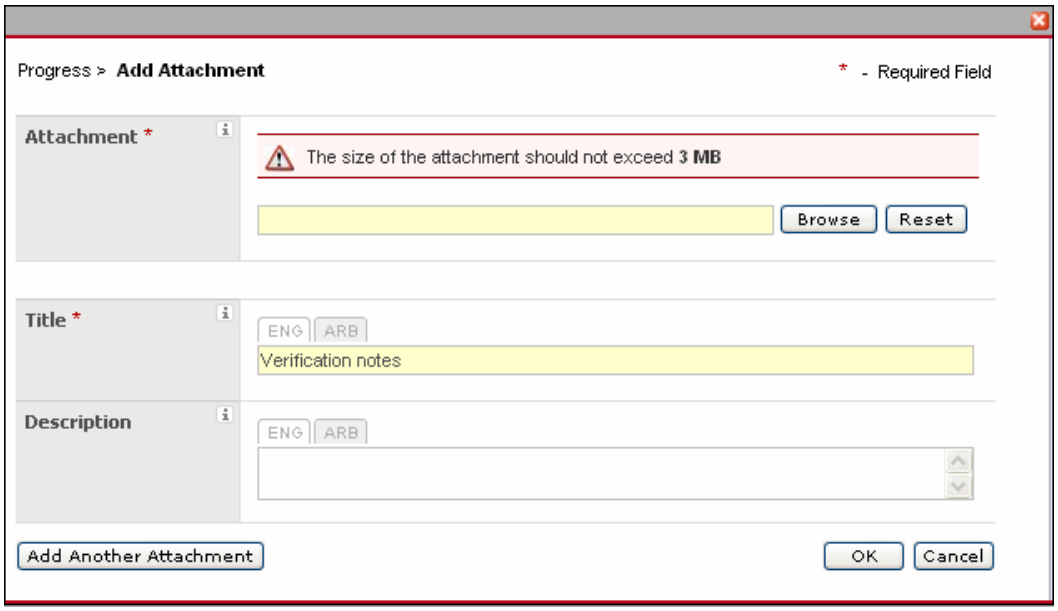

Figure 6: Adding an Attachment Form

3. Click the **Browse** button to locate the file that needs to be attached.

   Note: In order to remove a wrongly attached file, click the **Reset** button.

4. In the **Title** field enter the name for the document in English and Arabic languages. This is required.
5. Provide a brief **Description** for the document in English and Arabic languages.

6. Click the **OK** button to attach the file. The attached file will appear in the respective table in the *Notes and Attachments* section.

In order to attach another file, please click the **Add Another Attachment** button and provide the information requested as described in the paragraphs above.

4.1.2 Viewing Attachment

Click on the title of the corresponding attachment. The attached file will be displayed in your browser.

4.1.3 Deleting an Attachment

In order to delete an existing attachment, click ✖ **(Remove from the list)** to the left of the selected attachment.

5. SAVING DATA

When you have finished with data input or modification you should save your changes before you leave the page. Following options for saving the data are available both on the top and on the bottom of the page:

- **Save** - to save the data entered and to remain on the opened page.
  Note: In forms and sub-forms, clicking the **OK** button will save the changes made and navigates you to the previous screen.
- **Save and Close** - to save the information input and leave the opened page.

If you wish to cancel your changes, use the **Cancel** button.

6. REFERENCES

Please refer to the following *IDMS* related document:

- IDMS External Assistance Projects Application User Manual
- IDMS Capital Investment Projects Application User Manual
- IDMS Donor Profile Application User Manual
- IDMS Analytics User Manual
- IDMS Administration Center User Manual

IRAQ DEVELOPMENT MANAGEMENT SYSTEM (IDMS)

OFFLINE

USER MANUAL

Version 1.0

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1. INTRODUCTION

The purpose of this document is to describe how the *Iraq Development Management System (IDMS)* functions and to provide the necessary instructions for successful work with the system. The use of this document and the compliance with the standards specified herein is mandatory for anyone working with the mentioned application.

2. OVERVIEW

The *Iraq Development Management System (IDMS)* is an automated information management system which is designed to improve efficiency and coordination of donor activities in Iraq. 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 objectives of the *IDMS* is to serve as a reliable and credible source of information on overall donor contributions to Iraq's reconstruction, economic recovery and socio-economic development, as well as to support the Government in effectively managing development assistance and promoting the accountable and transparent use of resources.

The *IDMS* is a powerful tool to view project data organized into lists, reports, charts, and maps, present the project data in the form of list, chart and map reports, memorize/save the reports, print them, and export them into PDF, MS Word and MS Excel format files.

The *IDMS* 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.

For your convenience, in addition to the online data entry subsystem, the offline *IDMS* has been developed in order to ensure more flexibility of the data updating process. The offline version of the *IDMS* application is designed to ensure that project and development related data are successfully updated regardless of the quality of Internet connection. This data entry subsystem requires the end user to have the **Offline IDMS** pre-installed.

To ensure more flexibility and user-friendly environment, the IDMS application has been implemented as a bi-lingual system allowing the data to be presented in the system in two languages: English and Arabic.

3. GETTING STARTED

It is necessary to have the **Offline IDMS** application installed on the user's machine before starting to work with it. The Offline IDMS consists of a web service installed on the IDMS server and a desktop application installed on the user's workstation.

The *Offline IDMS Application* is a setup package which is distributed on a CD, or can be downloaded from the IDMS server. The Offline IDMS is compatible with Windows 2000/XP workstations. The Synergy Offline IDMS is installed by default at the following directory: *C:\Program Files\Synergy International Systems.* Each installation of Offline IDMS is assigned a unique ID (for data synchronization and support/troubleshooting purposes).

After the installation is completed, run the **Offline IDMS** application:

- navigate to the Offline IDMS from **Start** menu: **Start** ► All Programs ► Synergy International Systems ► Offline IDMS ► Offline IDMS;

  OR

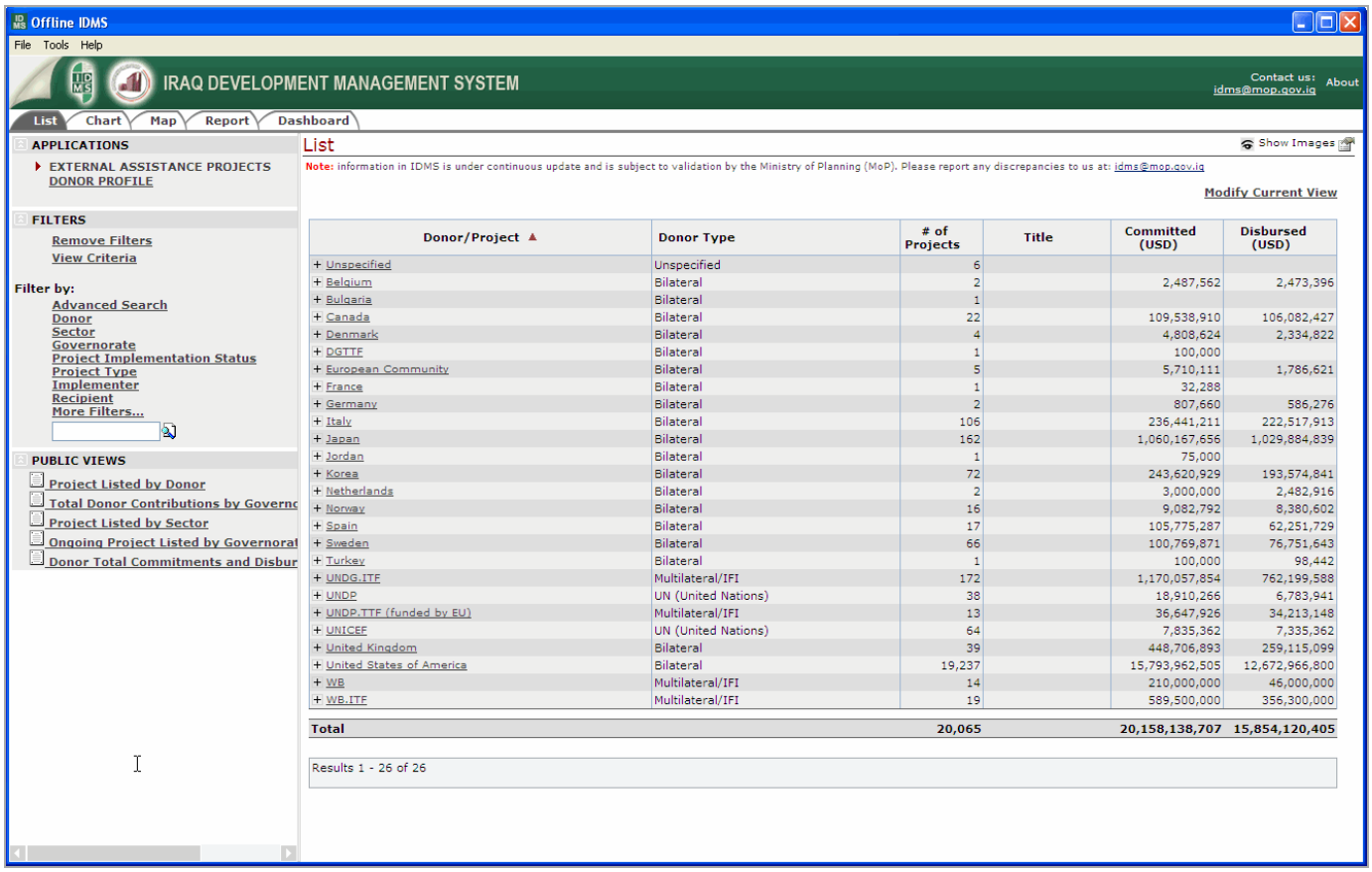
- click the

shortcut created on your desktop by the setup package.

You will be navigated to the *List* module of the **Offline IDMS** application by default (Figure 1), although with view permissions only (as if you accessed online IDMS for public view). Please also note that some options are inactive in the menus - the options for refreshing classifiers, submitting modifications to server require authorized access to the application.

Select ***Log In*** option from the ***File*** menu to gain access rights to be able to make modifications in the system, and subsequently synchronize them with the server. Please refer to the section below for more details on how to login into the system.

Note: Internet connection is required for logging into the system.



Donor/Project	Donor Type	# of Projects	Title	Committed (USD)	Disbursed (USD)
+ Unspecified	Unspecified	6			
+ Belgium	Bilateral	2		2,487,562	2,473,396
+ Bulgaria	Bilateral	1			
+ Canada	Bilateral	22		109,538,910	106,082,427
+ Denmark	Bilateral	4		4,808,624	2,334,822
+ DGTTF	Bilateral	1		100,000	
+ European Community	Bilateral	5		5,710,111	1,786,621
+ France	Bilateral	1		32,288	
+ Germany	Bilateral	2		807,660	586,276
+ Italy	Bilateral	106		236,441,211	222,517,913
+ Japan	Bilateral	162		1,060,167,656	1,029,884,839
+ Jordan	Bilateral	1		75,000	
+ Korea	Bilateral	72		243,620,929	193,574,841
+ Netherlands	Bilateral	2		3,000,000	2,482,916
+ Norway	Bilateral	16		9,082,792	8,380,602
+ Spain	Bilateral	17		105,775,287	62,251,729
+ Sweden	Bilateral	66		100,769,871	76,751,643
+ Turkey	Bilateral	1		100,000	98,442
+ UNDG.ITF	Multilateral/IFI	172		1,170,057,854	762,199,588
+ UNDP	UN (United Nations)	38		18,910,266	6,783,941
+ UNDP.TTF (funded by EU)	Multilateral/IFI	13		36,647,926	34,213,148
+ UNICEF	UN (United Nations)	64		7,835,362	7,335,362
+ United Kingdom	Bilateral	39		448,706,893	259,115,099
+ United States of America	Bilateral	19,237		15,793,962,505	12,672,966,800
+ WB	Multilateral/IFI	14		210,000,000	46,000,000
+ WB.ITF	Multilateral/IFI	19		589,500,000	356,300,000
Total		**20,065**		**20,158,138,707**	**15,854,120,405**

Figure 1: Starting Screen of Offline IDMS

4. LOGGING INTO THE OFFLINE IDMS APPLICATION

To be able to create new projects and/or modify the existing ones, you should log into the **Offline IDMS** system. It is required to have Internet access to gain data entry permissions from the IDMS server.

Note: Please check if your computer is connected to the network and Internet is available.

To log into the system:

1. Select ***Log In*** option from ***File*** menu (Figure 2).

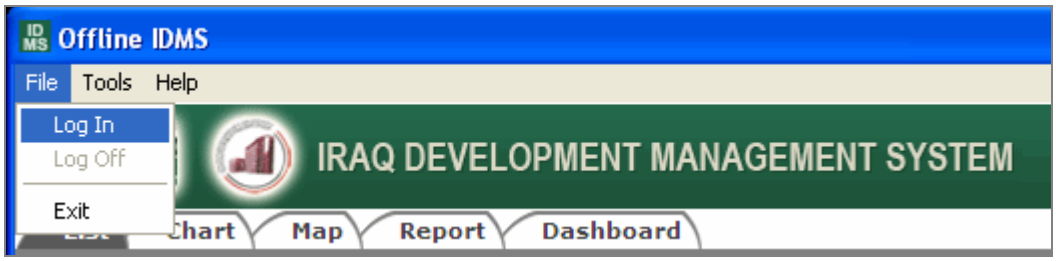


Figure 2: File Menu

2. Provide your username and password in the appropriate fields on the *Login Screen* (Figure 3). For Offline IDMS the same username and password are used as for online IDMS application.
   Note: The password is case-sensitive.
3. Press the **Log In** button to confirm the information input. Or, click the **Cancel** button to discard the operation.

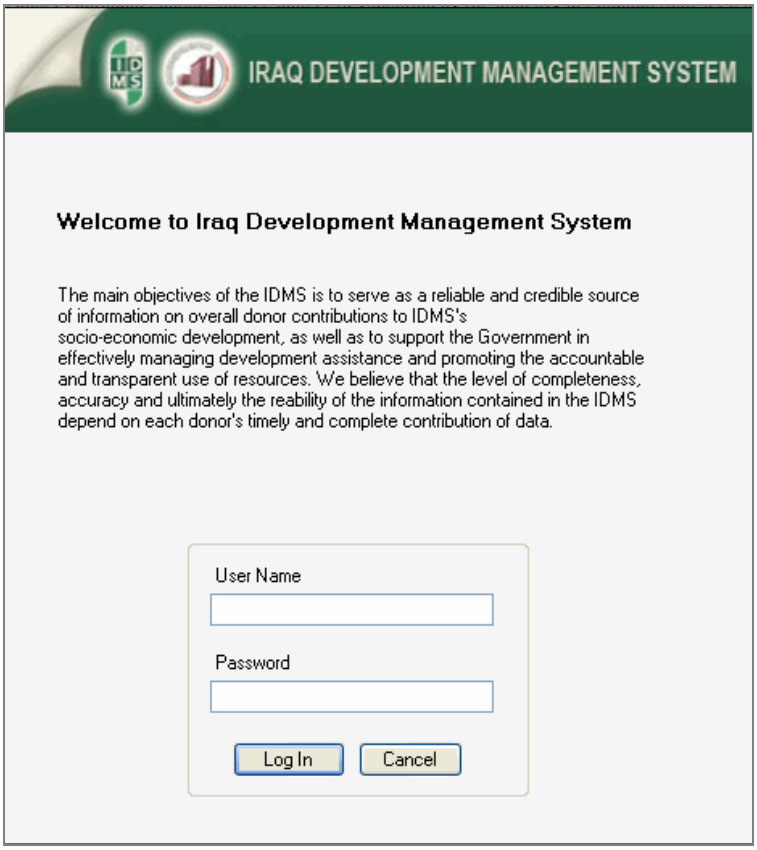


Figure 3: Login Screen

4.1 Switching the Offline IDMS Language

To switch the language of the Offline IDMS application, go to ***Change Language*** option in the ***Tools*** menu (Figure 4) and select the language.

Figure 4: Changing the Language

The Offline IDMS application will load in the selected language.

5. WORKING WITH THE OFFLINE APPLICATION

5.1 Data Synchronization

The main notion of the Offline IDMS is to supplement the Online IDMS and to provide the IDMS users with a tool to work in case of poor or interrupted Internet connectivity. The offline application contains a comprehensive exporting / importing mechanism, which allows exporting data from / importing data to the IDMS server.

After the installation is completed, you will get a local copy of the IDMS database to work with on your workstation. It is important to update the Offline IDMS application periodically to get the most up-to-date data from the IDMS server.

Please refer to THE OFFLINE IDMS APPLICATION UPDATE of the present document for details on how to update the Offline IDMS application.

In the offline mode, you will be able to add new projects as well as modify the existing ones.

When you work with the data entry form in the offline mode, the new data remains unreachable to other users even after pressing the **Save** button. The saving operation will save the modifications made on the local copy of the database. To make the data available to other users, you will have to submit the modifications to the IDMS server.

Please refer to SUBMITTING MODIFICATIONS IN THE OFFLINE IDMS APPLICATION of the present document for details on how to submit the data to the IDMS server.

Note: Though the Offline IDMS is intended for supporting the IDMS users with limited or no Internet connectivity at all, it can be used to work directly with live IDMS server. You can submit the data entry modifications directly to server as you would do when working with the Online IDMS. However, in case of Offline IDMS the user modifications are first saved on the local copy of the IDMS, and only then transferred to the server, while with the Online IDMS changes are saved on the server only.

5.2 Data Merging Principles

The main concept of data merging is that updates to project and grant/loan data are imported to the database on the basis of aggregation rather than replacement. That is, if the same section of the project data has been modified by two users independently, and each user has edited a separate entry within the same section, both modifications will be inserted on the server.

For the case when the same entry has been edited by more than one user, the system prioritizes modifications and accepts the one which has higher priority. The main criterion for prioritization is the *time stamp*. The IDMS keeps track of modifications per each data entry field. Thus, when merging, the system compares the time stamp of the concurrent modifications and the time stamp of the existing data field with that of the submission candidate. The latest changes are given higher priority.

However, there are a number of inter-dependent fields in the project and grant/loan data which cannot be submitted separately as it may corrupt the data integrity. For example, you cannot add a disbursement record without specifying the commitment, or one cannot specify a contact for the

project unless an organisation is indicated, since the list of contacts varies depending on the organisation selected for the project. In the same manner, the Offline IDMS cannot import some changes without tracking their consistency with other related data entry fields. For that reason, wherever there are such dependencies, the modifications are imported not field-by-field, but by each set of inter-associated fields grouped into blocks, the block being assigned the latest time stamp of the participating fields' time stamps. Each block is treated as one entity, i.e. it is imported or not depending on the time stamp of the block.

6. THE OFFLINE IDMS APPLICATION UPDATE

It is important to perform update of the **Offline IDMS** on a regular basis.

Note: It is highly recommended to update the database right after the Offline IDMS installation on first login to have the latest data to work with.

Offline IDMS's components, data structure or actual data update on client-side can be done either through *full* or *partial* upgrade.

Full upgrade is required when a new version of the online version of IDMS or the Offline IDMS application is released.

You can update the offline application by selecting ***Check for Updates*** option from ***Help*** menu (Figure 5).
Note: The Internet connection is required for this operation.

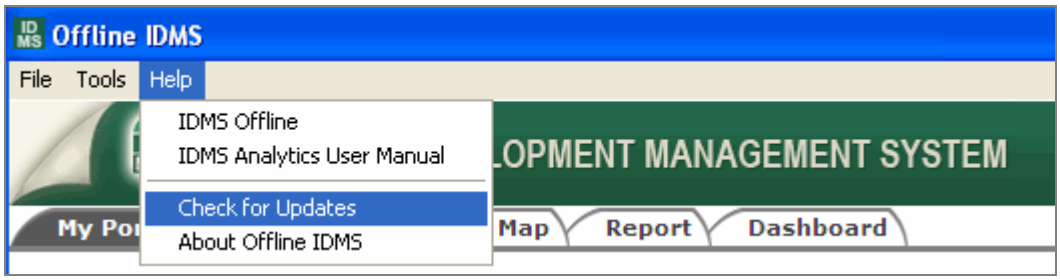


Figure 5: Checking for Updates

If the new version is released and updates are available, the notification window will appear (Figure 6). You can perform update by pressing the **OK** button, or postpone it by pressing the **Cancel** button.

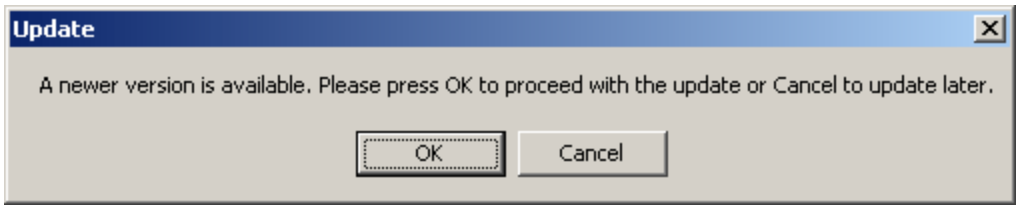


Figure 6: Updates Availability Notification

In most cases when data updates are available on the server, you do not have to do the *full* upgrade but can proceed with *partial* update only. You may need to refresh the data structure, get the latest data, etc. which does not obligatorily imply the need of upgrading all the components of the Offline IDMS application.

The following options are available for partial upgrade:

- Update data from server
- Update data from file
- Refresh classifiers from server

- Refresh classifiers from file

Updates from the server require Internet connection to be established with the IDMS server. In the absence or poor quality of the Internet connection, the update from file can be performed. This file can be provided by the IDMS administrator, who has access to the Internet and has IDMS Offline pre-installed.

6.1 Database update

There are two options available for importing data from the IDMS server. One of them allows importing data from a file; the other downloads the most recent data from the online version of the application. Please note that the latter option is not recommended for slow Internet connection.

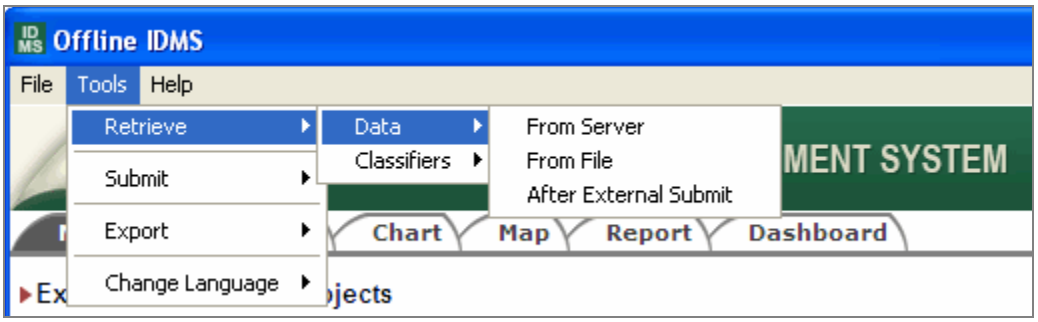


Figure 7: Retrieving Data from Server

6.1.1 Data update from the server

You can update the local database by accessing the IDMS server via Internet. In order to do so, select ***Tools*** ► ***Retrieve*** ► ***Data*** ► ***From Server*** (Figure 7).

Attention: Please note that if you have modified projects on your local version of the Offline IDMS, you should first submit your modifications to the IDMS server and then only retrieve data from the server, otherwise the data contained in your local version will be overwritten by the server data.

Upon your confirmation, the Download Progress window will appear (Figure 8). The local Offline IDMS will be updated with the latest data available for the time of creating the database snapshot.

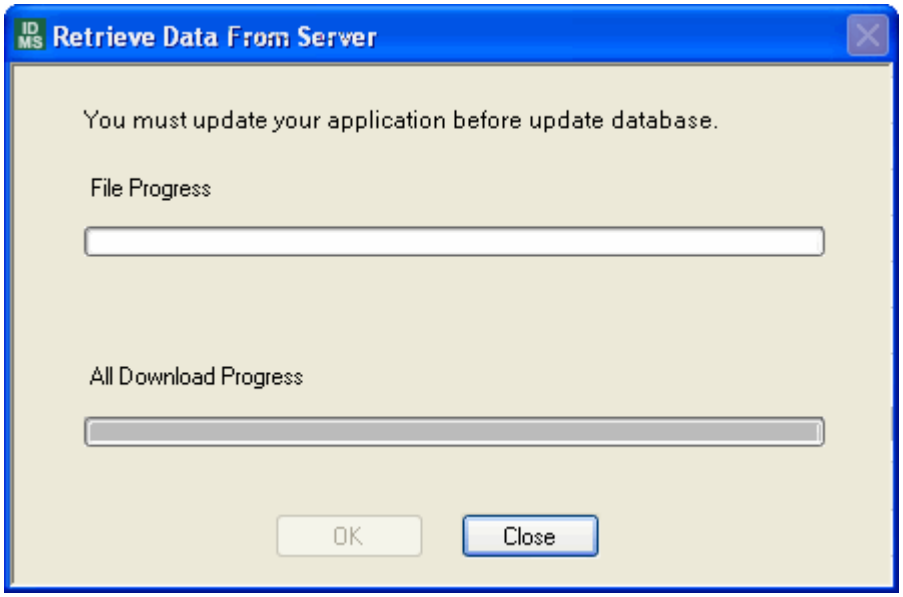


Figure 8: Download Progress Window

6.1.2 Data update from a file

Database update from file option is used to update data in case of poor Internet connection. You should have a database file in a due format received from the IDMS administrator. In order to import the received information on the local database, select ***Tools*** ► ***Retrieve*** ► ***Data*** ► ***From File*** (Figure 9).

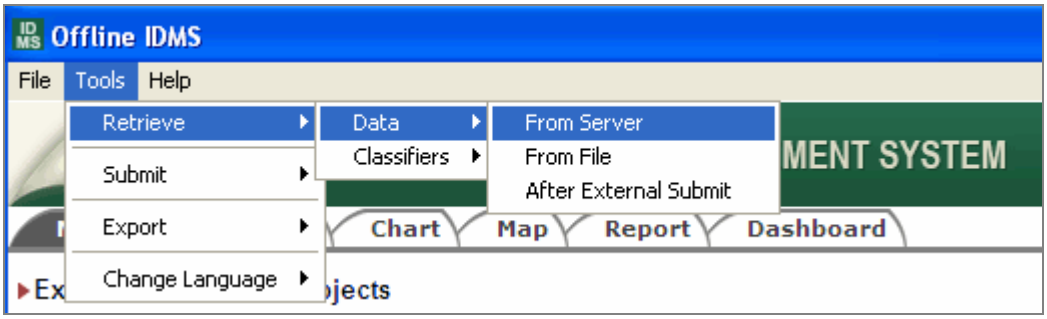


Figure 9: Retrieving Data from File

6.2 Refreshing classifiers

When the administrator adds, edits or removes a classifier (e.g., organisation, sector, location, currency, etc.) on the IDMS server, it is required to update classifiers on the local Offline IDMS before creating new projects.

The classifiers of the Offline IDMS application can be updated by selecting ***Tools*** ► ***Retrieve*** ► ***Classifiers*** (Figure 10).

You can update the offline version directly from the Internet, or by getting updates from file created by the IDMS administrator who has access to the Internet. The latter option can be of more use to those users who have intermittent or no internet connection.

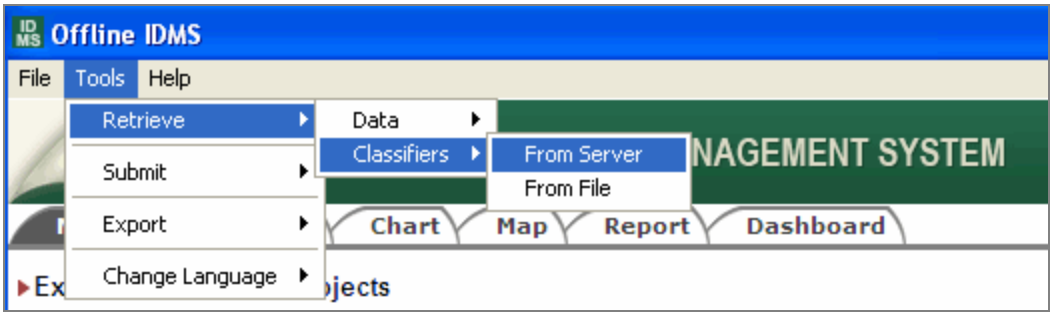


Figure 10: Refreshing Classifiers

6.2.1 Refreshing classifiers from the server

You may update classifiers directly from the IDMS server if Internet connection is available by selecting ***Tools*** ► ***Retrieve*** ► ***Classifiers*** ► ***From Server*** (Figure 10). This will download the most recent list of classifiers from the online version of the IDMS. You should restart the Offline IDMS application to see the changes take effect.

6.2.2 Refreshing classifiers from a file

Upon receiving the file, you should import the classifiers to the Offline IDMS by selecting ***Tools*** ► ***Retrieve*** ► ***Classifiers*** ► ***From File*** (Figure 10). In the opened window select the file to import the classifiers. After successful update of the classifiers, the following response window will appear (Figure 12).

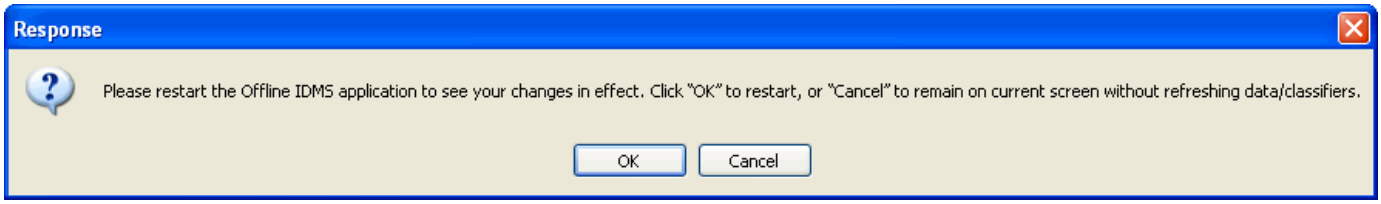


Figure 11: Classifier Update Response Window

7. SUBMITTING MODIFICATIONS IN THE OFFLINE IDMS APPLICATION

The data modifications performed on the local copy of the IDMS database are not accessible to other users unless you submit them to the IDMS server.

The following options are available:

- Submit modifications to the IDMS server directly.
  Note: Internet connection is required.
- Export modifications to file and then submit them to the server from file.

7.1 Submission of modifications to the IDMS server via Internet

If your workstation is connected to the Internet, you can submit your modifications to the IDMS server directly.

To submit the modifications, select ***Submit*** ► ***My Changes*** option from the ***Tools*** menu (Figure 12).

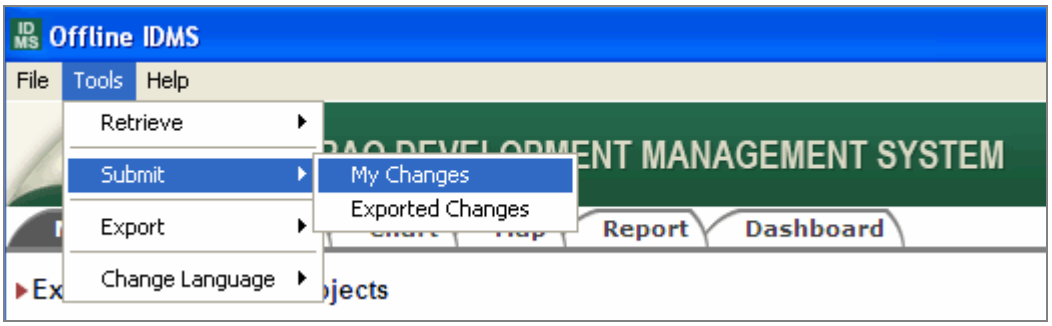


Figure 12: Submission of Modifications to the IDMS Server via Internet

After submission, the system will return a Submission Log indicating whether your modifications were accepted by the IDMS Server.

7.2 Submission of modifications to the IDMS server from a file

If your workstation has limited connectivity to the Internet, there is an option for exporting your modifications into a file of a due format and submitting them from another workstation which is connected to the Internet and where the Offline IDMS is pre-installed.

7.2.1 Exporting data to file

In order to export data to a file, please follow the steps described below.

1. Select ***Tools*** ► ***Export*** ► ***My Changes*** (Figure 13).
   'Save As' window will appear (Figure 14).
2. Define the location where the file should be stored (Figure 14).

3. Specify a name for the file. Please note that the default file name is of the following format **<SubmitChanges>.zip**. This is done to ensure easiness of keeping track of the exported files.
4. Click the **Save** button.

Figure 13: Exporting Modifications to File

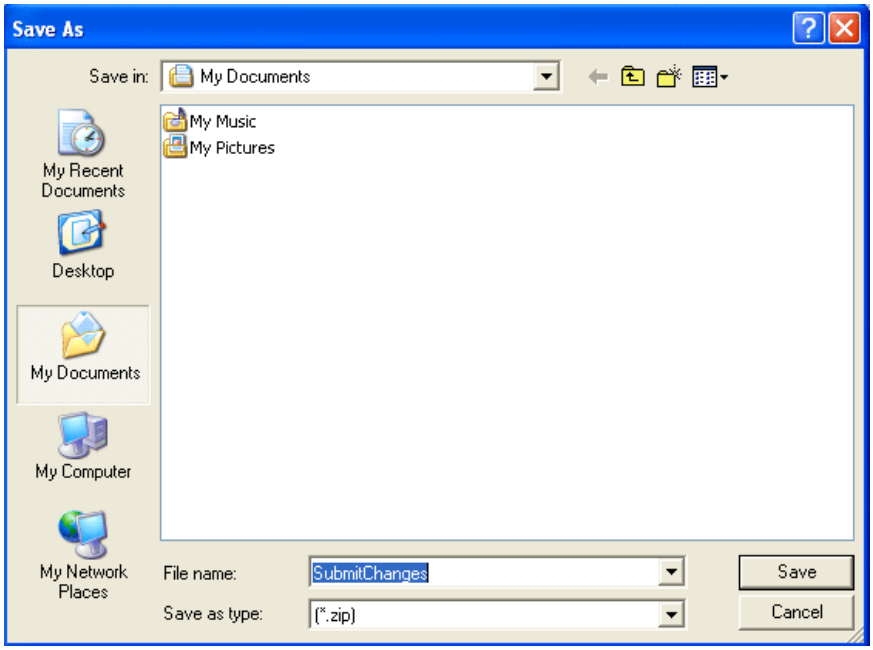


Figure 14: Saving the File

After successful export, you will receive a response from the system about .zip file creation (Figure 15). This .zip file with your modifications can be transferred to the IDMS Administrator for submission to the IDMS server.

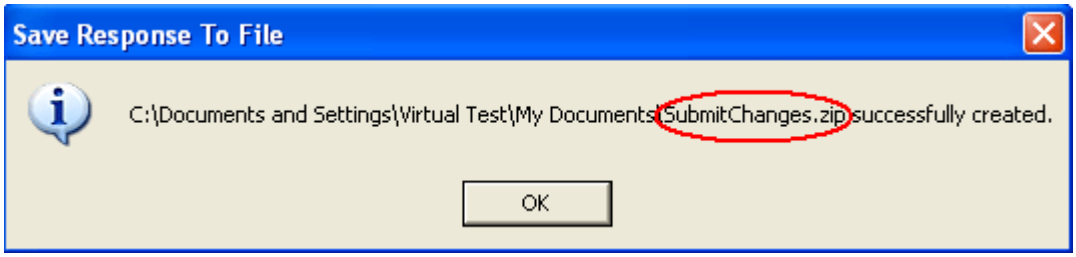


Figure 15: Successful .zip File Creation Notification

7.2.2 Submitting exported modifications from file

To submit the exported modifications from the file to the IDMS Server, select ***Tools*** ► ***Submit*** ► ***Exported Changes*** (Figure 16).

Note: The internet connection is required for this operation.

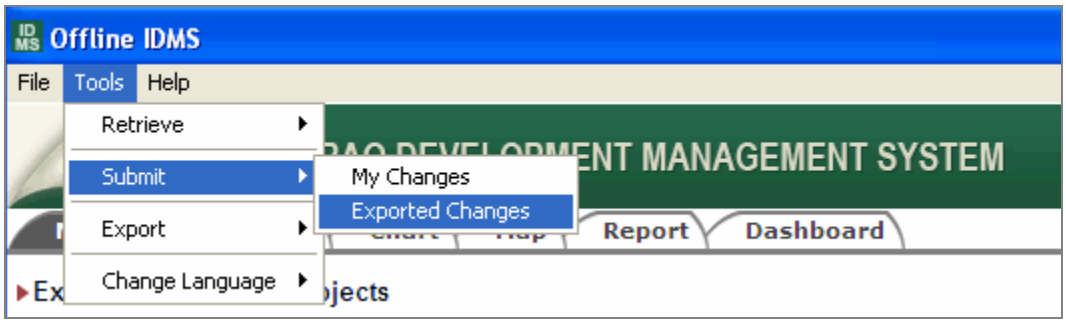


Figure 16: Submission of Exported Changes

An 'Open' window will appear (Figure 17). Locate the file to be exported – in our case the SubmitChanges.zip.

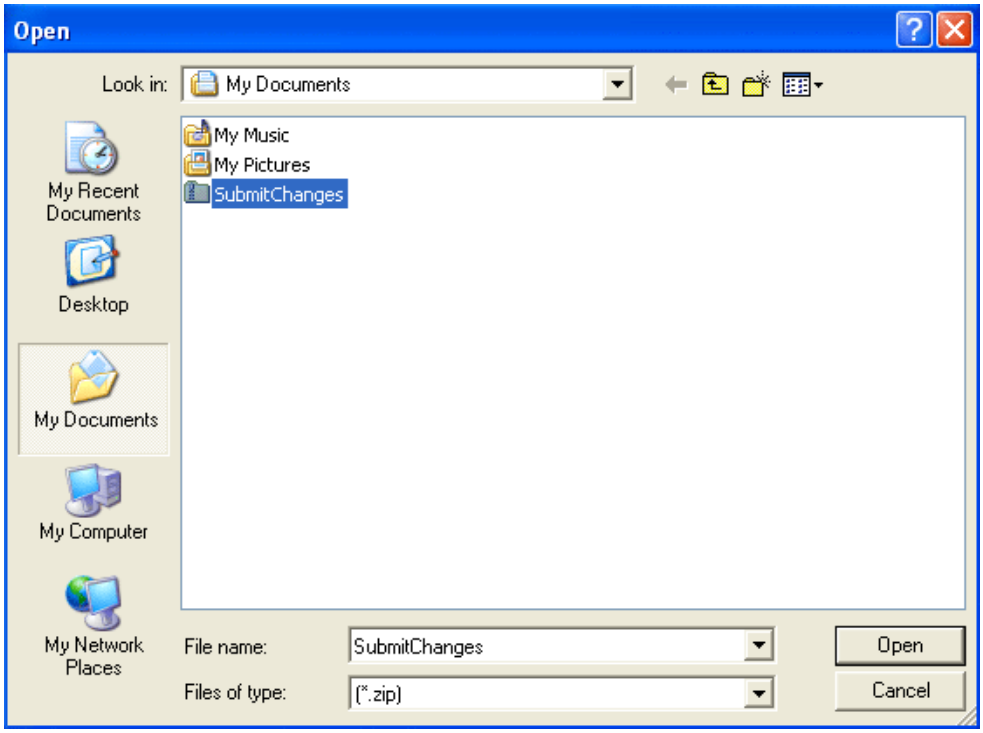


Figure 17: File Selection Window

After successful submission of the file to the IDMS server, you will receive the out.zip file (Figure 18).

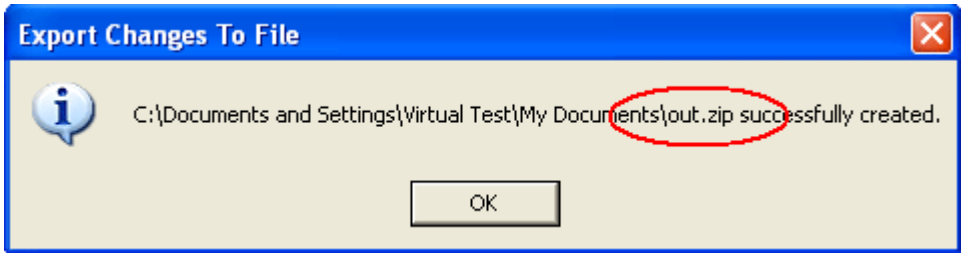


Figure 18: Response Window

7.2.3 Retrieving data after external submit

As the final step of data submission of your modifications through a file, select ***Tools*** ► ***Retrieve*** ►***Data*** ► ***After External Submit*** (Figure 19). Locate the out.zip file (Figure 20) on your workstation and confirm the data transfer.

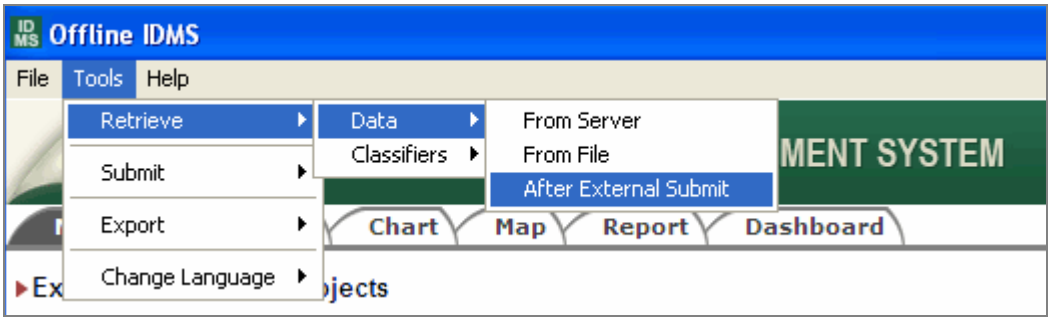


Figure 19: Retrieving Data after External Submission

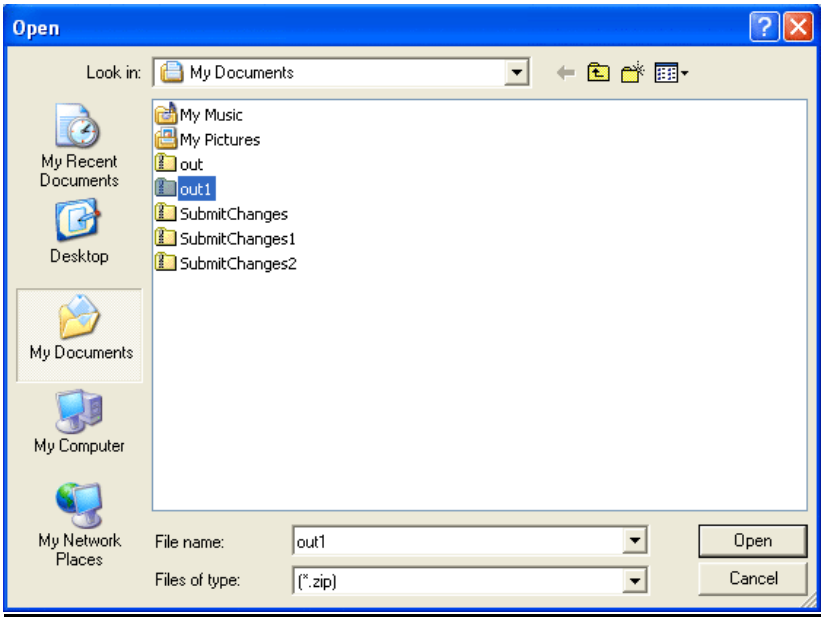


Figure 20: out.zip File Selection Window

8. LOGGING OUT OF THE OFFLINE IDMS APPLICATION

The offline version of the IDMS application is used to work with the project data in conditions of poor Internet connectivity. One of the ways to ensure successful interaction with the application is the ability of closing it without prior termination of the current session. You can close the application with the **Exit** option (***File ► Exit***) while retaining your session active. Please note that this option is useful in case your computer is not shared by multiple users. Otherwise, you will grant full access to your profile to others.

In order to prevent others from accessing your profile as well as making changes in your data it is essential to terminate your session. You can do this by choosing ***File ► Log Off*** option (Figure 21).

Note: Ending your session without prior submission of the modifications to the IDMS server will discard all the changes made within this session.

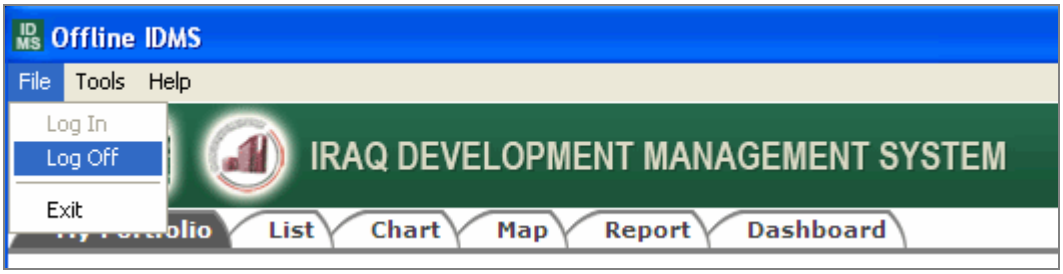


Figure 21: Logging out of the Application

IRAQ DEVELOPMENT MANAGEMENT SYSTEM (IDMS)

ANALYTICS USER MANUAL

Version 1.4

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1. INTRODUCTION

The purpose of this document is to describe how the *Iraq Development Management System (IDMS)* application functions and to provide the necessary instructions to ensure successful work with the application. Use of this document and compliance with the standards specified herein is mandatory for anyone working with the mentioned application.

2. OVERVIEW

The *Iraq Development Management System (IDMS)* is an automated information management system which is designed to improve efficiency and coordination of donor activities in Iraq. 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 *IDMS* is to serve as a reliable and credible source of information on overall donor contributions to Iraq's reconstruction, economic recovery and socio-economic development, as well as to support the Government in effectively managing development assistance and promoting the accountable and transparent use of resources.

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

IDMS 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, *IDMS* consists of the following applications:

- **External Assistance Projects** – this application is designed to track the ongoing projects that are financed from external sources, e.g. donor community, 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, Map and Report modules. Moreover, in this application you can add new projects or modify the information of existing projects through the built-in on-line *Data Entry* module.

- **Donor Profile -** this application is designed to track the donor profile information. Moreover, it gives the donor organisations / entities the possibility to provide information about the amount of assistance provided to the country, etc. This is done in the built-in on-line *Data Entry* module. Also, you can create analytical reports in the List, Chart, and Report modules.

- **Capital Investment Projects -** this application is designed to track the public investment projects that have been approved for the implementation and the projects that are currently being implemented. These projects comprise the Public Investment Portfolio

and are financed out of the national budget. Once you have accessed this application, you are able to view project details and create analytical reports in the List, Chart, Map and Report modules. Moreover, in this application you can add new projects or modify the information of existing projects, which is done in the built-in on-line *Data Entry* module.

- **Iraq Development Projects** - this application is designed to consolidate the data from the two applications: *External Assistance Projects and Capital Investment Projects.*

- **NDP Indicators** - this application is designed to track project indicators and the related progress.

The examples described in the sections below are based on the *External Assistance Projects* application.

IDMS provides a web-based user interface and requires a web browser (Internet Explorer) pre-installed.

Note: To ensure more flexibility and a more user-friendly environment, *IDMS* has been implemented as a bi-lingual system allowing the data to be presented in the system in two languages: English and Arabic.

3. WHO USES IDMS?

The table below lists the groups of users that might be accessing and managing the *IDMS* application:

Users Group	Who are they?	Why they need IDMS access?
Administrators	IDMS system administrator	Access to the entire data stored in *IDMS*.
Executing Body (ExB)	Ministry or Governorate users	Responsible for creating a new project request with all the required data and saving it as a draft.
Assigned MoP Sectoral Unit (MSU)	Ministry of Planning's Sectoral Unit users	Responsible for revising the draft project requests, making necessary changes and applying the draft for a submission. This user also negotiates with the Line Ministry before sending the draft forward to the MIU.
MoP Investment Unit (MIU)	Ministry of Planning's Investment Unit users	Responsible for sending the revised draft project request for an approval first to the Council of Ministers and then to the country Parliament.

For each user group, a specific role is assigned by the IDMS system administrator, in accordance to the requirements. Depending on the role, users get certain permissions to add, edit or modify and view entries in the IDMS application.

Note: If you do not have enough permission to perform certain actions, please refer to your project coordinator or system administrator.

Besides the group listed above, customized groups may also be created on demand.

4. LOGGING INTO THE IDMS APPLICATION

The starting screen of *IDMS* is the *Login Screen*. The application requires entering a valid username and password and then submitting them. The section below provides for the necessary instructions on logging into the *IDMS* application. You may change the IDMS language into Arabic by pressing التحويل إلى العربية link in the right upper corner of the page.

In order to log into the application, follow the steps described below:

1. Provide the username and password in the appropriate fields in the *Login Screen* (Figure 1).
2. Click the **LOGIN** button.

Note: The password is case sensitive.

Figure 1: IDMS Application Login Screen

A successful login directs you to the *My Workspace* module of the *IDMS* application.

Note: If you have forgotten your password, you can retrieve it by clicking the **Forgot Your Password?** link in the *Login Screen* and confirming your identity. After submitting your identity information, you will receive the password into the e-mail account indicated.

4.1 Registering for a Username and Password

New users can sign up for a username and password to start using the system.

In order to register in the system, follow the steps described below:

1. Click on the **Request a New Account** link at the bottom of the *Login Screen*. A *User Registration Form* (Figure 2) will appear.
2. Fill in the information requested.
3. Click the **Submit** button to submit the information provided.

Figure 2: User Registration Form

Once you submit the registration form, the IDMS administrator receives a notification. The administrator will review the information submitted and either approve the application or reject it. In case the application is approved, you will receive an e-mail message to the provided e-mail address. The e-mail will contain your login information details (username and automatically generated password) and the link to the IDMS login page.

Once logged in with the received username/password, you can manage your details, i.e. change personal data and the password. To edit personal details, log into the application, go to the *My Profile* section (Figure 3) and make the appropriate changes.

Figure 3: My Profile Section

4.2 Accessing IDMS without Registration

To ensure more flexibility and to provide access to the project data to a wider range of users, the system is designed in such a way that it allows public users to enter it without having to register for a username and password. Although, public users have access to the project data, they are not able to create new projects or modify / delete the existing ones.

Public users wishing to view project data should click on the **LOGIN AS A GUEST** button (Figure 1). They will be directed to the *List* module of the *IDMS* application.

5. IDMS ANALYTICS STRUCTURE

IDMS consists of the following main sections:

- MY WORKSPACE MODULE – used for quick access to the projects registered in the *IDMS* system by the user's group.
- LIST MODULE – used to create and execute ad-hoc queries on the data, and acquire results in the form of a list.
- CHART MODULE – used to filter and display the data in a chart form.
- MAP MODULE - used to filter and display the data in a map form.
- REPORT MODULE – generates complex reports over one or more criteria and presents the output in the printable and user-friendly format.
- DASHBOARD MODULE - used for quick access to the projects registered in the *IDMS* system.

The *IDMS* main window has a complex preview as it is shown in Figure 4.

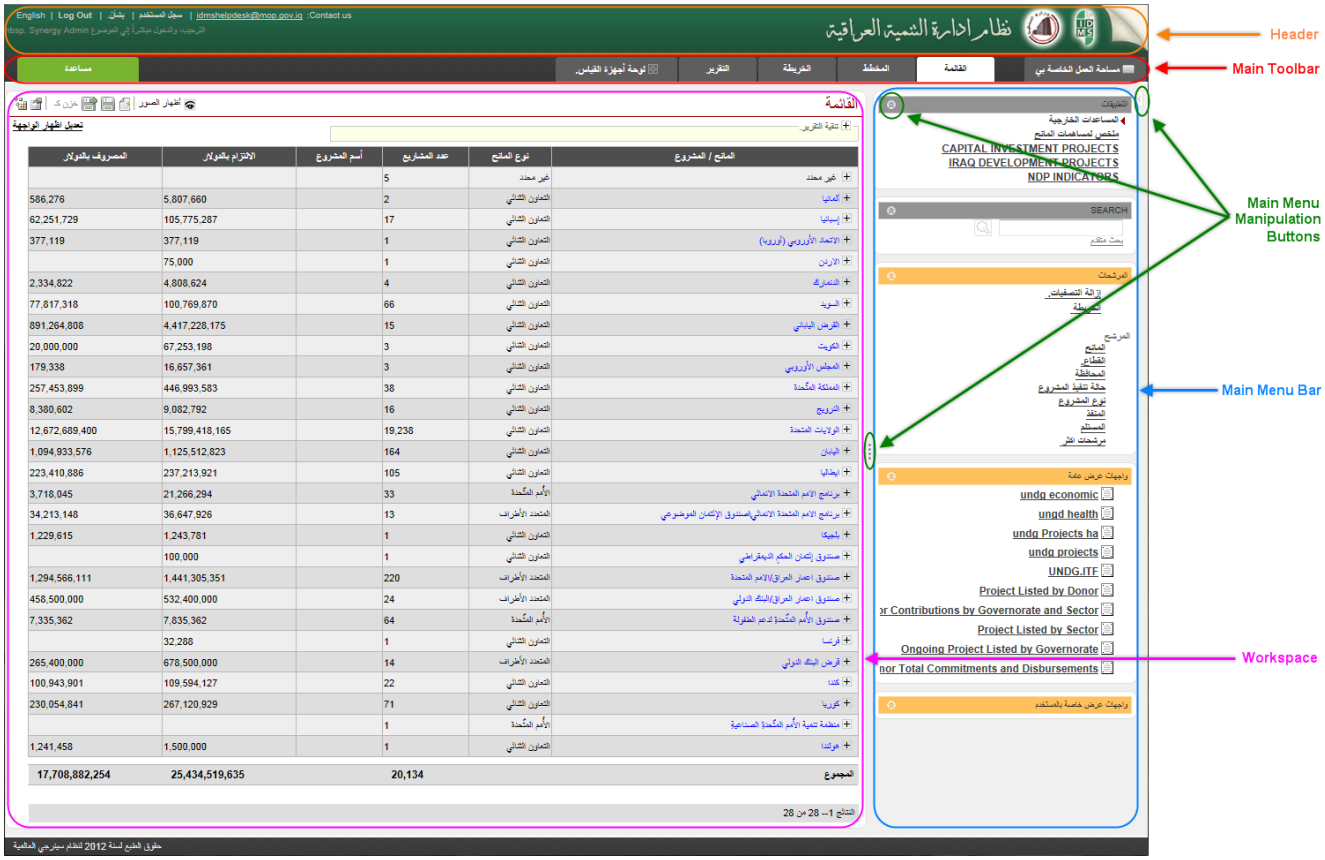


Figure 4: IDMS Analytics Structure

It contains the following components:

Component Name	Description
Header	This is the application header that contains application name and the IDMS logo. On the right side, the following functions are available:

	• **Contact Us** – e-mail address of the IDMS System Administrator. • **My Profile** – this opens your personal settings and details. For details, see Registering for a Username and Password. • **About** – opens the *IDMS* information window. • **Log Off** – this button is used to log off the application.
Main Toolbar	This is the main toolbar of the *IDMS* application. The following tabs are available here: • **My Workspace** – opens MY WORKSPACE MODULE to manage user specific projects. • **List** – opens the LIST MODULE of the selected Application (see Main Menu description below). • **Chart** –opens the CHART MODULE. • **Map** –opens the MAP MODULE. • **Report** - opens the REPORT MODULE. • **Dashboard** – opens the DASHBOARD MODULE for quick access to the projects registered in the *IDMS* system. • **Help** – opens the IDMS application help.
Main Menu Bar	This menu contains sections with main functions of the IDMS application: • **Application** – lists all applications present in *IDMS*. • **Search** – contains a common and advanced search functions among the selected application list. For details, see SEARCH. • **Filter** – contains filtering options. For details, see FILTERING. • **Public Views/Charts/Maps/Reports** – memorized views / charts / maps / reports (depending on the opened module) available to all users of the application. • **My Views/Charts/Maps/Reports** – memorized views / charts / maps / reports (depending on the opened module) created by and available to the current user only.
Main Menu Manipulation Buttons	• **Left/Right arrows** ( ) – used to hide/open the Main Menu bar. • **Up/Down arrows** ( ) – used to collapse/expand the section in the Main Menu bar. • **Frame Divider** – used to adjust the width of the Main Menu bar.
Workspace	In this frame all applications and modules are managed. Here are filtering and search results displayed.

6. MY WORKSPACE MODULE

The *My Workspace* section (Figure 5) of the *IDMS* application provides quick access to the projects and indicators created by the corresponding user.

In order to access *My Workspace* module, click on the **My Workspace** tab in the *Main Menu* of *IDMS* application. Editing permissions of records in *My Workspace* can be based on the user (whether the user has created the record) or user's group (whether someone from the group user belongs to has created the record). All these permissions are granted and managed from IDMS Administration Center (see *IDMS Administration Center User Manual* in REFERENCES).

My Workspace contains the following sections:

- **External Assistance Projects** – the draft and submitted external assistance projects are displayed here. See External Assistance Projects in My Workspace Module.
- **Capital Investment Projects** - the draft requests and approved capital investment projects are displayed here. See Capital Investment Projects in My Workspace Module.
- **NDP Indicators** – the National Development Plan Indicators are displayed here. See NDP Indicators in My Workspace Module.

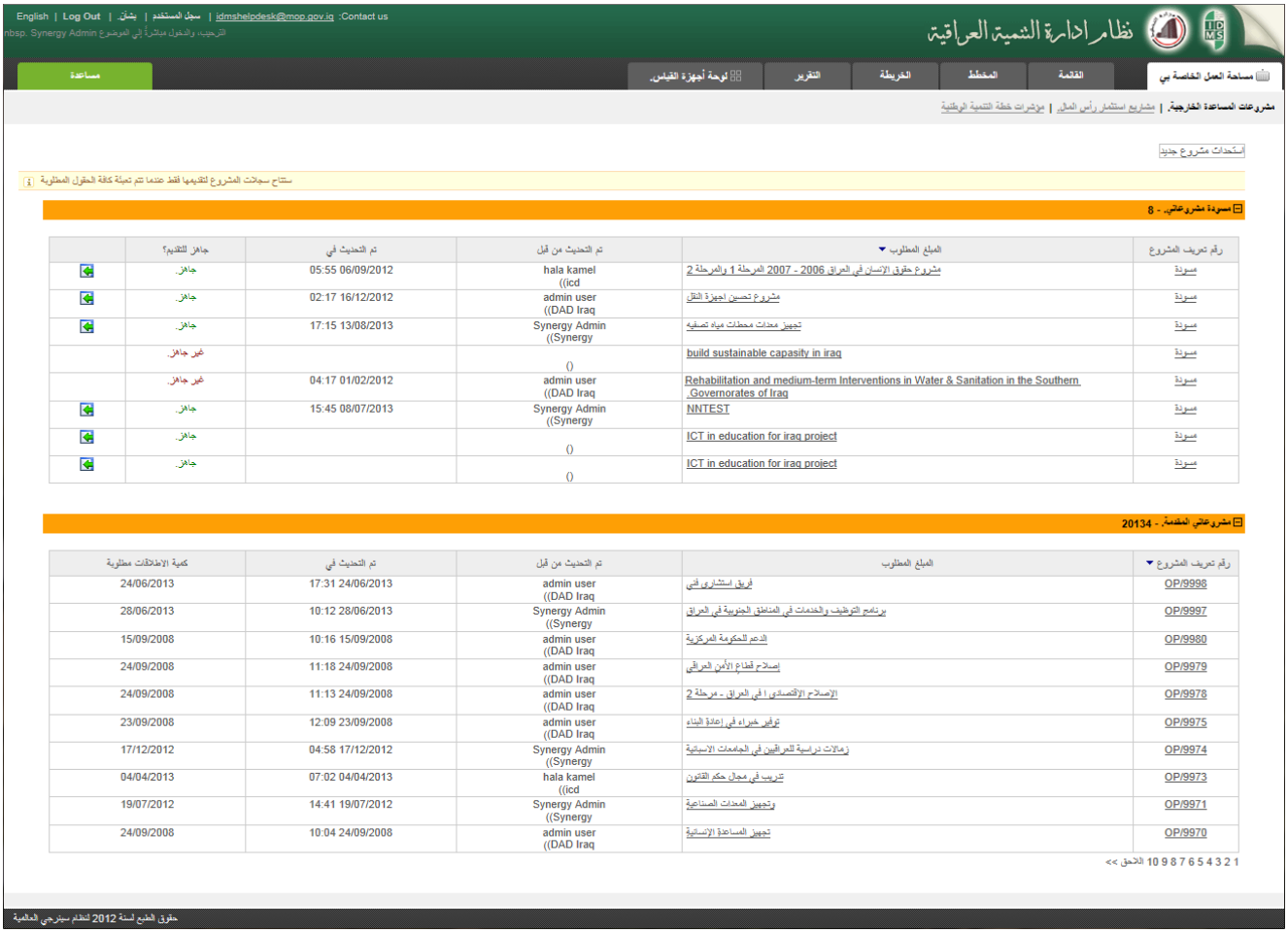


Figure 5: My Workspace Section

6.1 External Assistance Projects in My Workspace Module

In this page you may see a list of draft and submitted external assistance projects. Each project created in IDMS either from the *My Workspace* module or from the corresponding application should get submitted first in order to become public and official. Below is the procedure of project submission:

- The user adds an external assistance project. It is saved as a draft in the user's workspace, in the *My Draft Projects* list (Figure 6). Drafts may also be viewed and edited by other users that have the corresponding permissions. Further, drafts should be revised by the user or by the corresponding project manager.
- If all mandatory fields are filled in the project form, then draft gets a 'Ready' state in the *Ready for Submission?* column of the drafts table. If at least one mandatory field is not yet filled, the draft has 'Not Ready' state.
- Only drafts with the 'Ready' state can be submitted. To submit the draft, press the **Submit** button ( ) in the *My Draft Projects* table.

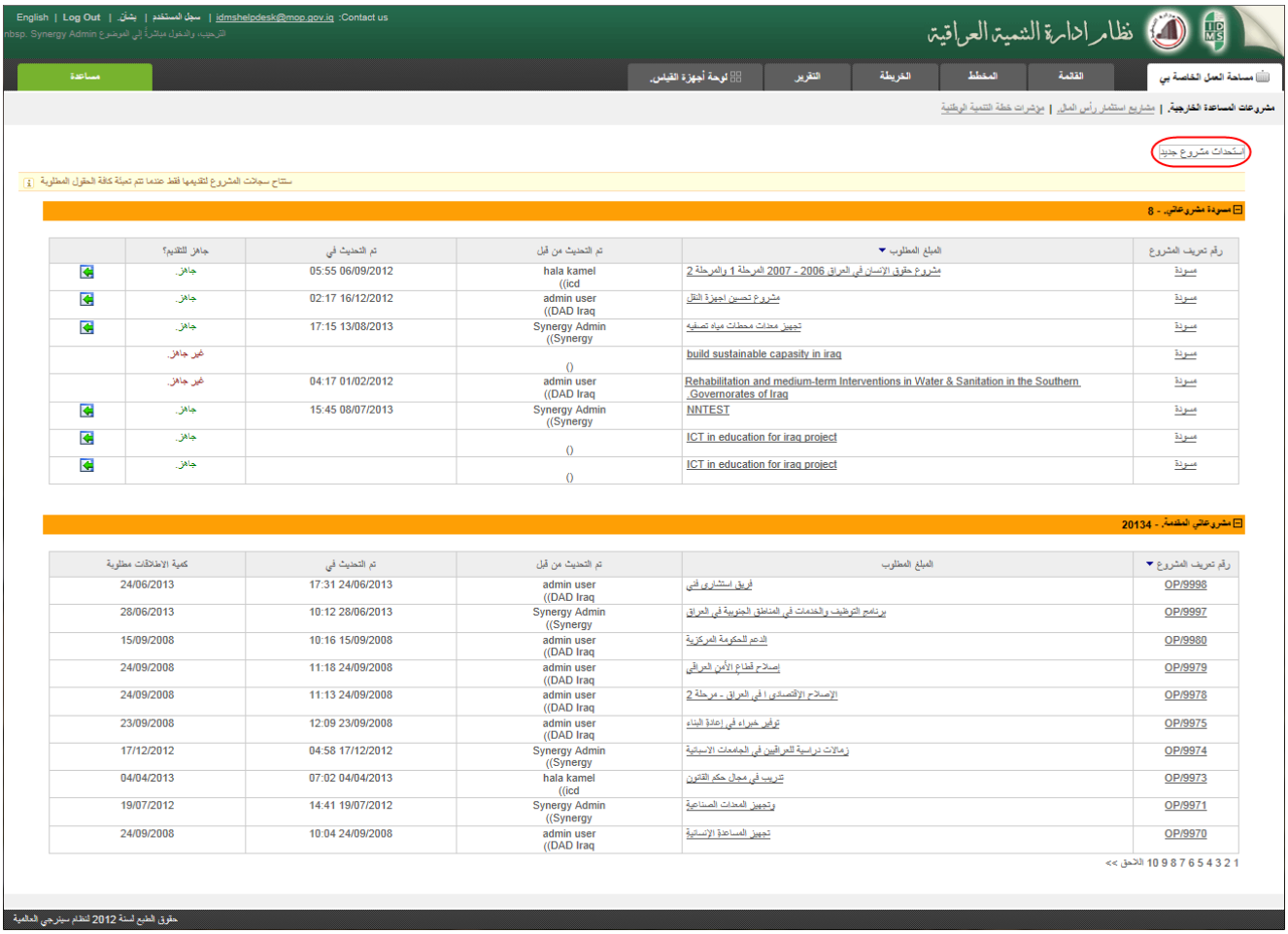


Figure 6: External Assistance Projects Section in My Workspace

Note: Only submitted drafts are displayed in the *List* table of the *External Assistance Projects* application (see LIST MODULE) and accessible to other users of the IDMS application.

In this section, an external assistance project may be created; details of existing projects can be viewed and edited.

The information displayed in *My Workspace* for each project includes the following:

- **Project ID** – the code of the External Assistance Project,
- **Project Title** – the title of the External Assistance Project,
- **Updated By** – last update author,
- **Updated On** – last update date,
- **Ready for Submission?** – indicates whether all mandatory fields are provided in the project draft and it is ready to be submitted or not. If the project draft is ready to be submitted, a corresponding **Submit** button ( ) appears next to this column.

6.1.1 Adding an External Assistance Project

To add a new external assistance project from the *My Workspace* module, follow the instructions below:

1. Go to the **External Assistance Projects** tab of the *My Workspace* module.
2. Click the **Create New Project** button (Figure 6). This will open an *Add External Assistance Project* form which is described in the *External Assistance Projects Application User Manual*, see REFERENCES.

6.1.2 Viewing External Assistance Project Details

Depending on your permissions you may also see or edit external assistance projects added by other users.

To view details of drafts and submitted projects in the *My Workspace* module, follow the steps below:

1. Go to the **My Workspace** module.
2. Click the **External Assistance Project** tab.
3. Expand the corresponding **My Drafts Projects** or **My Submitted Projects** list (Figure 6).
4. Click the project you wish to see the details for. You will be directed to the *Details* section of the *External Assistance Projects* application. For more information, see DETAILS SECTION.

6.2 Capital Investment Projects in My Workspace Module

To create a capital investment project in IDMS, you should first add a project request, which should pass an approval procedure first and then become a project (see Regular Funding Request Approval Procedure). The approval of the project requests is handled by the MoP Investment Unit users. Before a project request gets approved, it should be first submitted as a draft request and then pass a revision cycle. The approved request is copied into a project entry, while request itself remains in the system as well. Both the submitted requests and the approved projects are visible from the LIST MODULE and are available for analytics in the CHART MODULE, MAP MODULE and REPORT MODULE of the IDMS application.

Note: To keep the project active, the responsible entity should re-submit the project request every year.

The **Capital Investment Project** section of the *My Workspace* module (Figure 7) is divided into three groups: **My Draft Funding Requests**, **Submitted Funding Requests** and **Approved Projects**. These lists display the draft and submitted project requests and the approved capital investment projects correspondingly.

Certain actions are available for each of these sections. For details see the corresponding list description below.

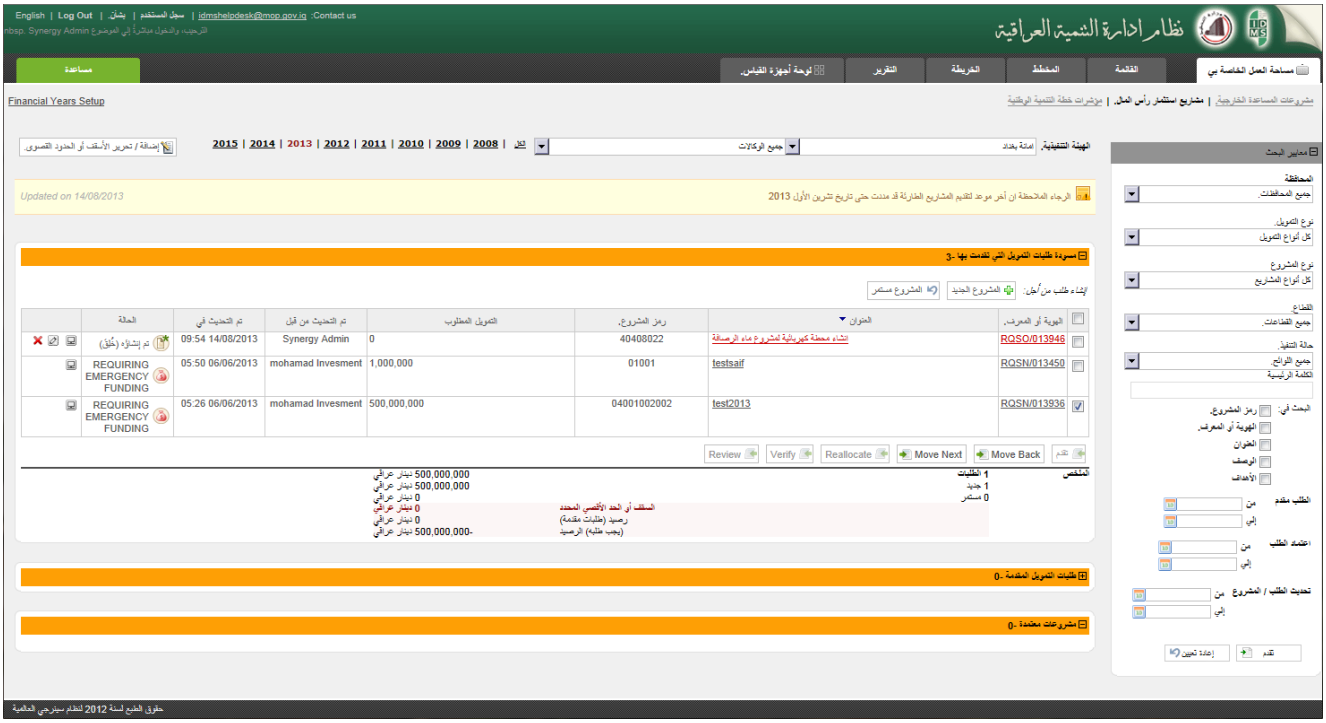


Figure 7: Capital Investment Projects Section in My Workspace

To start managing capital investment projects, select the **Executing Body** first. This will filter all projects for the selected entity. You may also select the **Agency** of the Executing Body to narrow down the list of projects to the specified agency. Finally, choose a **Year** to display the projects for. Once these selections are made, the filtered list of capital investment projects and the available functions will appear in the *Capital Investment Project* section.

On top of the *Capital Investment Project* section, there is an **Announcements** area where the MoP Investment Unit members and administrators can post any information related to the Capital Investment Project submission and approval procedures and any other relevant information (Figure 8). For details on how to manage announcements, see Managing Announcements.

Figure 8: Announcements Area in the Capital Investment Projects Section

The **Financial Years Setup** link in the right upper side of the *Capital Investment Projects* section (Figure 9) leads to the Financial Years Setup form to select active years and define regular and emergency request submission dates.

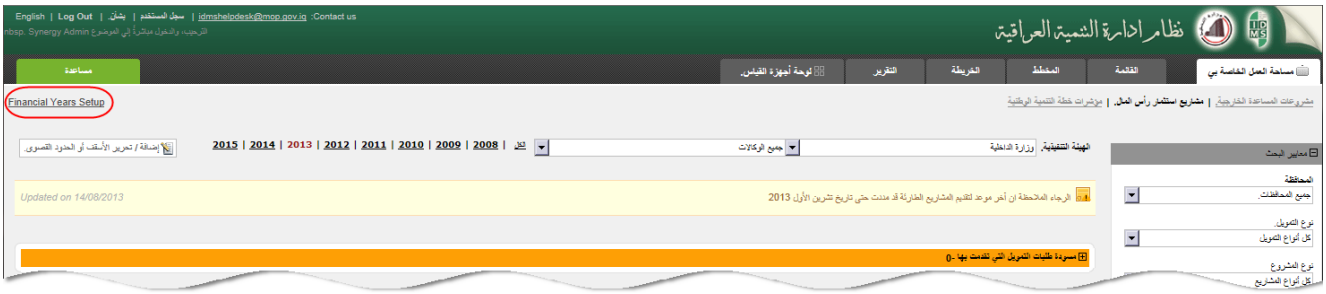


Figure 9: Financial Years Setup Link in the Capital Investment Projects Section

Requests are considered as *regular* if they are created within the regular request submission period. For regular requests, the workflow is described in Regular Funding Request Approval Procedure.

Requests created after the regular requests submission deadline has expired are considered as *emergency*. They can still be submitted if MoP will consider them important and if enough funding will be available. Emergency requests can be submitted with negative Balance (to be requested) and unless the Emergency submission date is not expired. For emergency requests, the workflow is described in Emergency Funding Request Approval Procedure.

The **Capital Investment Indicators** section in *My Workspace* module is enriched with an advanced search mechanism. For details, see chapter Search in Capital Investment Projects.

The **Add/Edit Ceilings** button is used to adjust Budget Ceilings of GoI (Government of Iraq) entities for the corresponding year. This option is only available to the IDMS administrators and MoP Investment Unit group users. For details, see Adjust Budget Ceilings.

6.2.1 Managing Announcements

Note: Only the MoP Investment Unit members and administrators are allowed to manage the announcements in the *Capital Investment Projects* section.

If you have enough permission to edit announcements, click the **Add Announcement** link at the top of *Capital Investment Projects* section (Figure 10).

Figure 10: Add Announcements Button in Capital Investment Projects Section

This will activate the **Announcements** field (Figure 11).

Figure 11: Editing Announcements Area in Capital Investment Projects Section

Enter the announcement text in the English and Arabic languages and press the **Submit Announcement** button ( ) to post the announcement. The date of the last update will be displayed in the *Announcement* area. To remove the posted announcement, activate the **Announcements** field by clicking it and remove the text of the announcement. If no announcement was made, regular users will not see the announcements area in the *Capital Investment Projects* section of the *My Workspace* module.

6.2.2 Financial Years Setup

In the **Financial Years Setup** window (Figure 12), active financial years should be selected for Capital Investment Projects.

Note: New projects can be created and ongoing projects may be accessed only for active years. No changes (i.e. editing or moving) could be made to the funding requests/projects associated with inactive years.

To set the year active, select the **Is Active** checkbox for the certain year.

To define the regular request submission period, select the **Regular Request Submission Start Date** and **Regular Request Submission End Date** from the corresponding fields. To define the emergency request submission end date, choose a date from **Emergency Request Submission End Date** field. For all date fields in this window, a calendar popup is available, see Figure 13: Calendar.

Figure 12: Financial Years Setup Window in My Workspace

Note: The *Regular Request Submission Start Date* should be before *Regular Request Submission End Date*, and *Emergency Request Submission End Date* should be after *Regular Request Submission End Date.*

Figure 13: Calendar

6.2.3 My Draft Funding Requests

The **My Draft Funding Requests** list displays the draft requests created by the Executing Body group users. The following information is displayed in the list:

- **ID** – the system generated unique request code,
- **Title** – the title of the request,
- **Project Code** – the request related project code. If the request has been copied from some other project, you will see the code of the original project here.
- **Required Funding** – the funds requested in the request,
- **Updated By** – last update author,
- **Updated On** – last update date,
- **Status** - the status of the draft. Following values may be seen in this column:
  - **CREATED** – for initially created draft requests, both regular and emergency requests. **Note:** For definition of regular and emergency requests, see Capital Investment Projects in My Workspace Module.
  - **REQUIRING EMERGENCY FUNDING** – shows up for emergency requests only when no enough funding is available to process the request.

  - **EMERGENCY FUNDING REQUESTED** – shows up for emergency requests only when funding is requested for the request.
  - **EMERGENCY FUNDING VERIFIED** – shows up for emergency requests only when funding for the request has been verified.
  - **EMERGENCY FUNDING REVISION REQUESTED** – shows up for emergency requests only in the stage of funding revision.
  - **EMERGENCY FUNDING REJECTED** – shows up for emergency requests only when funding for the request has been rejected.
  - **EMERGENCY FUNDING APPROVED** – shows up for emergency requests only when funding for the request has been approved.
- **Actions** – you may view ( ), edit ( ) and delete ( ) the draft request.
  Note: The delete action is available to administrator or Executing Body users and serves as a permanent delete for the funding request (the record will be fully deleted from *IDMS*).

In the *My Draft Funding Requests* list, drafts are marked in red and grey colors. Red drafts are those that are still pending mandatory information to be provided and cannot be submitted at this stage. Grey drafts are ready for the submission.

Draft projects may be selected/deselected using checkboxes allocated to each entry in the table. The top checkbox located in the heading of the *My Draft Funding Requests* list is used to select/deselect all draft projects (Figure 14). Below are listed functions to perform over the selected drafts in the *My Draft Funding Requests* list:

Note: The functions described below are not available after the emergency request submission end date (see Financial Years Setup).

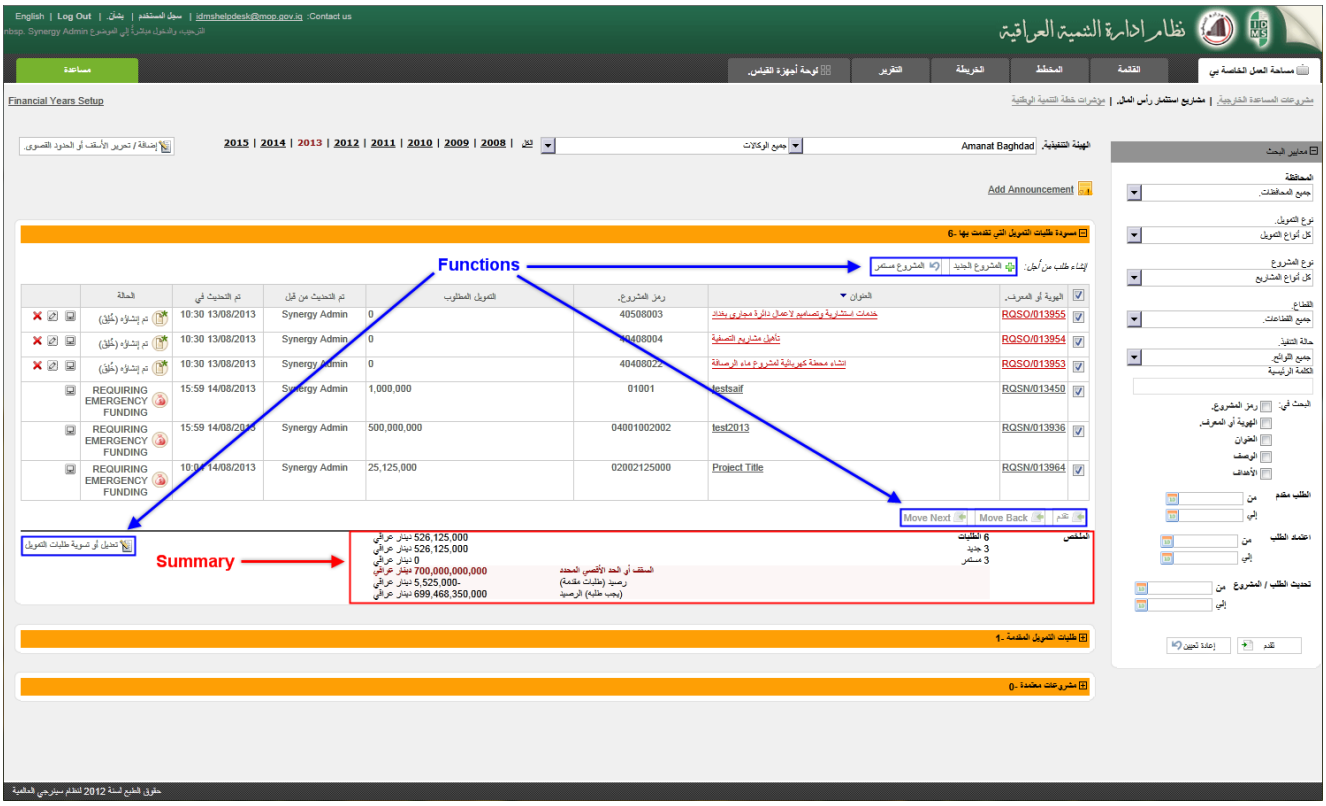


Figure 14: Functions and Summary in Draft List of Capital Investment Projects Section

- **New Project** – opens a form where a new project request may be created. For details on the *New Project* form, see *IDMS Capital Investments Projects Application User Manual* in REFERENCES.
- **Ongoing Project** – opens a list of approved projects for the selected Executing Body and/or Agency for the selected year (Figure 15). This list displays only projects marked other than Accomplished (set from the **Implementation Status** field described in *IDMS Capital Investments Projects Application User Manual*, see REFERENCES) and with the Start/End Dates spanning the selected year. Projects that already have an ongoing request created for the selected year are not listed here.
  By selecting the ongoing project, you may create a new request for the current year for that project. To do that, expand the GoI list, choose one or more ongoing projects and press **Create Draft** button. The new funding request will be generated with the unique *Request Code* and will appear in the *My Draft Funding Requests* list. The project **Type** for the new funding requests will be 'Ongoing'.
- **Adjust Funding Requests** – available for administrator and Executing Body group users and displays a list of GoI (Government of Iraq) entity the Executing Body is responsible for or the whole list of entities for the administrator. Here you may adjust the yearly allocations for the requests' local and foreign amounts. For details, see Adjust Project Funding Requests.
  Note: This button is not available during emergency submission period when the regular project submission period is expired (see Financial Years Setup).
- **Submit**– submits all selected draft requests.
  Note: This button is only active when **Balance (to be Requested)** summary field has a positive value (for details on balance requirements, see below) and all selected drafts are

grey (all mandatory information is provided for them). This button goes inactive if at least one red draft is selected. For details on drafts coloring, see above.

- **Move Back** / **Move Next** – used to move the selected drafts to the previous/ next year. The moved funding requests will appear in the *My Draft Funding Requests* list for the previous/next year and will disappear from the same list for the current year.

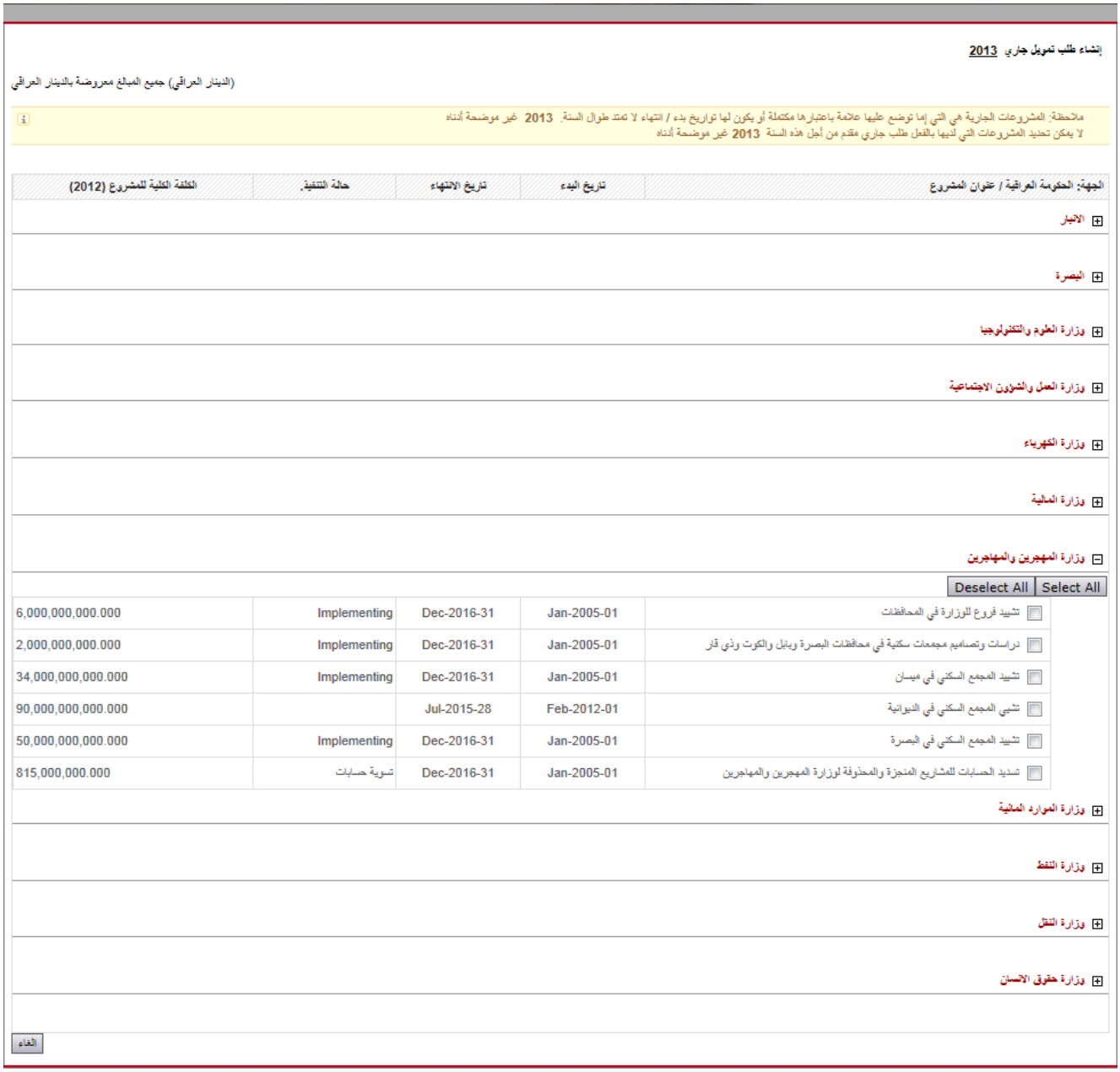


Figure 15: Create Ongoing Funding Request Window

The following buttons are used for emergency funding requests and are only available during emergency request submission period (see Financial Years Setup):

- **Reallocate** – used to start a reallocation procedure for the selected funding requests. Reallocation is performed for requesting additional funds from other projects of the selected ministry for the needs of the corresponding funding request.
- **Verify** – used to verify the emergency funding request. This button is inactive for regular funding requests.

- **Review -** used to review the emergency funding request. This button is inactive for regular funding requests.

The following summary is displayed for the **My Draft Funding Requests** list:

Note: This summary is only available when the *Executing Body* is specified in the *Capital Investment Project* section. See Capital Investment Projects in My Workspace Module.

- **Requests** – the number of draft requests in the list and the total required funds for those drafts.
- **New** – the number of new drafts in the list and the total required funds for those drafts.
- **Ongoing** – the number of ongoing drafts (requests created for ongoing projects) in the list and the total required funds for those drafts.
- **CEILING ASSIGNED** – the sum of *Planned Allocation* and *Rollover Amount* for the selected Executing Body, as defined in the *Adjust Budget Ceilings* form. For details, see Adjust Budget Ceilings.
  Note: For emergency projects (see Capital Investment Projects in My Workspace Module), this is the sum of *Allocation Approved by MoP / CoM* and *Rollover Amount* for the selected Executing Body.
- **Balance (Submitted Requests) –** the remainder calculated based on the Assigned Ceiling and the total of all submitted requested funds.
- **Balance (to be Requested) -** the remainder calculated based on the Assigned Ceiling, the total of all draft and submitted requested funds.

6.2.4 Submitted Funding Requests

The **Submitted Funding Requests** list displays the submitted requests (Figure 16) created by the Assigned MoP Sectoral Unit group users. The following information is displayed in the list:

- **ID** – the code of the request. You will see the request code here if the request is copied from an approved project, and *New* for the new request for the selected year.
- **Title** – the title of the request,
- **Project Code** – the request related project code,
- **Required Funding** – the funds requested in the request,
- **Updated By** – last update author,
- **Updated On** – last update date,
- **Status** - the status of the submitted project describes its revision stage. The following statuses are available:
  - **ABANDONED** - appears when the project is abandoned.
    Note: The abandoned projects remain in the *Submitted Funding Requests* list for the current year and cannot be deleted.
  - **NEGOTIATION** – appears when project request is in a negotiation with the relevant Line Ministry.
  - **PENDING APPROVAL** – appears when the MoP Sectoral Unit requires further revisions made on the project request.
  - **PROCESSED** – appears when the project request has been accepted by the MoP Sectoral Unit and there are enough funds available (per assigned ceilings of the corresponding Executing Body, see Adjust Budget Ceilings).
  - **REJECTED** – appears when the project is rejected.

- **REQUIRING FUNDING** – appears when there is lack of funds requested in the project.
- **SUBMITTED** – appears when the project is submitted to the revision.
- **UNDER PRIMARY REVIEW** – appears when the MoP Sectoral Unit is reviewing the project.
- **UNDER SPECIALIZED REVIEW** – appears when a specialized review is necessary and the responsible MoP Sectoral Unit forwards the project request to another MoP Sectoral Unit for further advice.
- **UNDERGOING REVISIONS** – appears when the MoP Sectoral Unit requires further revisions made on the project request.
- **VERIFICATION** – appears when project is sent to verification internally within the MoP Sectoral Unit.

Submitted funding requests may be selected/deselected using checkboxes allocated to each entry in the table. The top checkbox located in the heading of the *Submitted Funding Requests* list is used to select/deselect all submitted projects.

The following functions are available for the **Submitted Funding Requests** list (Figure 16):

- **View** – you may filter the submitted requests in the *Submitted Funding Requests* list by the specific report status. The **View** drop-down list contains all statuses that the request can get in the submission cycle. By selecting the certain status from the list, only requests with the specific status will be displayed in the *Submitted Funding Requests* list.
- **Submit** – sends the selected requests for an approval.
  Note: This button appears when the selected requests passed a revision, have the status **PROCESSED** and when available funds exist in the Budget Ceilings (see Adjust Budget Ceilings). Please note, that if a GoI entity has other projects submitted, the available funds for the new project will be calculated depending on the ceiling allocated to the corresponding GoI entity and the funds already used by other approved projects for the selected year.

The following summary is displayed for the **Submitted Funding Requests** list:

- **Requests** – the number of submitted requests in the list and the total required funds for those requests.
- **New** – the number of new drafts in the list and the total required funds for those requests.
- **Ongoing** – the number of ongoing project requests (created for ongoing projects) in the list and the total required funds for those requests.
- **CEILING ASSIGNED** – the sum of *Allocation Approved by MoP / CoM* and *Rollover Amount* for the selected Executing Body, as defined in the *Adjust Budget Ceilings* form. For details, see Adjust Budget Ceilings.
- **Balance (to be allocated) -** the remainder calculated based on the Assigned Ceiling and the total of all submitted requested funds.

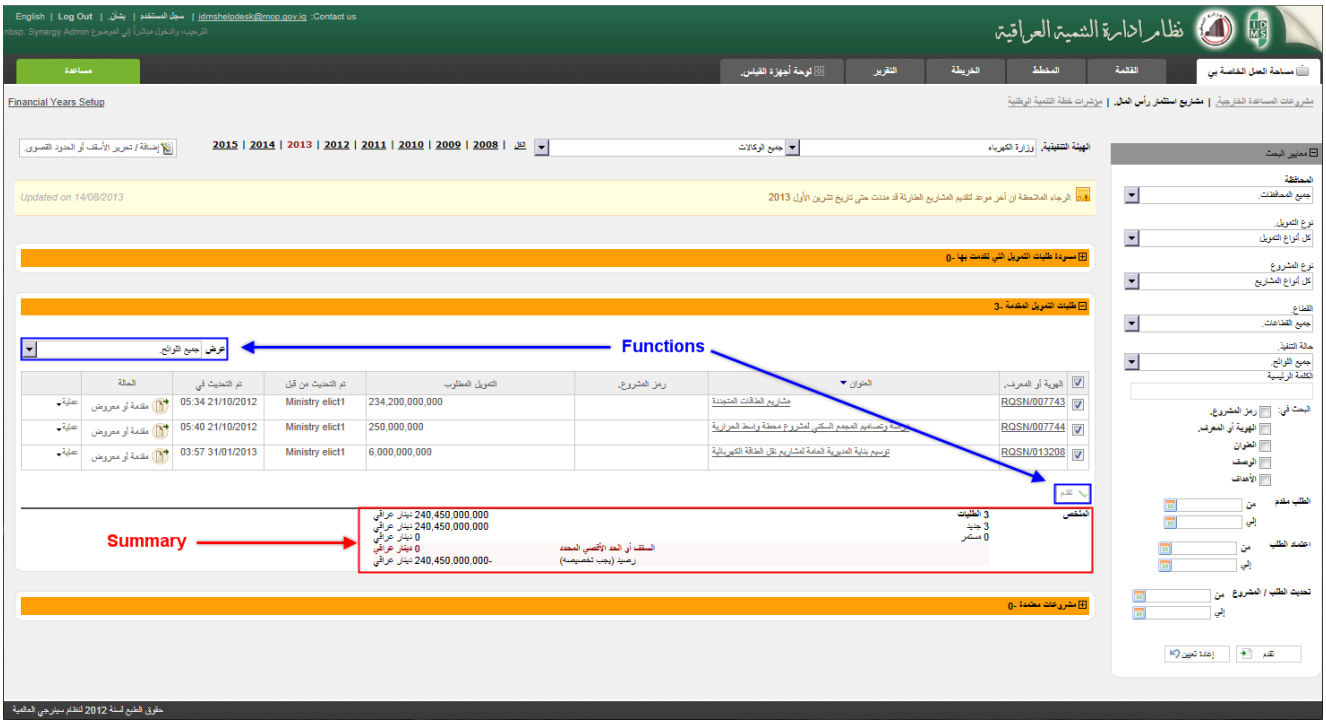


Figure 16: Functions and Summary in Submitted List of Capital Investment Projects Section

6.2.5 Approved Projects

The **Approved Projects** list displays projects approved by the MoP Investment Unit group users (Figure 17). The following information is displayed in the list:

- **ID** – the code of the request. You will see the request code here if the request is copied from an approved project, and *New* for the new request for the selected year.
- **Title** – the title of the project.
- **Project Code** – the project code.
- **Expended in Current Year** – the funds expended for the project in the selected year,
- **Expended (%)** – the expended funds from the originally approved amount allocated for the selected year.
- **Updated By** – last update author.
- **Updated On** – last update date.
- **Status** - the status of the submitted project describes its revision stage. The following statuses are available:
  - **STOPPED** – appears when the project is stopped. In this state, Yearly Allocation of the project can be set to 0. See Adjust Project Funding Requests.
  - **APPROVED –** appears when the project is approved.
  - **CANCELLED** – appears when the project is cancelled.
  - **REALLOCATION REQUESTED** – appears when the project has been requested for an additional funding.
  - **REALLOCATION REVISION REQUESTED** – appears when reallocation request was not verified and sent back to the revision. This may happen due to lack of documents for the reallocation request or any other related information.

- **REALLOCATION VERIFIED** – appears when the project reallocation request is verified. During verification, Assigned MoP Sectoral Unit user should check and confirm reallocation documents and other request related information.
- **REALLOCATION APPROVED** – appears when enough funds are available for project reallocation.
- **REALLOCATION REQUIRING FUNDING –** appears when no enough funds are available for project reallocation.

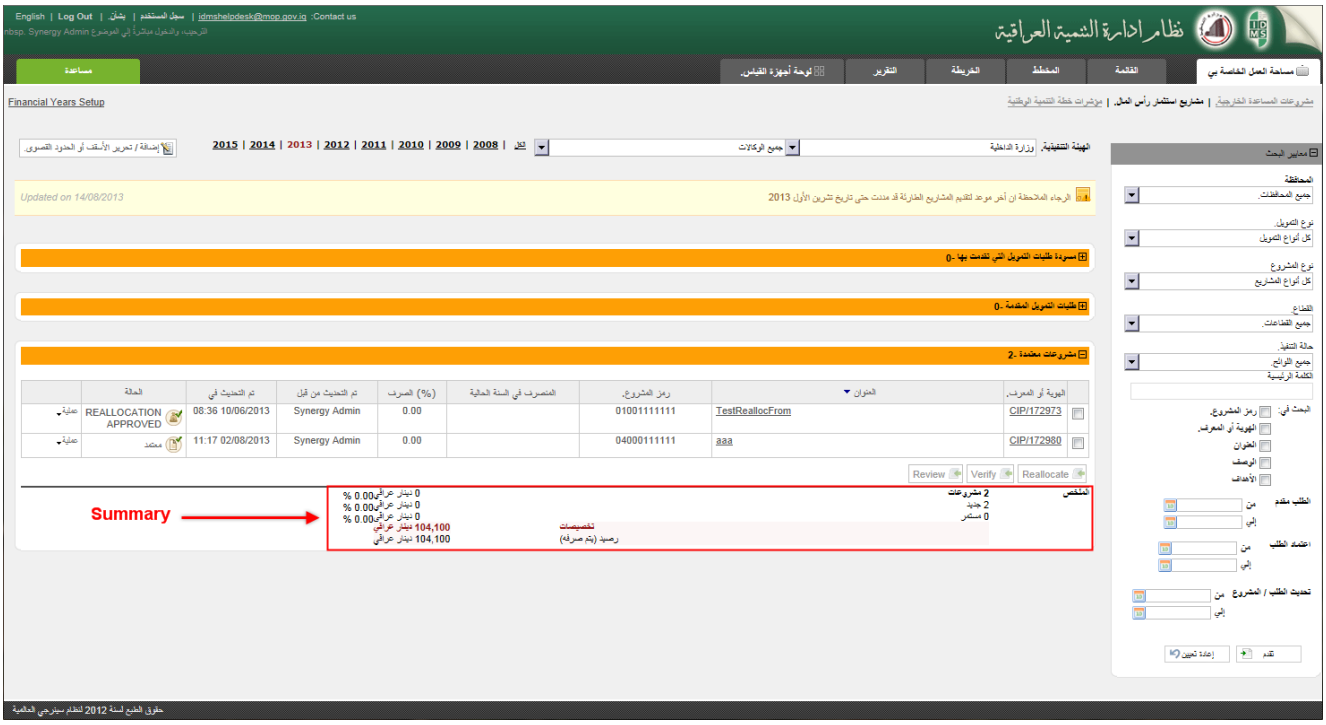


Figure 17: Summary in Approved List of Capital Investment Projects Section

The following summary is displayed for the **Approved Projects** list:

- **Projects** – the number of approved projects in the list and the total required funds for those projects.
- **New** – the number of new approved projects in the list and the total required funds for those projects.
- **Ongoing** – the number of ongoing approved projects (created for ongoing projects) in the list and the total required funds for those projects.
- **ALLOCATED** – the total funds allocated for all approved projects.
- **Balance (to be expended) –** the remainder calculated based on the Assigned Ceiling (see Adjust Budget Ceilings), the total of all draft and submitted requested funds.

The following buttons are used for emergency funding requests and are only available during emergency request submission period (see Financial Years Setup):

- **Reallocate** – used to start a reallocation procedure for the selected projects. Reallocation is performed to request additional funds from other projects of the selected ministry for the needs of the corresponding funding request.
- **Verify** – used to verify the reallocation request. This button is only active when project is in the reallocation phase.

- **Review -** used to review the reallocation request. This button is only active when project is in the reallocation phase.

6.2.6 Adjust Budget Ceilings

In the **Adjust Budget Ceilings** form (Figure 18 and Figure 19), adjust the Budget Ceilings of GoI (Government of Iraq) entity agencies for the corresponding year. The GoI entities are grouped in funds. Every GoI entity shows a list of underlying agencies for which the budget ceilings should be defined.

Note: The users can only be associated to Government Investment Fund and Regional Development Fund. Other funds in the list do not have any user associations.

Figure 18: Adjust Budget Ceilings Form – Part 1

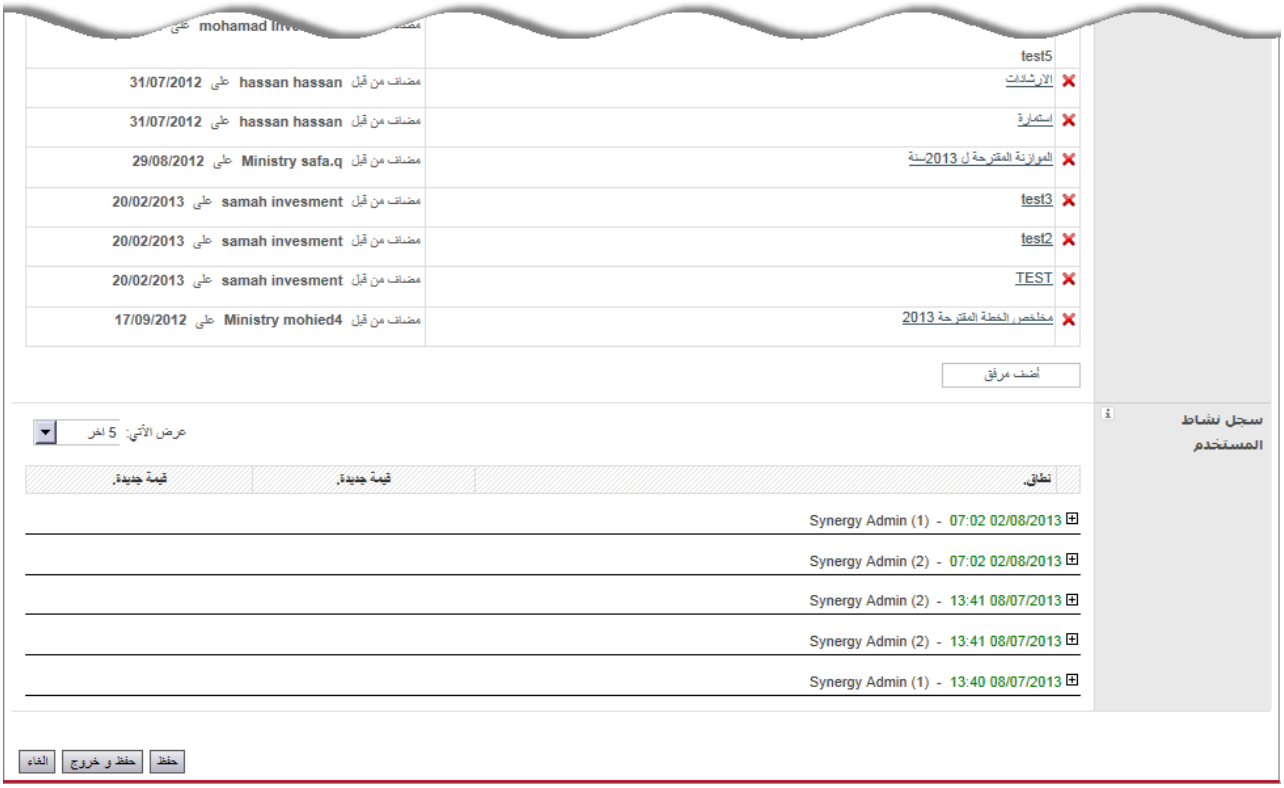


Figure 19: Adjust Budget Ceilings Form – Part 2

To insert budget ceiling data for the agency, you should expand the list of budget ceiling for the corresponding Fund and GoI entity by clicking the plus sign next to them.

In order to edit existing projects, follow the steps below:

1. Click the (**Edit**) button to the left of the Government entity information on which you would like to edit. The following data input fields will appear:
   - **NDP Allocation**
   - **Planned Allocation**
   - **Allocation Approved by Mop / CoM**
   - **Allocation Approved by Parliament**
   - **Rollover Amount**
   - **Final Allocation** – this field expresses the summary of the Rollover Amount and Allocation Approved by Parliament, if available, otherwise Allocation Approved by Mop / CoM, if available. If, it is not available, then the Planned Allocation will be displayed.
2. Make the appropriate changes in the input fields and save them by clicking the **OK** button.

For each of the above data, the **Total** is calculated for all agencies in the GoI entity and for all GoI entities in the fund and is displayed in red color next to the corresponding fund and GoI entity name.

Note: All values in the *Adjust Budget Ceilings* form are displayed and inserted in the local currency IQD (Iraqi Dinar).
For each modification made to the ceilings, you should provide a comment in the **Justification for Changes** in both English and Arabic languages.

You may additionally attach any ceilings related attachments from **Attach Document** section. For details on how to attach documents or other related files, see *IDMS Capital Investments Projects Application User Manual* in REFERENCES.

The **User Activity Log** displays information about the recent changes made to the funds. Identifies the users who performed the changes and the date/time when the modifications were made.

Note: In the right side you may select the number of latest updates to be displayed or you may choose to display whole modification history on the particular record.

6.2.7 Adjust Project Funding Requests

In the *Adjust Project Funding Requests* form (Figure 20), you may see only those funds and GoI entities which you are allowed to manage. You may expand the list of requests/projects for the corresponding GoI entity by clicking the plus sign next to it. The **Foreign Currency**, as well as, **Project Cost** and **Total** are not editable in this form and are defined from each project details (see *IDMS Capital Investments Projects Application User Manual* in REFERENCES). The **Status** of the project indicates whether the project is approved or stopped.

The following information may be managed here for each project:

- **Local** – indicates the local funds requested by the project/request in the local currency IRQ (Iraqi Dinar). This value can be set to 0 from this form for the stopped projects only.
- **Foreign** - indicates the foreign funds requested by the project/request in the defined currency. This value can be set to 0 from this form for the stopped projects only.

Note: The sum of **Local** and **Foreign** funds should not exceed the *Project Cost* defined for the specific project. For details on how the *Project Cost* is defined, see *IDMS Capital Investments Projects Application User Manual* in REFERENCES.

The **Total** of local and foreign funds provided is automatically calculated, converted into local currency IRQ (Iraqi Dinar) and is displayed in red.

Additionally, the following summary information is displayed for each GoI:

- **Ceiling Assigned/Allocated** – the total ceilings for all listed drafts of the selected executing body, defined in the *Final Allocation* field of the Adjust Budget Ceilings form.
- **Balance (Submitted Requests) -** the remainder calculated based on the **Assigned Ceiling** and the total of all submitted and approved requested funds.
- **Balance (to be Requested) –** the remainder calculated based on the **Assigned Ceiling**, the total of all draft, submitted and approved requested funds.

For each modification made to the list of funds, you should provide the comment in the **Justification for Changes** in both English and Arabic languages.

You may additionally attach any related attachments to the defined funds from **Attach Document** section. For details on how to attach documents or other related files, see *IDMS Capital Investments Projects Application User Manual* in REFERENCES.

تعديل طلبات تمويل المشروع / المخصصات من أجل السنة 2013

* -الحقل المطلوب

الجهة / المشروع للحكومة العراقية	عملة أجنبية	تكلفة المشروع	محلية *	أجنبية	الإجمالي
(Amanat Baghdad - (3					0
(Presidency Council - (0					0
(Council of Ministers - (0					0
(Ministry of Labor Social Affairs - (0					0
(Ministry of Health - (4					675,004,050
TestReallocTo - 01000222222	IQD	50,000	4,000	50	4,050
هدم واعادة بناء مركز صحي عدد (2) (سليمان الفيضي /داوودالجنابي)/بغداد	IQD	2,646,000,000	225,000,000		225,000,000
هدم واعادة بناء مركز صحي عدد (2) (سليمان الفيضي /داوودالجنابي)/بغداد	IQD	2,646,000,000	225,000,000		225,000,000
هدم واعادة بناء مركز صحي عدد (2) (سليمان الفيضي /داوودالجنابي)/بغداد	IQD	2,646,000,000	225,000,000		225,000,000

السقف أو الحد الأقصى المسند / المخصص	880,000,000,000 دينار عراقي
(طلبات مقدمة) الرصيد	231,763,275,950 دينار عراقي
(يجب طلبه) الرصيد	231,088,271,900 دينار عراقي

(Ministry of Defense - (0	0
(Diwaniyah - (4	35,000,000,000
(Diyala - (1	500,000,000
(Erbil - (0	0
(Karbala - (0	0
(Kirkuk - (0	0
(Maysan - (3	2,000,100,000
(Sulaymaniyah - (0	0
(Wasit - (5	18,300,000,000

تبرير التغييرات * ARB ENG

ضرورية لمواجهة أزمة طارئة

ارفاق وثيقة * (وثائق المشروع, تقارير المراقبة, وغيرها)

أضف مرفق

سجل نشاط المستخدم

عرض الأتي: 5 اخر

نطاق	قيمة أصلية	قيمة جديدة

حفظ | حفظ و خروج | الغاء

Figure 20: Adjust Funding Requests/Allocations Form

The **User Activity Log** displays information about the recent changes made to the funds. Identifies the users who performed the changes and the date/time when the modifications were made.

Note: In the right side you may select the number of latest updates to be displayed or you may choose to display whole modification history on the particular record.

6.2.8 Regular Funding Request Approval Procedure

The regular funding request approval diagram is presented in Figure 21.

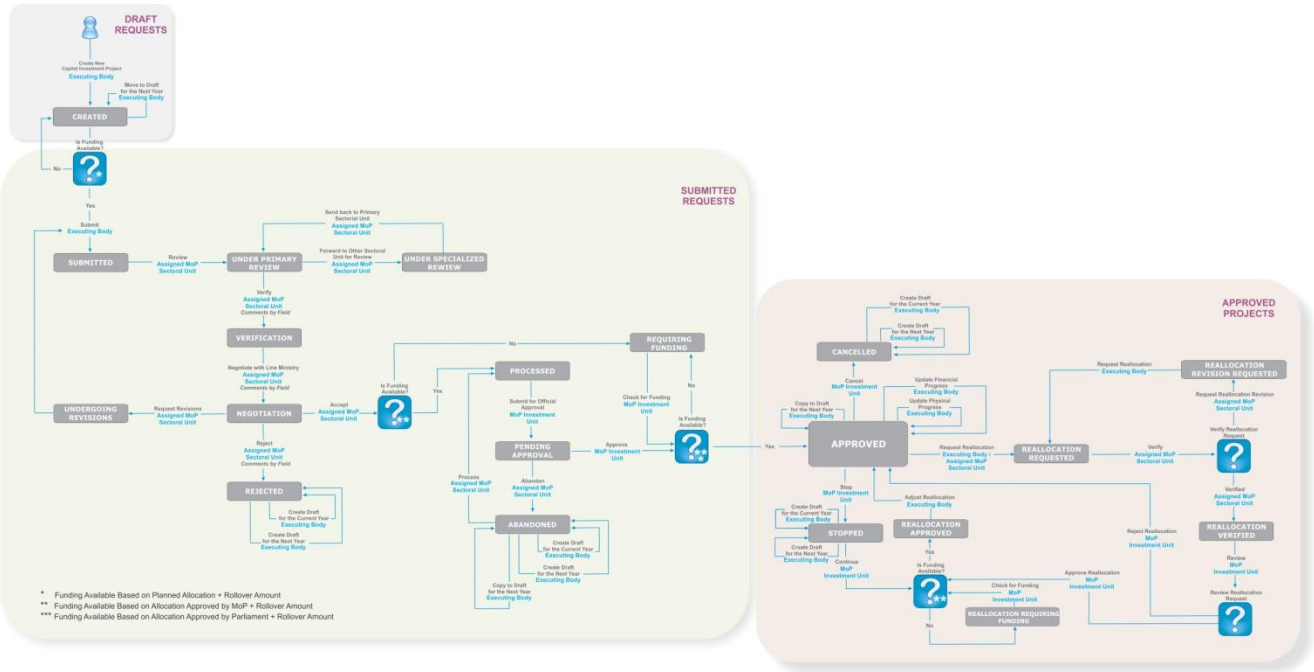


Figure 21: Regular Funding Request Approval Procedure

1. The Executing Body group user creates a funding request. It is saved as a draft in the *My Draft Funding Requests* list of My Workspace module (Figure 14). At this stage, the draft can be moved to the next year. The funding request will appear in the *My Draft Funding Requests* list for the next year and will disappear from the same list for the current year.
   Note: Only Executing Body group users and administrators are able to edit the request drafts at this stage.
2. If Balance (to be Requested) for the current year is a positive value (Planned Allocation + Rollover Amount is greater than 0) and the draft is ready for the submission (i.e. all mandatory information is provided), the **Submit** button located under *My Draft Funding Requests* list becomes active. Executing Body group user submits all selected drafts for further revision. The submitted funding requests will appear in the *Submitted Funding Requests* list (Figure 16).
3. On the next stage, the submitted funding requests are passing through the complicated revision cycle managed by the Assigned Mop Sectoral Unit group users. During multilevel revision (including revisions by one or more Sectoral Units and negotiations with the Line Ministry), the following actions may be taken over the submitted project requests:

- **Reject** due to negotiation results. For rejected projects, draft projects with all the data of the corresponding project may be created for the current or the next year.
- **Abandon** due to insufficient funding available or other reasons that may come out during the official revision. For abandoned projects, draft projects with all the data of the corresponding project may be created for the current or the next year, or project may be copied to the next year. Copied project will have the same project code as the original project. However, all other details of the copied project will be individual. Abandoned projects may be processed again, if needed.
- **Approve** for an implementation. The approved requests are copied into a project and are displayed in the *Approved Projects* list (Figure 17).
  Note: To approve the project, there should be enough *Allocation Approved by Parliament* for the selected Executing Body, as defined in the *Adjust Budget Ceilings* form. For details, see Adjust Budget Ceilings.

4. For approved projects, the following actions are available:
   - **Update Financial Progress** by indicating the most recent financial data of the project.
   - **Update Physical Progress** by indicating the most recent physical data of the project.
   - **Stop** due to being temporarily non actual. Stopped projects may be continued again, copied to the draft for the current year or for the next year.
   - **Cancel** due to being non actual. Cancelled projects may be continued again, copied to the draft for the current year or for the next year.
   - **Create Draft for the Current/Next Year** for copying the project to the current/next year. The copied project will appear in the *My Drafts Funding Requests* list of the current/next year and will have the same project code as the original project. However, all other details of the copied project will be individual.
   - **Reallocate** if additional funding is required for the project. With this action, the project will enter into reallocation request revision phase. Reallocation is performed to request additional funds from other projects of the selected ministry for the needs of the corresponding funding request.

   For details on each of these actions, and what data is required while taking the action, see *Capital Investment Projects User Manual* in REFERENCES.

5. For projects that have requested reallocation, the Assigned MoP Sectoral Unit user may either verify the reallocation request or send it to the revision. Verified reallocation requests are processed to the next stage where funding for reallocation should be confirmed. If the funding is available, reallocation is approved by MoP Investment Unit user and then project funds breakdowns should be adjusted by Executing Body. When the reallocation is adjusted, the project enters **APPROVED** state again. If there are no enough funds for emergency project reallocation, MoP Investment Unit user rejects the reallocation request and the projects appears back in the **APPROVED** state.
   Note: During reallocation phase, the other project which has provided funds to the project requested reallocation will also change its state. Once reallocation was verified, the project which provided funds should be revised independently for funds breakdown adjustment.

6.2.9 Emergency Funding Request Approval Procedure

Emergency funding requests are those created after the regular requests submission deadline has expired but before the emergency request submission end date. The emergency requests can be submitted even with the negative Balance (to be requested) and require an emergency processing.

The emergency funding request approval diagram is presented in Figure 22.

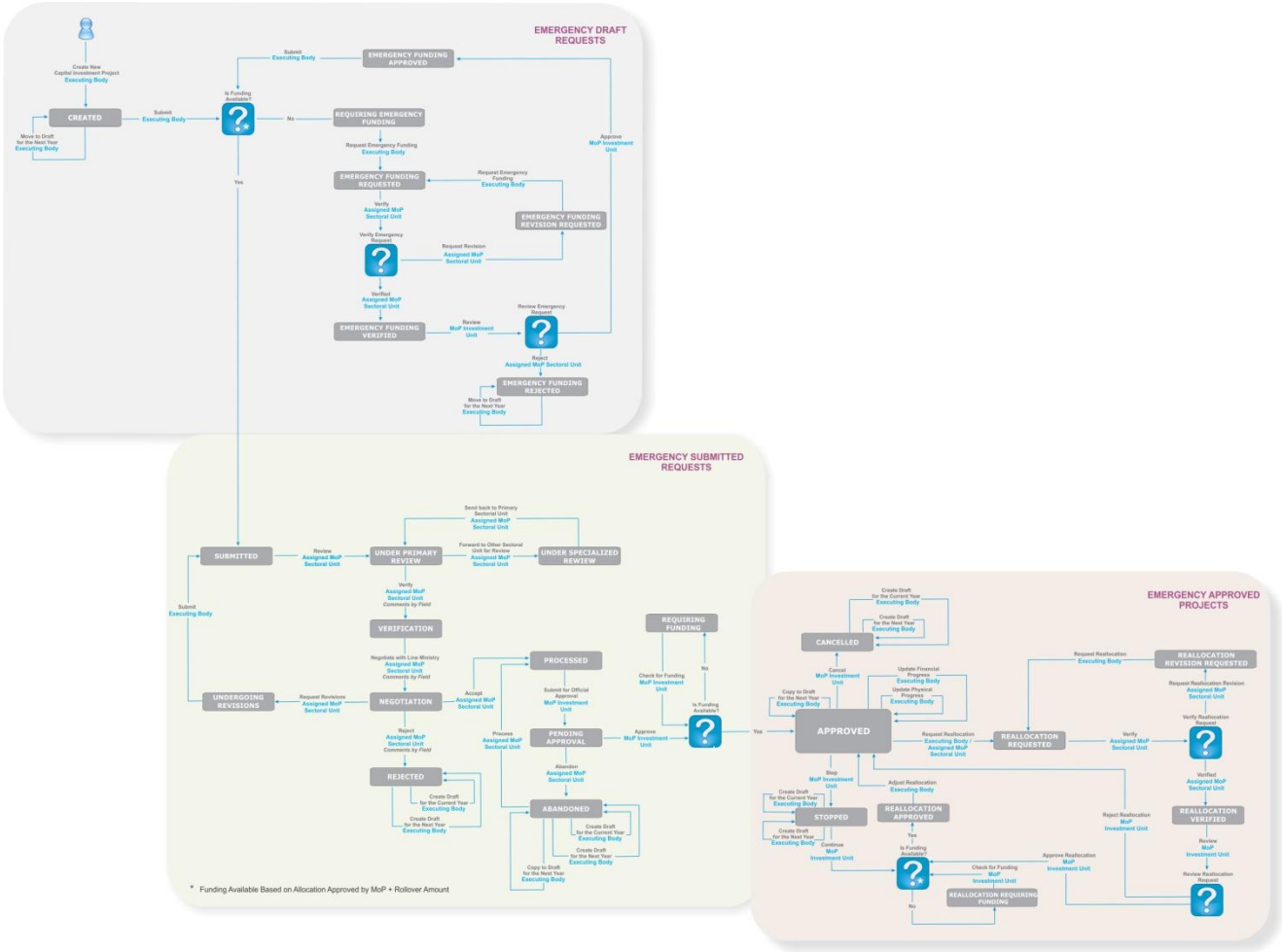


Figure 22: Emergency Funding Request Approval Procedure

1. The Executing Body group user creates an emergency funding request. It is saved as a draft in the *My Draft Funding Requests* list of My Workspace module (Figure 14). At this stage, the draft can be moved to the next year. The emergency funding request will appear in the *My Draft Funding Requests* list for the next year and will disappear from the same list for the current year.
   Note: Only Executing Body group users and administrators are able to edit the emergency request drafts at this stage.
2. Even with the negative Balance (to be Requested), Executing Body can submit the emergency funding request. However, before entering the **SUBMITTED** state, emergency request is passing through a funding approval procedure. If there is enough funding available for the emergency request, the request will be submitted, otherwise, if no

enough funds are available, the emergency request will remain in the **EMERGENCY FUNDING REJECTED** state. From this state, the emergency request can be moved to the next year. When moved, the emergency funding request will appear in the *My Draft Funding Requests* list for the next year and will disappear from the same list for the current year.

3. On the next stage, the submitted emergency funding requests are passing through the complicated revision cycle managed by the Assigned Mop Sectoral Unit group users. During multilevel revision (including revisions by one or more Sectoral Units and negotiations with the Line Ministry), the following actions may be taken over the submitted project requests:
   - **Reject** due to negotiation results. For rejected projects, draft projects with all the data of the corresponding project may be created for the current or the next year.
   - **Abandon** due to insufficient funding available or other reasons that may come out during the official revision. For abandoned projects, draft projects with all the data of the corresponding project may be created for the current or the next year, or project may be copied to the next year. Copied projects will have the same project code as the original project. However, all other details of the copied project will be individual. Abandoned projects may be processed again, if needed.
   - **Approve** for an implementation. The approved requests are copied into a project and are displayed in the *Approved Projects* list (Figure 17).

4. For approved emergency projects, the following actions are available:
   - **Update Financial Progress** by indicating the most recent financial data of the project.
   - **Update Physical Progress** by indicating the most recent physical data of the project.
   - **Stop** due to being temporarily non actual. Stopped projects may be continued again, copied to the draft for the current year or for the next year.
   - **Cancel** due to being temporarily non actual. Cancelled projects may be continued again, copied to the draft for the current year or for the next year.
   - **Create Draft for the Current/Next Year** for copying the project to the current/next year. The copied project will appear in the *My Drafts Funding Requests* list of the current/next year and will have the same project code as the original project. However, all other details of the copied project will be individual.
   - **Reallocate** if additional funding is required. With this action, the project will enter into reallocation request revision phase. Reallocation is performed for requesting additional funds from other projects of the selected ministry for the needs of the corresponding funding request.

   For details on each of these actions, and what data is required while taking the action, see *Capital Investment Projects User Manual* in REFERENCES.

For emergency projects that have requested reallocation, the Assigned MoP Sectoral Unit user may either verify the reallocation request or send it to the revision. Verified reallocation requests are processed to the next stage where funding for reallocation should be confirmed. If the funding is available, reallocation is approved by MoP Investment Unit user and then project funds breakdowns should be adjusted by Executing Body. When the reallocation is adjusted, the project enters **APPROVED** state again. If there are no enough funds for emergency project reallocation,

MoP Investment Unit user rejects the reallocation request and the projects appears back in the **APPROVED** state.

Note: During reallocation phase, the other project which has provided funds to the project requested reallocation will also change its state. Once reallocation was verified, the project which provided funds should be revised independently for funds breakdown adjustment.

6.2.10 Adding a Capital Investment Project Request

To add a new project request, follow the instructions below:

1. Go to the **Capital Investment Projects** tab of the *My Workspace* module.
2. In the *My Draft Funding Requests* section, click the **New Project** button (Figure 14).
3. This will open a form which is described in IDMS Capital Investments Projects Application User Manual, see REFERENCES.

6.2.11 Viewing Capital Investment Project Details

Depending on your permissions you may also see or edit project requests added by other users.

To view details of draft and submitted request and the approved projects in the *My Workspace* module, follow the steps below:

1. Go to the *My Workspace* module.
2. Click on the **Capital Investment Projects** tab.
3. Expand the *My Draft Funding Requests*, *Submitted Funding Requests* or *Approved Projects* lists, as needed (Figure 7).
4. Click the request or project *Title* you wish to see the details for. This will open the selected request/project details. For details, see REFERENCES.

6.2.12 Search in Capital Investment Projects of My Workspace

In the *Capital Investments Projects* section of the *My Workspace* module, you are offered to use an advanced search and a quick search features to filter the list of projects/requests with some criteria (Figure 23).

6.2.12.1 Quick Search

The quick search options are displayed in the My Workspace module right above the list of capital investment projects and requests. You may want to filter the list of projects and requests for the certain **Year** or **Executing Body**.

Selecting either of the criteria in the quick search toolbar will displayed a filtered list of projects/requests.

Note: You may join both the Quick Search and the Advanced Search criteria together to get the needed filtering.

To reset the yearly filtration and display the list of projects/requests of all years, press the **All** link in the right side of the quick search toolbar.

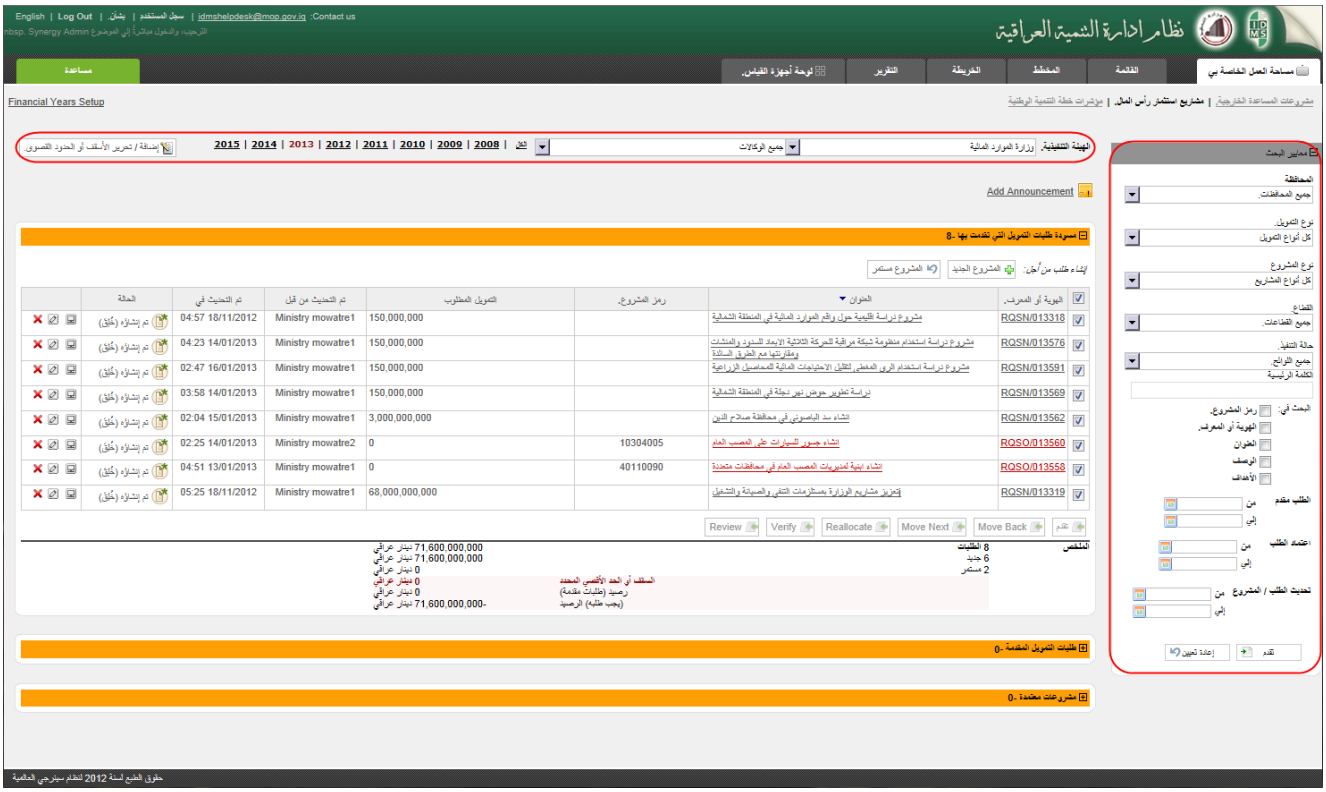


Figure 23: Advanced Search in Capital Investment Projects Section

6.2.12.2 Advanced Search

The advanced search mechanism is used to filter the list of indicators depending on the given one or more advanced search criteria (Figure 23).

The following advanced search criteria are available:

- **Governorate** – filters by the governorate the project is dedicated to.
- **Funding Type** – filters by the funding type assigned to the project.
- **Project Type** – filters by the new or ongoing projects.
- **Sector** - filters by the economy sector the project is dedicated to.
- **Implementation Status** –filters by the status of the project/request.
- **Keyword** –filters the indicators by the keywords. You may want to search the indicated keywords in the **Project Code**, **ID**, **Title**, **Description** and/or **Objectives** fields.
- **Request Submitted** – filters by the date or a range of dates when the request was submitted. Calendar popup is available for these fields, see Figure 13: Calendar.
- **Request Approved** – filters by the date or a range of dates when the request was approved. Calendar popup is available for these fields, see Figure 13: Calendar.
- **Project/Request Updated** – filters by the date or a range of dates when the project or request was updated the last time. Calendar popup is available for these fields, see Figure 13: Calendar.

Once one or more criteria are selected, press the **Submit** button to get the filtered list of projects/requests. If you want to clean the filtering, press the **Reset** button in the searching section of the screen to clear the defined criteria and then press **Submit** to get the whole list of projects/requests.

6.3 NDP Indicators in My Workspace Module

In this page you may see a list of all indicators created from *My Workspace* module or from the corresponding application by the corresponding user or other users from the same user group. The indicator related information and progress is also outlined in the NDP Indicators table.

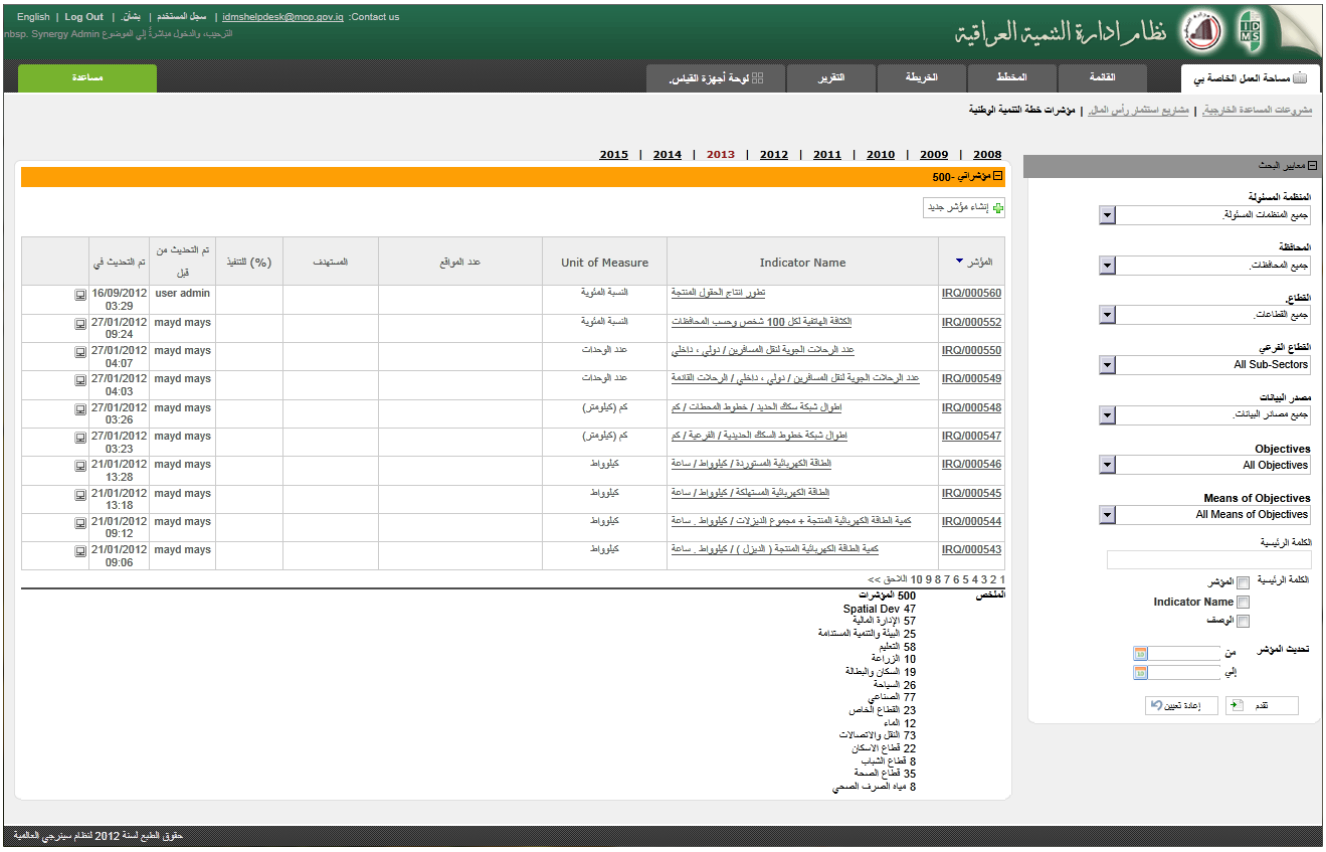


Figure 24: NDP Indicators Section in My Workspace

In this section, the NDP indicator may be created; details of the existing indicators can be viewed and edited.

The information displayed in **My Workspace** for each indicator includes the following information:

- **Indicator** – the code of the indicator.
- **Indicator Name** – the title of the indicator.
- **Unit of Measure –** the unit of measure of the indicator**.**
- **# of Locations** – the number of locations covered by the indicator.
- **Target** – the target value of the indicator.
- **Actual (%) –** actual progress of the indicator, in percents.
- **Updated By** – last update author.

- **Updated On** – last update date.
- **Actions** – you may view ( ), edit ( ) and delete ( ) the indicator.

The **NDP Indicators** section in *My Workspace* module is enriched with an advanced search mechanism. For details, see chapter Search in NDP Indicators of My Workspace.

6.3.1 Adding a New Indicator

To add a new NDP indicator from *My Workspace* module, follow the instructions below:

1. Go to the **NDP Indicators** tab of *My Workspace* module.
2. Click the **Create New Indicator** button (Figure 25).

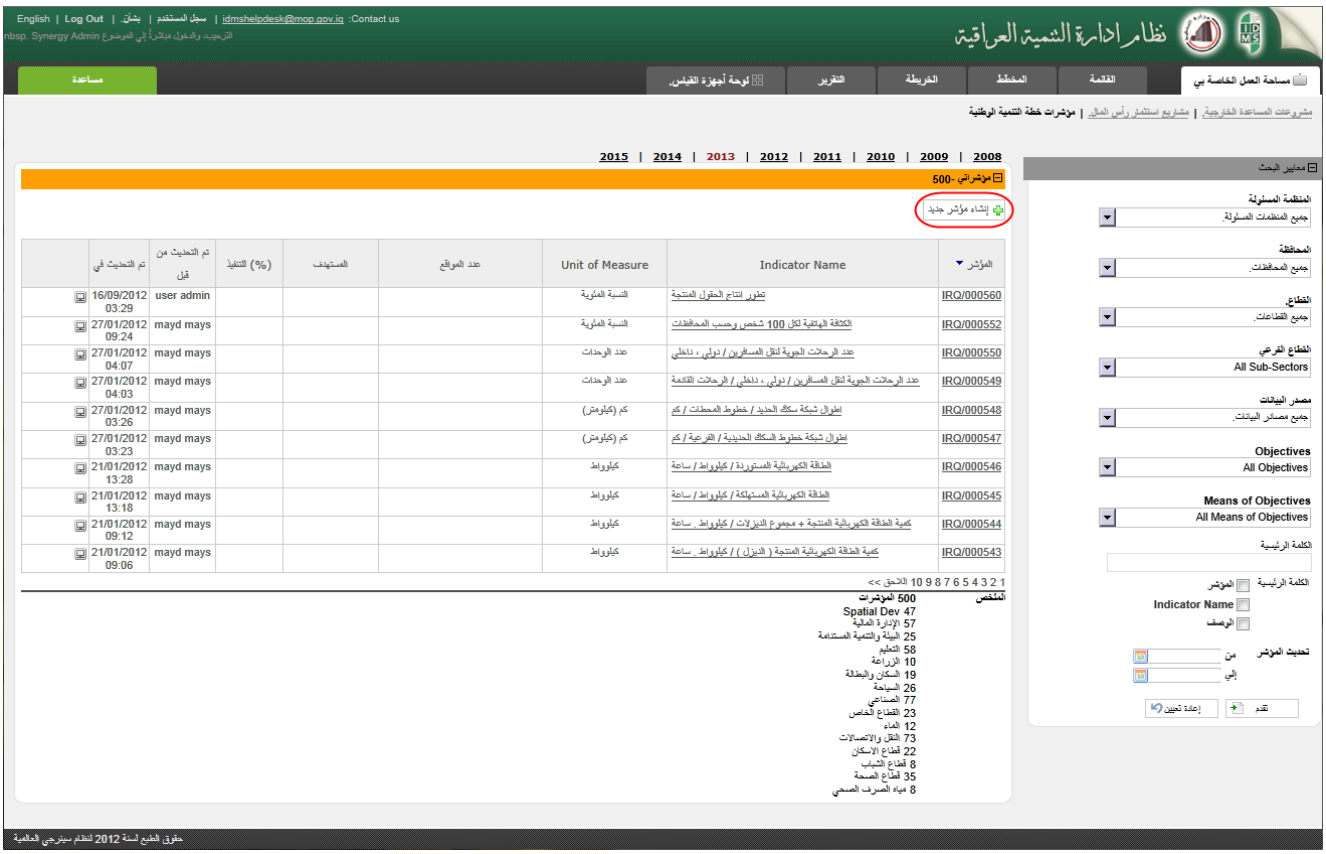


Figure 25: Create New Indicator button in NDP Indicators Section

This will open an **Add Indicator** form which is described in *IDMS NDP Indicators User Manual*, see REFERENCES.

6.3.2 Viewing Indicator Details

Depending on your permissions you may also see or edit NDP indicators added by other users.

To view details of drafts and submitted projects in the *My Workspace* module, follow the steps below:

1. Go to the **My Workspace** module.
2. Click the **NDP Indicator** tab.

3. Click on the indicator you wish to see the details for. This will open indicator details. For details, see REFERENCES.

6.3.3 Search in NDP Indicators of My Workspace

The advanced search mechanism is used to filter the list of indicators depending on the given one or more search criteria (Figure 26).

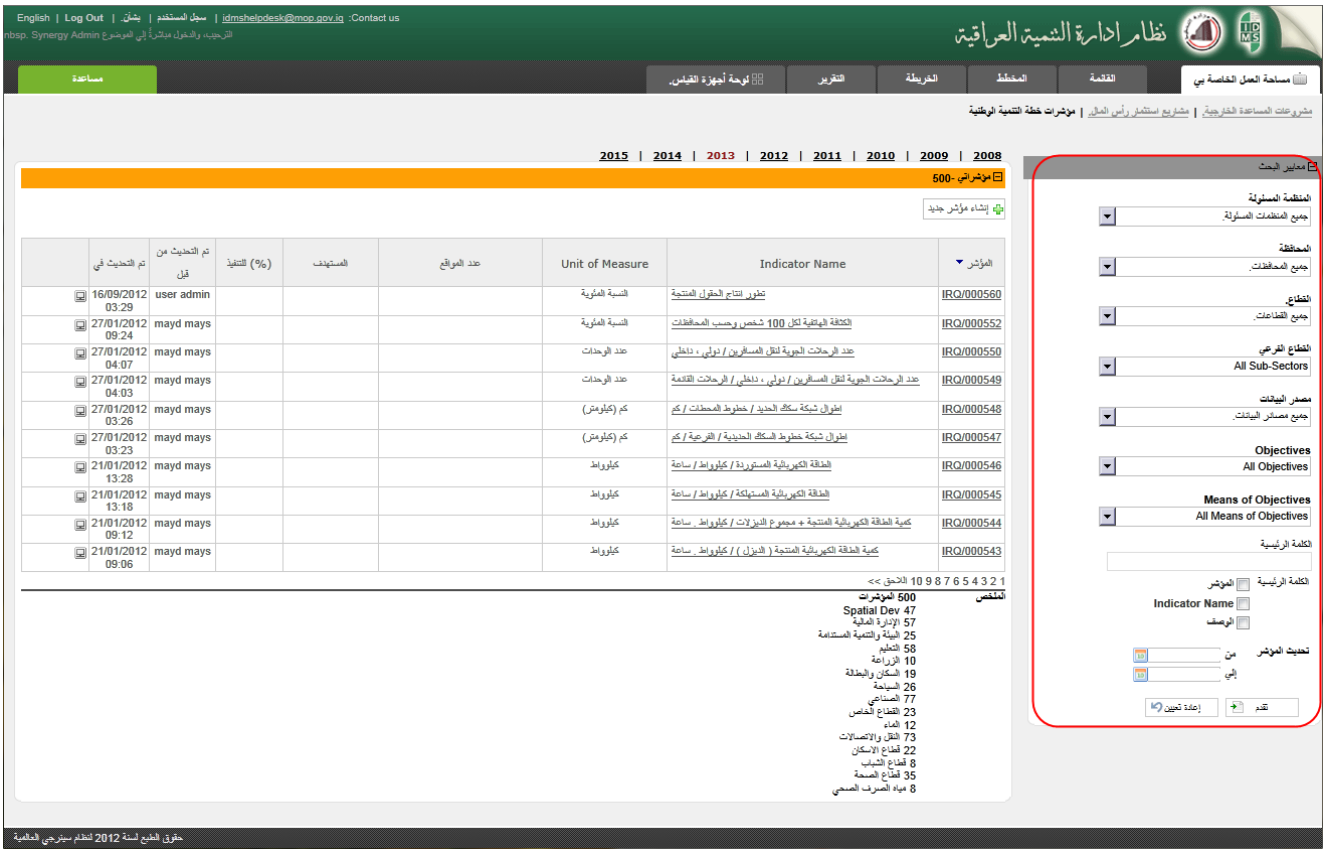


Figure 26: Advanced Search in NDP Indicators Section

The following search criteria are available:

- **Responsible Organisation** – filters by the organisation responsible for the indicator.
- **Governorate** – filters by the governorate the indicator is dedicated to.
- **Sector** - filters by the economy sector the indicator is dedicated to.
- **Sub-Sector –** filters by the sub-sector the indicator is dedicated to.
- **Data Source** –filters by the data source information for the indicator.
- **Objectives –** filters by the objective set for the indicator.
- **Means of Objectives** – filters by the means of objectives for the indicator.
- **Keyword** –filters the indicators by the keywords. You may want to search the indicated keywords in the **ID**, **Title**, and/or **Description** fields.
- **Indicator Updated** – filters by the date or a range of dates when indicators were updated the last time. A calendar popup is available for these fields, see Figure 13: Calendar.

Once one or more criteria are selected, press the **Submit** button to get the filtered list of indicators. If you want to clean the filtering, press the **Reset** button in the searching section of the screen to clear the defined criteria and then press **Submit** to get the whole list of indicators.

7. LIST MODULE

In the *List* module (Figure 27) of the *IDMS* application, you can create and execute ad-hoc queries on projects data, and acquire results in the form of a list.

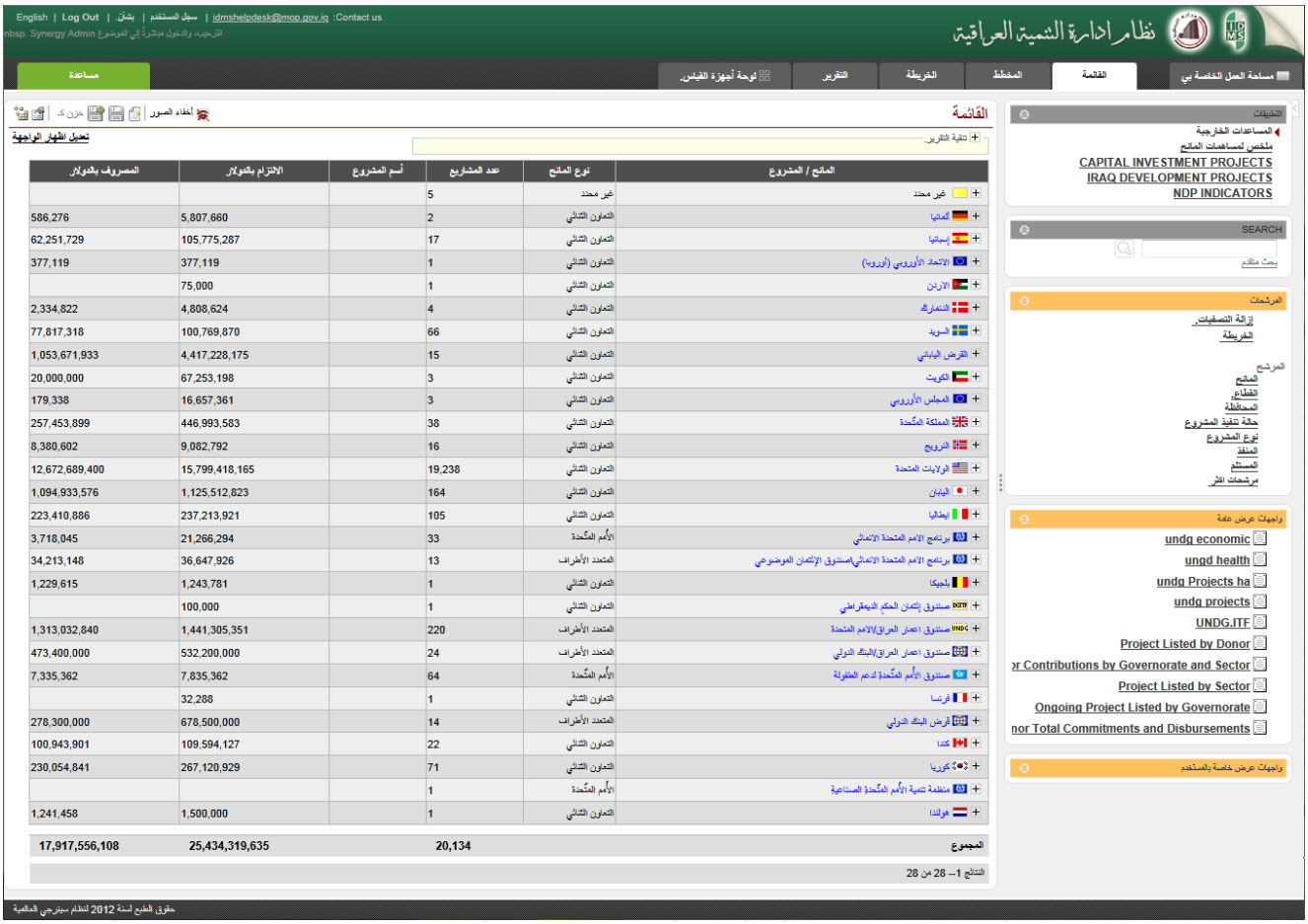


Figure 27: IDMS Application List Module

7.1 Accessing the List Module

A list consists of at least one group and one column, but the actual quantity of groups and columns is defined by the user's choice of view. Please see Modifying the Current View for more details on how to define groups / columns of a list.

In order to access the *List* module, click on the **List** tab. You will be navigated to the *List* module. In this module, you can view data organized according to the selected groupings and columns, modify the currently used list, save it as a pre-defined report, include it under a definite group, etc.

7.2 Expanding the List Item

It is possible to expand the list item level to view the information of the sub-level(s). 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 28). 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.

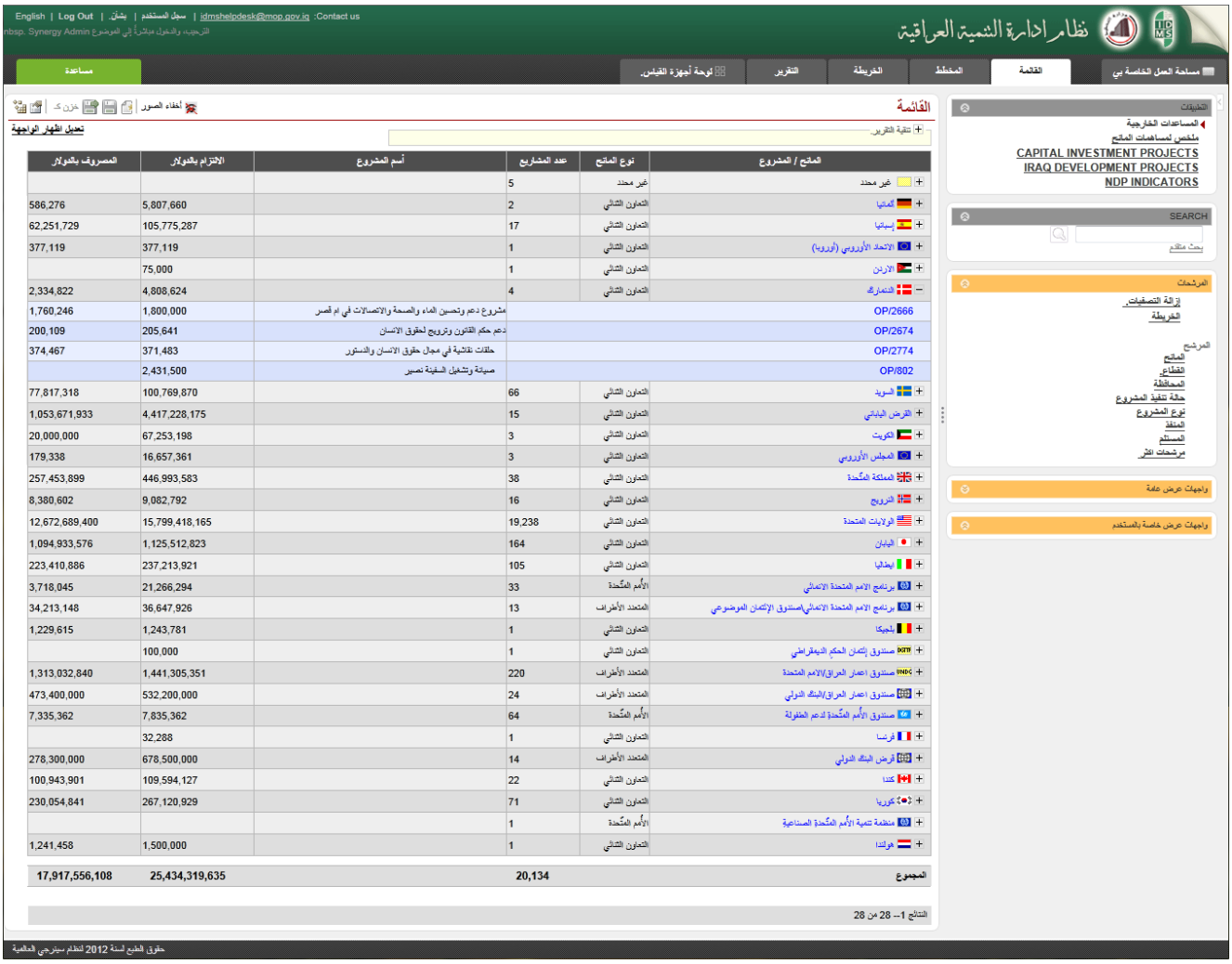


Figure 28: Expanding the List Item Level

7.3 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. Clicking the upward- or downward-pointing arrow that appears on the column can reverse the order of the list.

7.4 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.

7.5 Refining the Report

In the *List* module, you can refine the list view displayed on the screen to focus on specific data. Options for refining a report are listed in the *Refine Report* area (Figure 29). The criteria in the **Refine Report** section are dependent on the groups in the user defined current view. See Modifying the Current View.

For example, if you have selected Project Type → Project hierarchy as the groupings for the view, you will be able to filter the data by Project Type. In the same way, if you have indicated Project Type → Project → Implementer hierarchy as the groupings for the view, you will be able to filter the data by a Project Type and Implementer.

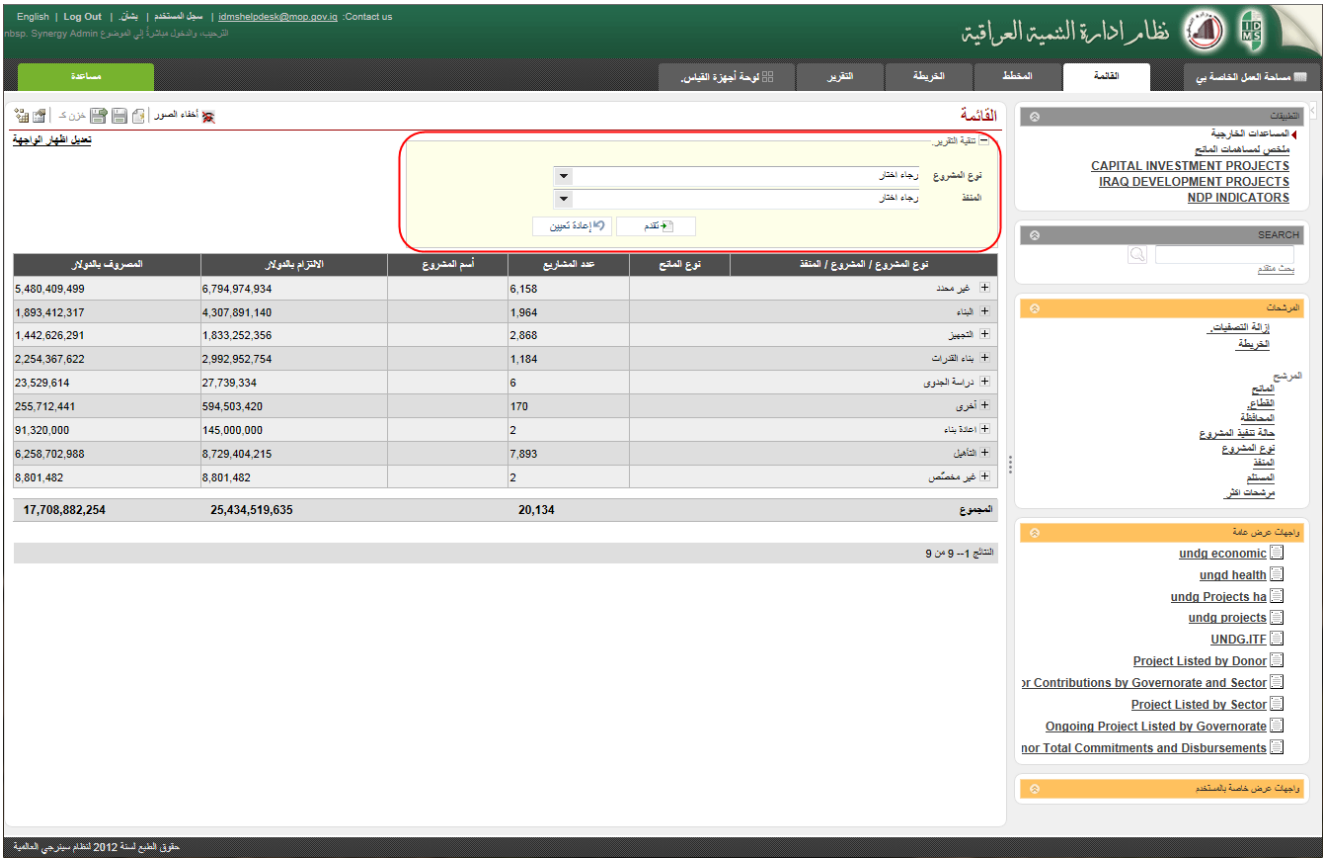


Figure 29: Refine Report Area

Once you select the appropriate category to refine the list view report by and click the **Submit** button, the report will be regenerated with only the selected category data included in it (Figure 30).

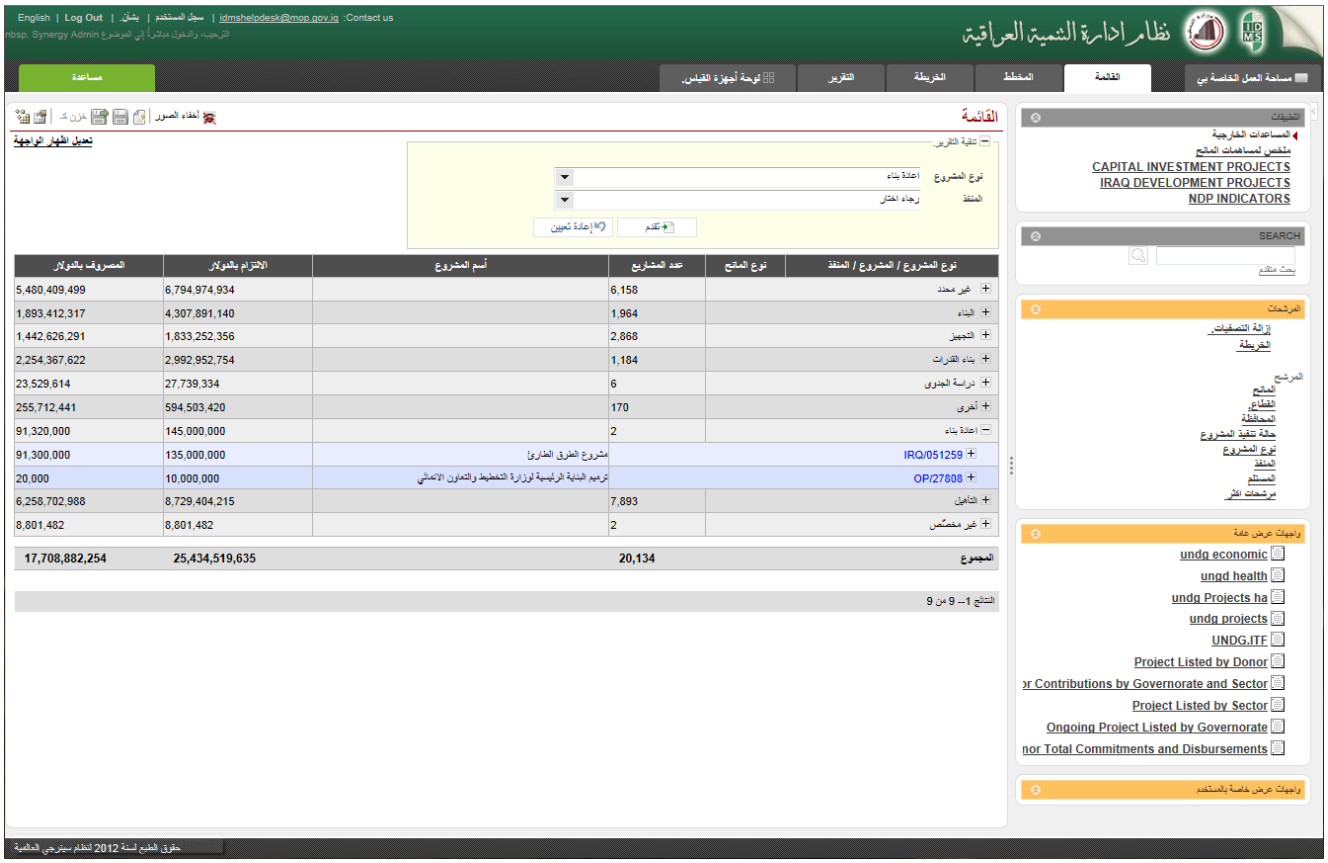


Figure 30: Refining a Report

7.6 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 31).

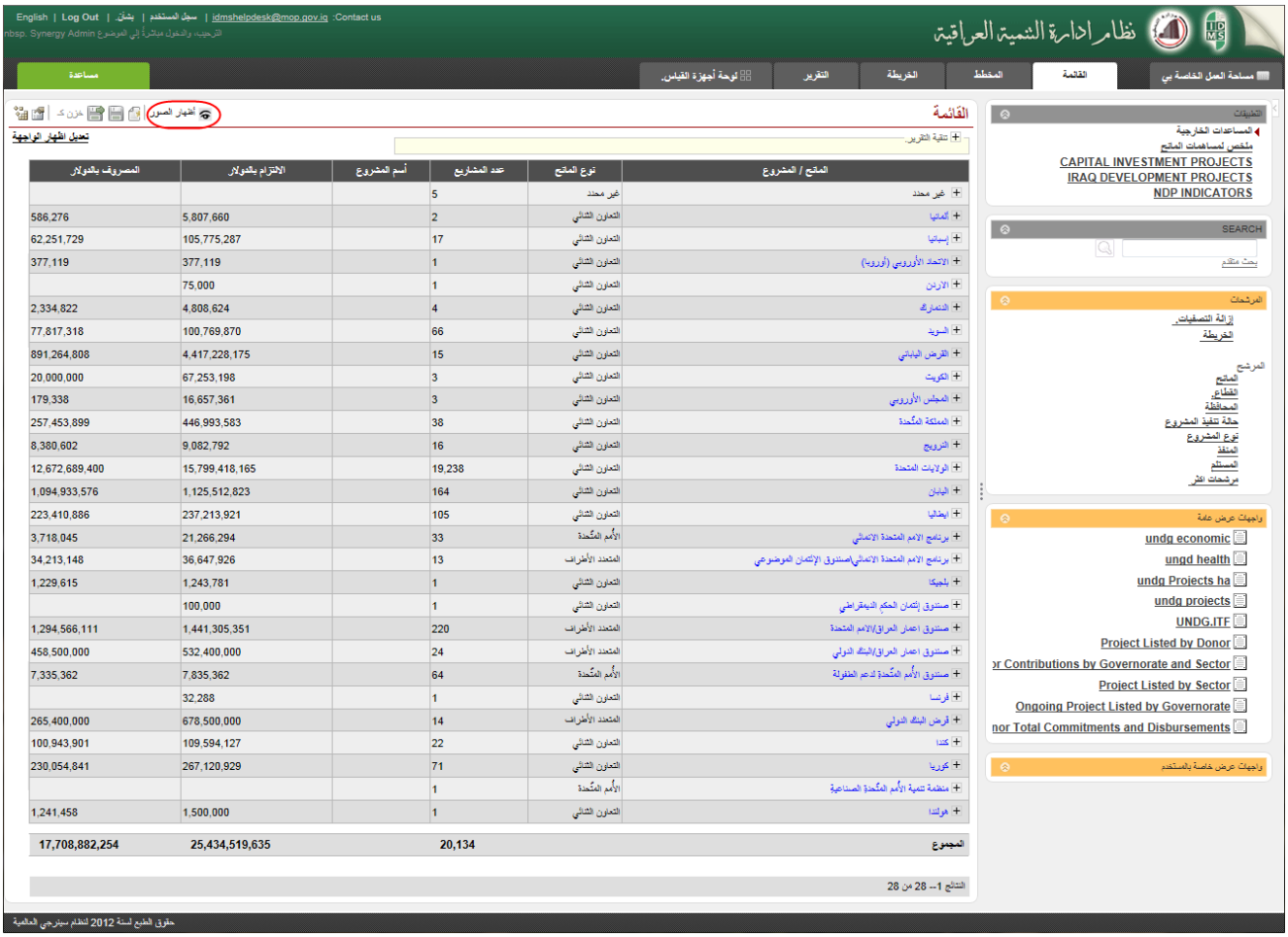


Figure 31: Hiding Images in the List

Note: Clicking the Show Images button will show the images.

7.7 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 32) will appear presenting the administrator with the groupings/columns selected and available for the list view.
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.
6. After finishing making changes in the view, click the **OK** button for the changes to take effect. Or, click the **Cancel** button to discard the changes made.

Figure 32: Modifying the Current View

7.7.1 Adding List Groups / Columns / Column Groupings

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

1. 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.
2. Click the **(Select)** button. The selected group(s) / column(s) will appear in the *Selected Groups / Columns* panel.

7.7.2 Re-ordering Groups / Columns / Column Groupings

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

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

7.7.3 Removing Groups / Columns / Column Groupings

In order to remove the selected groups / columns / column groupings from the list, follow the steps below:

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

7.7.4 Setting a View as Default

After making changes in the view currently displayed in the *List* module, you can set the newly created view as default. This means that the new view will be displayed when the user accesses the *List* module.

In order to set a view as default, follow the steps below:

1. Make the necessary changes in the current view as described in the sections above.
2. 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.

7.8 Sample Views

In the following chapters, you can see several samples on list reports.

7.8.1 Sample View 1

Figure 33: Defining List View Groupings for Sample View 1

Figure 34: Defining List View Columns for Sample View 1

If you have indicated **Sector** / **Sub-Sector** / **Project** hierarchy as a grouping (Figure 33) and, **# of Projects** / **Committed (USD)** / **Disbursed (USD)** as columns (Figure 34), following list view will appear (Figure 35):

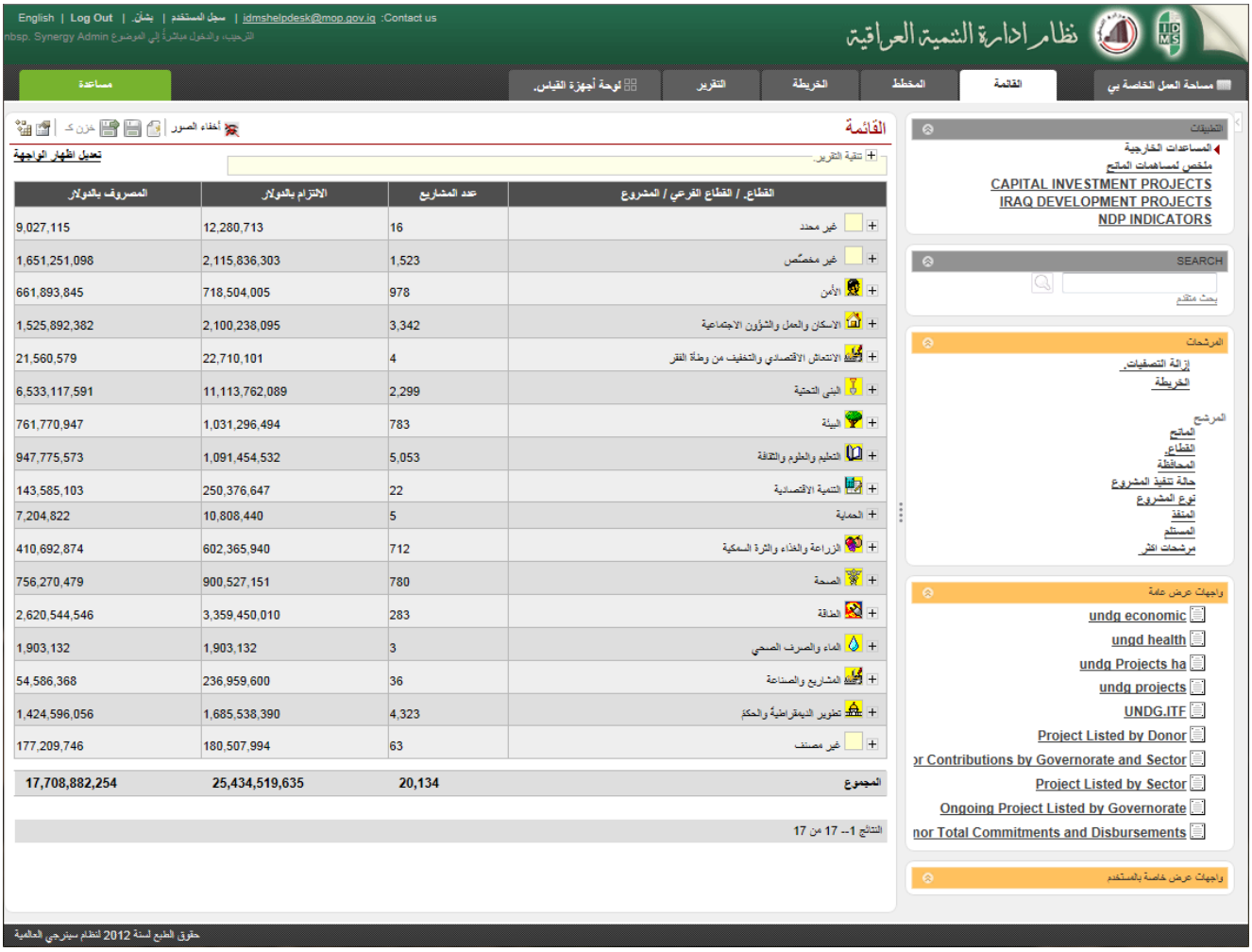


Figure 35: Sample View 1

7.8.2 Sample View 2

Figure 36: Defining List View Groupings for Sample View 2

Figure 37: Defining List View Columns for Sample View 2

If you have indicated **Governorate** / **Qadha** / **Nahia** / **Project** hierarchy as a grouping (Figure 36) and, **# of Projects** / **Committed (USD)** / **Disbursed (USD)** as columns (Figure 37), following list view will appear (Figure 38):

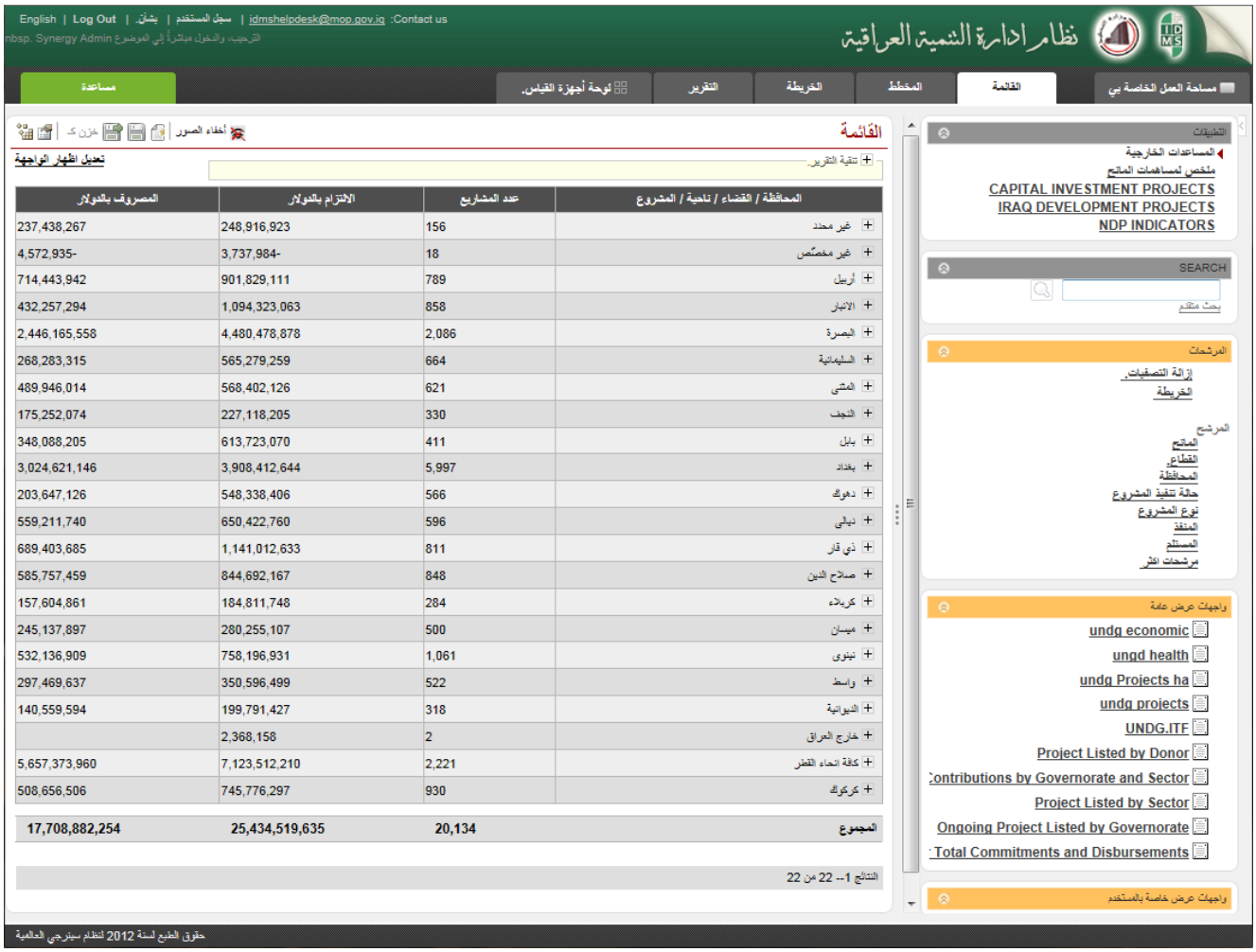


Figure 38: Sample View 2

8. CHART MODULE

The *IDMS* application is equipped with a powerful chart designer that empowers you with all necessary tools to create charts for professionally looking presentations and reports. A user-friendly interface, great number of visual effects and pre-defined chart types, flexible chart components selection, and on-screen real-time chart visualization make using the chart designer an easy and delightful experience.

8.1 Key Features

You can make use of the following key features of the *Chart* tool in *IDMS*:

- ✓ Rich user interface that supports movable windows for arranging the screen as desired.
- ✓ The ability to resize the charts directly in the workspace.
- ✓ The ability to show or hide the data labels and legends.
- ✓ The ability to customize the coloring, or choose pattern-filled charts for black and white printing.

8.2 Accessing the Chart Module

As it has been stated above, the system provides for the opportunity to present data in the form of different charts. In order to access the *Chart* module of the system, click on the **Chart** tab. The *Chart* module appears where a pre-defined chart is displayed.

8.3 Main Screen and Its Components

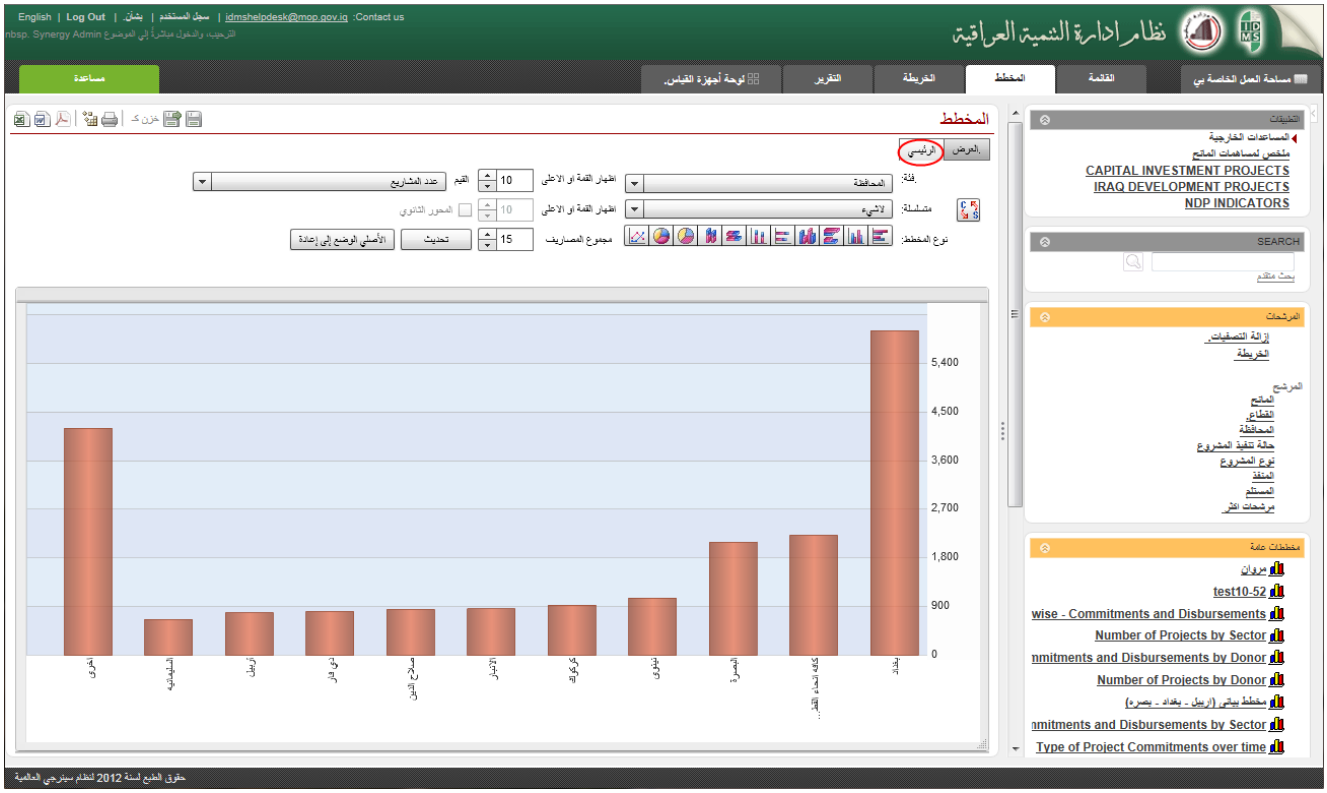


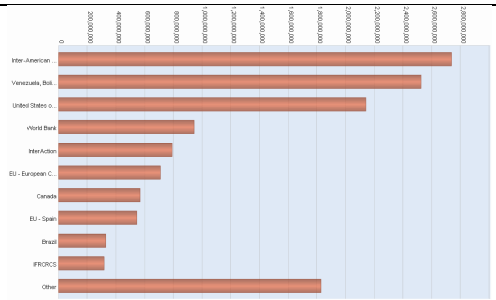
Figure 39: Main Screen of the Chart Module

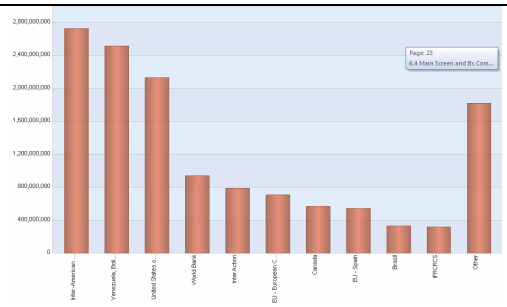
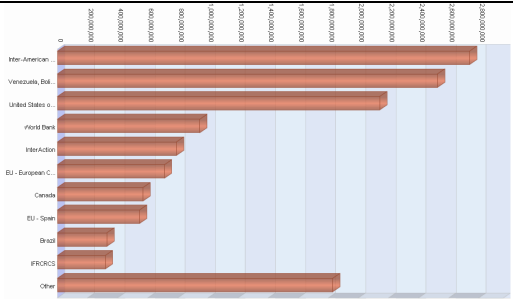
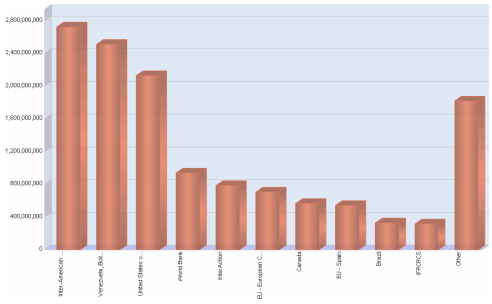
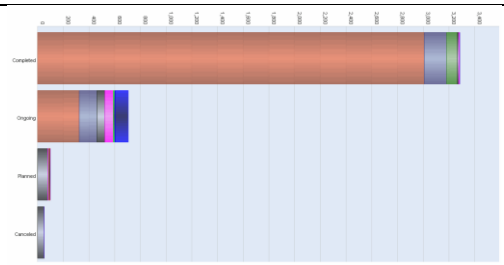
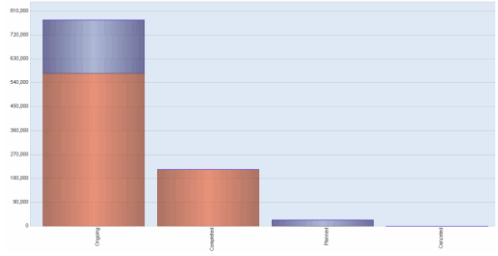
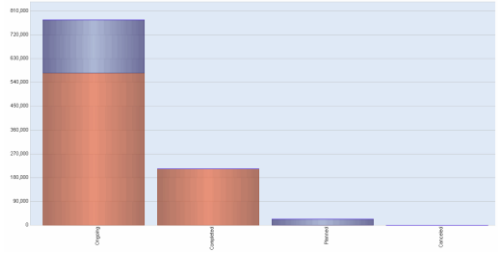
1. **Category** - allows selecting one of the options provided in the **Category** drop-down menu located at the top of the *Chart* window. The selected category will define one of the chart axes. Selection of a category for the chart report is required.

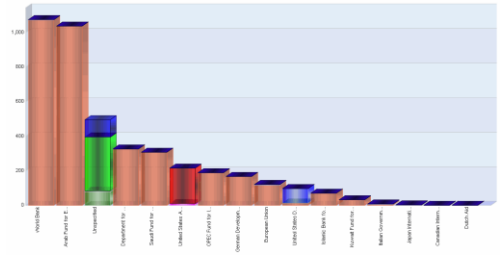
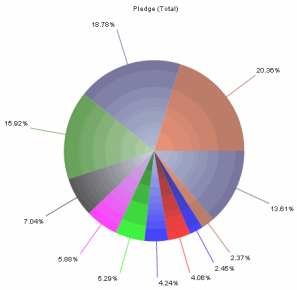
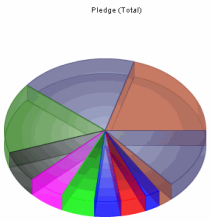
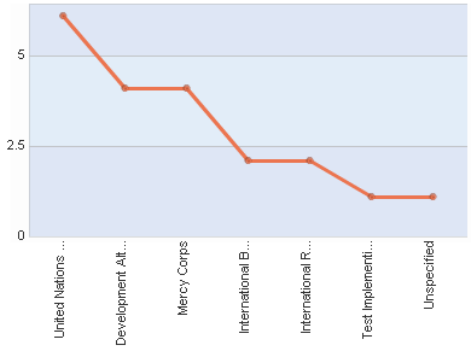
2. **Series** - allows selecting one of the options provided in the **Series** drop-down menu located at the top of the *Chart* window. The selected series will define the chart legend. Selection of a series for the chart report is optional.

   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:

Chart Type	Example
1. Bar	

2. Column	
3. 3D Bar	
4. 3D Column	
5. Stacked Bar	
6. Stacked Column	
7. Stacked 3D Bar	

8. Stacked 3D Column	
9. Pie	
10. 3D Pie	
11. Line	

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 designed is displayed.

8.4 View Screen and Its Components

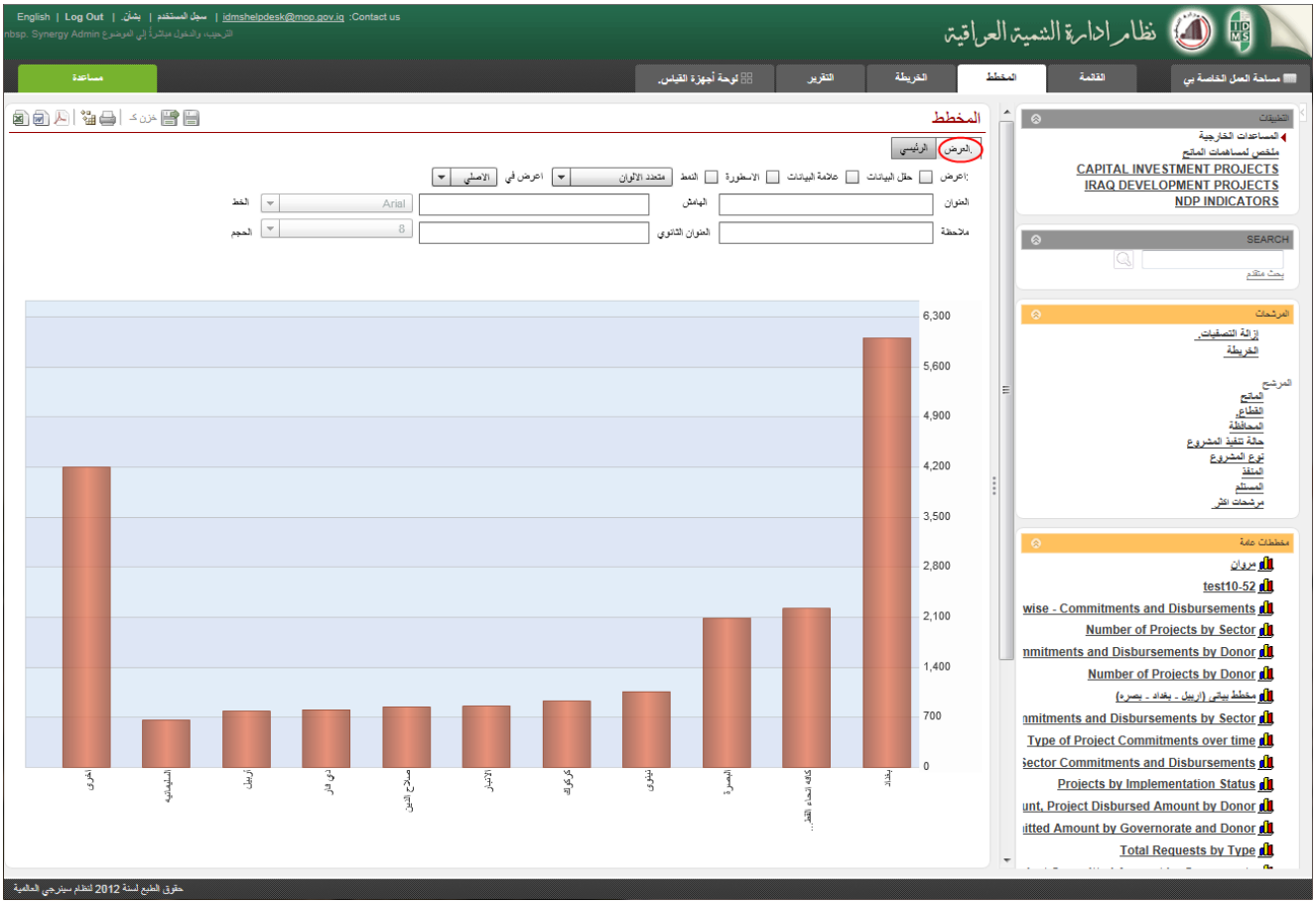


Figure 40: View Screen of the Chart Module

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.

8.5 Sample Chart Reports

In the following chapters, you can see several samples on charts.

8.5.1 Sample Chart Report 1

If you select the **Sector** as a chart Category, **Committed (USD)** / **Disbursed (USD)**' as Values to be shown on the chart, click the **3D Column** chart button to specify the chart type, and activate the **Data Table** option in the *View* window, the following chart report will appear (Figure 41):

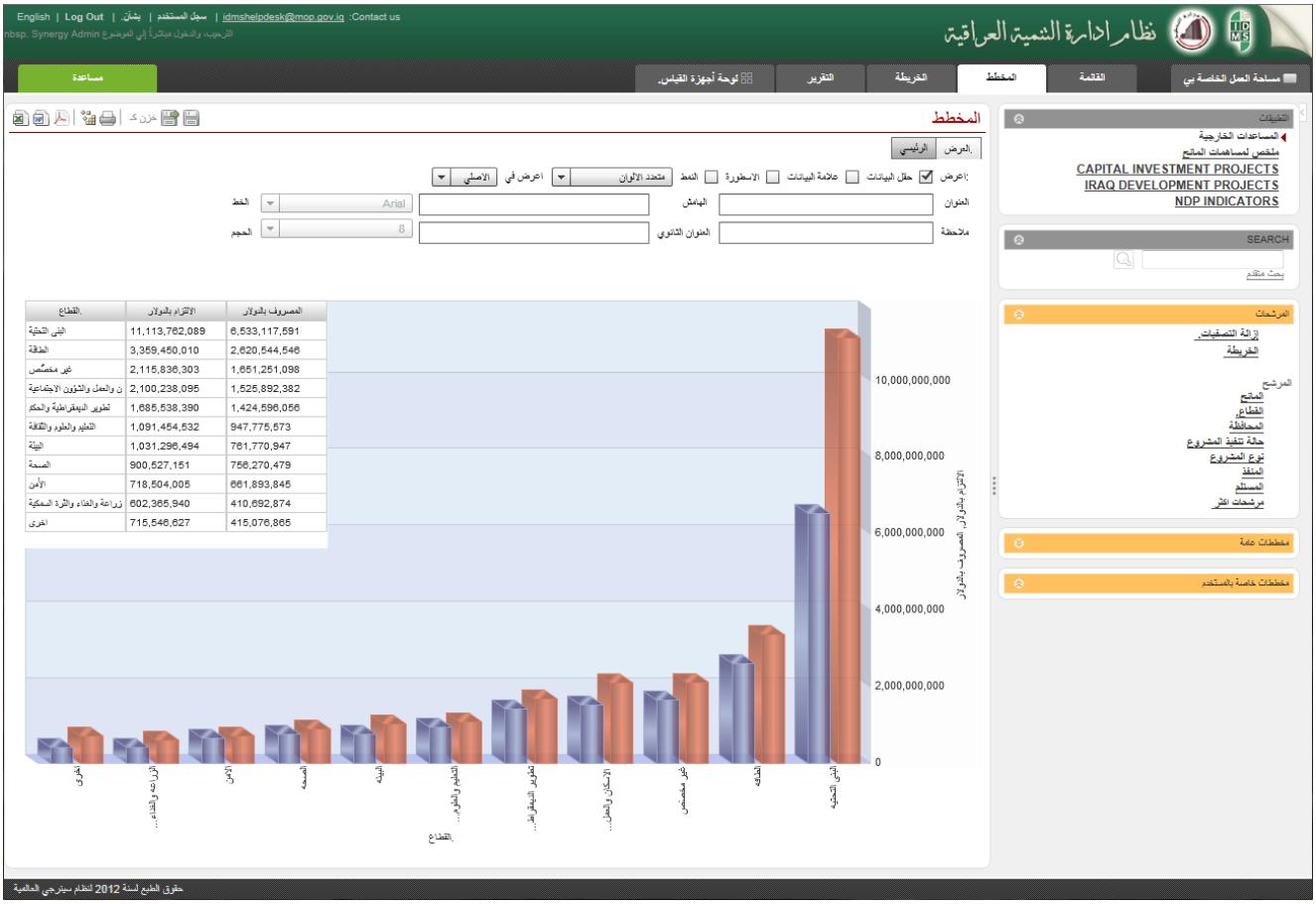


Figure 41: Sample Chart Report 1

8.5.2 Sample Chart Report 2

If you select the **Governorate** as a chart Category, **Committed (USD)** / **Disbursed (USD)** / **Expended (USD)** as Values to be shown on the chart, click the **3D Pie** chart button to specify the chart type, and activate the **Data Table** and **Legend** options in the *View* window, the following chart report will appear (Figure 42):

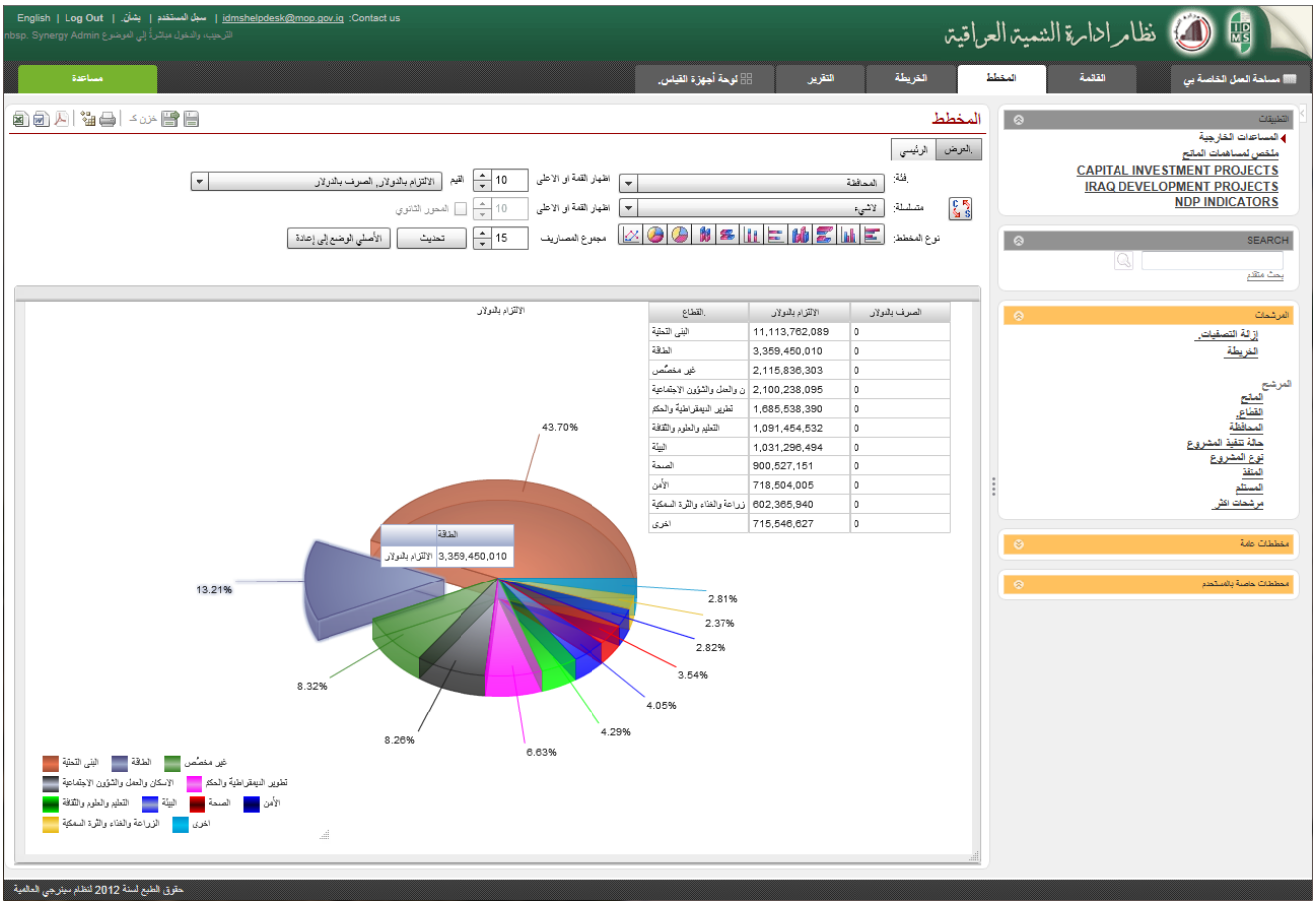


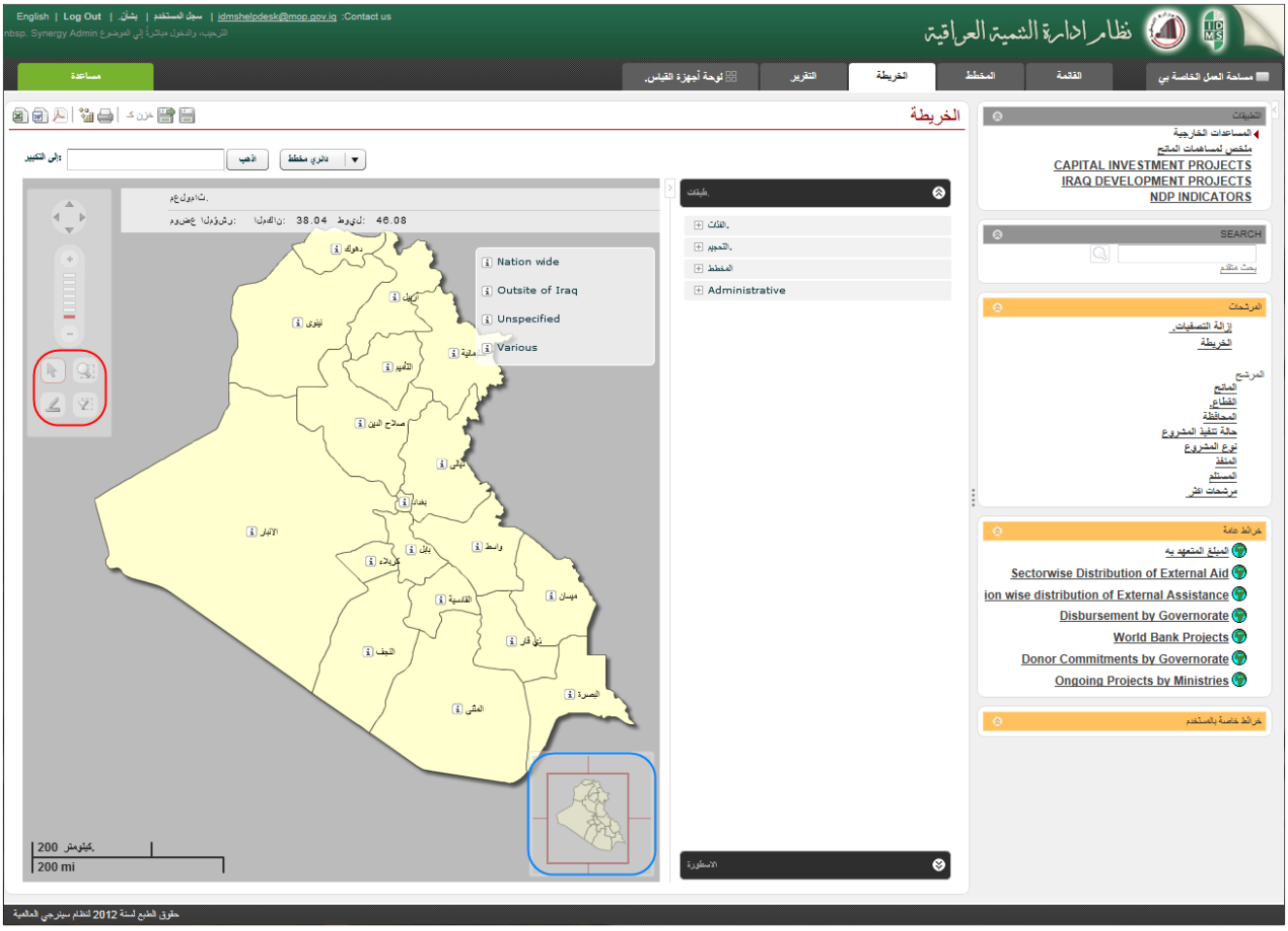
Figure 42: Sample Chart Report 2

9. MAP MODULE

In the *Map* module of *IDMS*, you can make use of an advanced GIS tool for data visualization, mapping and analysis.

In this module, you can plot data directly on a map and then access that data through the map. You can also query, aggregate, disaggregate, filter, and edit data on a map, visually capture data at any desired level, from the most general to the most detailed, down to the district level.

Moreover, the GIS tool offers an impressive array of state-of-the-art, advanced GIS features, such as the ability to zoom freely; to select a point on a map and ask the system to display any category of data within a given radius ('buffered zone querying').



Select
Zoom by Selection
Distance
Buffered Zone Query

Mini Map

Figure 43: Map Module

9.1 Key Features of the GIS Tool

Below are the key features of the GIS tool in the *IDMS* application:

- Vector-based platform
- Multi-layer mapping
  - Dynamic number of administrative territorial units
  - Category or Indicator data
  - Static Data (Borders, Cities, Rivers, Roads, Construction Sites, etc.)
  - Names and Labels
  - Any other type of layer

- Data visualization features
  - Plotting Category or Indicator Data as icons/images/flags
  - Plotting data based on GPS coordinates
  - Any layer which contains data associated to a precise GPS coordinate can be plotted on the map.
  - Coloring administrative territories based on dynamic scaling (e.g. level of certain pollution)
  - Plotting graphs on maps
  - Attaching photo images to GPS locations (or conditional locations)

- Reference features
  - Legend
  - Dynamic legends are displayed depending on the selection of layer(s).
  - Tooltips
  - Details of an administrative territories
  - Details on plotted categories and indicators

- Navigation features
  - Free zoom-in/zoom-out
  - Mouse wheel-based zoom-in/zoom-out
  - Scaled zoom-in/zoom-out
  - Map Panning (mouse drag and buttons)
  - Mini Map Preview
    The preview displays a small window of the entire world or country and is used for quick navigation to a desired location with one click without having to zoom out, find the new location and zoom in again.

- GIS specific features
  - Distance Measurement
  - Buffered Zone Querying
  - Geocoding
- Internationalization features
  - User interface multi-lingual capability
  - Map multi-lingual capability

- Export & Print
  - Export to PDF, Word, or Excel
  - Print

- Interoperability
  - Map retrieval via web services

9.2 Accessing the Map Module

The system provides for the opportunity to present data on the map of the country. In order to access the *Map* module of the system, click on the **Map** tab. You will be navigated to the *Map* module where the map of the country is displayed.

In the *Map* module, you can choose to view different data sets displayed on the map, create and display reports, save them as pre-defined reports, arrange them in the desired way, print them, etc.

9.3 The Map Module Screen Components

The following figure describes some of the features available in the main screen of the *Map* module (Figure 43):

1. **Zoom to panel -** allows free zooming to the desired administrative unit (governorate or district).

2. **Chart type selector -** allows defining whether the data should be presented in form of a pie chart or a bar chart when plotting graphs on the map.

3. **Navigation controls -** a set of tools that provide common navigation functions, such as panning and zooming.

4. **Map -** the map of the country.

5. **Scale Bar -** allows you to work out the distances on the map. The distances are expressed both in the metric and English units of measure.

6. **Mini Map -** an overview map of the entire country displayed in a small window allowing quick navigation to a desired location with one click without having to zoom out, find the new location and zoom in again.

7. **Layers Panel -** provides a variety of data to choose to display on the map.

8. **Legend Panel -** explains the categories and data series displayed on the map.

9. **Location information section -** displays the name of the administrative unit when it is pointed on the map.

10. **Cursor position section -** displays the geographic coordinates (expressed as latitude and longitude) for any point on the map.

9.4 Working in the Map Module

9.4.1 Zooming in / Zooming out

The GIS tool is equipped with the advanced zooming capabilities used to enlarge or reduce the view of the map on the screen. The following zooming options are available:

Free zoom in / zoom out

This option allows you to easily explore the data through Intelligent Searching. You can enter any combination of letters in the *Zoom to* panel and select the administrative territory (district) to navigate to from the list containing the search results (Figure 44). The selected item will be magnified and displayed in the main screen.

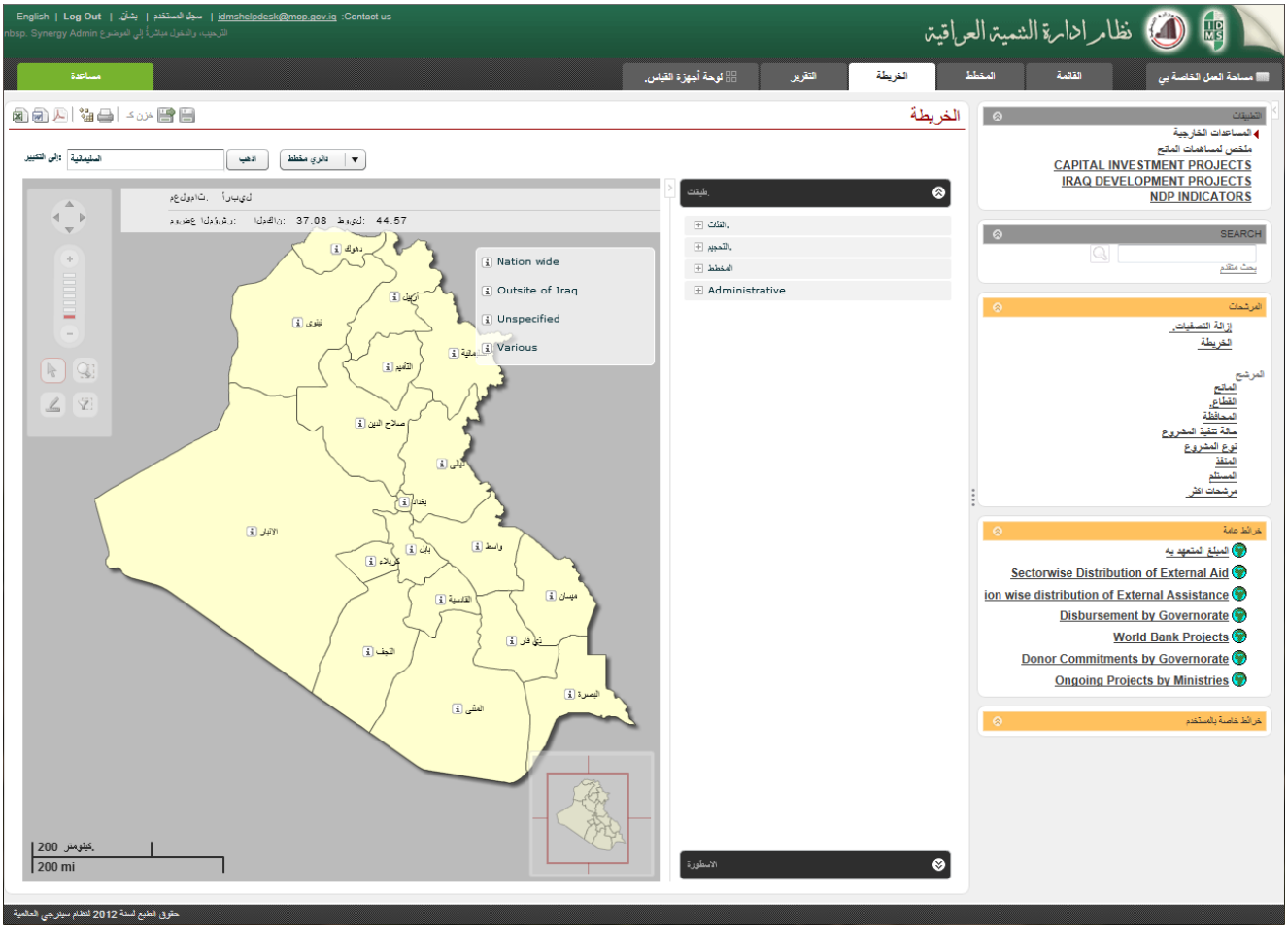


Figure 44: Intelligent Searching

Scaled zoom in / zoom out

This option allows zooming in / zooming out using the scale tool available in the Advanced GIS.

This means that when changing the zoom scales by clicking either on + or −, you can magnify or reduce the viewport according to the scale value.

Mouse wheel-based zoom-in/zoom-out

This option supports mouse wheel-based zooming in / zooming out. In order to enlarge or reduce the viewport using the scroll wheel button of the mouse, you should click anywhere on the map and use the wheel button in the backward motion to zoom in and in the forward motion to zoom out.

Zoom by Selection

This option allows magnifying the original viewport or a portion of it using the mouse. To be able to enlarge an area on the map, you should activate the *Zoom by Selection* option by clicking the button then select a region on the map to magnify.

9.4.2 Measuring Distance

In the Map module, you can measure the distance between two points on the map.

To do this, click button, select the point on the map and drag the mouse to the second point to trace a path to measure (Figure 45). The measured distance will be expressed both in metric and English units of measure.

Note: Measuring is calculated using the latitude and longitude coordinates from point to point and does not consider elevation.

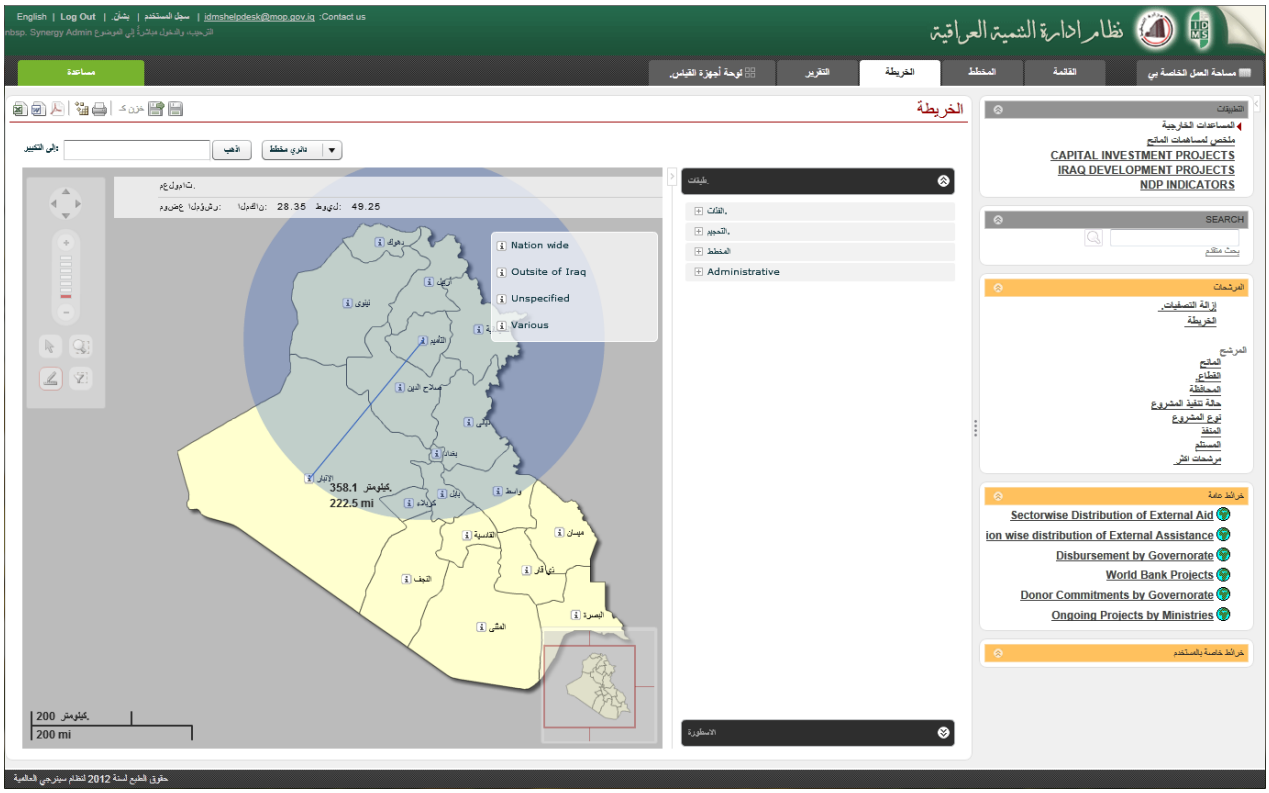


Figure 45: Measuring Distance

9.4.3 Buffered Zone Querying

This feature in the Advanced GIS tool is used to select a point on a map and display any type of data within a given radius. In addition, the tool is easily navigable through a Mini Map, Navigation Bar and Intelligent Search Tools.

To be able to create a buffered zone to view data for, select the button, and then select the region on the map to highlight. The selected area will be activated while the rest of the screen will be disabled (Figure 46). This tool may be useful for presentations on screenshots to mark the selected area on the map.

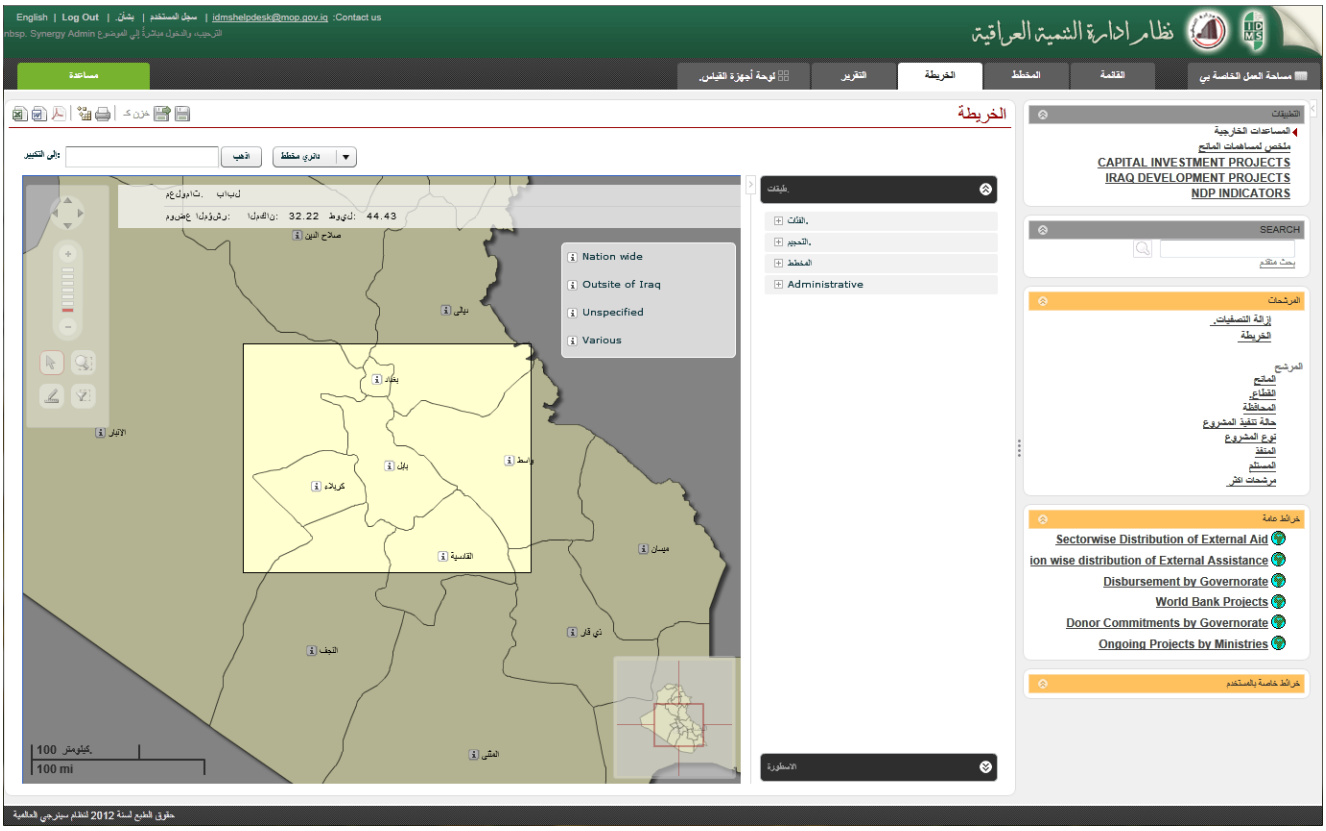


Figure 46: Buffered Zone Querying

9.4.4 Using Layers

The Layers feature in the *Map Module* provides a variety of data to select to display over the viewing area. You can use the Layers feature to display the following information:

- Display categories;
- Choose to view data on a scaling map;
- Plot data in the form of different graphs (pie chart or bar chart);
- Display map features such as governorate or qadha borders.

The following layers can be applied in *IDMS*:

Categories

This option is used to plot category data on the map and to view them in form of different icons / images. To enable this option, expand the *Category* section and selecting the category(ies) listed.

Note: When pointing the mouse cursor on a respective icon/image on the map, you can view the details for the selected category.

Scaling

This option is used to view the data on a scaling map. This means that the selected data series will not be displayed in form of graphs, but the administrative territories will be colored according to the selected scaling category instead. The scaling legend at the bottom left side of the map prompts on the coloring pattern used.

To enable this option, expand the *Scaling* section in the Layers panel and select one of the possible alternatives listed.

Chart

You can plot different data series on a map and view them in the form of different graphs, such as pie charts or bar charts. You can turn on this option by expanding the *Chart* section in the Layers panel and selecting the chart category(-ies) to be displayed on the map. By default, the selected category(-ies) will appear in the form of a pie chart. However, you can choose the view the data in the form of a bar chart by selecting the appropriate option from the **Chart Type** drop-down (Figure 47).

Note: When pointing the mouse cursor on any of the chart constituents, you can view the data that stands behind it. The details on plotted chart categories are displayed when clicking the button.

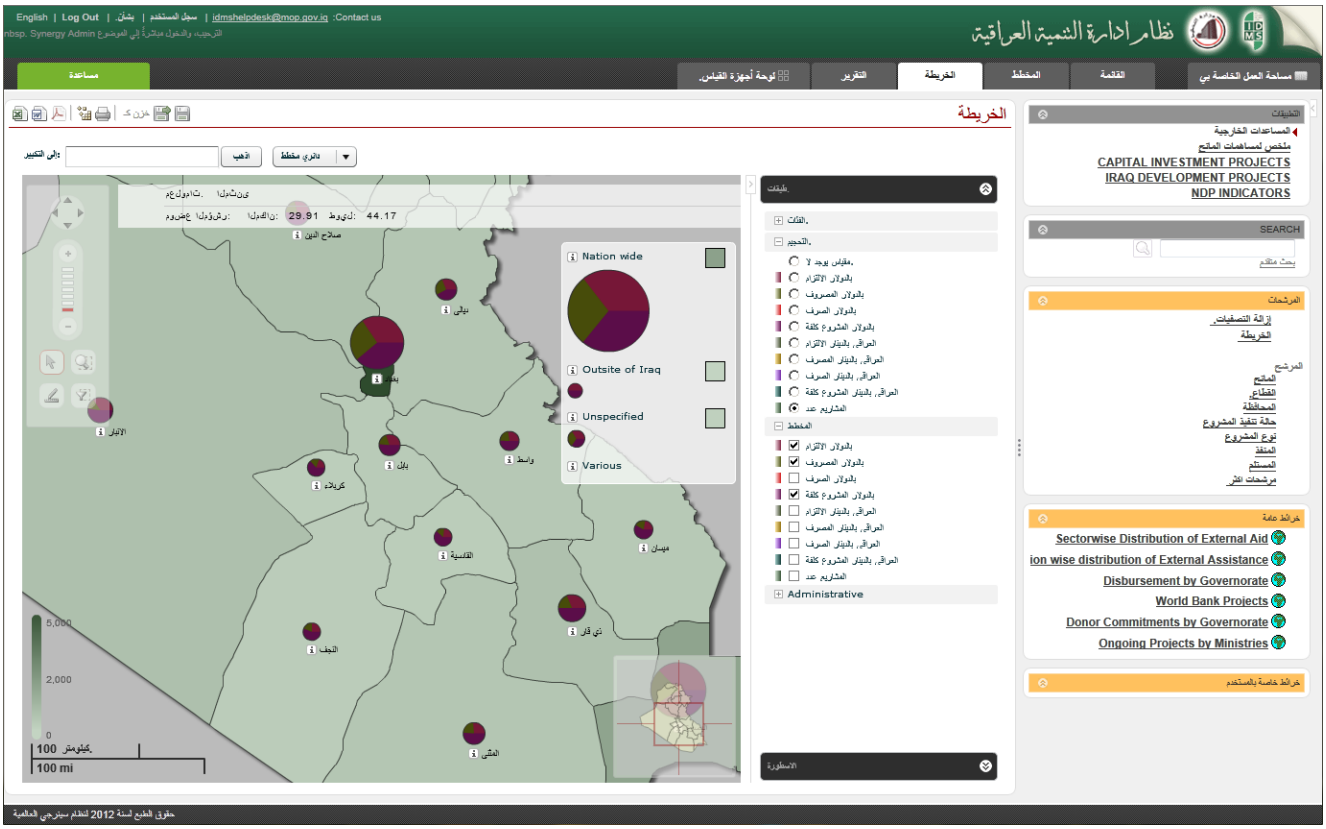


Figure 47: Selecting Chart Type

Political/Administrative

You can turn on border information by expanding the *Political/Administrative* section in the Layers panel and selecting one of the following options:

- **Auto -** displays border information for all territorial units when the zoom in is selected. For example, if you zoom in to district level, the border information for both governorates and district will be displayed on the map.
- **Governorate -** displays the border information for all governorates.
- **Qadha–** displays the border information for all qadhas.

9.4.5 Viewing Legend

To explain the data series or categories on the map, the legend is used to identify the patterns or colors that are assigned to the selected categories (Figure 48). It is worth mentioning that each data series or category is represented by a unique pattern or color in the map legend, which is displayed in the following ways:

- In the *Legend* section if you have chosen to apply any category to the map.
- At the bottom left side of the map if you have selected to view data on the scaling map.

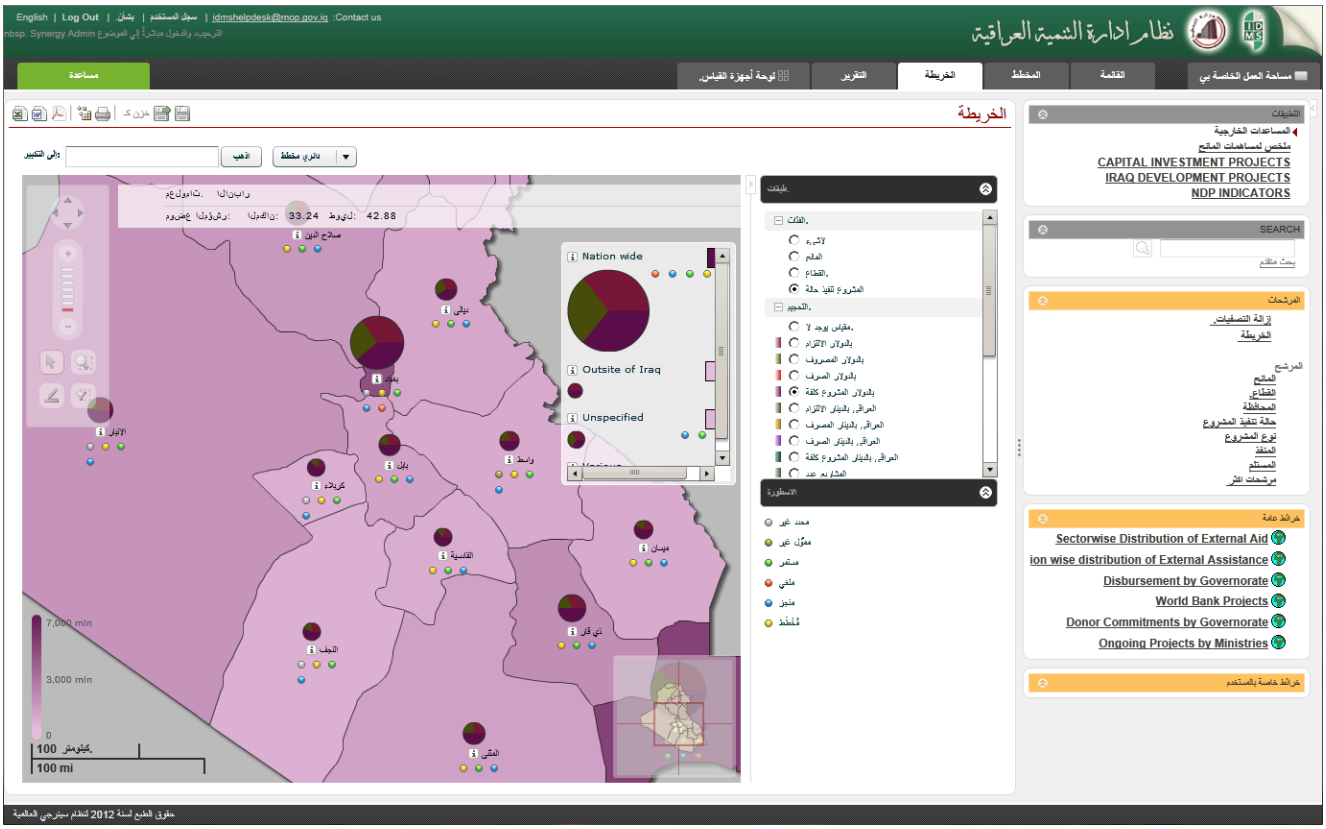


Figure 48: Viewing Chart Legend

9.4.6 Using Mini Map

The Mini Map window feature displays an additional view of the country map with a position indicator that corresponds to the current view inside the main screen (Figure 49). One of the main features of the Mini Map is that while the Mini Map window responds to position adjustments in the main screen, you can also interact directly with it. Double-clicking any area within the window or dragging the position cursor to the desired place will adjust position both in the Mini Map and in the main screen to the point in the Mini Map window that the user selects.

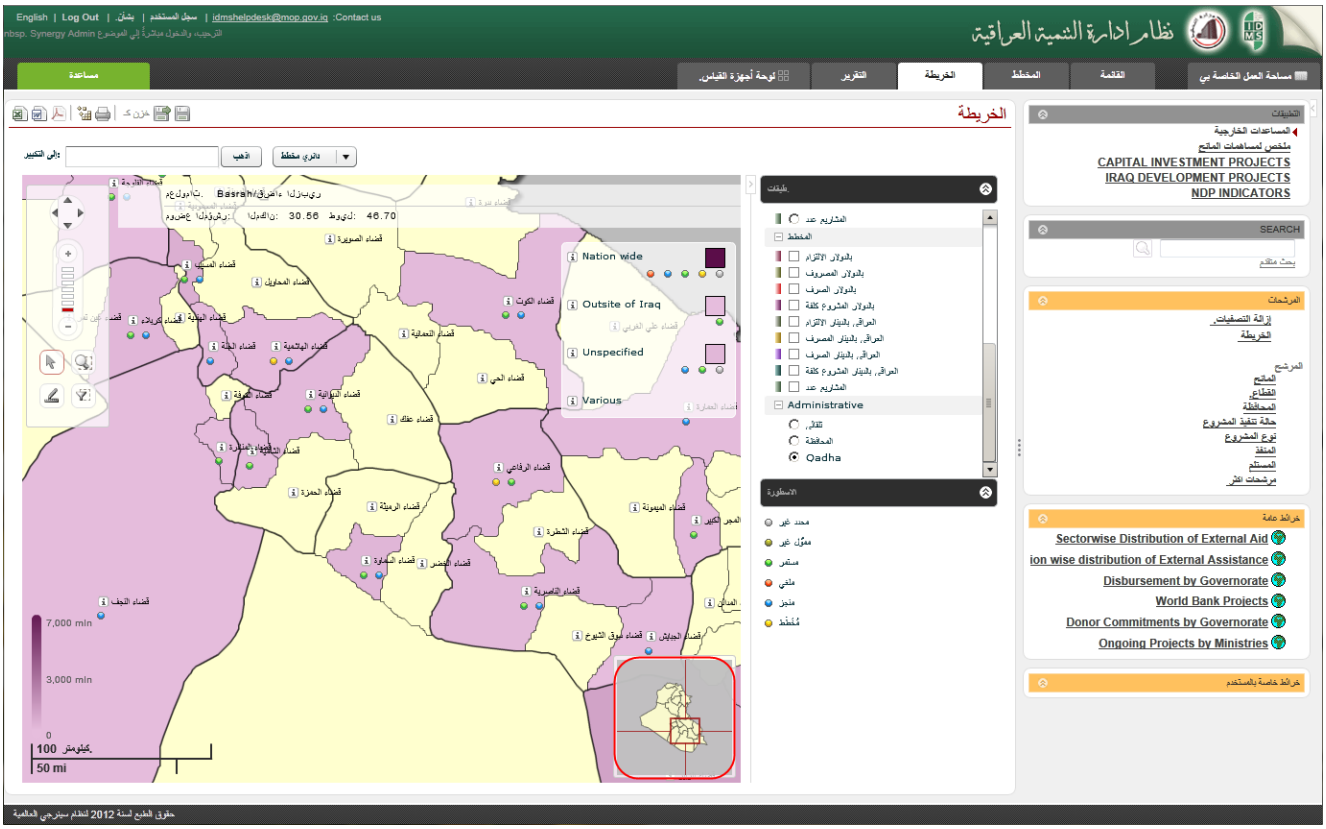


Figure 49: Using Mini Map

9.5 Viewing the Data Displayed on the Map

The Advanced GIS tool is used to view the data referring to definite territorial units – governorates and/or cities/villages when zoomed in to this level. In order to access the data for a specific territorial unit, point the mouse cursor on the ℹ button (Figure 50). The information that is displayed in the information window includes but is not limited to # of people in need of shelter, # of houses totally destroyed, estimate # of households, etc. If you have plotted any chart category on the map, the chart category details appear in the information window as well.

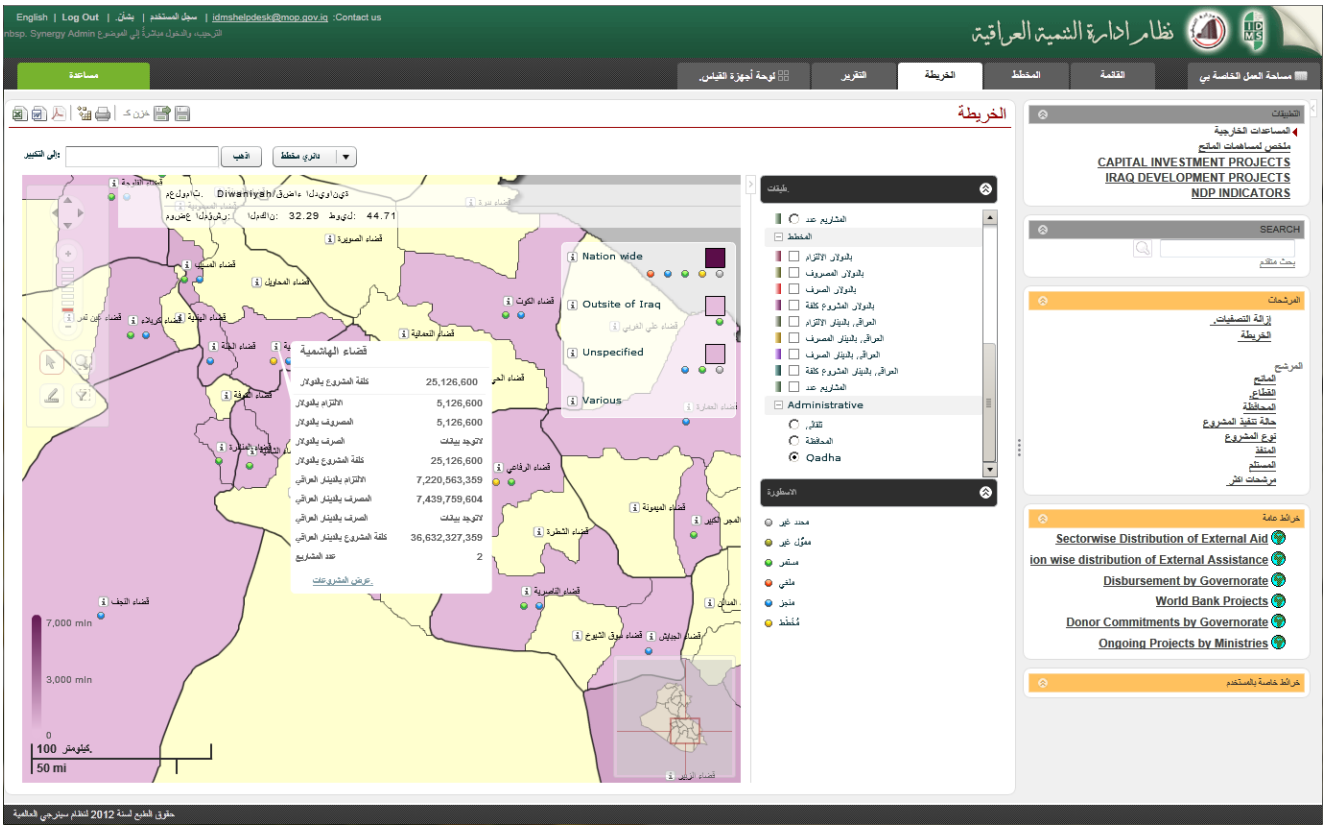


Figure 50: Viewing the Data Displayed on the Map

9.6 Sample Map Reports

In the following chapters, you can see several samples on maps.

9.6.1 Sample Map Report 1

You will get the following map report if you have selected **Project Implementation Status** as a map Category and open the **Legend** panel (Figure 51):

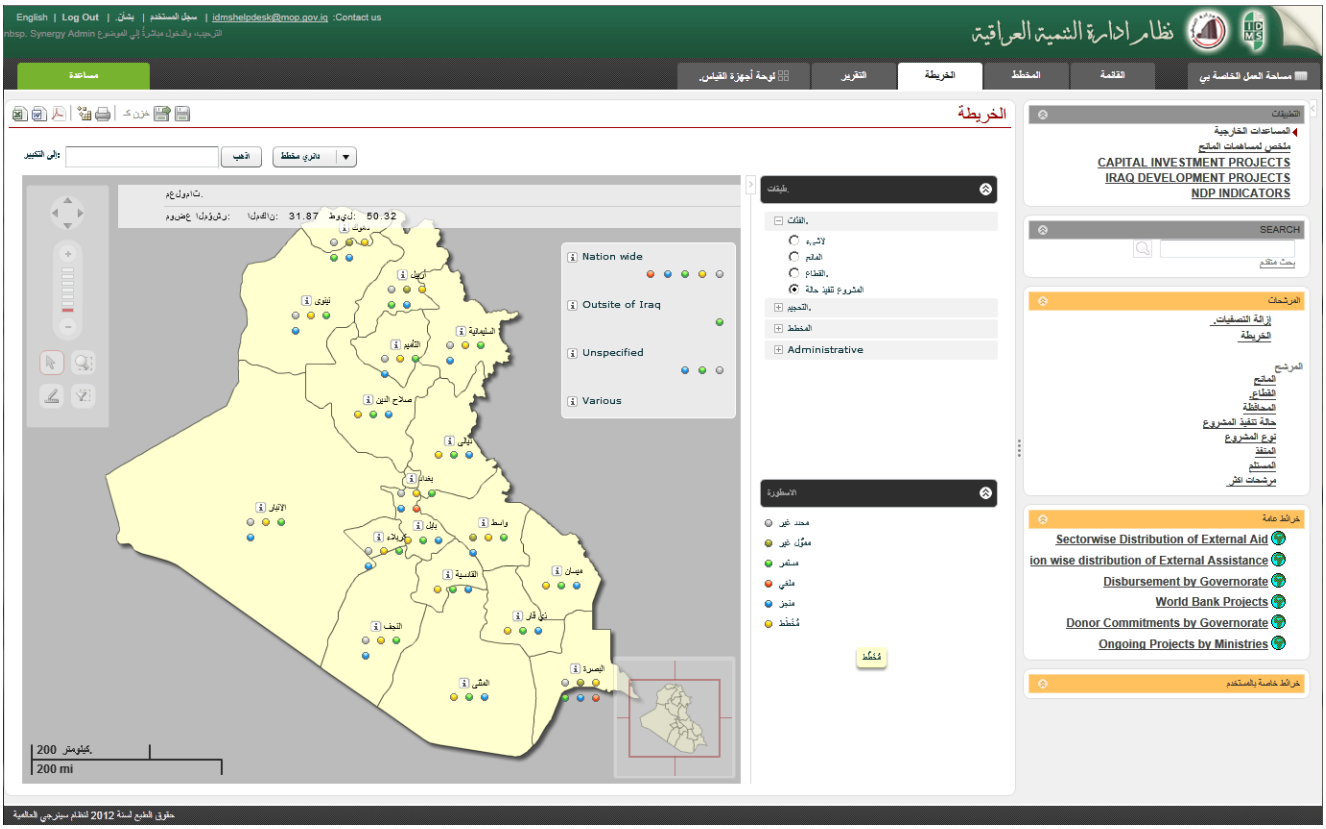


Figure 51: Sample Map Report 1

9.6.2 Sample Map Report 2

If you have selected **Project Cost (USD)** as a map Scale, the following map report will appear (Figure 52):

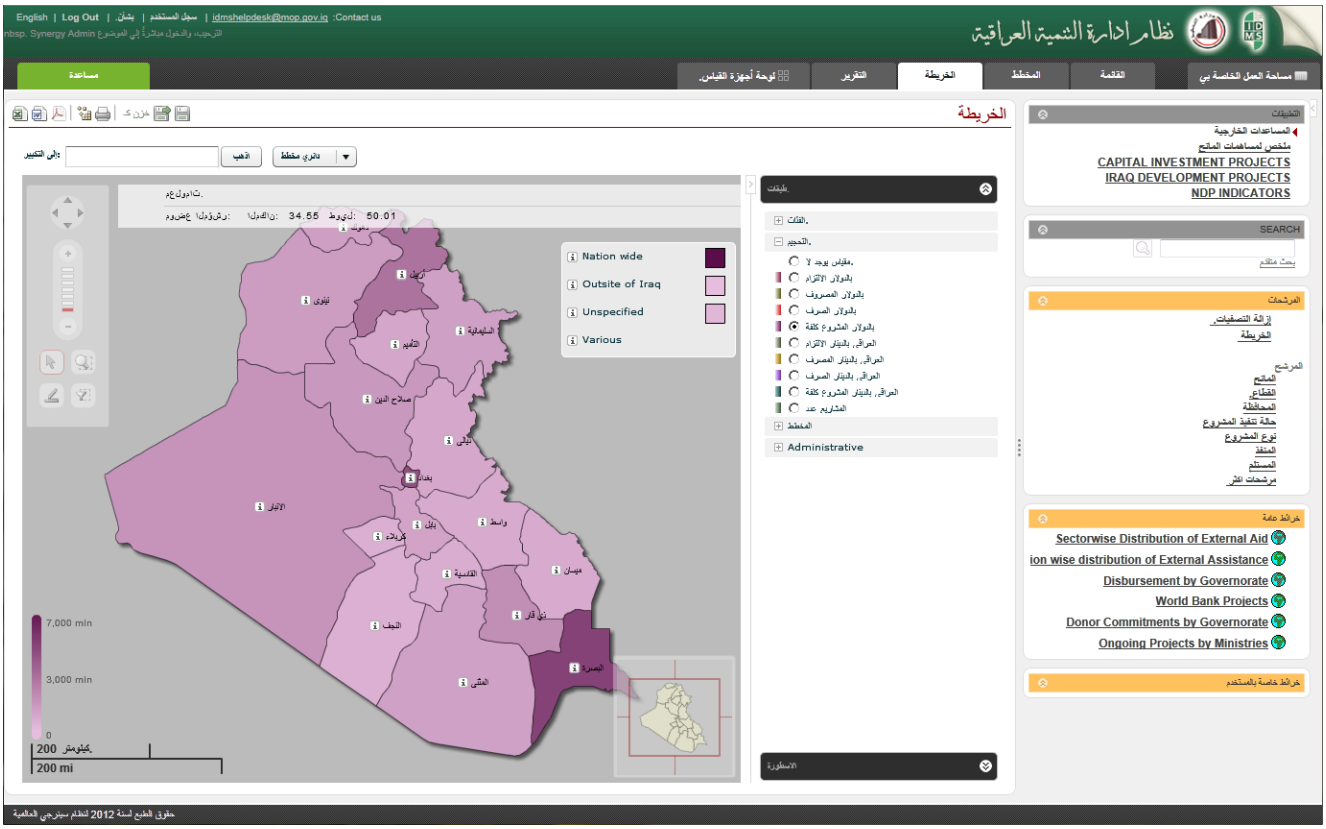


Figure 52: Sample Map Report 2

10. REPORT MODULE

In the *Report* module of the *IDMS* application, you can create and execute ad-hoc queries on the data, and acquire results in the form of different reports.

10.1 Accessing the Report Module

As it has been stated above, the system provides for the opportunity to create different sorts of list reports. In order to access the *Report* module of the system, click on the **Report** tab. You will be navigated to the Report module of the application where the *Report Designer* (Figure 53) will open.

In this module, you can create list reports, save them as predefined reports, arrange them in the desired way, print them, etc.

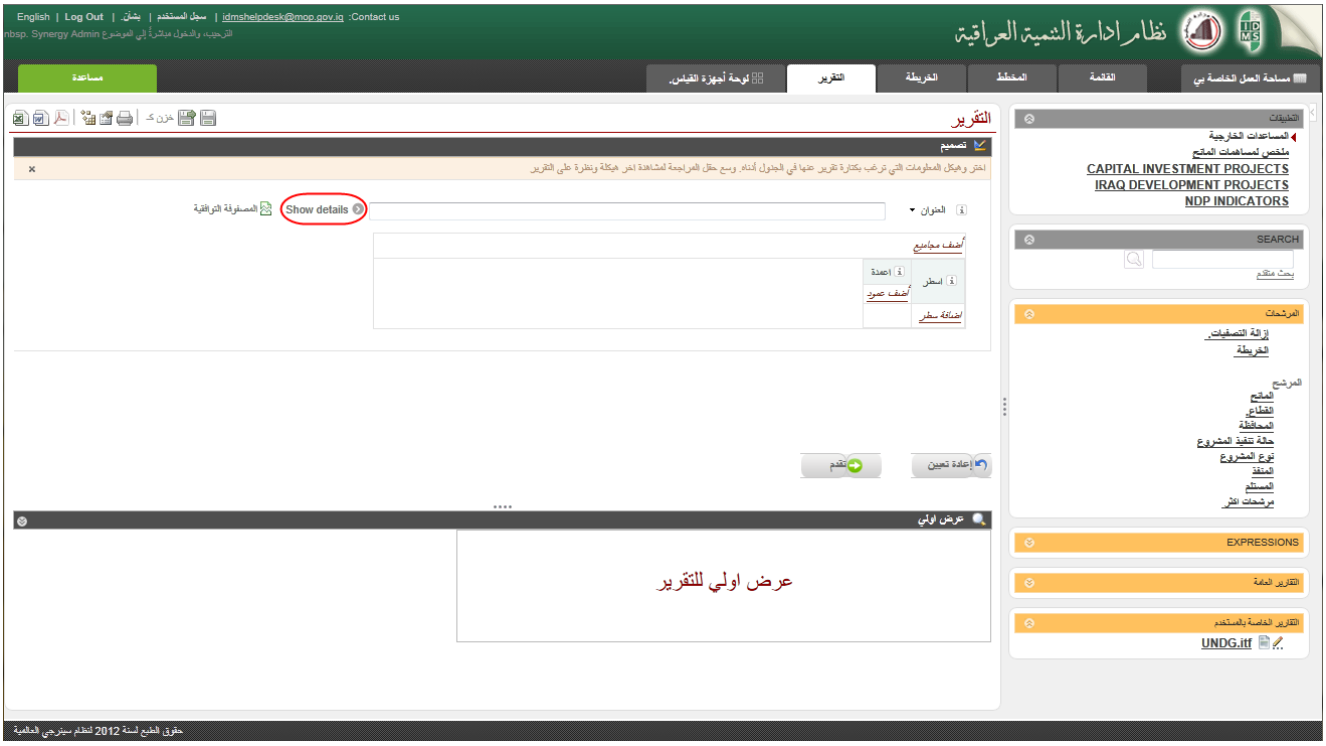


Figure 53: IDMS Application Report Module

10.2 Creating a Report

In order to create a report, i.e. to structure the report table and choose what information should appear in the rows and columns of the table, add report components, which are:

- **Text entries** – title, subtitle, header, and footer. For these fields, the expected input is a free text.
  Note: By default, the *Report Designer* gives you the possibility of adding report titles. However, you can change the default view to make adjustments for other text entry components (sub-title, header and footer) as well. To be able to provide additional textual information to the report, you will have to click the **Show Details** link and provide the

appropriate information in the fields that emerge. Clicking the **Hide Details** link will collapse the text entry fields displaying only the **Title**.

- **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. They provide instructions on how to compose and submit queries.

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 54).
   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 the report column is selected, 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.

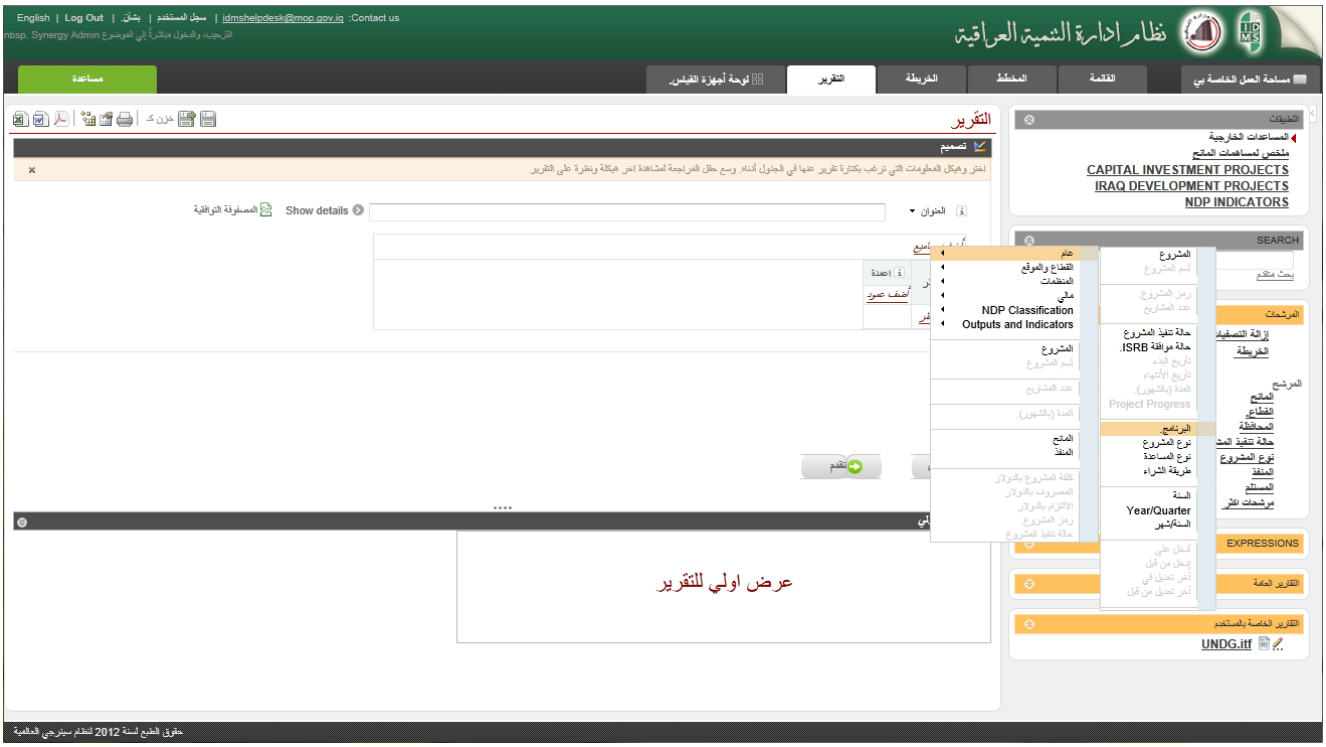


Figure 54: Selecting a Grouping for a Report

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 54) to open the *Compatibility Matrix* table (Figure 55). This is a table that displays the compatibility between all categories and measures in the database to display them in the report.

المصفوفة التوافقية

- يشير إلى التوافق بين الفئة والتدبير -.

الصفوف (الفئات) / الأعمدة (التدابير).	Output Progress (# to date)	Output Target (#)	Project Progress	آخر تعديل في	آخر تعديل من قبل	أنجز على	قسم المشروع	إدخل من قبل	الأعمال التي تحدث أثناء المشروع	الأعمال التي حدثت بعد المشروع	الالتزام بالدولار	الالتزام بالدينار العراقي	الصرف بالدولار	الصرف بالدينار العراقي	(المدة بالشهور).	المساهمة في صندوق الأمم المتحدة لأعلاه لأعمال بالدولار	المساهمة في صندوق الأمم المتحدة لأعلاه الأعمال بالدينار العراقي	المساهمة في صندوق البنك الدولي لأعلاه لأعمال بالدولار	المساهمة في صندوق البنك الدولي لأعلاه الأعمال بالدينار العراقي	المساهمة في صندوق برنامج الأمم المتحدة الانمائي بالدولار	المساهمة في صندوق برنامج الأمم المتحدة الانمائي بالدينار العراقي	الصرف بالدينار العراقي	الصرف بالدولار	تاريخ الانتهاء	تاريخ البدء	(تقدم مؤشرات الأداء الأساسية (# الجارية	حالة تنفيذ المشروع	(#) رقم المشروع	رمز المشروع	عدد المشاريع	كلفة المشروع بالدولار	كلفة المشروع بالدينار العراقي	(#) مؤشرات الأداء الأساسية المستهدفة
NDP Objective									•	•	•	•	•	•								•	•							•	•	•	•	
NDP Sector									•	•	•	•	•	•								•	•							•	•	•	•	
Year/Quarter									•	•	•	•	•	•								•	•							•				
البرنامج.									•	•	•	•	•	•								•	•							•	•	•		
السنة									•	•	•	•	•	•								•	•							•	•	•		
السنة/شهر									•	•	•	•										•	•							•				
القضاء									•	•	•	•	•	•								•	•							•	•	•		
القطاع.									•	•	•	•	•	•								•	•							•	•	•		
القطاع الفرعي									•	•	•	•	•	•								•	•							•	•	•		
القطاع الفرعي للخطة التنمية الوطنية									•	•	•	•	•	•								•	•							•	•	•		
المانح									•	•	•	•	•	•		•	•	•	•	•	•	•	•					•		•	•	•		
المحافظة									•	•	•	•	•	•								•	•							•	•	•		
المخرجات	•	•																												•				
المستلم									•	•	•	•	•	•								•	•							•	•	•		
المشروع	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•							•	•	•	•	•	•		•		•	•	•	•
المنفذ									•	•	•	•										•	•							•	•	•		
اهم مؤشرات الاداء																										•				•				•
حالة تنفيذ المشروع									•	•	•	•	•	•								•	•							•	•	•		
حالة موافقة ISRB.									•	•	•	•	•	•								•	•							•	•	•		
طريقة الشراء									•	•	•	•	•	•								•	•							•	•	•		
مستفيدين مباشرين وغير مباشرين									•	•	•	•	•	•								•	•							•	•	•		
ناحية									•	•	•	•	•	•								•	•							•	•	•		
نوع التمويل.									•	•	•	•										•	•							•	•	•		
نوع المانح									•	•	•	•	•	•								•	•							•	•	•		
نوع المساعدة									•	•	•	•	•	•								•	•							•	•	•		
نوع المستفيد									•	•	•	•	•	•								•	•							•	•	•		
نوع المشروع									•	•	•	•	•	•								•	•							•	•	•		
نوع المنفذ									•	•	•	•	•	•								•	•							•	•	•		

Figure 55: Compatibility Matrix

10.3 Previewing a Report

At any time during the process of creating a report, look in the *Preview* section at the bottom of the page, in order to view the final structure of the report (Figure 56). The Preview will not be ready for viewing unless there is at least one table row defined.

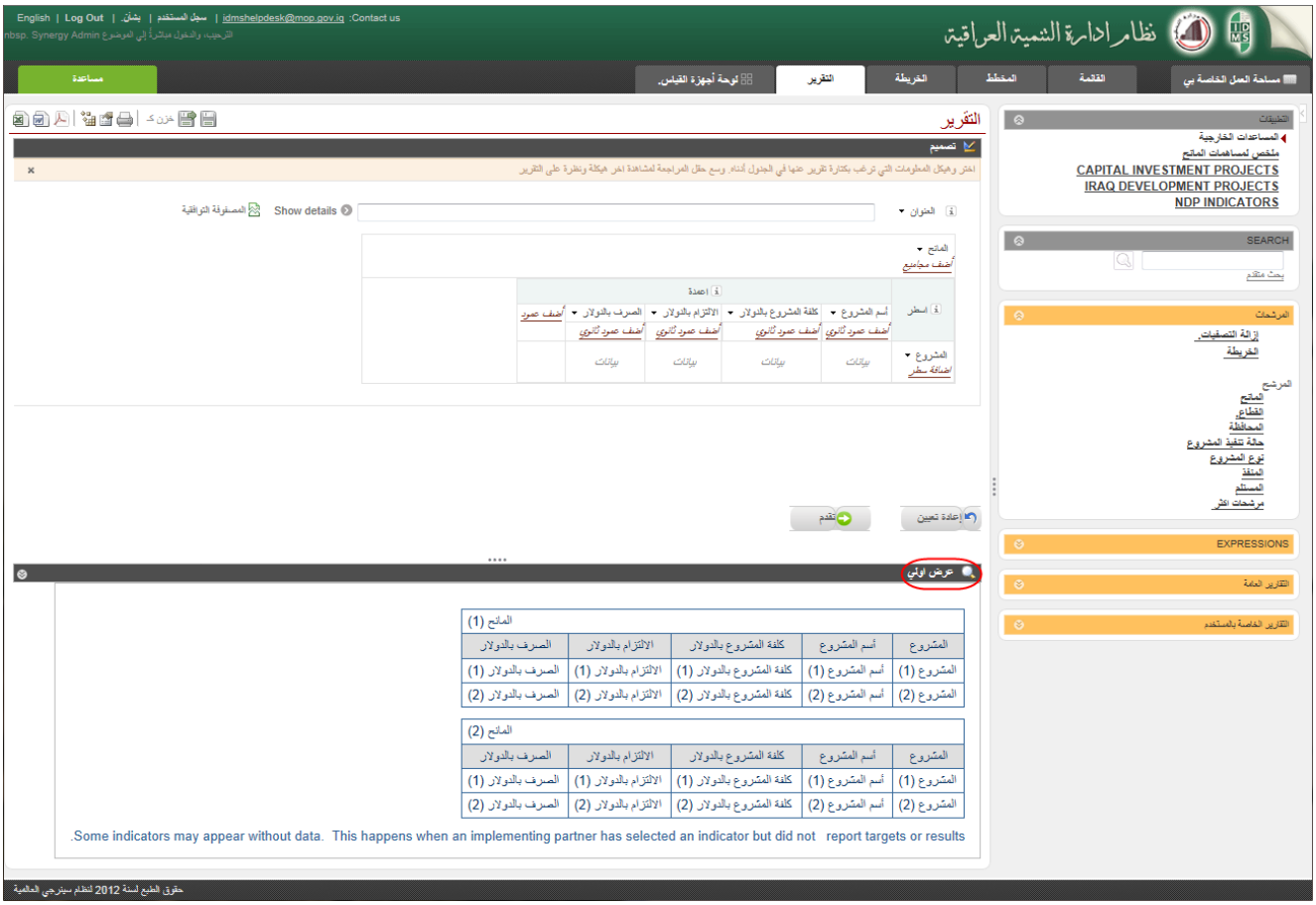


Figure 56: Previewing the Report

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. This section can be expanded in order to display whole of the information.

10.4 Generating a Report

The final step in the process of creating a report is report generation. By clicking the

(Submit) button, a request to the Reporting Engine is submitted 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.

Note: If the report generated contains a large number of data, you can refine it to focus on specific data. For more details on how to refine a report, see Refining the Report.

10.5 Sample Reports

In the following chapters, you can see several samples on reports.

10.5.1 Sample Report 1

If you have indicated:

- **Donor** as the report table grouping;
- **Project** as the row;
- **Title**, **Project Cost (USD)**, **Committed (USD)**, and **Disbursed (USD)** as columns (Figure 57);

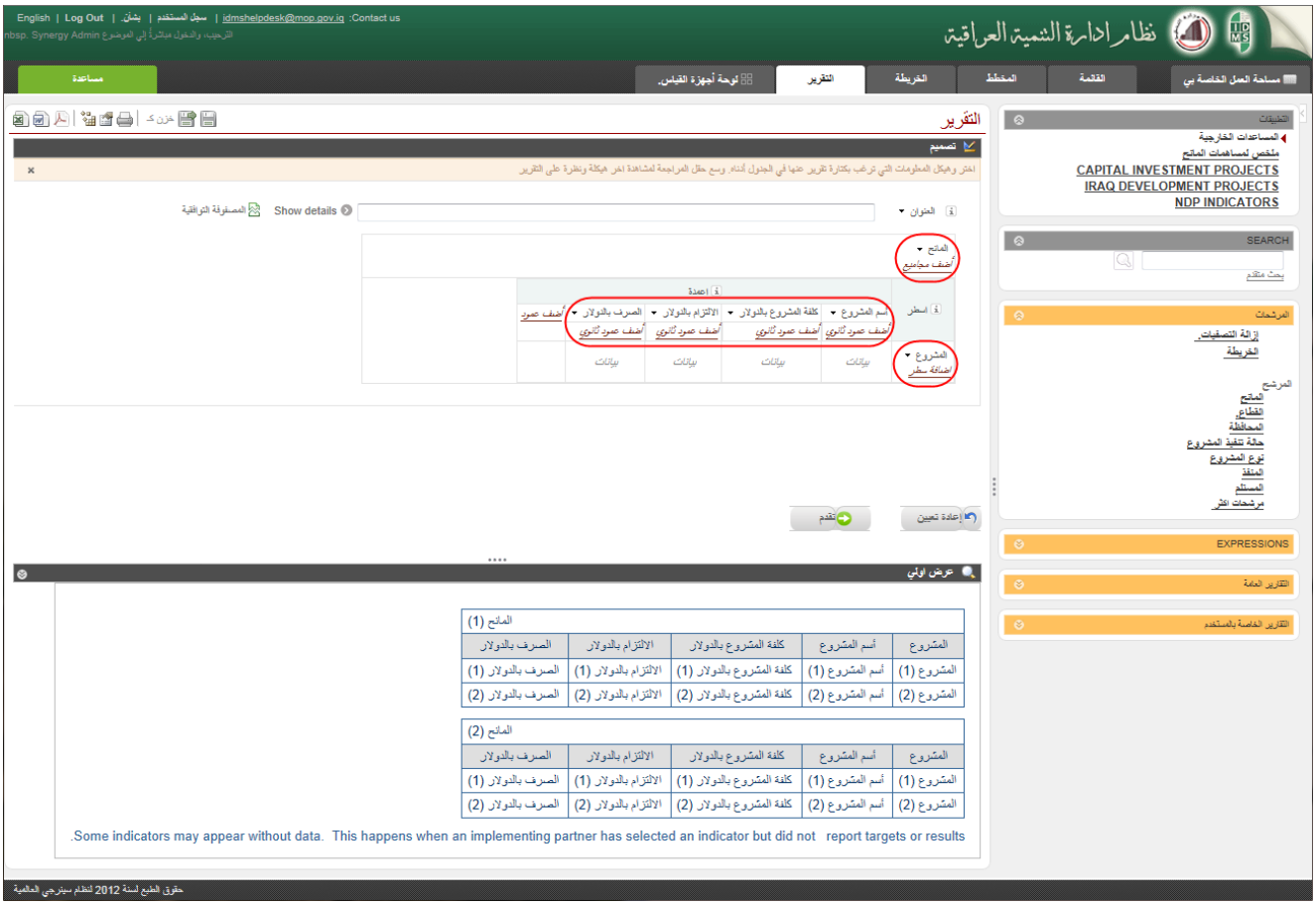


Figure 57: Creating a Report 1

You will have the following result (

تنقية التقرير

غير محدد

المشروع	أسم المشروع
OP/10596	Title International Employment Conference: "Employment for the Future of Iraq"
OP/2456	Cultural heritage preservation
OP/25913	Kerbala Area-Hay Al Gadeer Light Infrastructure & Community Cleanup
OP/27813	تطوير المركز الطبي للطوارء في مستشفى رزكاري التعليمي
OP/27814	تطوير المركز الطبي للطوارءفي مستشفى رزكاري التعليمي

ألماني

المشروع	أسم المشروع
IRQ/051125	مشروع رفع مستوى إعادة الاندماج المستديم الاقتصادي الاجتماعي للعائدين العراقيين من خلال برنامج الأمن الإنساني والاستقرار.
OP/27769	للمساعدات الفنية للعراق OCV مفوضية

إسبانيا

المشروع	أسم المشروع
OP/10480	التطوير الإعلامي المرحلة الثانية
OP/2285	إصدار الورقة النقدية العراقية
OP/2670	تقرير ورقة العمل في مجال العلاقات العامة والاخبار - الانتخابات العراقية 2004-2005
OP/27778	(تطوير وسائل الاعلام (المرحلة الثانية
OP/9956	تجهيز الأجهزة الطبية
OP/9957	صدار الورقة النقدية العراقية من فئة 250 دينار لصالح البنك المركزي
OP/9959	تجهيز اوراق نقدية إلى المصرف المركزي العراق
OP/9961	إعادة تأهيل مستشفى طفل
OP/9963	ربعة حلقات دراسية لمشروع تنظيف الانغام الانساني (2 حلقة دراسية تخص المواضيع الاساسية و 2 حلقة دراسية تخص المعلمين لهذا المشروع
OP/9964	الدعم المالي للمشاريع الصغيرة في العراق
OP/9966	زمالات دراسية للعراقيين في الجامعات الاسبانية
OP/9968	زمالات دراسية للعراقيين في الجامعات الاسبانية
OP/9970	تجهيز المساعدة الإنسانية
OP/9971	وتجهيز المعدات الصناعية
OP/9973	تدريب في مجال حكم القانون
OP/9974	زمالات دراسية للعراقيين في الجامعات الاسبانية
OP/9975	توفير خبراء في إعادة البناء

(الاتحاد الأوروبي (أوروبا

المشروع
IRQ/0051237

الاردن

المشروع	أسم المشروع
OP/10045	مركز الأمن الإنساني الإقليمي

Figure 58):

تنقية التقرير

غير محدد

المشروع	أسم المشروع
OP/10596	Title International Employment Conference: "Employment for the Future of Iraq"
OP/2456	Cultural heritage preservation
OP/25913	Kerbala Area-Hay Al Gadeer Light Infrastructure & Community Cleanup
OP/27813	تطوير المركز الطبي للطوارئ في مستشفى رزكاري التعليمي
OP/27814	تطوير المركز الطبي للطوارئفي مستشفى رزكاري التعليمي

ألماني

المشروع	أسم المشروع
IRQ/051125	مشروع رفع مستوى إعادة الاندماج المستديم الاقتصادي الاجتماعي للعائدين العراقيين من خلال برنامج الأمن الإنساني والاستقرار.
OP/27769	للمساعدات الفنية للعراق OCV مفوضية

إسبانيا

المشروع	أسم المشروع
OP/10480	التطوير الإعلامي المرحلة الثانية
OP/2285	إصدار الورقة النقدية العراقية
OP/2670	تقرير ورشة العمل في مجال العلاقات العامة والاخبار - الانتخابات العراقية 2004-2005
OP/27778	(تطوير وسائل الاعلام (المرحلة الثانية
OP/9956	تجهيز الأجهزة الطبية
OP/9957	إصدار الورقة النقدية العراقية من فئة 250 دينار لصالح البنك المركزي
OP/9959	تجهيز اوراق نقدية إلى المصرف المركزي العراق
OP/9961	إعادة تأهيل مستشفى طفل
OP/9963	اربعة حلقات دراسية لمشروع تنظيف الانغام الانساني (2 حلقة دراسية تخص المواضيع الاساسية و 2 حلقة دراسية تخص المعلمين لهذا المشروع
OP/9964	الدعم المالي للمشاريع الصغيرة في العراق
OP/9966	زمالات دراسية للعراقيين في الجامعات الاسبانية
OP/9968	زمالات دراسية للعراقيين في الجامعات الاسبانية
OP/9970	تجهيز المساعدة الإنسانية
OP/9971	وتجهيز المعدات الصناعية
OP/9973	تدريب في مجال حكم القانون
OP/9974	زمالات دراسية للعراقيين في الجامعات الاسبانية
OP/9975	توفير خبراء في إعادة البناء

(الاتحاد الأوروبي (أوروبا

المشروع
IRQ/0051237

الأردن

المشروع	أسم المشروع
OP/10045	مركز الأمن الإنساني الإقليمي

Figure 58: Sample List Report 1

10.5.2 Sample Report 2

If you have indicated:

- **Governorate** as the report table grouping;
- **Project** as the report row;
- **Title** and **Project Cost (USD)** as columns (Figure 59);

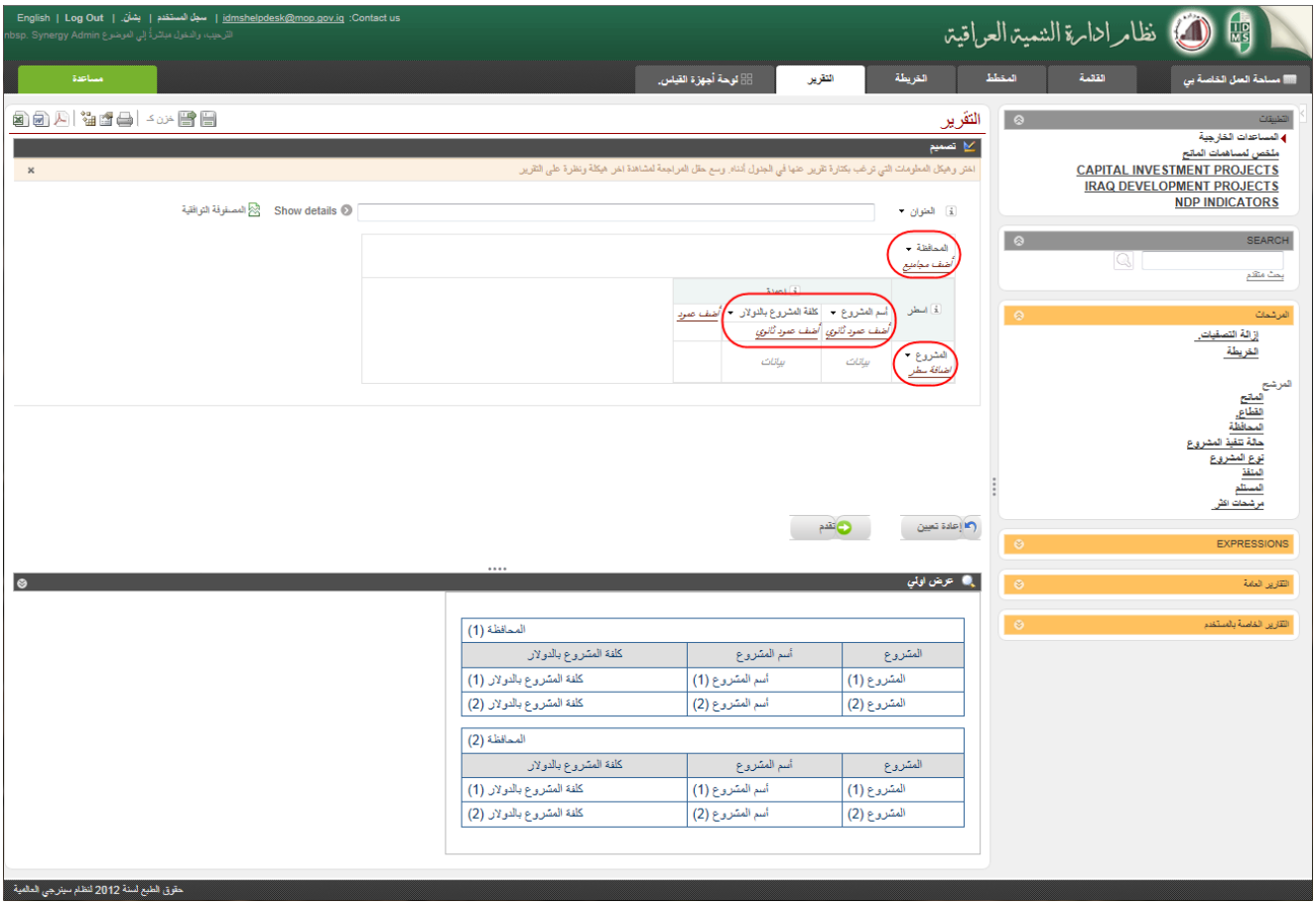
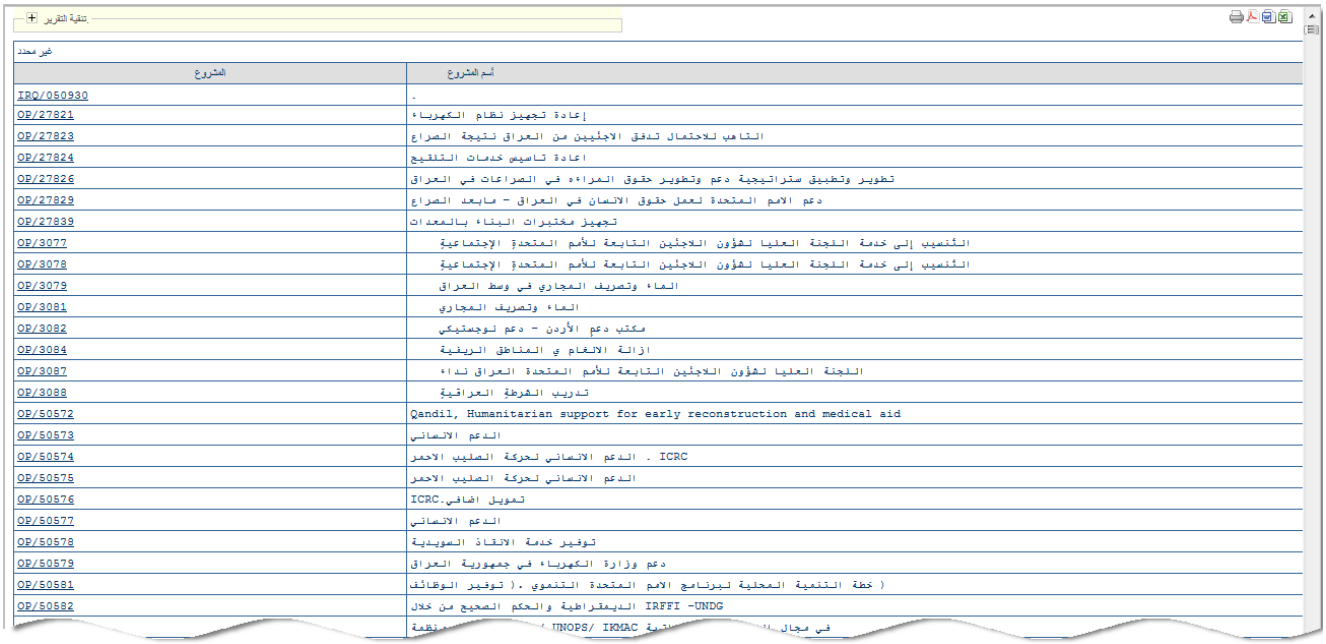


Figure 59: Creating a Report 2

You will have the following result (Figure 60):



المشروع	أسم المشروع
IRQ/050930	.
OP/27821	إعادة تجهيز نظام الكهرباء
OP/27823	التاهب للاحتمال تدفق الاجئين من العراق نتيجة الصراع
OP/27824	اعادة تاسيس خدمات التلقيح
OP/27826	تطوير وتطبيق ستراتيجية دعم وتطوير حقوق المراءه في الصراعات في العراق
OP/27829	دعم الامم المتحدة لعمل حقوق الانسان في العراق - مابعد الصراع
OP/27839	تجهيز مختبرات البناء بالمعدات
OP/3077	التنسيب إلى خدمة اللجنة العليا لشؤون اللاجئين التابعة للأمم المتحدة الإجتماعية
OP/3078	التنسيب إلى خدمة اللجنة العليا لشؤون اللاجئين التابعة للأمم المتحدة الإجتماعية
OP/3079	الماء وتصريف المجاري في وسط العراق
OP/3081	الماء وتصريف المجاري
OP/3082	مكتب دعم الأردن - دعم لوجستيكي
OP/3084	ازالة الالغام ي المناطق الريفية
OP/3087	اللجنة العليا لشؤون اللاجئين التابعة للأمم المتحدة العراق نداء
OP/3088	تدريب الشرطة العراقية
OP/50572	Qandil, Humanitarian support for early reconstruction and medical aid
OP/50573	الدعم الانساني
OP/50574	ICRC . الدعم الانساني لحركة الصليب الاحمر
OP/50575	الدعم الانساني لحركة الصليب الاحمر
OP/50576	تمويل اضافي.ICRC
OP/50577	الدعم الانساني
OP/50578	توفير خدمة الانقاذ السويدية
OP/50579	دعم وزارة الكهرباء في جمهورية العراق
OP/50581	(خطة التنمية المحلية لبرنامج الامم المتحدة التنموي .(توفير الوظائف
OP/50582	IRFFI -UNDG الديمقراطية والحكم الصحيح من خلال

Figure 60: Sample List Report 2

10.6 Customizing Reports

You can customize the reports by assigning font characteristics to report components, re-ordering rows and columns, etc. The sections below will describe the instructions to customize the reports.

10.6.1 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 61).

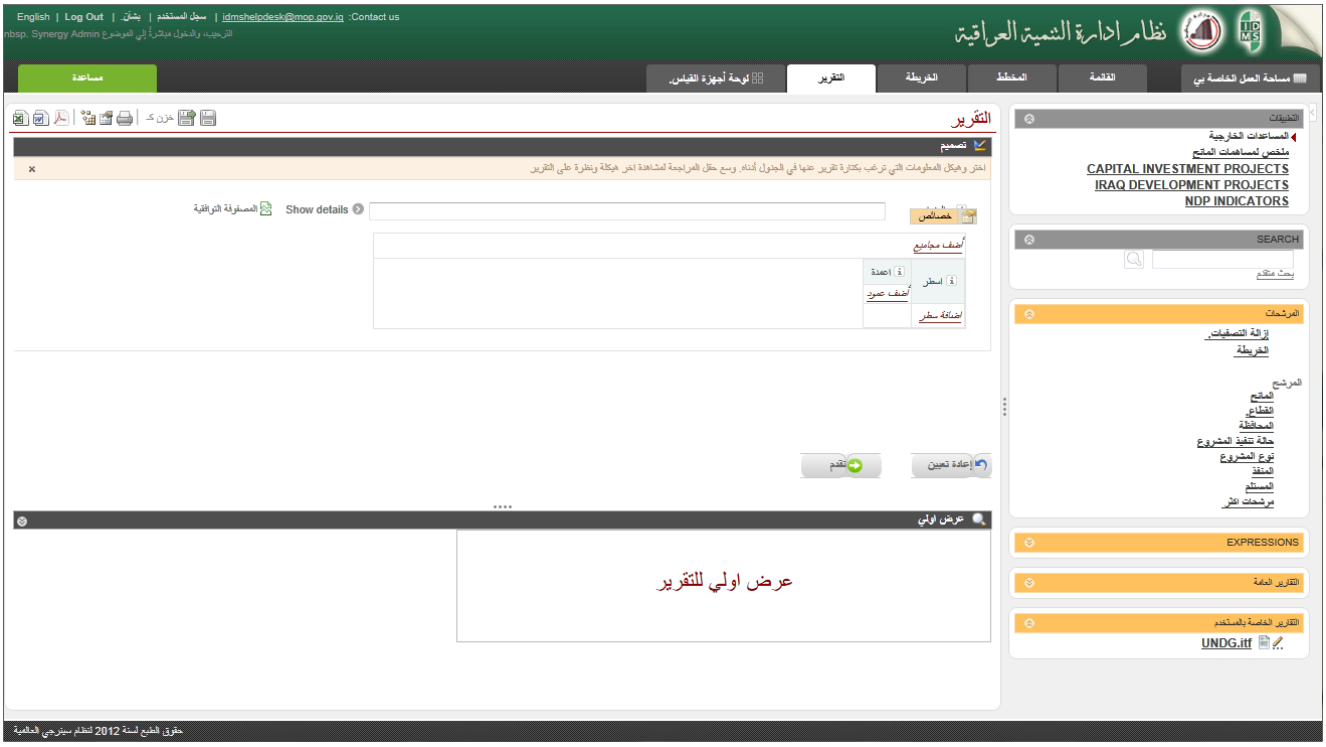


Figure 61: Reports Window with Properties Focus on the Title Field

The *Properties* window will appear. **Please note** that for text entries the *Properties* window includes text formatting buttons and a text area (Figure 62). For other report components, like rows, columns, etc., the *Properties* window also allows assigning additional characteristics, e.g. sorting order, reference text, etc. (Figure 64).

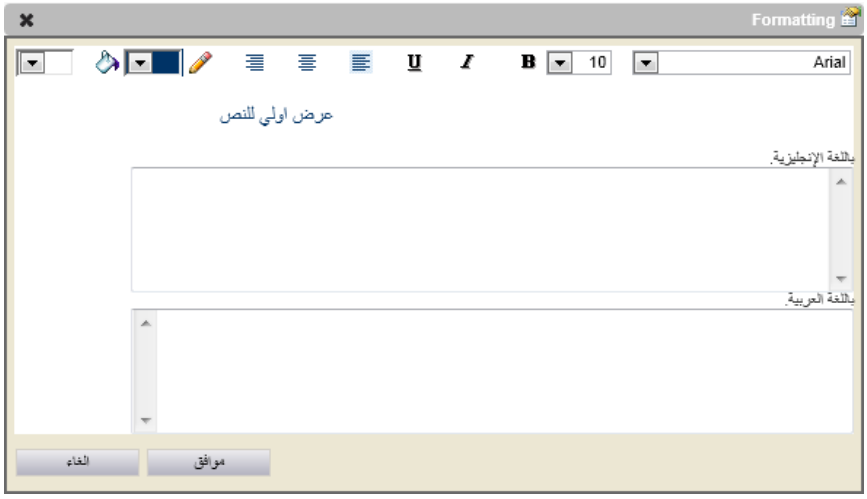


Figure 62: Formatting/Styling Text Entries

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.
4. 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.

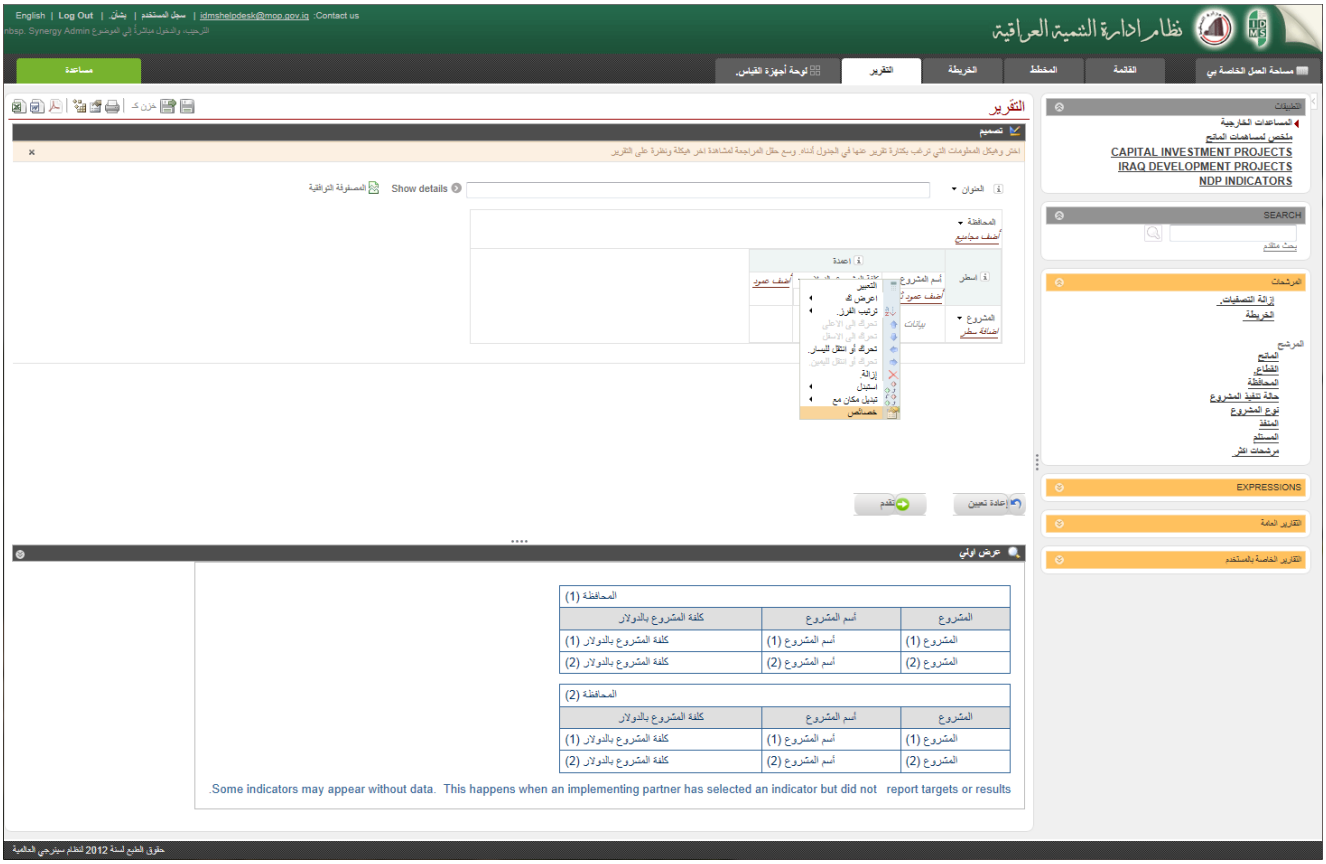


Figure 63: Reports Window with Properties Focus on the Column

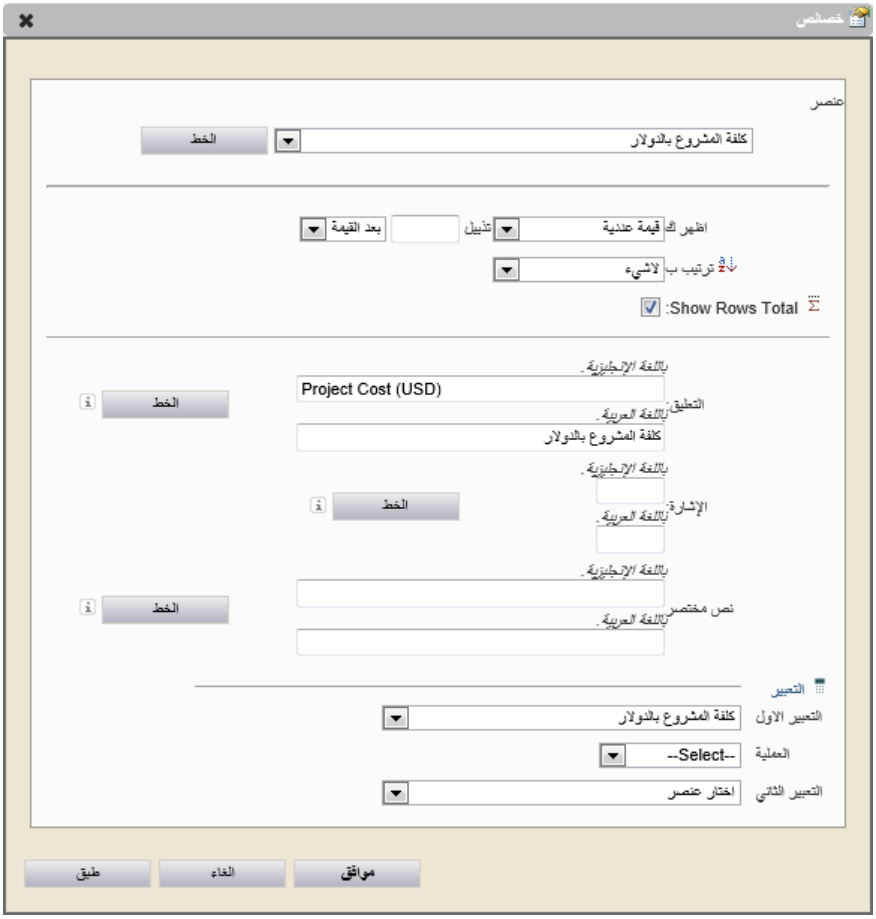


Figure 64: Assigning Properties to Report Table Components

10.6.2 Re-ordering Report Table Components

This option is used to establish and modify the order of the report table components, like rows, columns, etc. In order to re-order report table components, follow the steps below:

1. Click on 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 65).

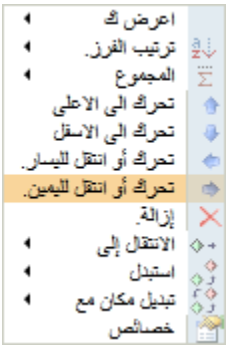


Figure 65: Reordering Report Table Components

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

10.6.3 Sorting Report Table Components

You may change the order in which the table components will appear in the final report. The report table components can be sorted either in an *Ascending* (A-Z) or a *Descending (Z-A)* order. In order to alphabetically sort the report table components, follow the steps below:

1. Click on the component item for which the sorting order needs to be changed.
2. Select the **Sorting Order** option from the actions list (Figure 66).
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.

Note: The sorting order for the report components can also be defined from within the *Properties* window.

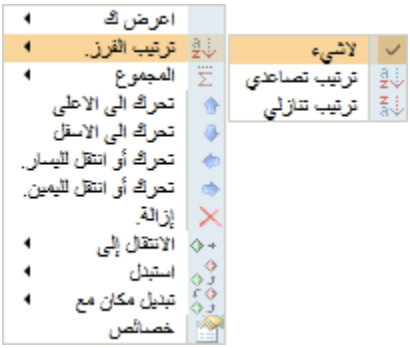


Figure 66: Defining the Sorting Order

10.6.4 Removing a Report Table Component

It is possible to remove a report table component from being included in the report, if this is necessary. 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.

10.6.5 Switching Report Table Components

The report table components may be switched between report grouping, rows and columns. If there are sub-columns selected, switching between table groupings / rows and columns is disabled. It is possible to switch between table groupings / rows and sub-columns.

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

1. Click on the component item that needs to be switched.
2. Select the **Switch Place with** option from the menu that appears (Figure 67).

Figure 67: 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. For instance, switching is selected between table grouping and row, the table grouping item will be removed from table grouping and added as the row item, while the row item will 'trade' places with the table grouping item.

10.6.6 Building Complex Expressions

IDMS is incorporated with a tool that allows building complex expressions based on mathematical equations. These expressions can then be used as column and sub-column items when drawing up a report.

In order to add an expression, follow the steps below:

1. Go to the **Report** module.
2. Click the **Add** button at the bottom of the *Expressions* section (Figure 68Figure 70). The *Expressions* window will appear (Figure 69).

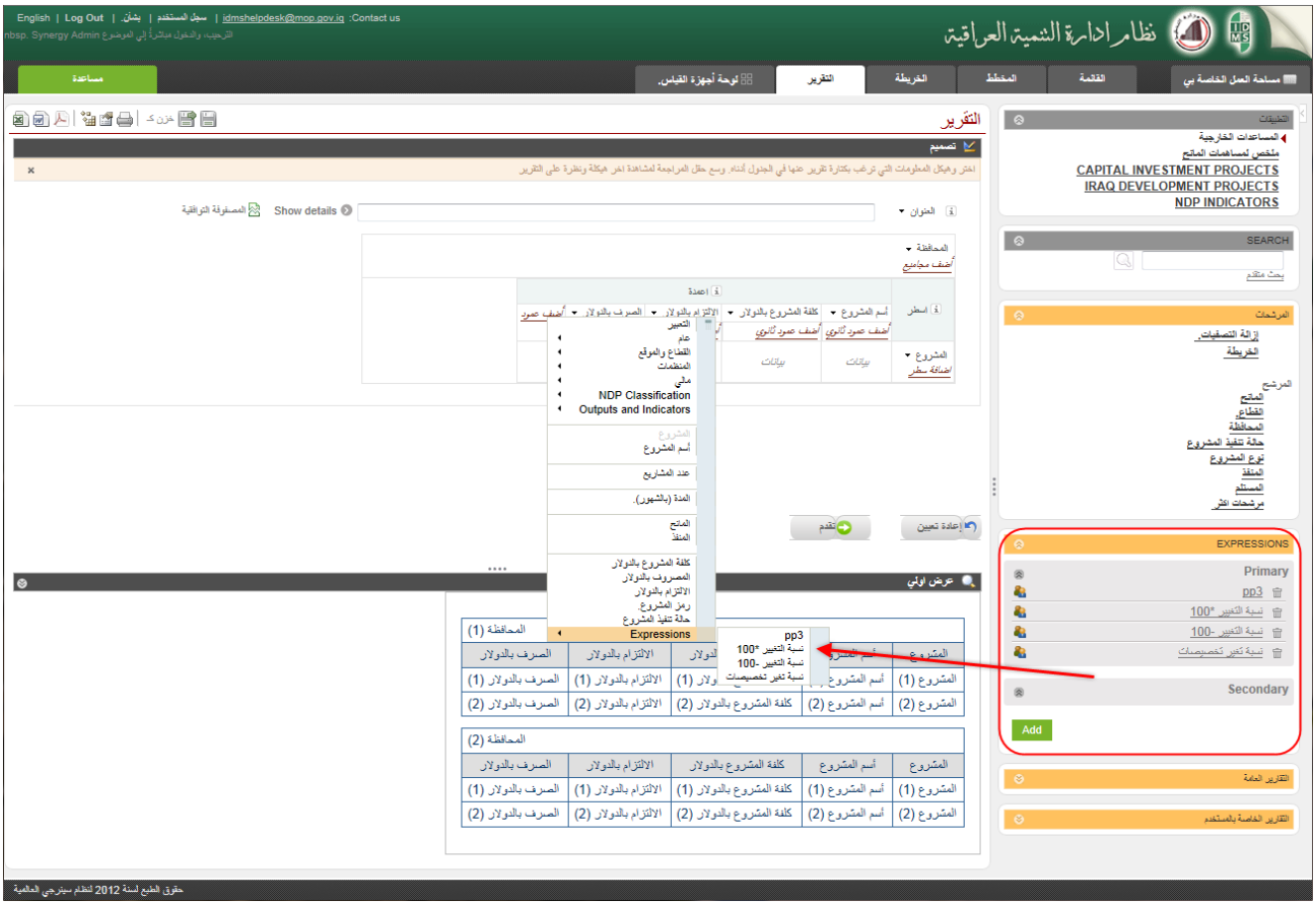


Figure 68: Expressions Section in the Report Module

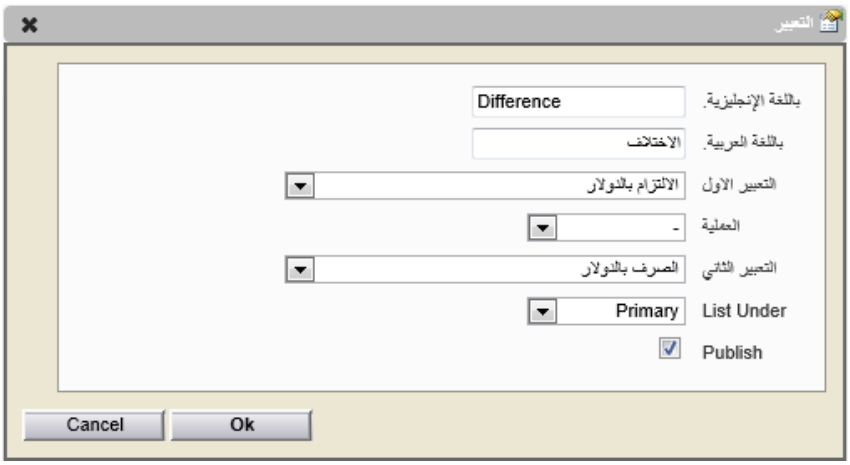


Figure 69: Adding an Expression

3. Enter the expression title in English and Arabic.
4. Select the expression members and arithmetic operation from the respective drop-down lists (Figure 69).
5. Specify where to list the expression. The following options are available:
   - Primary
   - Secondary

   Note: *Secondary* expressions can be used as expression members.
6. Choose whether to publish the expression by selecting the respective checkbox.

7. Click the **Ok** button to save the expression. The newly added *Primary* expression will appear in the categories list (Figure 68).

10.7 Sample Report Formatting

If you have indicated:

- **Projects Listed by Donor** as the report title;
- **Donor** as the report table grouping;
- **Project** as the report row;
- **Title**, **Project Cost (USD)**, **Committed (USD)**, and **Disbursed (USD)** as columns;
- Assign some value characteristics (e.g. font size, background color, etc.) (Figure 70):

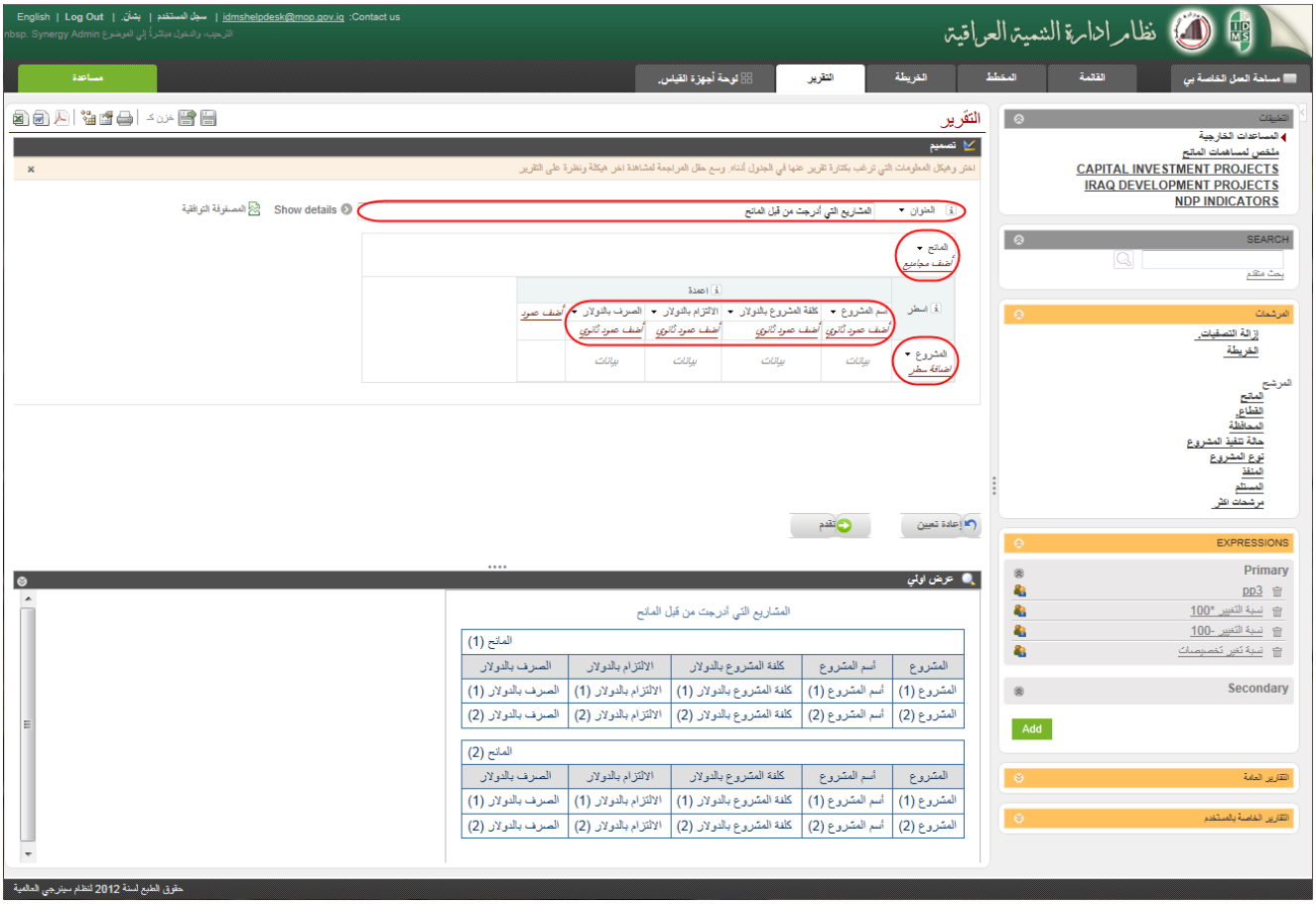


Figure 70: Creating and Formatting a Report

You will have the following result (Figure 71):

تنقية التقرير

المشاريع التي أدرجت من قبل المانح

غير محدد

المشروع	أسم المشروع
OP/10596	Title International Employment Conference: "Employment for the Future of Iraq"
OP/2456	Cultural heritage preservation
OP/25913	Kerbala Area-Hay Al Gadeer Light Infrastructure & Community Cleanup
OP/27813	تطوير المركز الطبي لطوارئ في مستشفى رزكاري التعليمي
OP/27814	تطوير المركز الطبي لطوارئفي مستشفى رزكاري التعليمي

ألماني

المشروع	أسم المشروع
IRQ/061125	مشروع رفع مستوى إعادة الاندماج المستديم الاقتصادي الاجتماعي للعائدين العراقيين من خلال برنامج الأمن الإنساني والاستقرار.
OP/27769	للمساعدات الفنية للعراق OCV مفوضية

إسباني

المشروع	أسم المشروع
OP/10480	التطوير الإعلامي المرحلة الثّانية
OP/2285	إصدار الورقة النقدية العراقية
OP/2670	تقرير ورشة العمل في مجال العلاقات العامة والاخبار - الانتخابات العراقية 2004-2005
OP/27778	(تطوير وسائل الاعلام (المرحلة الثانية
OP/9956	تجهيز الأجهزة الطبية
OP/9957	طبع الورقة النقدية العراقية من فئة 250 دينار لصالح البنك المركزي
OP/9959	تجهيز اوراق نقدية إلى المصرف المركزي العراق
OP/9961	إعادة تأهيل مستشفى طفل
OP/9963	اربعة حلقات دراسية لمشروع تنظيف الالغام الانساني (2 حلقة دراسية تخص المواضيع الاساسية و 2 حلقة دراسية تخص المعلمين لهذا المشروع
OP/9964	الدعم المالي للمشاريع الصغيرة في العراق
OP/9966	زمالات دراسية للعراقيين في الجامعات الاسبانية
OP/9968	زمالات دراسية للعراقيين في الجامعات الاسبانية
OP/9970	تجهيز المساعدة الإنسانية
OP/9971	وتجهيز المعدات الصناعية
OP/9973	تدريب في مجال حكم القانون
OP/9974	زمالات دراسية للعراقيين في الجامعات الاسبانية
OP/9975	توفير خبراء في إعادة البناء

(الاتحاد الأوروبي (أوروبا

Figure 71: Sample Formatted Report

11. DASHBOARD MODULE

Reporting requirements have changed dramatically over the past few years. Nowadays, it is not enough to be able to produce a report to analyze data, but it is more essential to have a reporting tool that will allow for a visual display of the most important information consolidated and arranged on a single screen so that real-time data can be monitored at a glance.

As a comprehensive reporting tool, IDMS removes the limitations on report development giving the possibility to view various types of reports such as lists, maps, and charts displayed in a user-friendly environment on a dashboard. Unlike 'regular' reports, dashboards provide visual, at a glance insight into the data to be analyzed, thus giving the decision-makers the possibility to leverage information assets in real-time through visually rich, responsive and personalized business intelligence dashboards. This way, they will achieve better data interpretation and, as a result, more informed decision making.

11.1 Key Features

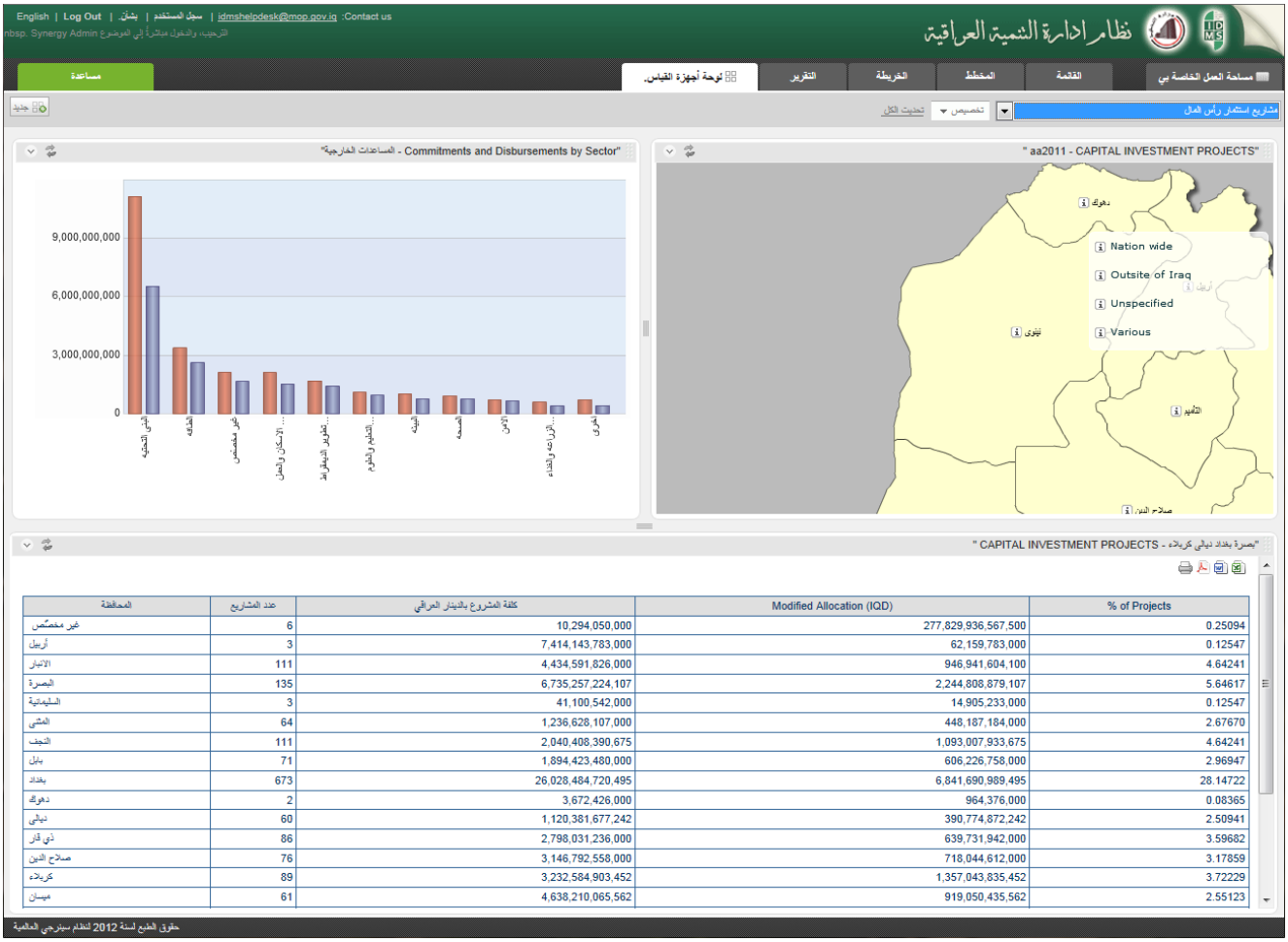
You can make use of the following key features of the *Dashboard* tool in *IDMS*:

- ✓ An intuitive drag-and-drop environment that turns adding reports to a dashboard into an easily manageable task.
- ✓ Fully resizable report windows.
- ✓ Better visualization of the information presented in graph reports.
- ✓ The ability to print reports for future reference.
- ✓ The ability to export reports on the dashboard in MS Word, MS Excel, and Adobe PDF formats.

11.2 Accessing the Dashboard Module

In order to access the *Dashboard* module of the system, you should click the **Dashboard** tab. This will navigate you to the *Dashboard* module. In this module, you can create dashboards, include reports under them, etc.

11.3 Main Screen and Its Components



المحافظة	عدد المشاريع	كلفة المشروع بالدينار العراقي	Modified Allocation (IQD)	% of Projects
غير مخصّص	6	10,294,050,000	277,829,936,567,500	0.25094
أربيل	3	7,414,143,783,000	62,159,783,000	0.12547
الانبار	111	4,434,591,826,000	946,941,604,100	4.64241
البصرة	135	6,735,257,224,107	2,244,808,879,107	5.64617
السليمانية	3	41,100,542,000	14,905,233,000	0.12547
المثنى	64	1,236,628,107,000	448,187,184,000	2.67670
النجف	111	2,040,408,390,675	1,093,007,933,675	4.64241
بابل	71	1,894,423,480,000	606,226,758,000	2.96947
بغداد	673	26,028,484,720,495	6,841,690,989,495	28.14722
دهوك	2	3,672,426,000	964,376,000	0.08365
نينوى	60	1,120,381,677,242	390,774,872,242	2.50941
ذي قار	86	2,798,031,236,000	639,731,942,000	3.59682
صلاح الدين	76	3,146,792,558,000	718,044,612,000	3.17859
كربلاء	89	3,232,584,903,452	1,357,043,835,452	3.72229
ميسان	61	4,638,210,065,562	919,050,435,562	2.55123

Figure 72: Dashboard Module

- **Dashboard Selector -** contains a list of pre-defined dashboards. By choosing a definite dashboard from this list, you can view the reports stored in the selected dashboard.

- **Customize -** allows performing the following operations:
  - ***Name* -** displays the dashboard name.
  - ***Save* -** saves a dashboard so that it can be shared with other users.
  - ***Save as New* -** saves a dashboard as a new one. This option is especially useful if you need to make modifications in a definite dashboard while keeping the source information intact. This way overwriting of the original dashboard is prevented.
  - ***Public* -** makes the dashboard available to other users as well if selected.
  - ***Scroll Mode*** - toggles the scrollbar thus allowing additional space for adding reports to the dashboard.
  - ***Remove* -** deletes a dashboard together with its contents.
  - ***Cancel* -** discards the modifications made to the dashboard currently displayed on the screen.

- ***Update all* -** loads the latest data from the database.

- ***New*** **-** creates a new dashboard.

- **Add New Item -** adds a new report under the definite dashboard from the list of all pre-defined reports previously created.

- **Dashboard Workspace -** the main screen of the Dashboard module where the content of a definite dashboard is viewed.

11.4 Dashboard Management

11.4.1 Create a New Dashboard

In order to create a new dashboard, follow the steps below:

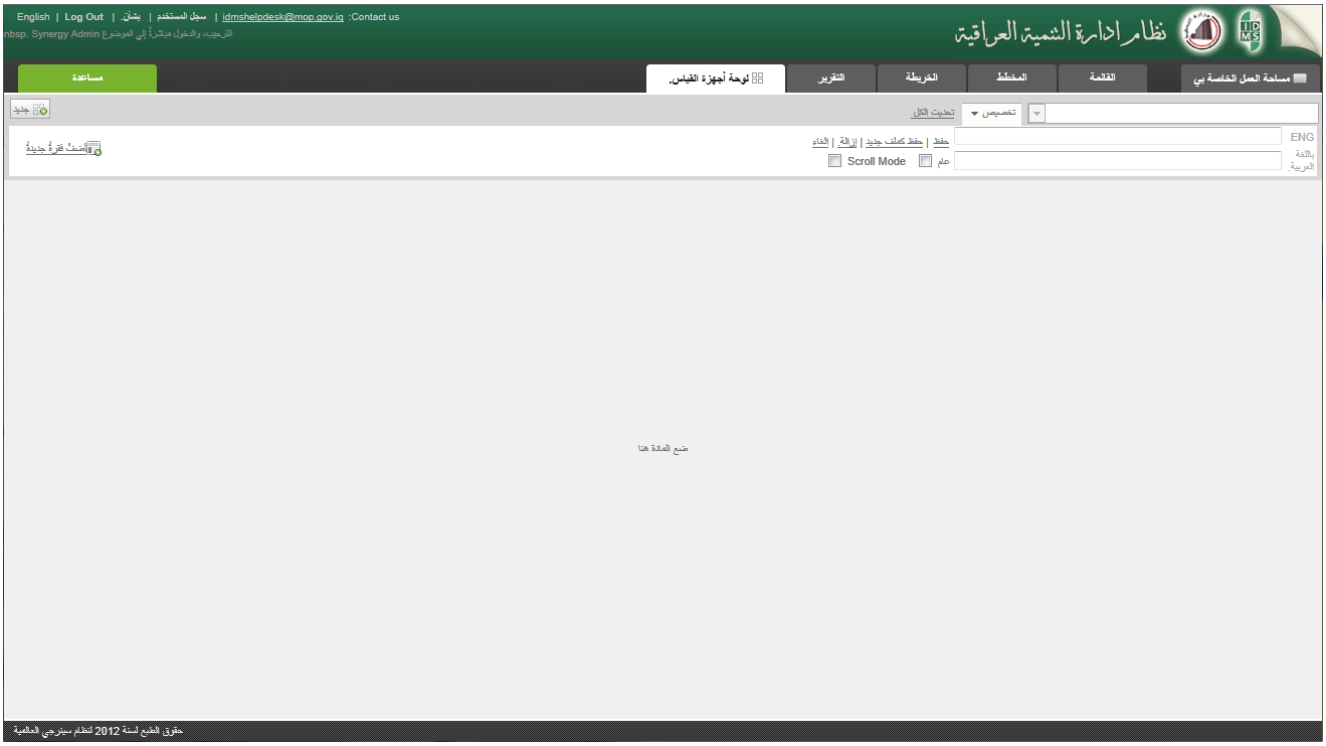


Figure 73: Adding a New Dashboard

1. Click the **New** button at the upper right corner of the screen. New field appears in the left part of the screen to give a name other than the default one to the dashboard and to save it. Also, the list of all existing pre-defined reports is used to add new items to the dashboard (Figure 73).
2. Give the desired name to the dashboard in the English and Arabic languages.
3. Add reports to the dashboard, see Add an Item to a Dashboard.
4. Save it.

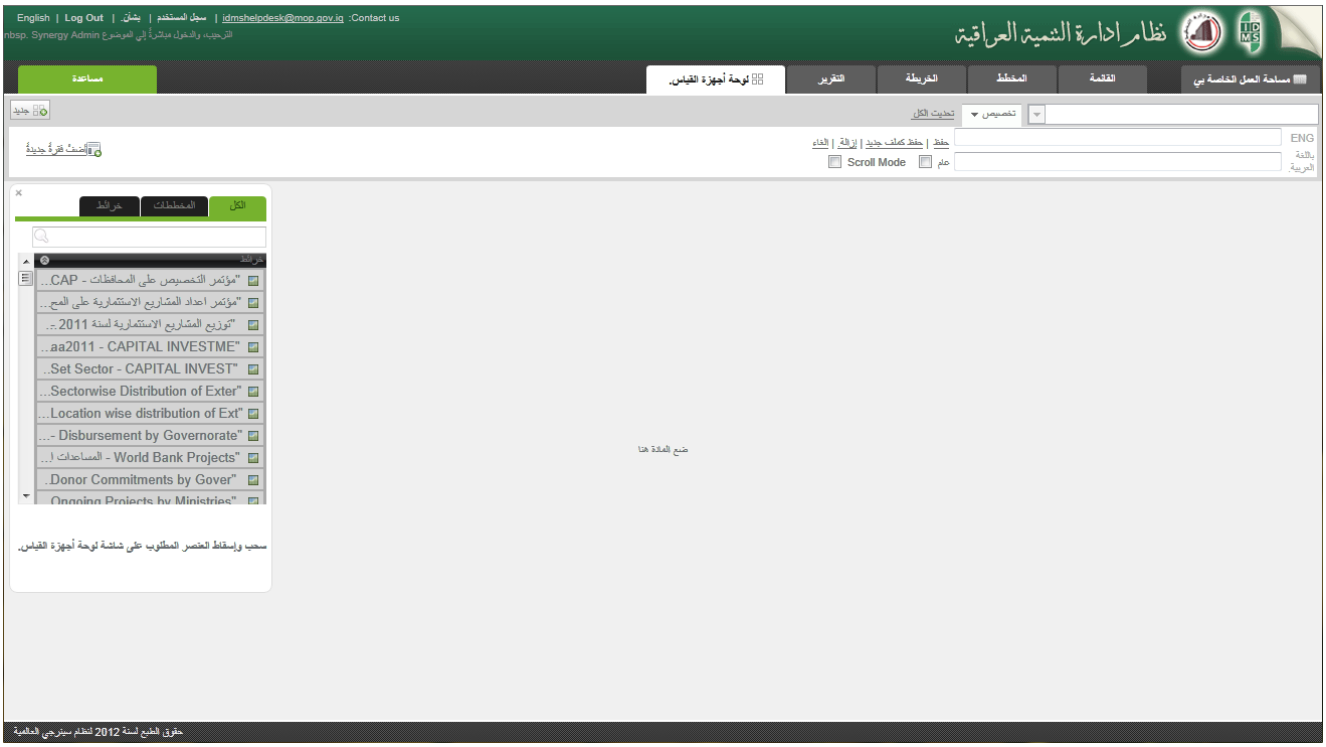


Figure 74: List of Pre-defined Reports

11.4.2 Add an Item to a Dashboard

In order to add a report to a dashboard, follow the steps described below:

1. Click the **Add New Item** link. The list of all reports previously saved reports will appear (Figure 74).
2. Select a report to add to a dashboard and drag-and-drop it onto the main screen.
3. If you want to add another report to the dashboard, select it in the list, drag it onto the main screen and hold the left mouse button until a green rectangle appears on the screen indicating an area where the new report can be placed. Keep the mouse button pressed until the green rectangle turns blue and release the mouse button (Figure 75).
4. You may add multiple reports to the dashboard.

Note: The reports can be arranged either in vertical or in horizontal order. Once the place for the report is selected, it cannot be changed.

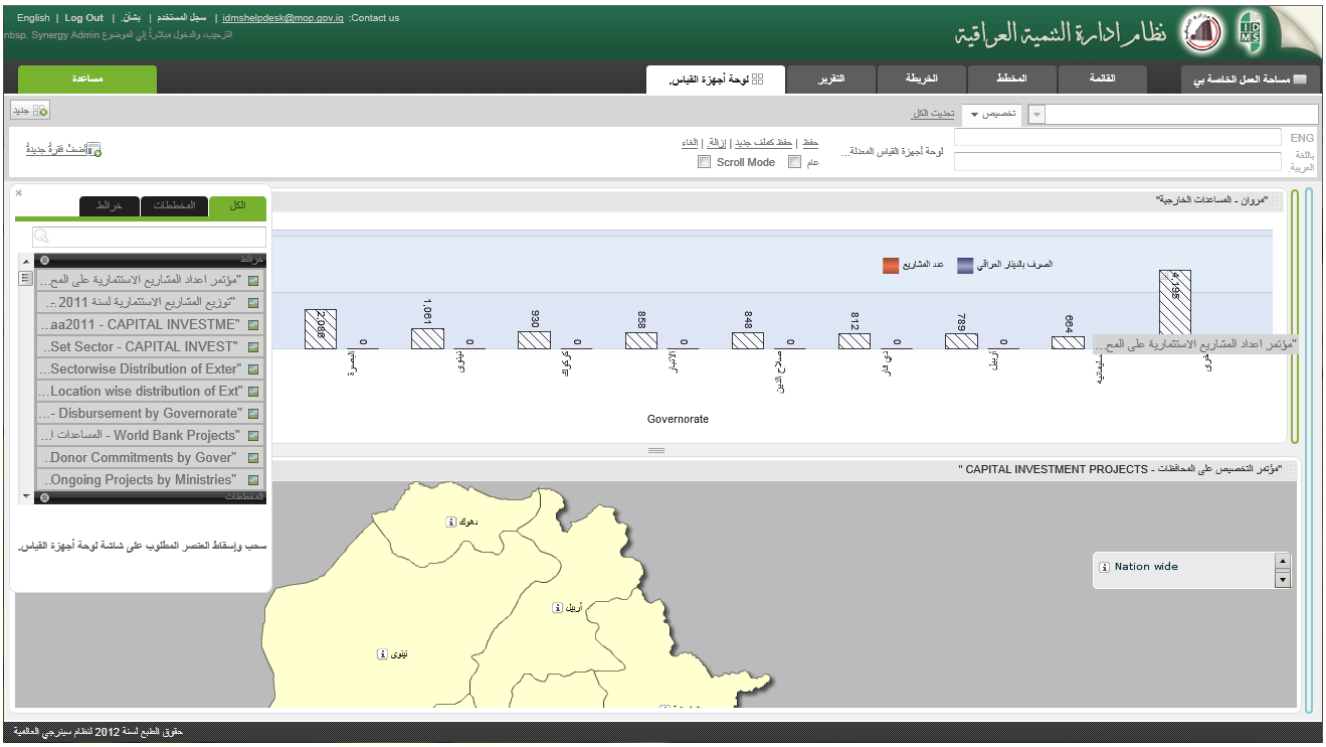


Figure 75: Adding a New Report

11.4.3 Customize a Dashboard

In the *Dashboard module*, you can customize any dashboard created, i.e. rename the dashboard, save the changes made to it, save a copy of the dashboard, delete a dashboard, and/or discard the changes made. For details, see below.

In order to customize a dashboard, follow the steps below:

1. Click the **Customize** button. A new section will appear displaying all customizable options in the *Dashboard* module (Figure 76).
2. Take the necessary action.
3. Save the changes.

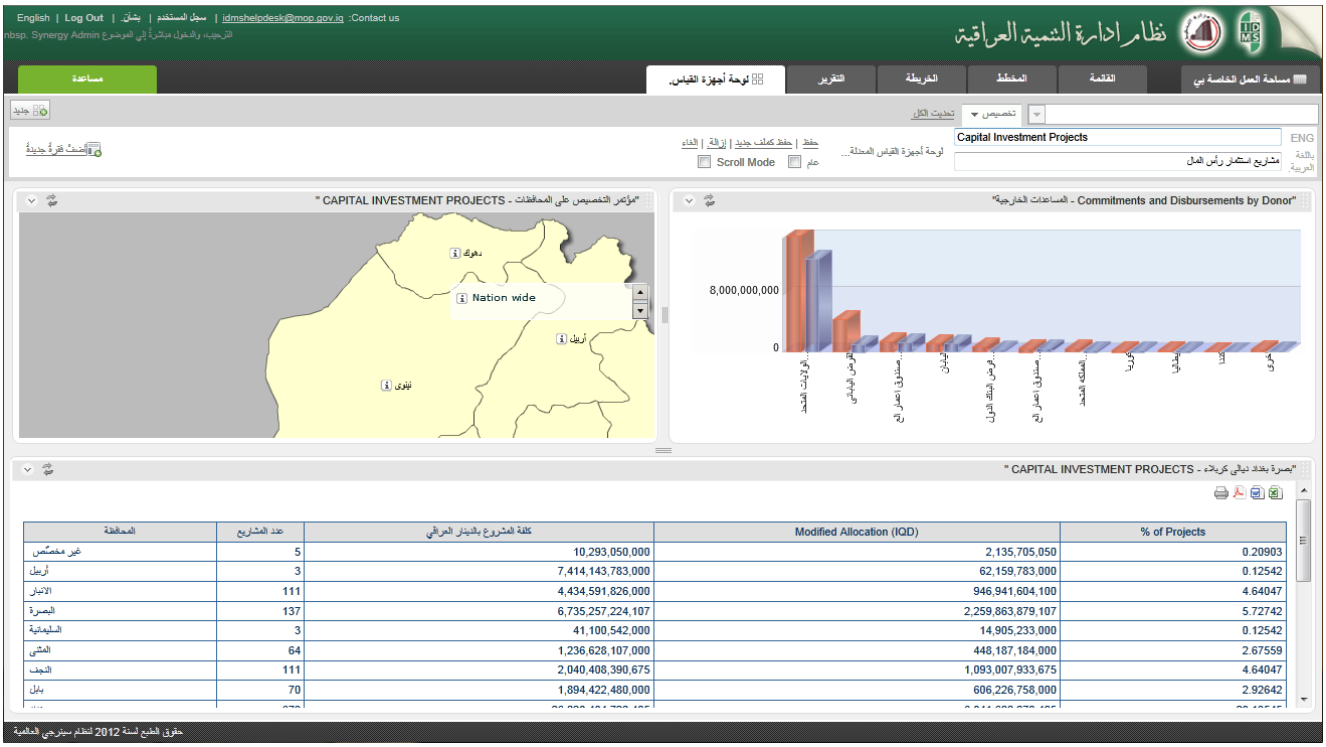


Figure 76: Customizing a Dashboard

11.4.4 Save a Dashboard

After the new dashboard has been created and items added to it, it is necessary to save it to be able to view it later on. It should be mentioned that there are two options for saving dashboards:

- ***Save:*** saves all modifications made to the dashboard.
- ***Save as New***: saves a copy of a dashboard under a new name.

In order to save a dashboard / a copy of a dashboard, follow the steps below:

1. Select the respective **Save** or **Save as New** option.
2. Click **OK** in the message window indicating the dashboard / the changes to it have been saved successfully.

11.4.5 Delete a Dashboard

In order to delete a dashboard, follow the steps below:

1. Select the dashboard that you want to delete. Its contents will be displayed on the main screen.
2. Click the **Remove** link. The selected dashboard will be deleted.

11.4.6 Discard the Changes

In order to discard the changes made to the dashboard currently displayed on the screen, follow the steps below:

1. Click the **Cancel** link.

2. Confirm that you want to discard all changes made to the dashboard by clicking **OK** in the warning message window that appears.

11.4.7 Update Data

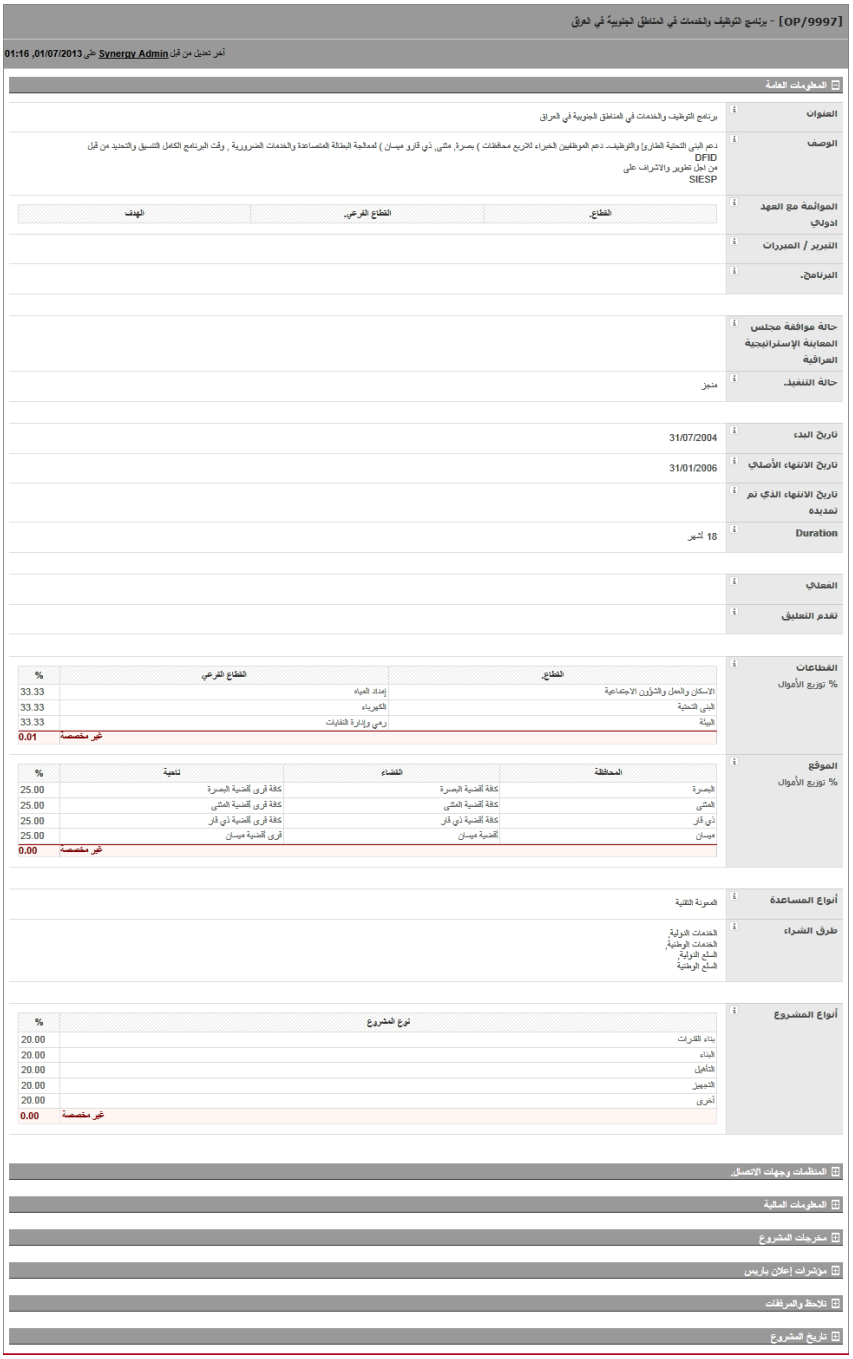
For decision makers, it is very important to have access to the latest data available. This is why the Dashboard module allows you to update all reports included in various dashboards. In order to load the latest data from the database, select the **Update All** option.

If you want to update the data in an individual report, click **Refresh** button in the top toolbar of the report screen. The latest data for the selected report will be loaded from the database.

12. DETAILS SECTION

IDMS has a built-in *Details* section, where detailed project information can be viewed, e.g. project financial information, the sector(s) of economy it supports, the project location, etc.

The *Details* section can be accessed from the *List*, *Chart*, *Map, Report* and *My Workspace* modules. In the *Details* section, the user can view detailed project information, browse among other projects listed under the same parent item, print project details, etc. Moreover, the user is able to modify an existing one. **Please note** that for modifying an existing project, special user permissions are required.



[OP/9997] - برنامج التوظيف والخدمات في المناطق الجنوبية في العراق

آخر تعديل من قبل Synergy Admin على 01/07/2013, 01:16

المعلومات العامة

العنوان	برنامج التوظيف والخدمات في المناطق الجنوبية في العراق
الوصف	دعم البنى التحتية الخارج والتوظيف- دعم الموظفين الخبراء لتربع محافظات) بصرة, مثنى, ذي قار و ميسان) لمعالجة البطالة المتصاعدة والخدمات الضرورية , وقت البرنامج الكامل التنسيق والتحديد من قبل DFID من اجل تطوير والاشراف على SIESP
المواءمة مع العهد ادولي	القطاع, القطاع الفرعي, الهدف
التبرير / المبررات	
البرنامج.	
حالة موافقة مجلس المعاينة الإستراتيجية العراقية	
حالة التنفيذ.	منجز
تاريخ البدء	31/07/2004
تاريخ الانتهاء الأصلي	31/01/2006
تاريخ الانتهاء الذي تم تمديده	
Duration	18 أشهر
الفعلي	
تقدم التعليق	

القطاعات % توزيع الأموال

القطاع	القطاع الفرعي	%
الاسكان والعمل والشؤون الاجتماعية	إمداد المياه	33.33
البنى التحتية	الكهرباء	33.33
البيئة	رامي وإدارة النفايات	33.33
غير مخصصة		0.01

الموقع % توزيع الأموال

المحافظة	القضاء	ناحية	%
البصرة	كافة أقضية البصرة	كافة قرى أقضية البصرة	25.00
المثنى	كافة أقضية المثنى	كافة قرى أقضية المثنى	25.00
ذي قار	كافة أقضية ذي قار	كافة قرى أقضية ذي قار	25.00
ميسان	أقضية ميسان	قرى أقضية ميسان	25.00
غير مخصصة			0.00

أنواع المساعدة	المعونة الفنية
طرق الشراء	الخدمات الدولية, الخدمات الوطنية, السلع الدولية, السلع الوطنية

أنواع المشروع

نوع المشروع	%
بناء القدرات	20.00
البناء	20.00
التأهيل	20.00
التجهيز	20.00
أخرى	20.00
غير مخصصة	0.00

المنظمات وجهات الاتصال

المعلومات المالية

مخرجات المشروع

مؤشرات إعلان باريس

تلاحظ والمرفقات

تاريخ المشروع

Figure 77: Details Section

12.1 Accessing the Details Section

In order to access the *Details* section, follow the steps below:

1. Access the *Details* section by clicking on the one of the following:
   - In the *My Workspace* module: Click the respective project. You will be directed to the **Details** section (Figure 77).
   - In the *List module*: Click the project for the details to be displayed. This will open the *Details* section of the application where more detailed information about the project will be displayed.
     Note: Depending on the list representation settings, additional expanding the list items may be required to reach the project.
   - In the *Chart* module: Click the chart for the details to be displayed (e.g., click on a relevant bar to see what it consists of). This will open the *Details* section of the application where all items matching the selection will be listed. The first item in the list will be displayed in an expanded mode.
   - In the *Map* module: Point the mouse cursor on the object on the map. The project information window will appear. In order to access the project details section select the View Projects link. This will open the *Details* section. The first item in the list will be displayed in an expanded mode.
     Note: You can also choose to view the detailed information on all the projects that are in progress in the given territorial unit by pointing the mouse cursor on the button.
   - In the *Report* module: Create a report indicating 'Project' as a value for the report row and click the **Submit** button. For more details on how to create and generate reports, please see Creating a Report. In the report generated, click the project name.
2. Take the necessary actions (review the provided information, update and improve as needed). You may also want to print the project details, see Printing the Project Details for details. The **Close** button is used to return to the main screen.

12.2 Browsing among Projects

In the *Details* section, you can browse among the projects. To browse projects, use correspondingly **Previous** or **Next** buttons in the top of the *Details* window (Figure 77).

Note: In the *Chart* and *Map* modules, you can also scroll down to the bottom of the page, find the appropriate project in the list presented and click it for the details to be displayed.

12.3 Printing the Project Details

In the *Details* section, you can print out the details of the selected project. In order to print out the selected project details, follow the steps below:

1. Click the **(Print)** button in the top toolbar. A window with printer settings appears.
2. Choose the printer settings as needed and press **Print**.

12.4 Editing an Existing Project

In the *Details* section, you may also edit those existing projects that have been either created by yourself or you have permissions to manage.

In order to edit existing projects, follow the steps below:

1. Click the **Edit** button at the top of the *Details* window. The data input window appears which is described in the corresponding Application User Manual, see REFERENCES.
2. Make the appropriate changes in the input window and save.

13. CUSTOMIZED REPORTING

IDMS is used to customize the already-created reports in the List, Chart, Map, and Reports 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 re-organise the reports in the desired way: include it into a group of reports or create a new report group for it, rename the report, etc. *IDMS* also enables you to export the reports to the desired format (Word, Excel, etc.) or print them out.

13.1 Setting Report Options

In the *List* and *Report* modules, you can set the report options, i.e. 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 toolbars. An *Options* window (Figure 78) will appear.
2. Specify whether the row serial number should be displayed in the first column of the generated report by selecting the appropriate value from the respective drop-down list.
   Note: This option is available in the Report module only.
3. 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.

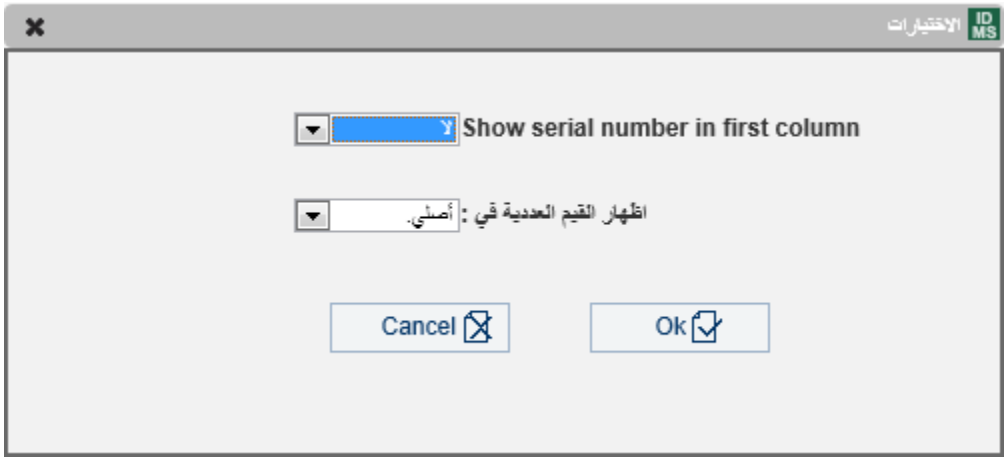


Figure 78: Setting the Report Options

4. After finishing, click the **OK** button for the changes to take effect. Or, click the **Cancel** button to discard the changes made.

13.2 Saving Reports

After creating reports of different types, you can memorize them as pre-defined reports and include them either in the *Public Reports* group and make them available for all users who access application or in the *My Reports* group available to you only.

There are two ways of saving a report in *IDMS* 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.

13.2.1 How to Save New Reports

From the *List*, *Report, Chart*, and *Map* modules, you can design an appropriate report and save it. In order to save the report created, follow the steps below:

1. Click on the **(Save)** button on the top right side of the screen. A *Memorize Report* window (Figure 79) will appear.
2. Define the report name in the *Memorized Name* field both in English and Arabic.

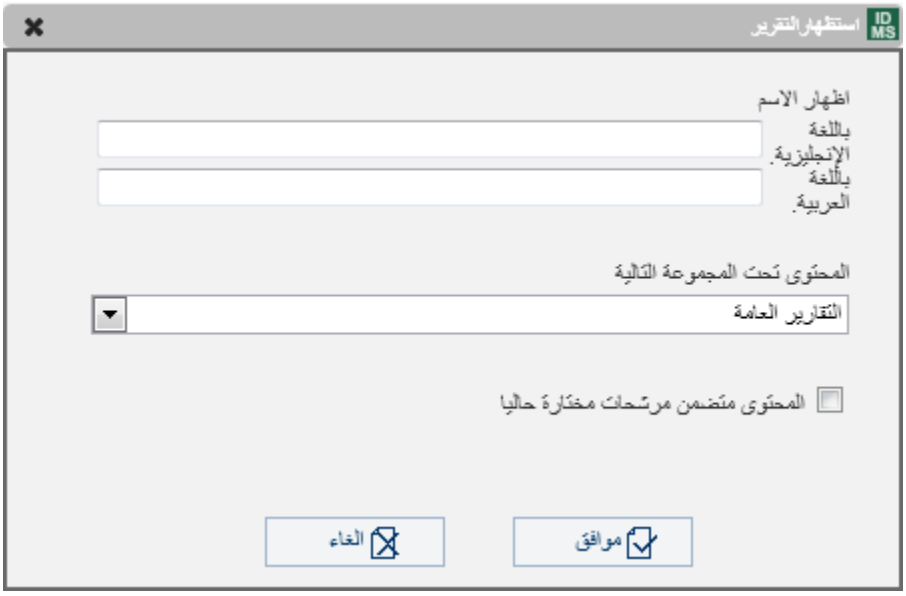


Figure 79: Memorizing a Report

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 or click **Cancel** to discard the changes made.

13.2.2 How to Save a Copy of the Report

In the *IDMS* application, you can save a copy of an existing report. The copy of the report can be saved in a different location, with a different name or edited content.

In order to save a copy of a 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 79) will appear.
2. Save the report by the steps described in the section above.

13.3 Re-organising Reports

You can organise the reports in the desired way, i.e. rename the reports, create groups to include reports under, etc.

From the *List*, *Chart, Map*, and *Report* modules, you can design appropriate reports and organize them in the preferred way. In order to organize the reports, click n the respective **(Organise Views / Charts / Maps / Reports)** button at the top right side of the Screen. An *Organise Reports* window (Figure 80) will appear. You may perform the following actions:

- Deleting Reports or Report Groups
- Adding a Sub-group
- Re-ordering Reports and Groups
- Setting a Report as Default
- Setting a Report as Default for Public Users

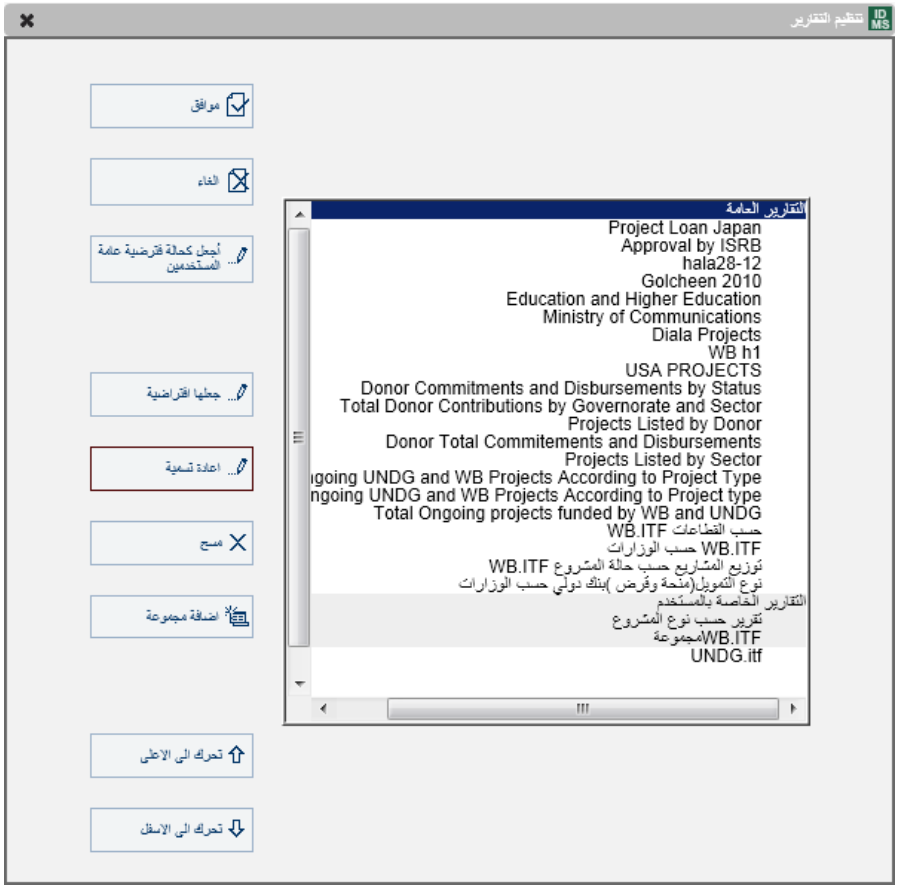


Figure 80: Organizing the Reports

13.3.1 Renaming Reports and Report Groups

In order to rename a report/report group, follow the steps below:

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.

13.3.2 Deleting Reports or Report Groups

In order to delete a report/report group, follow the steps below:

1. Highlight the report / group to be deleted.
2. Click the **Delete** button.
3. Click the **OK** button to confirm deletion.

Note: *Public Reports a*nd *My Reports* groups cannot be deleted.

13.3.3 Adding a Sub-group

In order to add a sub-group, follow the steps below:

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.

13.3.4 Re-ordering Reports and Groups

In order to re-order reports/report groups, follow the steps below:

1. Highlight the report / group the sorting order of which needs to be changed.
2. Click the **Move Up / Move Down** button.

13.3.5 Setting a Report as Default

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

13.3.6 Setting a Report as Default for Public Users

In order to set a report as default, follow the steps below:

1. Highlight the report to be displayed in the respective module when a public user accesses it.
2. Click the **Set as Default for Public Users** button (Figure 80). The selected report will be marked with *(default for public users)* option.

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

13.4 Viewing Predefined Reports

In the *List, Chart*, *Map*, and *Report* modules, you can view the predefined reports stored under **Public Views/Charts/Maps/Reports** or **My Views/Charts/Maps/Reports** section (see *Main Menu Bar* description in IDMS ANALYTICS STRUCTURE) 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 *Map* module;
- - in the *Report* module.

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

13.5 Editing Predefined 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 predefined 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. For more details on how to apply formatting to the reports, see Customizing Reports.

The predefined *List* and *Chart* reports stored in **Public Views/Charts** or **My Views/Charts** can also be edited after you have selected to view them (see Viewing Predefined Reports). 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, see Saving Reports.

13.6 Exporting Reports

From the *Chart, Map,* 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.

13.7 Printing Reports

From the *Chart, Map,* 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.

14. FILTERING

The system allows for data filtration. Filtering is used to narrow down the information displayed in the reports. The filtration works in the Step-by-Step technology, which enables to implement new filtering over the results of the previous one. This option reduces the size of reports and makes them easier to read. Filters can be added to new or existing reports. Defined filtering is applicable for list, reports, charts, and maps.

The list of the most frequently used filter categories is displayed under the *Filter By:* section. The list of all available filter categories is displayed when the *More Filters* section is accessed.

14.1 Creating Filtering Criteria

Follow the instructions below to create filtering criteria:

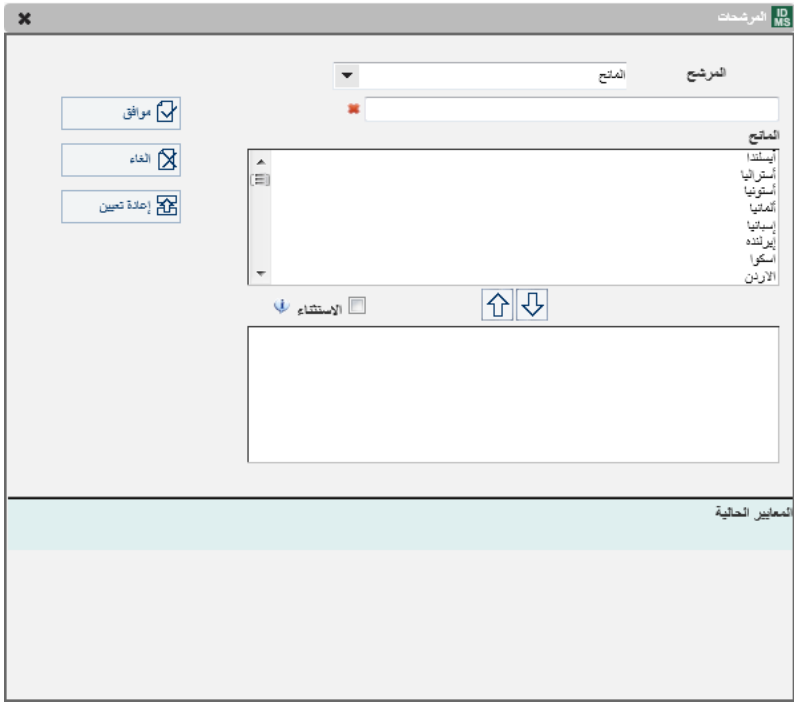


Figure 81: Filters

1. Click on the hyperlink under the *Filtering* section that represents the *Category* according to which the filtering will be carried out. A *Filters* window (Figure 81) 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 can 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 **View Criteria** hyperlink.
2. Select a *Category* item from the list in the first text area.

Note: In case the category items list is long and hard to browse in, you can search for a specific item(s) by providing search criteria in the respective field. The search result will return all possible matches (Figure 82).

3. Click on the downward-pointing arrow button to add the item selected to the list in the second text area (Figure 83).
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, Chart, or Map). The system will regenerate and download, to the client's side, an updated report that applies the updated filtering criteria.

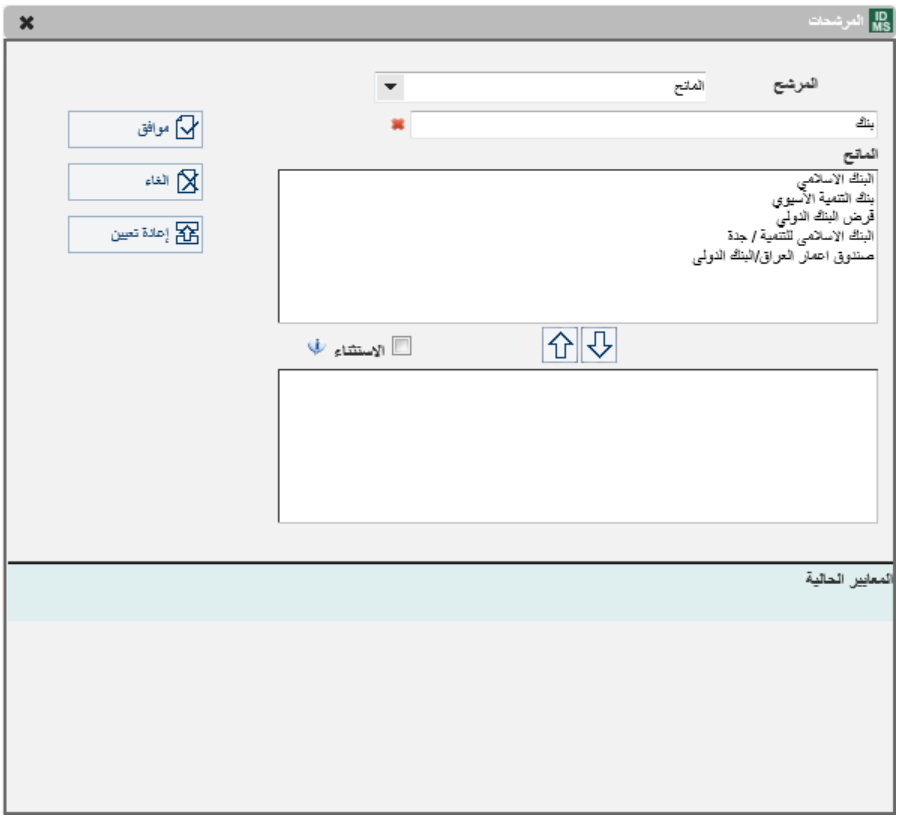


Figure 82: Searching for a Category Item

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

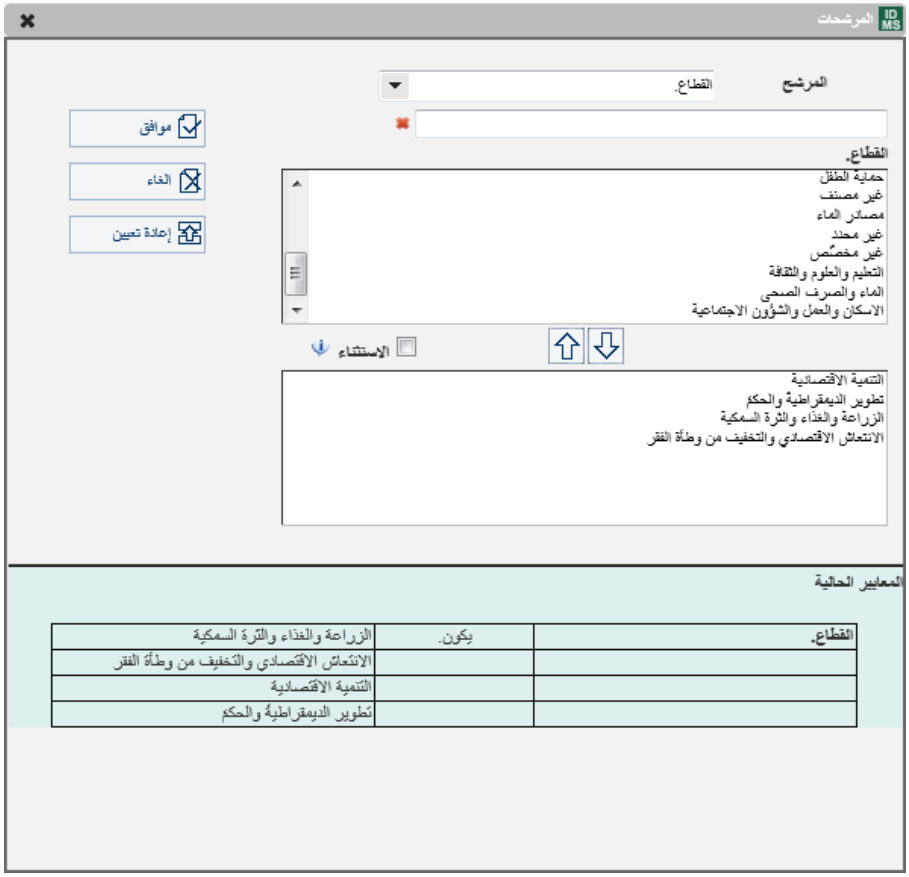


Figure 83: Creating Filtering Criteria

14.2 Sample Filtering Criteria

If the following is selected for the initial view (Figure 84), and you have indicated:

- **Project Type** as a filtering category; and,
- **Capacity Building**, **Rehabilitation**, and **Supply** as category items (Figure 85).

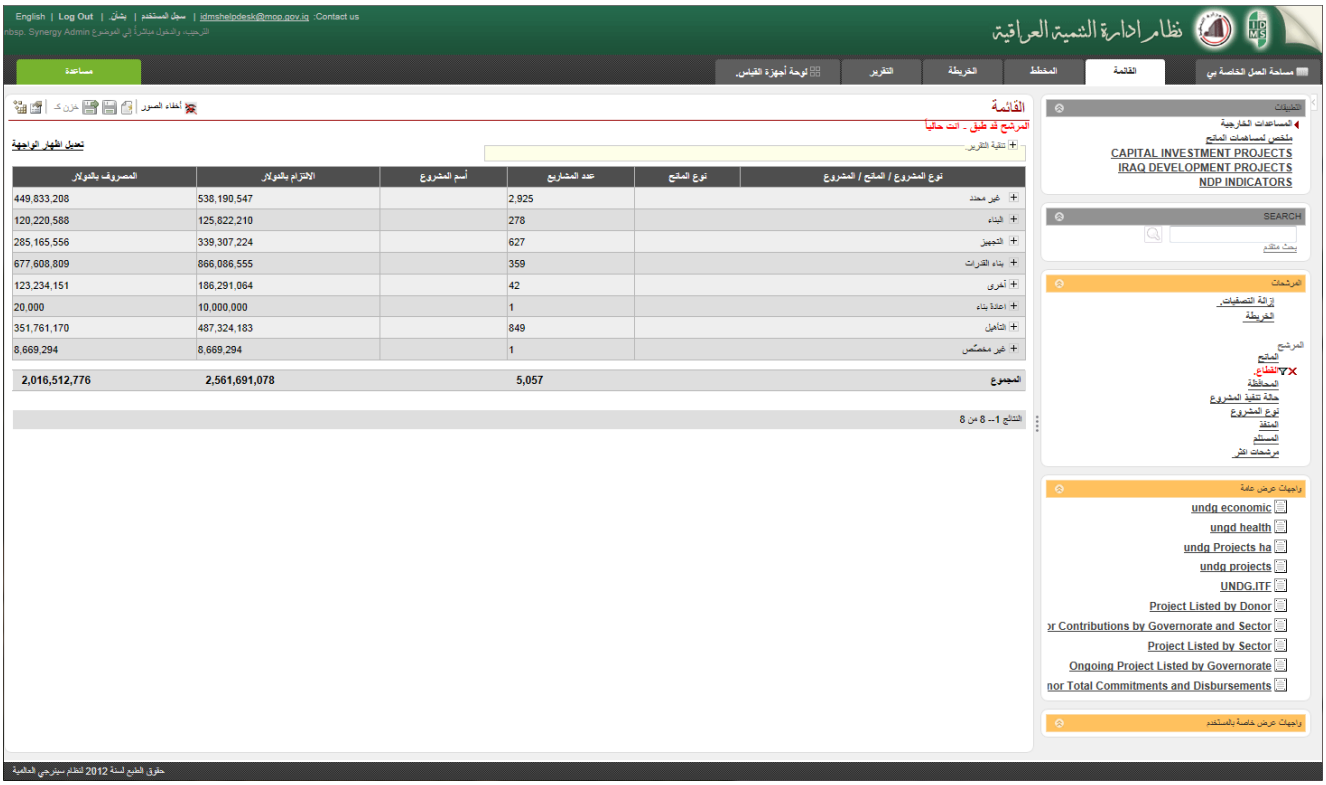


Figure 84: Initial View

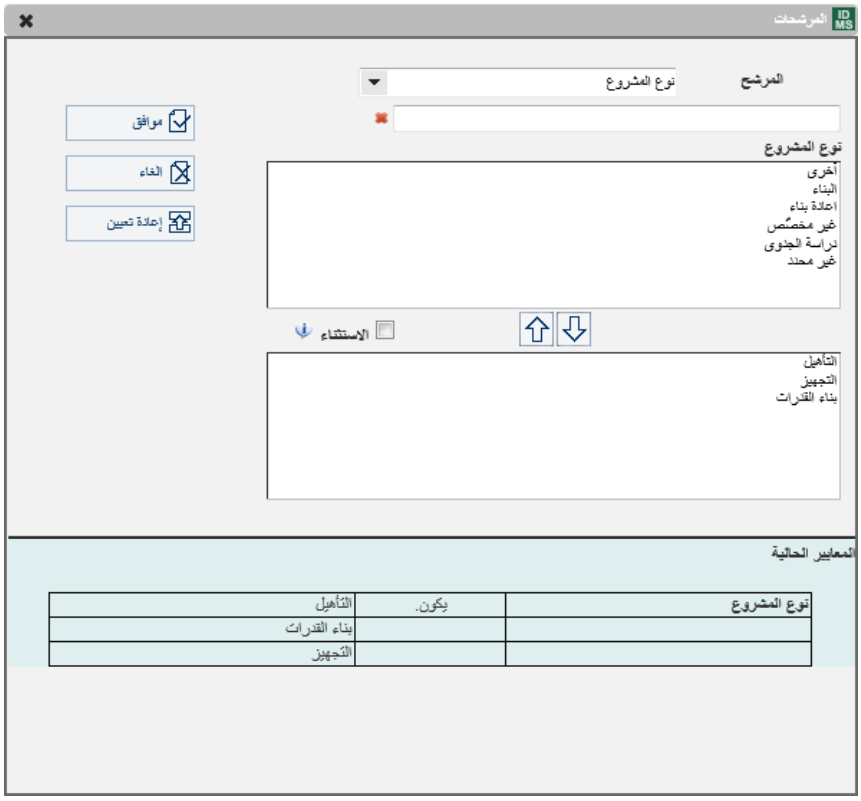


Figure 85: Sample Filtering Criteria

The following view will appear (Figure 86):

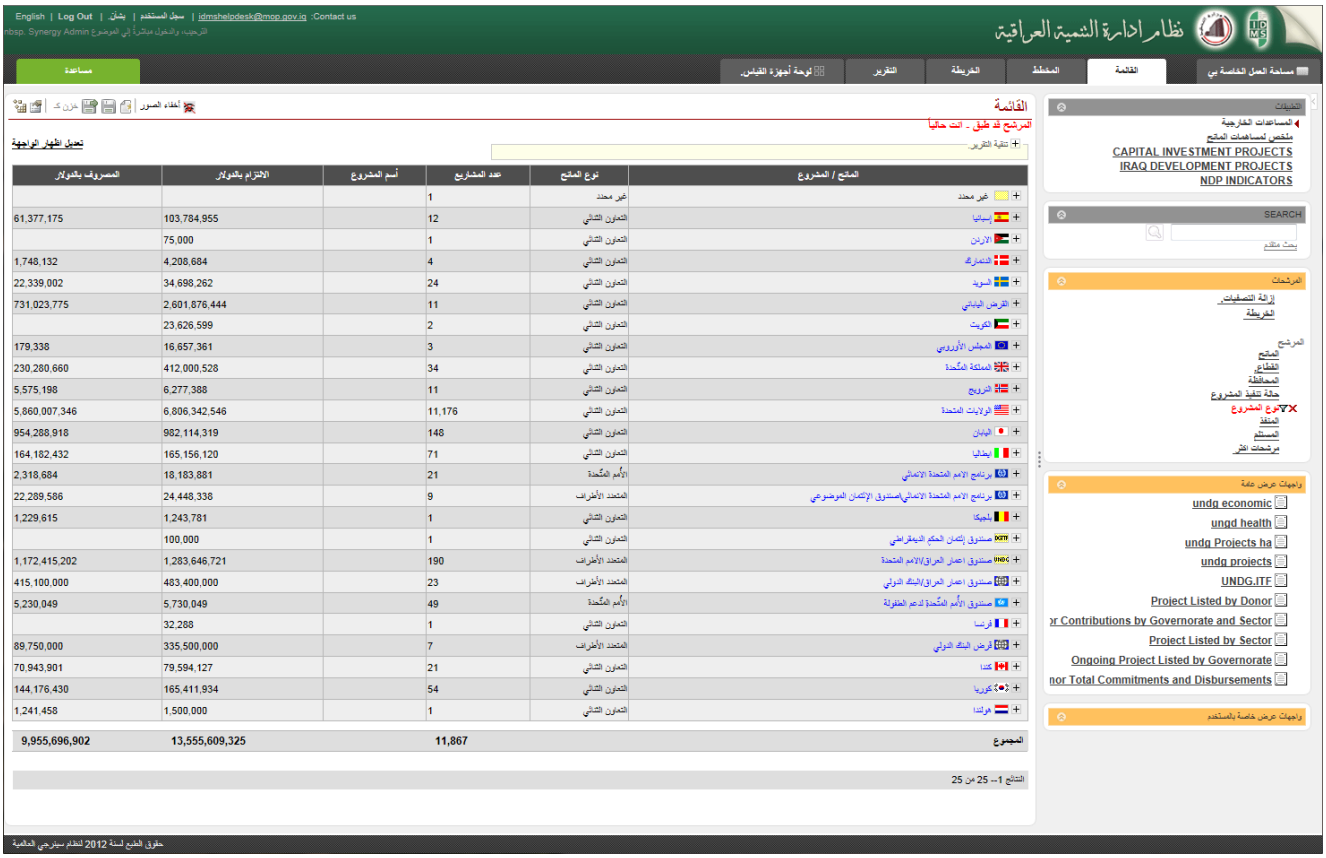


Figure 86: Filtered List

15. SEARCH

IDMS is equipped with a comprehensive search mechanism, which allows searching for any relevant information.

15.1 Simple Search

The simple search interface is available to find any relevant information quickly and easily within the integrated *IDMS* content. Simple search implies that you can type search operators directly into the search box.

15.2 Advanced Search

In addition to providing easy access to the content, *IDMS* application has a number of specific features that is used to find exactly what is looked for. One of these features is advanced search that allows setting different complex conditions using the *Advanced Search* form. It gives several additional fields which may be used to qualify searches by such criteria as district, sub-sector, project title, etc.

Follow the instructions below to create search criteria:

1. Click the **Advanced Search** link under the *Filters* section. You will then be redirected to the *Filters* section (Figure 87).

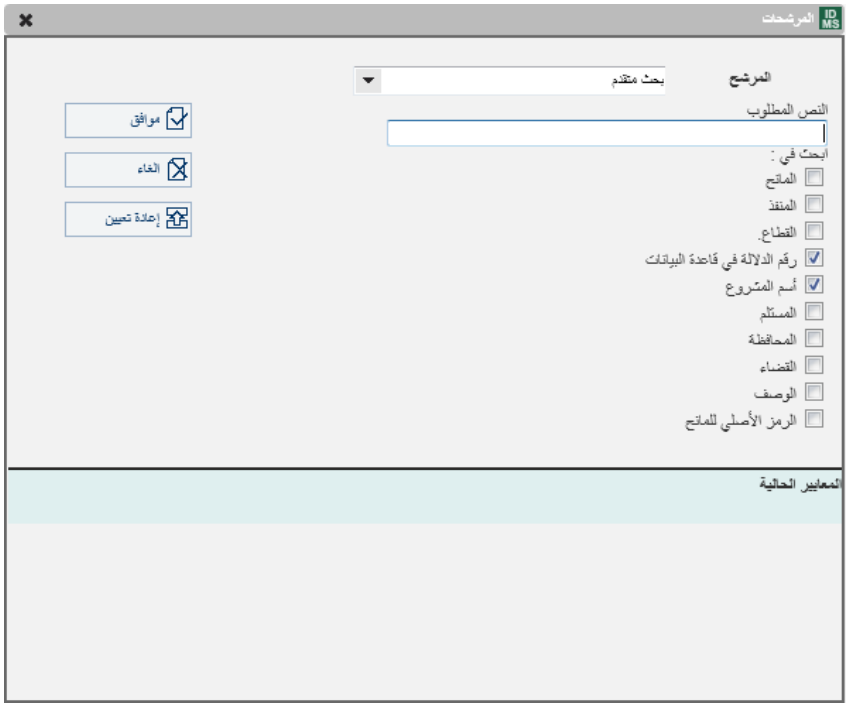


Figure 87: Creating a Search Criteria

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 on 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, Chart, or Map).

Note: The simple search (searching on all fields) is also available at the bottom of the *Filters* section.

15.3 Sample Search Criteria

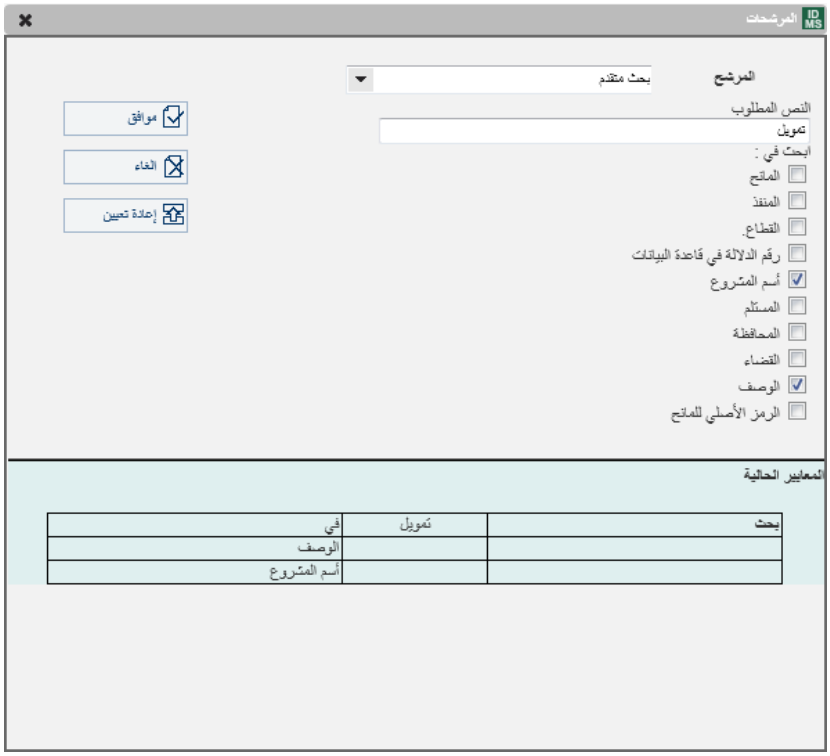


Figure 88: Defining Search Criteria

If you have selected to look for **Finance** among project titles and descriptions (Figure 88), the following search result (Figure 89) will appear.

Figure 89: Search Results

16. LOGGING OUT

Once you have finished using the application it is necessary to log off. In order to log out from the application, select the *Log Out* option in the upper right corner of the application window.

17. REFERENCES

Please refer to the following IDMS related documents:

- IDMS External Assistance Projects Application User Manual
- IDMS Capital Investments Projects Application User Manual
- IDMS Donor Profile Application User Manual
- IDMS NDP Indicators Application User Manual
- IDMS Administration Center User Manual

IRAQ DEVELOPMENT MANAGEMENT SYSTEM (IDMS)

CAPITAL INVESTMENTS PROJECT APPLCATION

USER MANUAL

Version 1.4

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1. INTRODUCTION

This document describes the *Capital Investment Projects* application of the *Iraq Development Management System (IDMS)*. It provides the necessary instructions that a user should follow during the data entry process. The document is addressed to those who will use the *IDMS* application to add or modify project information.

2. OVERVIEW

The *Iraq Development Management System (IDMS)* is an automated information management system which is designed to improve efficiency and coordination of donor activities in Iraq. 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 aid data.

The main objective of *IDMS* is to serve as a reliable and credible source of information on overall donor contributions to Iraq's reconstruction, economic recovery and socio-economic development, as well as to support the Government in effectively managing development assistance and promoting the accountable and transparent use of resources.

In the current version of *IDMS*, the following applications are present:

- **External Assistance Projects**
- **Donor Profile**
- **Capital Investments Projects**
- **Iraq Development Projects**
- **NDP Indicators**

The *Capital Investment Projects* application in *IDMS* is designed to track the investment projects that are financed from the national budget. Once you have accessed this application, you can view project details, track investment flows to the country, and create analytical reports in the *List*, *Chart*, *Map*, and *Report* modules. Moreover, the *Capital Investment Projects* application contains a built-in on-line data entry subsystem, which is designed to allow entering the project related data remotely via Internet. The on-line *Data Entry* module allows for entering new and modifying the existing information.

In the current design, the *Capital Investment Projects* application consists of the following sections:

- **General Information** section is used to provide basic information on the project. This includes the project title, the sectors of economy supported by the project, the project start and the end dates, project locations, executing body, project beneficiary, etc.

- **Financial Information** section is used to enter information related to the total project cost, payments, and expenses. All fund allocations by implementation years, location and type of expense should also be recorded here.

- **Procurement** section provides procurement related information on the project. This includes the procurement plans and contracts details.

- **Impact Analysis** section is used to provide information on competitive advantages, environmental impacts, social indicators and expected quantitative indicators.

- **Required Resources** section is used to add information related to construction materials, as well as man-power and energy resources required during the project implementation.

- **Monitoring and Evaluation** section is used to provide information on overall progress of the project, the key performance indicators of the project, progress on the contracts, and factors that may be delaying the project implementation.

- **Notes and Attachments** section is used to enter additional notes and comments on the project as well as attach project documents such as the project proposal and reports.

- **Project History** section is used to view statistical data on access to the given project.

To navigate from one section to another, use the respective tab controls found at the top of the screen. Also, click the respective **Next / Previous** button at the bottom of the screen to go to the next / previous section.

The *Capital Investment Projects* application provides a web-based user interface and requires a web browser (Internet Explorer) pre-installed.

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

3. GENERAL INFORMATION

In the *General Information* section (Figure 1 and Figure 2), you can provide basic information on the project. This includes the project title, sectors supported by the project, project start and end dates, locations, executing body, project beneficiary, etc.

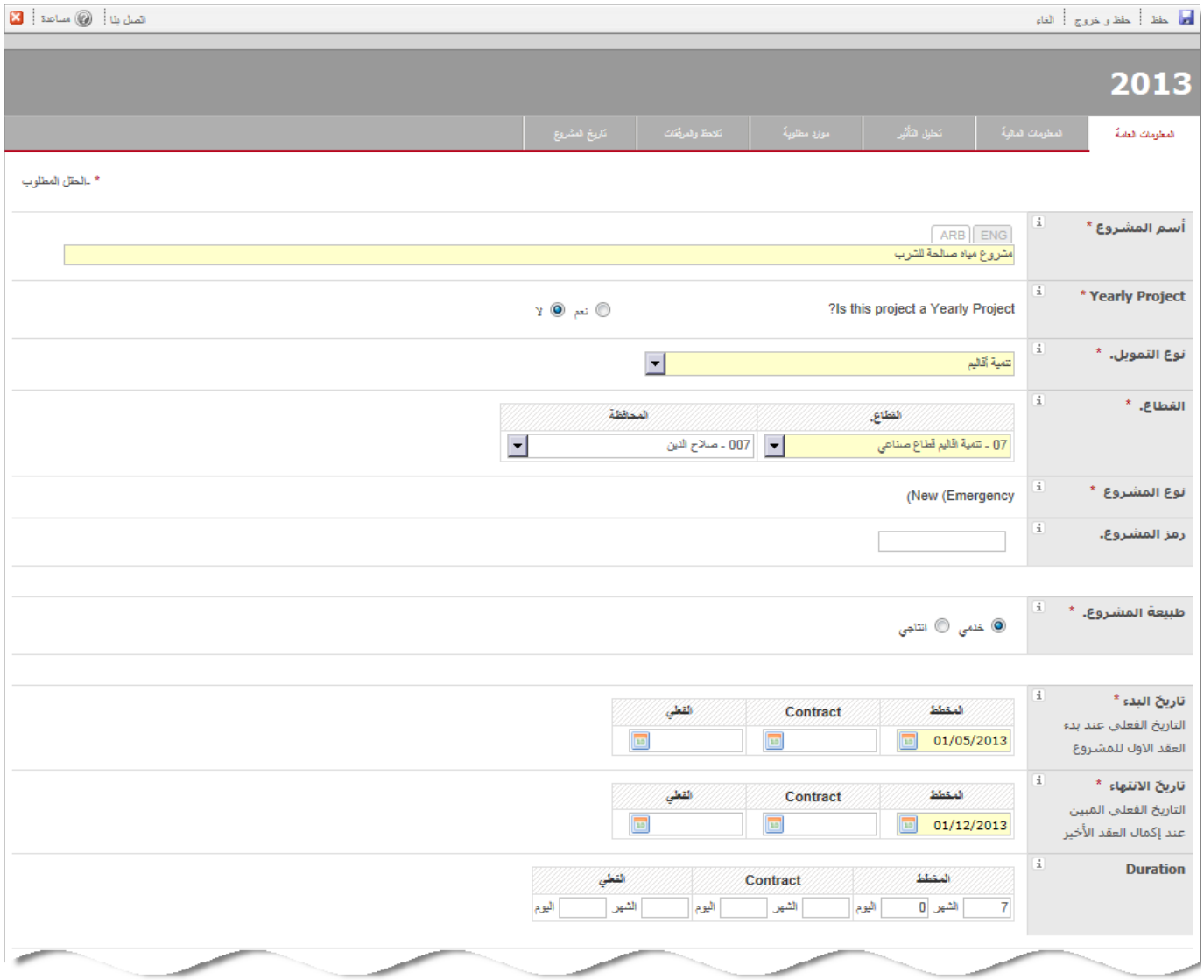

Figure 1: General Information Section (Part 1)

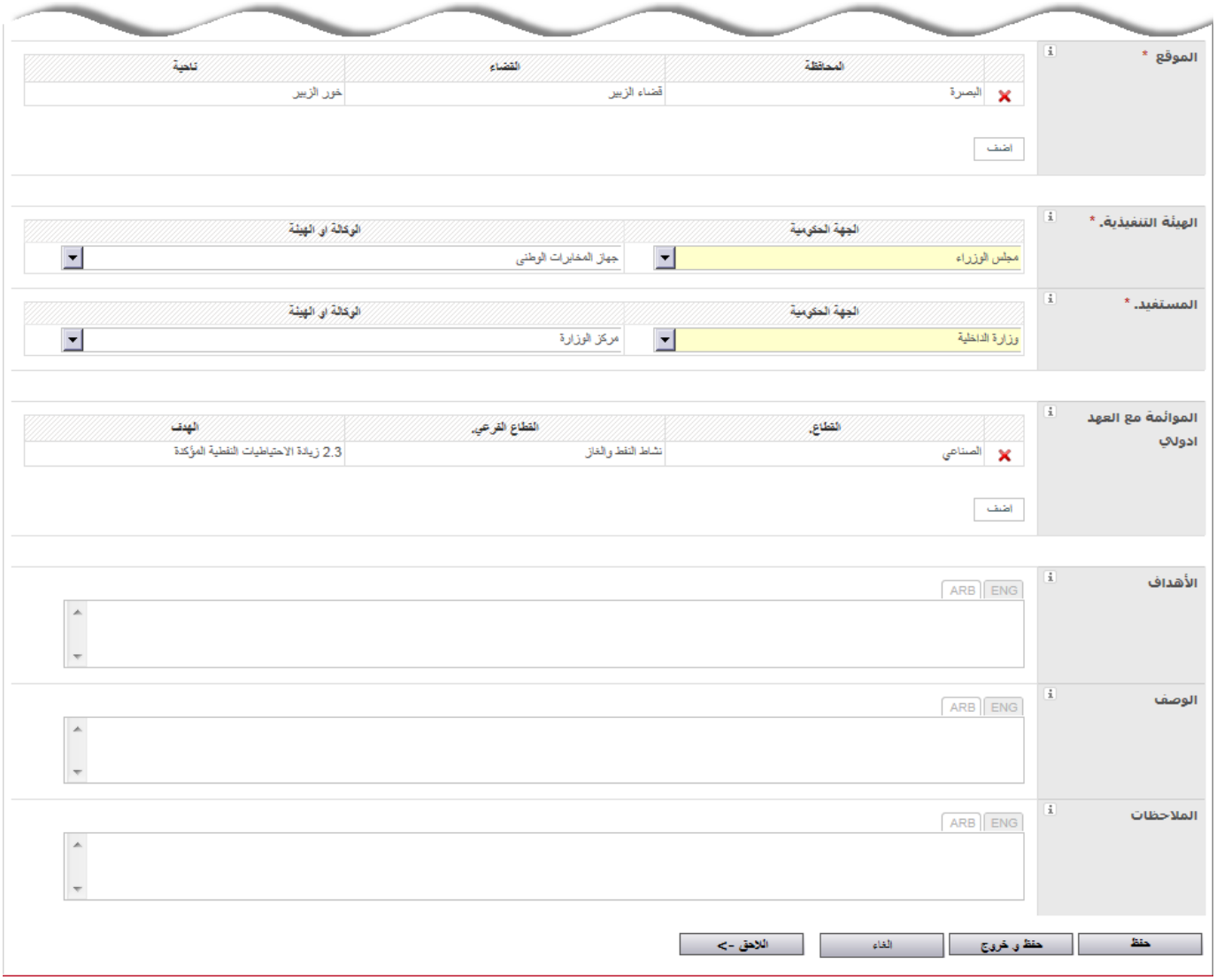

Figure 2: General Information Section (Part 2)

For more details on what information is requested in the *General Information* section, refer to the table below:

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Project Title	Indicate here the official **Project Title** used in project documents and approved by the competent agency in the English and Arabic languages. *This field is mandatory.* In case that a pre-determined official title does not exist, please create a one-line synopsis of the project. Please note that the title is the information that users see when displaying the search results.

Yearly Project	Indicate whether this is a **Yearly Project** or not by specifying the respective radio button. *This field is mandatory*. Please note that all projects having duration of twelve months or less are considered yearly projects. They are intended for funding maintenance activities only and are transferred to the next year automatically preserving the same project code and same title. However, cumulative expenses are not calculated for yearly projects and, respectively, they are not a part of overall cumulative expenses.
Funding Type	Provide information on the **Funding Type** by selecting the respective instance from the drop-down list. *This field is mandatory*. Please note that depending on the funding type selected, you may be required to provide additional information in the **Partnership Details** and/or **Donors** fields. You can provide the information requested by: • Adding partnership details in the English and Arabic languages. • Providing *Donor* information. For more details, see Managing Donors.
Sector	Indicate the **Sector** of the economy to which the project contributes by selecting the appropriate instance from the *Sector* drop-down list. *This field is mandatory*. Also, specify the *Activity* related to the selected *Sector*. Please note that selection of the Sector/Activity is carried out in a Step-by-Step way. Once the appropriate sector is selected, the list of all activities pertaining to the selected sector becomes available in the *Activity* field.
Project Type	This is an automatically generated field which may have the *New* or *Ongoing* values. The project which is not yet started, i.e. not approved, or it is approved for the first year is of a *New* type. When submitting the request of an existing project for the next year, the new request will have an *Ongoing* project type. Also, both new and ongoing projects can be either of *Regular* or *Emergency* type. Requests are considered as *Regular* if they are created within the regular request submission period. Requests created after the regular request submission deadline has expired are considered as *Emergency*.
Project Code	Provide information about the **Project Code** assigned to the project. For more details, see Providing Project Code. **Note:** The project code should be unique in the system. If an existing code is entered, the system will prevent saving the project.
Project Nature	Provide information about the **Project Nature** by activating the respective radio button (*Production* or *Service*). *This field is mandatory*.

Start Date *Actual date reflects when the first contract started*	Define the date on which the implementation of project activities is supposed to begin (planned) and begins (actual). Provide the date when the first contract started. A calendar popup is available for date input, see Figure 3: Calendar. *This field is mandatory*.
End Date *Actual date reflects when the last contract completed*	Indicate the date by which the implementation of project activities is supposed to be completed (planned) and the actual date of completion (actual). Provide the date when the last contract was completed. A calendar popup is available for date input, see Figure 3: Calendar. *This field is mandatory*.
Duration	Indicate the planned and actual time-span for the project implementation. **Note:** If you specify the project end date, the project duration is automatically calculated by the system. If the project duration is provided first, the project end date is automatically calculated by the system as soon as you navigate away from the field.
Locations	Specify the geographic **Locations** in the recipient country that are intended to benefit from the project activities. Please note that selection of the project location is carried out in a Step-by-Step way. Once the appropriate governorate is selected, the list of all qadhas pertaining to the selected governorate becomes available in the *Qadha* field. The same refers to the qadha/nahia selection. *This field is mandatory*. For more details, see Managing Locations.
Executing Body	Provide information about the **Executing Body** by selecting the respective instance from the *Government Entity* drop-down list. *This field is mandatory.* Also, specify the *Agency* within the selected *Government Entity*. Please note that selection of the Government Entity/Agency is carried out in a Step-by-Step way. Once the appropriate Government Entity is selected, the list of all agencies pertaining to the selected entity becomes available in the *Agency* field.
Beneficiary	Add information about the **Beneficiary** by selecting the respective instance from the *Government Entity* drop-down list. *This field is mandatory.* Also, specify the *Agency* within the selected *Government Entity*. Please note that selection of the Government Entity/Agency is carried out in a Step-by-Step way. Once the appropriate Government Entity is selected, the list of all agencies pertaining to the selected entity becomes available in the *Agency* field.

Alignment with NDP	Indicate how the project is aligned with the National Development Plan (NDP). For more details, see Managing NDP Alignment.
Objectives	Provide the description of the **Objectives** that the project seeks to achieve in the English and Arabic languages.
Description	Provide the project **Description** in the English and Arabic languages. This can be several paragraphs of a free text.
Notes	Enter additional **Notes** about the project in the English and Arabic languages.

Figure 3: Calendar

3.1 Managing Donors

This chapter outlines how to add, edit and remove donor records.

3.1.1 Adding a Donor Record

In order to add a new record, follow the steps below:

1. Click the **Add** button at the bottom of the field. A new record will appear (Figure 4).

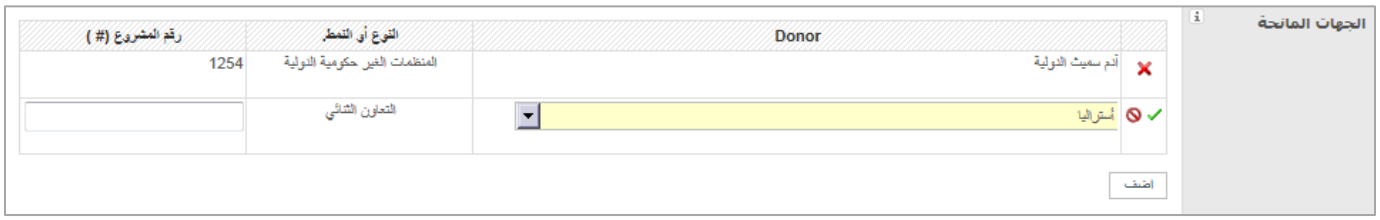

Figure 4: Adding a Donor Record

2. Select the **Donor** from the respective drop-down list. The **Type** field information will automatically be generated.
3. Provide the **Project Ref. #** (project reference number).
4. Click the ✓ **(OK)** button to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to terminate the operation.

3.1.2 Editing Donor Records

In order to edit an existing donor record, follow the steps below:

1. Click the record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click the ✓ **(OK)** button to save the changes made. Or, click ⊘ **(Cancel)** to discard them.

3.1.3 Removing Donor Records

In order to remove an existing donor record, use the ✕ **(Remove from the list)** button to the left of the selected record.

3.2 Managing Locations

This chapter outlines how to add, edit and remove location records.

3.2.1 Adding a Location Record

In order to add a new location record for the project, follow the steps below:

1. Click the **Add** button at the bottom of the field. A new record will appear (Figure 5).

Figure 5: Adding a Location Record

2. Select the appropriate **Governorate** from the drop-down list.
3. Indicate the appropriate **Qadha** by selecting the respective instance from the drop-down list.
4. Select the appropriate **Nahia** from the drop-down list.
5. Click the ✓ **(OK)** button to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to terminate the operation.

3.2.2 Editing Location Records

In order to edit an existing location record, follow the steps below:

1. Click the location record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click the ✓ **(OK)** button to save the changes made. Or, click ⊘ **(Cancel)** to discard them.

3.2.3 Removing Location Records

In order to remove an existing location record, use the ✕ **(Remove from the list)** button to the left of the selected record.

3.3 Managing NDP Alignments

This chapter outlines how to add, edit and remove NDP alignment records.

3.3.1 Adding an NDP Alignment Record

In order to add a new NDP alignment record, follow the steps below:

1. Click the **Add** button at the bottom of the field. A new record will appear (Figure 6).

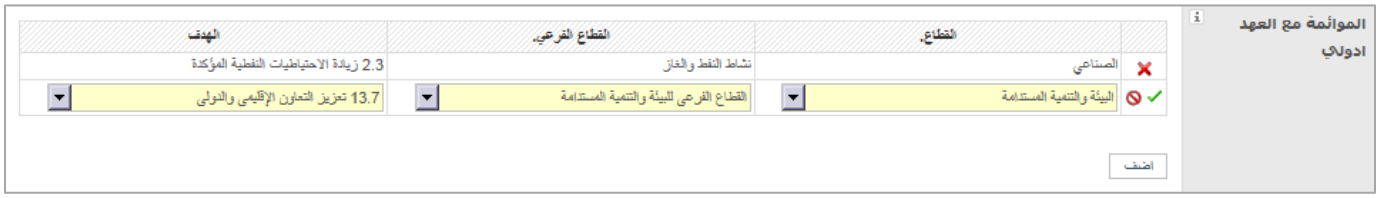

Figure 6: Specifying Alignment with NDP

2. Select the **Sector** and **Sub Sector** from the appropriate drop-down lists.
3. Select the appropriate **Objective**.
4. Click the ✓ **(OK)** button to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to terminate the operation.

3.3.2 Editing NDP Alignment Records

In order to edit an existing NDP alignment record, follow the steps below:

1. Click the record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click the ✓ **(OK)** button to save the changes made. Or, click ⊘ **(Cancel)** to discard them.

3.3.3 Removing NDP Alignment Records

In order to remove an existing NDP alignment record, use the ✘ **(Remove from the list)** button to the left of the selected record.

4. FINANCIAL INFORMATION

In the *Financial Information* section (Figure 7), you may enter information about project costs, allocations by implementation years, location and type of expense, etc.

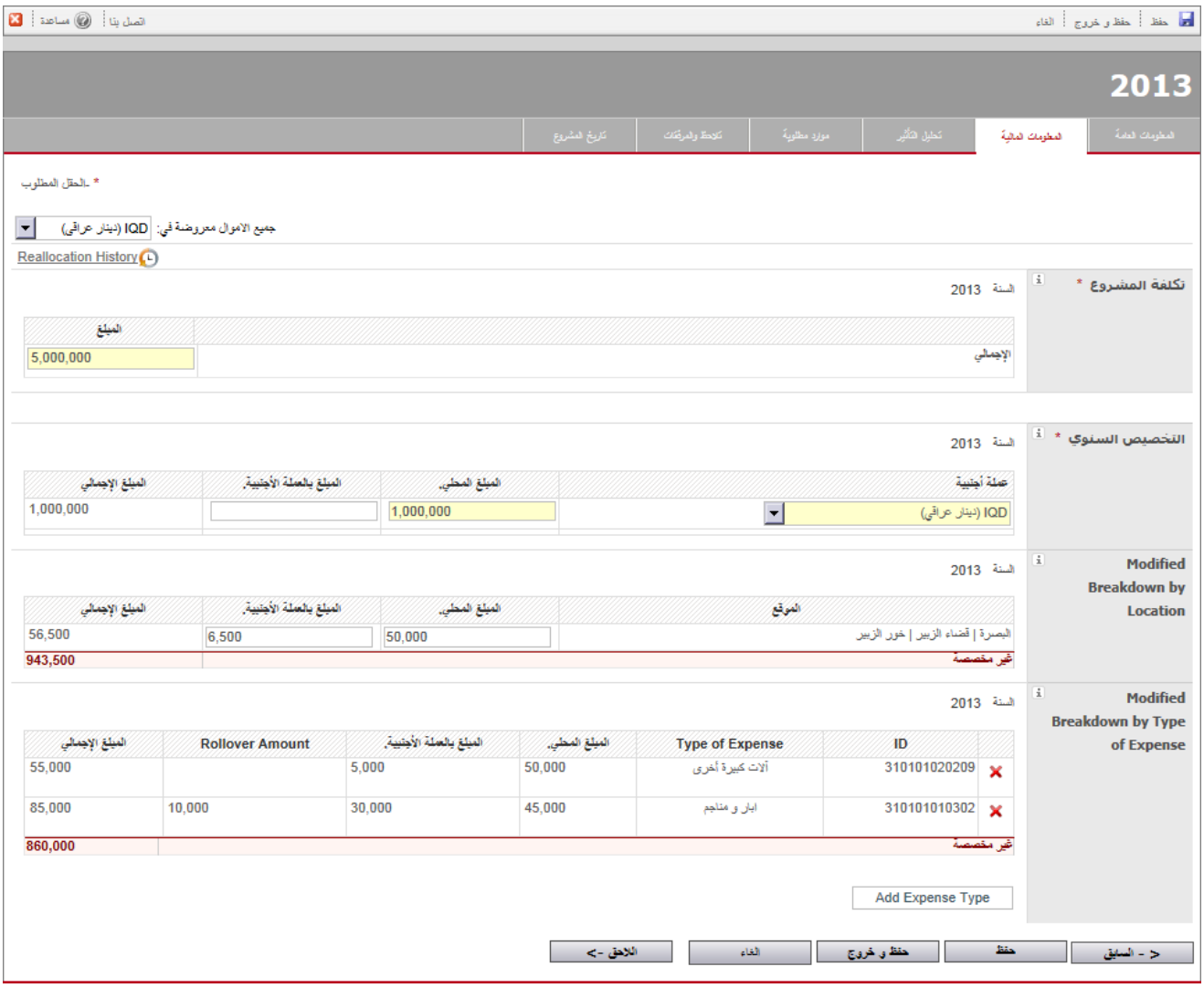

Figure 7: Financial Information Section

Note: Some fields in this section are available for ongoing or approved projects only.

All amounts in the *Financial Information* section can be viewed either in IDQ (Iraqi Dinar) or USD (US Dollar). To switch between these options, select the appropriate value from the **All amounts are displayed in:** drop-down list at the top of the screen.

Note: For all total amount fields in this section, you may see the amount converted to IDQ or USD by hovering the mouse cursor on the corresponding amount. If IDQ amount is displayed, the tooltip will show the USD equivalent; and vice versa, if USD amount is displayed, the tooltip will show the IDQ equivalent.

The **Reallocation History** link in the right upper side of this section leads to the *Reallocation History* page (Figure 8), where details on the project reallocation status, type, attachments and users responsible for the changes can be viewed. The page content is different depending on the reallocation type. For details, see PROJECT SUBMISSION.

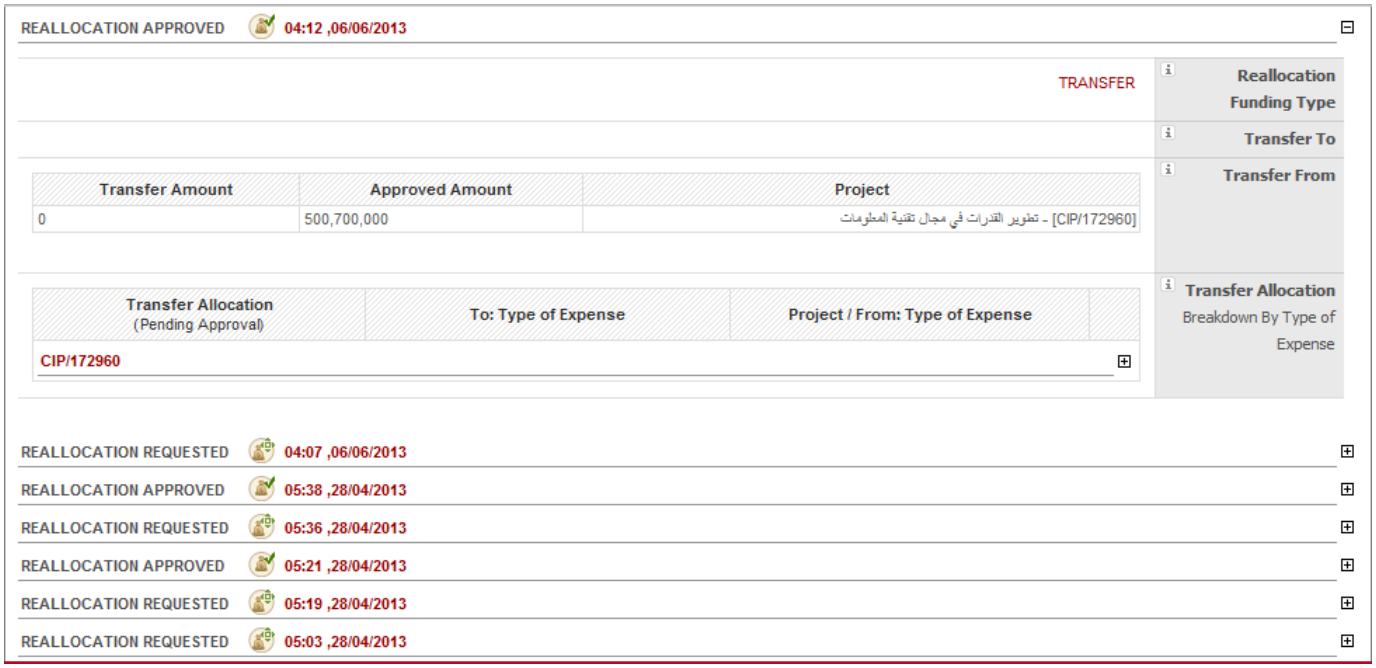

Figure 8: Reallocation History Page

For more details on how to provide the information requested in the *Financial Information* section, refer to the table below.

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Project Cost	First, select the year for which the **Project Cost** should be defined. Then, define the amount requested for the project implementation in the selected year. *This field is mandatory*. **Note:** When accessing this section for a new project request, you may provide the *Project Cost* for the current year only.
Yearly Allocation	First, select the year for which the project **Yearly Allocation** should be defined. Then, select the **Foreign Currency** in which the foreign funds are defined in the corresponding field. **Note:** Once the appropriate currency is selected, the default exchange rate per 1 USD is provided in accordance with the project start date. However, you can change it, if this is necessary. The exchange rate is used when converting the amounts into USD. In the **Local Amount** field, provide the project expenses made in the local currency and in the **Foreign Amount** field, provide expenses made in the

	selected foreign currency. The **Total Amount** field value will automatically be calculated based on the provided local and foreign amounts. *This field is mandatory*. **Note:** When accessing this section for a new project request, you may provide the *Yearly Allocation* for the current year only.
Modified Breakdown by Location	Specify how the recorded project cost is allocated throughout all project implementation locations. Enter both local and foreign amounts allocated (it should be entered in the currency indicated). The value in the **Total Amount** field will automatically be calculated. **Note:** You need to specify locations in the GENERAL INFORMATION tab before you can indicate the **Modified Breakdown by Location**. For more details, see Managing Locations.
Modified Breakdown by Type of Expense	Break down the allocated amount according to the type of expense (local, foreign, and rollover). The value in the **Total Amount** field will automatically be calculated. For more details, see Managing Expense *Types*.
Payments *by MoF to Ministry/ Governorate*	This field is available for ongoing projects only and is used to provide information about the transfer of funds from the Ministry of Finance to another Ministry or Governorate. The values in the **% out of Yearly Allocation** and **% out of Total Project Cost** will automatically be calculated. Please note that the payment information should be provided for the budget year specified above. For more details, see Managing Expense *Types*.
Expenses *by Ministry/ Governorate to Implementer*	This field is available for ongoing projects only and is used to provide information about the transfer of funds from the Ministry or Governorate to the entity directly involved in the project implementation. The value in the **TOTAL** field will automatically be calculated. The information on the **Cumulative Expenses up to the Current Year** is displayed in the upper part of the *Expenses* table. It shows the total of all project expenses for the previous years, including the current year. Please note that the expense information should be provided for the budget year specified above. For more details, see Managing Expenses.

4.1 Managing Expense Types

This chapter outlines how to add and remove types of expenses in the FINANCIAL INFORMATION and the *Request Reallocation Form*, which appears when an approved project is requesting reallocation (see PROJECT SUBMISSION). This chapter also explains how to breakdown the funds among the selected expense types.

4.1.1 Adding an Expense Type Record

In order to add a new expense type record, follow the steps below:

1. Click the **Add Expense Type** button at the bottom of the *Modified Breakdown by Type of Expense* field (Figure 9). The *Add Type of Expense* form will appear (Figure 11).

Figure 9: Modified Breakdown by Type of Expense Field in Financial Information Section

Figure 10: Modified Breakdown by Type of Expense in the Request Reallocation Form

2. Locate the expense type to add information for.
   Note: To make it easier to locate the appropriate expense type in the long list, the system has a search capability. To find the relevant expense type, enter the expense type name or ID in the appropriate field, indicate the section and level to search in and click the **GO** button. Use the look-up controls of Section, Level 1, Level 2, Level 3, Level 4, and Level 5 to find the appropriate type of expense. The list of all expense types matching the criteria will be displayed in the *Types of Expense* table.
3. Add the selected expense type(s) as one(s) relevant to the project by ticking the check-box to the left of the appropriate record and clicking the **Add Selected** button. The selected expense type(s) will appear in the *Selected Expense Types* table.
4. Click the **OK** button to return to the FINANCIAL INFORMATION section (or to the *Request Reallocation Form* if the form was accessed from there), where the selected expense types will appear in the respective field. Or, click **Cancel** to terminate the operation.

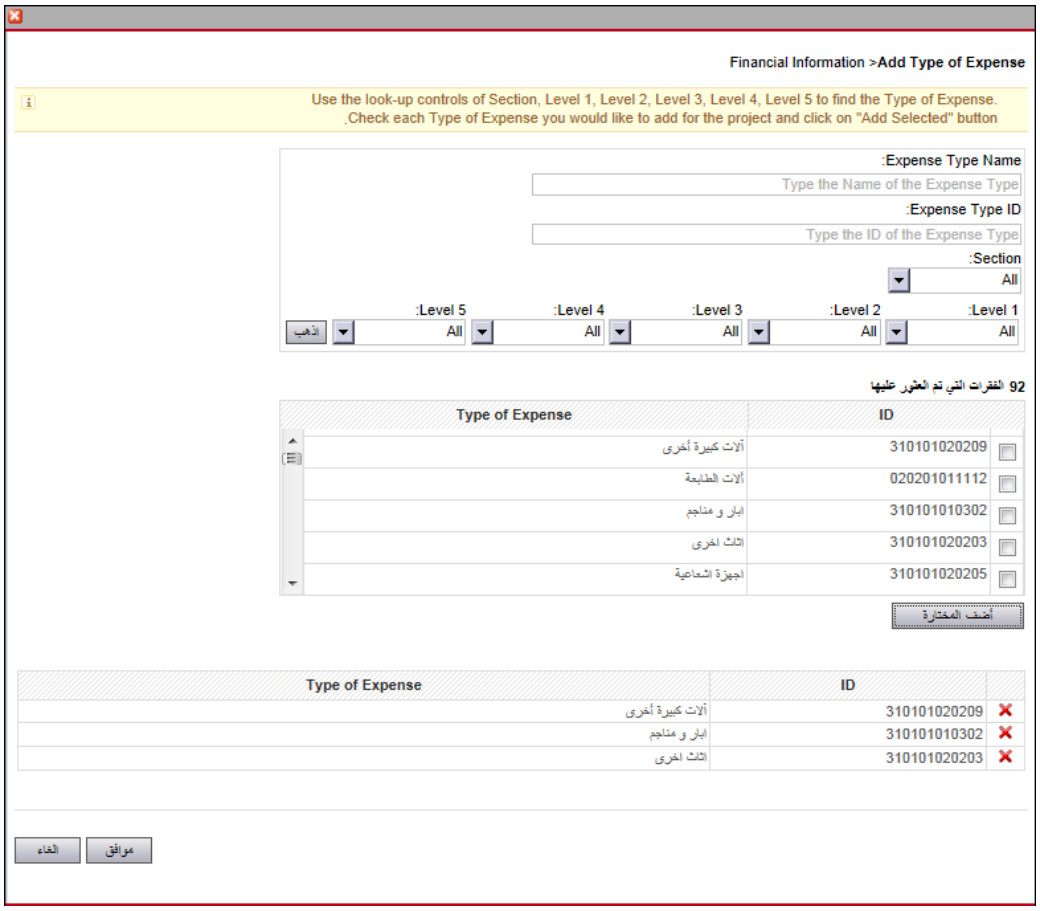

Figure 11: Adding a Type of Expense Record

4.1.2 Removing Expense Type Records

In order to remove an expense type record, use the ✘ **(Remove from the list)** button to the left of the selected record. The same operation can be done from the *Add Type of Expense* form (see Adding an Expense Type Record).

Note: You cannot remove the **To be specified** type of expense.

4.1.3 Providing Breakdown by Type of Expense

In order to provide the breakdown for the selected types of expense, follow the steps below:

1. If you have accessed the *Modified Breakdown by Type of Expense* field from the FINANCIAL INFORMATION section, then in that section, click the expense type record to add financial information for. This will activate the selected record (Figure 12). Provide the following information for each expense type:
   - **Local Amount** - this is the expended amount in the local currency.
   - **Foreign Amount -** this is the expended amount in the foreign currency.
   - **Rollover Amount -** this is the remaining amount over the previous years' allocations and actual expenses.

     Note: The value in the *Rollover Amount* field should not exceed the amount remaining after you subtract actual expenses amount from the previous years' allocations.

2013 Year

Modified Breakdown by Type of Expense

Total Amount	Rollover Amount	Foreign Amount	Local Amount	Type of Expense	ID	
55,000		5,000	50,000	Other large machines	310101020209	✗
82,500	1,000	6,500	75,000	Wells and mines	310101010302	⊘ ✓
862,500					Unallocated	

Add Expense Type

Figure 12: Providing Financial Information for the Type of Expense

2. If you have accessed the *Modified Breakdown by Type of Expense* field from the *Request Reallocation Form* (see Submitting Reallocation Request), then in that form, click the expense type record to add financial information for. This will activate the selected record (Figure 13). Provide the following information for each expense type:
   - **Revised Local Amount** - this is the revised amount in the local currency.
   - **Revised Foreign Amount -** this is the revised amount in the foreign currency.
   - **Rollover Amount -** this is the remaining amount over the previous years' allocations and actual expenses.

     Note: The value in the *Rollover Amount* field should not exceed the amount remaining after you subtract actual expenses amount from the previous years' allocations.

Note: For emergency funding requests, instead of revised amounts, requested amounts should be defined here.

السنة 2013

Modified Breakdown by Type of Expense

المبلغ الإجمالي	Rollover Amount	المبلغ بالعملة الأجنبية	المبلغ المحلي	Type of Expense	ID	
700,000,000			700,000,000	الاعمال الاضافية	020101010202	✗
800,075,000	10,000	65,000	800,000,000	لوازم زراعية	020201010905	⊘ ✓
500,000,000			500,000,000	المخصصات الليلية	020202010101	✗
1,000,000,000			1,000,000,000	علف الحيوانات	020201011104	✗
75,000-					غير مخصصة	

Add Expense Type

Figure 13: Revising Reallocation Financial Information for the Type of Expense

3. Click the ✓ **(OK)** button to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to terminate the operation.

4.2 Managing Payments

This chapter outlines how to add, edit and remove payment records.

4.2.1 Adding a Payment Record

In order to add a new payment record, follow the steps below:

1. Select the **Year** to display the payments for.
2. Click the **Add Payment** button at the bottom of the field (Figure 14). The *Add/Edit Payment* form will appear (Figure 15).

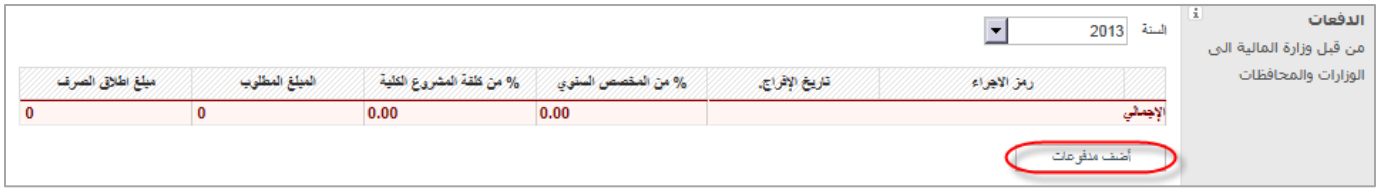

Figure 14: Payments Field

3. Type the **Transaction Code** in the respective field. *This field is mandatory.*
4. Specify the date when the ministry or governorate placed the request for payment in the **Request Date** field. A calendar popup is available for this input, see Figure 3: Calendar.
5. Indicate the date when the funds were released in the **Release Date** field. *This field is mandatory.* A calendar popup is available for this input, see Figure 3: Calendar.
6. Enter the **Requested Amount**. This is the amount that has been requested by the Ministry/Governorate for the project implementation.

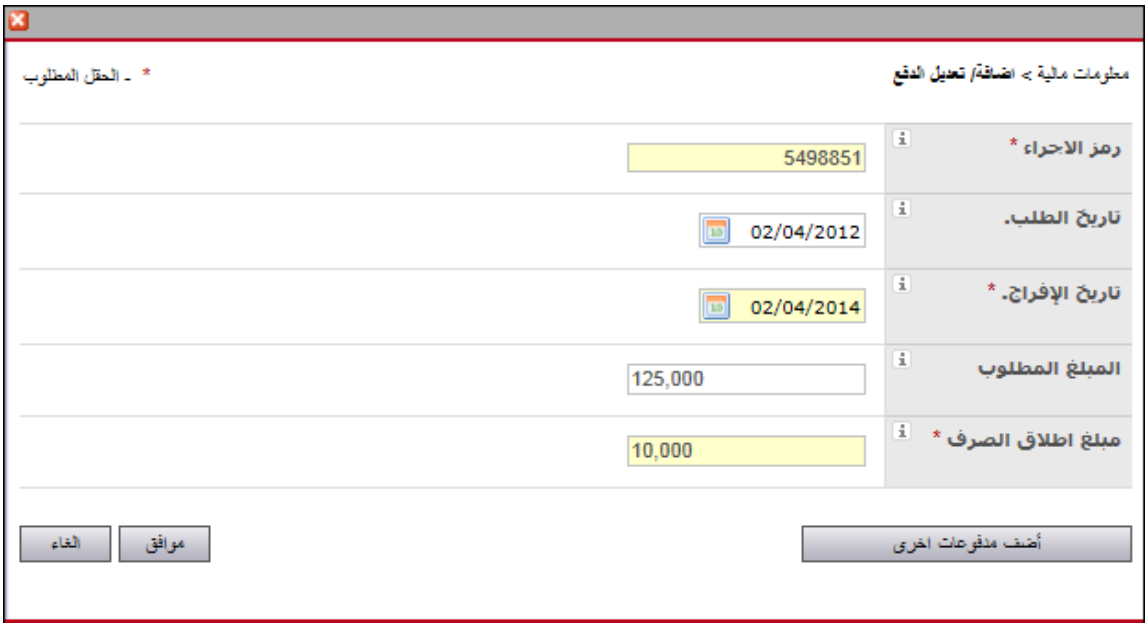

Figure 15: Adding a Payment Record

7. Enter the **Released Amount**. *This field is mandatory.* This is the amount that has been allotted to the Ministry/Governorate by the Ministry of Finance.
   Note: The total released amount for all payments recorded should not exceed the corresponding yearly allocation amount defined in the *Yearly Allocation* field. See FINANCIAL INFORMATION for details.
8. Click the **OK** button to confirm the information input and to return to the FINANCIAL INFORMATION section.

In order to add another payment record, click the **Add Another Payment** button and provide the information requested as described in the paragraphs above.

Note: The new payment record appears under the project budget year when the money transfer was made. The information on the payment record becomes available when the appropriate year is selected.

4.2.2 Editing Payment Records

In order to edit an existing payment record, follow the steps below:

1. Click the record that needs to be modified. You will be directed to the *Add/Edit Payment* sub-section where the details of the selected record will be displayed.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button to save the changes made and return to the FINANCIAL INFORMATION section.

4.2.3 Removing Payment Records

In order to remove an existing payment record, use the ✘ **(Remove from the list)** button to the left of the selected record.

4.3 Managing Expenses

This chapter outlines how to add, edit and remove expenses records.

4.3.1 Adding an Expense Record

In order to add a new expense record, follow the steps below:

1. Select the **Year** to display the expenses for.
2. Click the **Add Expenses** button at the bottom of the field (Figure 16). The *Add/Edit Expenses* form will appear (Figure 17).

Figure 16: Expenses Field

3. Indicate the **Type of Expenses** by selecting the appropriate instance from the drop-down list. *This field is mandatory*.
4. Indicate the **Date** when the expense was made. *This field is mandatory*. A calendar popup is available for this input, see Figure 3: Calendar.
5. Select the **Contract Reference Number** from the drop-down list. This is the ID of the contract associated with the given expense.
6. Enter the **Expended Amount**. This is the amount that has been used to purchase services, goods or cover other project-related costs.
7. Enter the **Predecessor Amount**. This is the amount left from the previous year's budget and available in the current one.
8. Enter the **Credit Amount**. This is the amount that has been provided as credit.
9. Click the **OK** button to confirm the information input and return to the FINANCIAL INFORMATION section.

In order to add another expense record click the **Add Another Expense** button and provide the information requested as described in the paragraphs above.

Note: The new expense record appears under the project budget year when the expense was made. The information on the expense record becomes available when the appropriate year is selected.

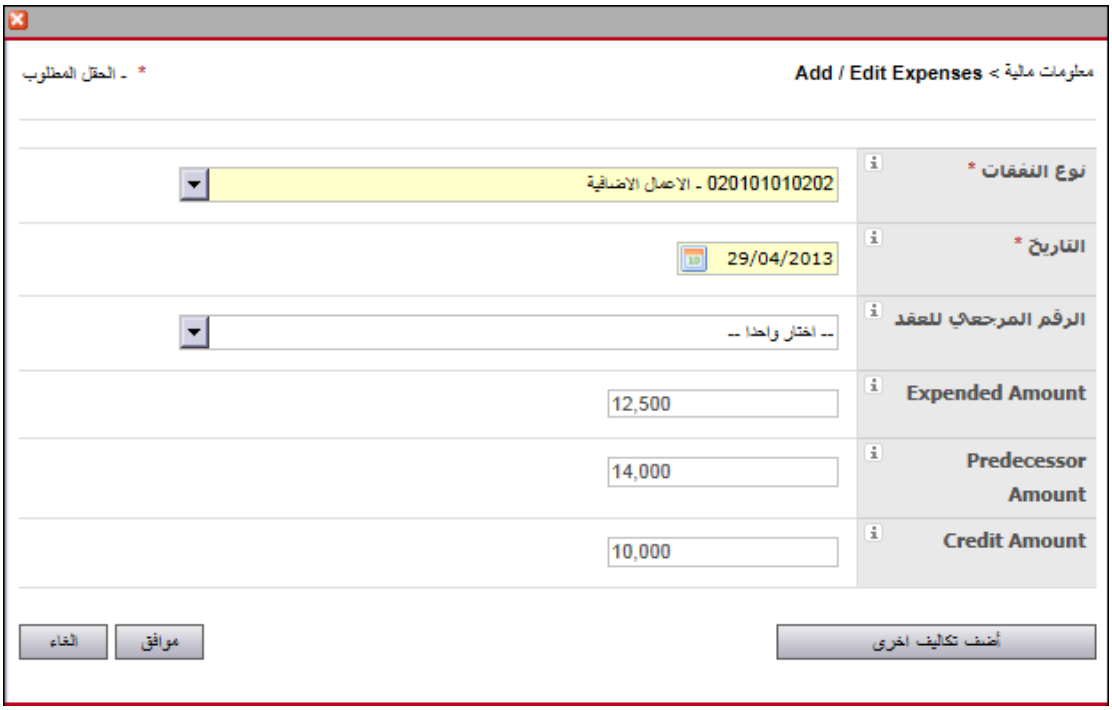

Figure 17: Adding an Expense Record

4.3.2 Editing Expense Records

In order to edit an existing expense record, follow the steps below:

1. Click the record that needs to be modified. You will be directed to the *Add/Edit Expenses* sub-section where the details of the selected record will be displayed.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button to save the changes made and return to the FINANCIAL INFORMATION section.

4.3.3 Removing Expense Records

In order to remove an existing expense record, use the ✘ **(Remove from the list)** button to the left of the selected record.

5. PROCUREMENT

In the *Procurement* (Figure 18) section, you can provide procurement related information on the project. This includes the procurement plans and contracts details.

Note: This section is available for ongoing and approved projects only.

All amounts in the *Procurement* section can be viewed either in IDQ (Iraqi Dinar) or USD (US Dollar). To switch between these options, select the appropriate value from the **All amounts are displayed in:** drop-down list at the top of the screen.

Note: For all total amount fields in this section, you may see the amount converted to IDQ or USD by hovering the mouse cursor on the corresponding amount. If IDQ amount is displayed, the tooltip will show the USD equivalent; and vice versa, if USD amount is displayed, the tooltip will show the IDQ equivalent.

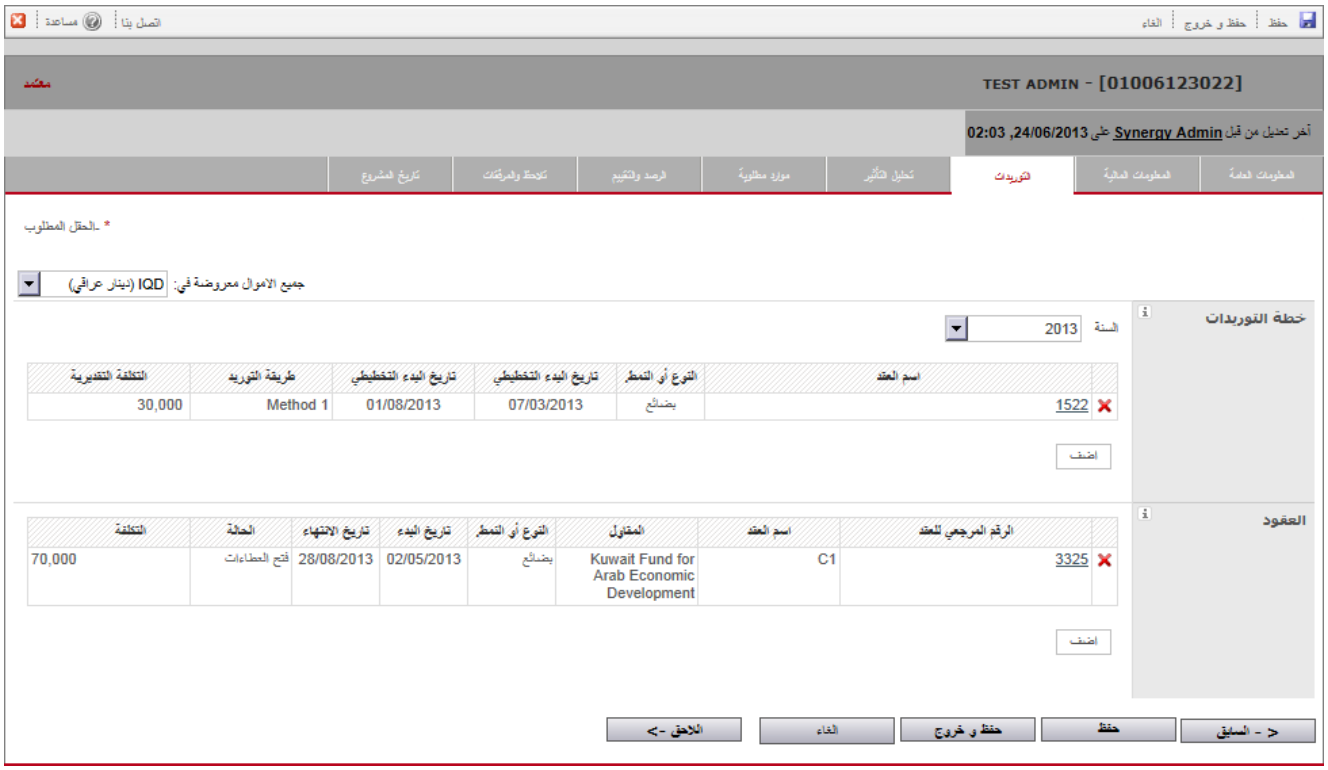

Figure 18: Procurement Section

For more details on how to provide the information requested in the *Procurement* section, refer to the table below:

Field Name	Instructions
Procurement Plan	Indicate here the detailed procurements plans for each selected year of the project activity. You should first select the **Year** to display the procurement plans for. For more details, see Managing Procurement *Plan*.

Contracts	Define here any project procurement related contracts for each selected year of the project activity. You should first select the **Year** in the *Procurement Plan* section to display the procurement contracts for. For more details, see Managing Contracts.

5.1 Managing Procurement Plan

This chapter outlines how to add, edit and remove procurement plan records.

5.1.1 Adding a Procurement Plan Record

In order to add a new procurement record, follow the steps below:

1. Click the **Add** button in the *Procurement Plan* section. You will be directed to the *Add/Edit Procurement Plan* sub-section (Figure 19).

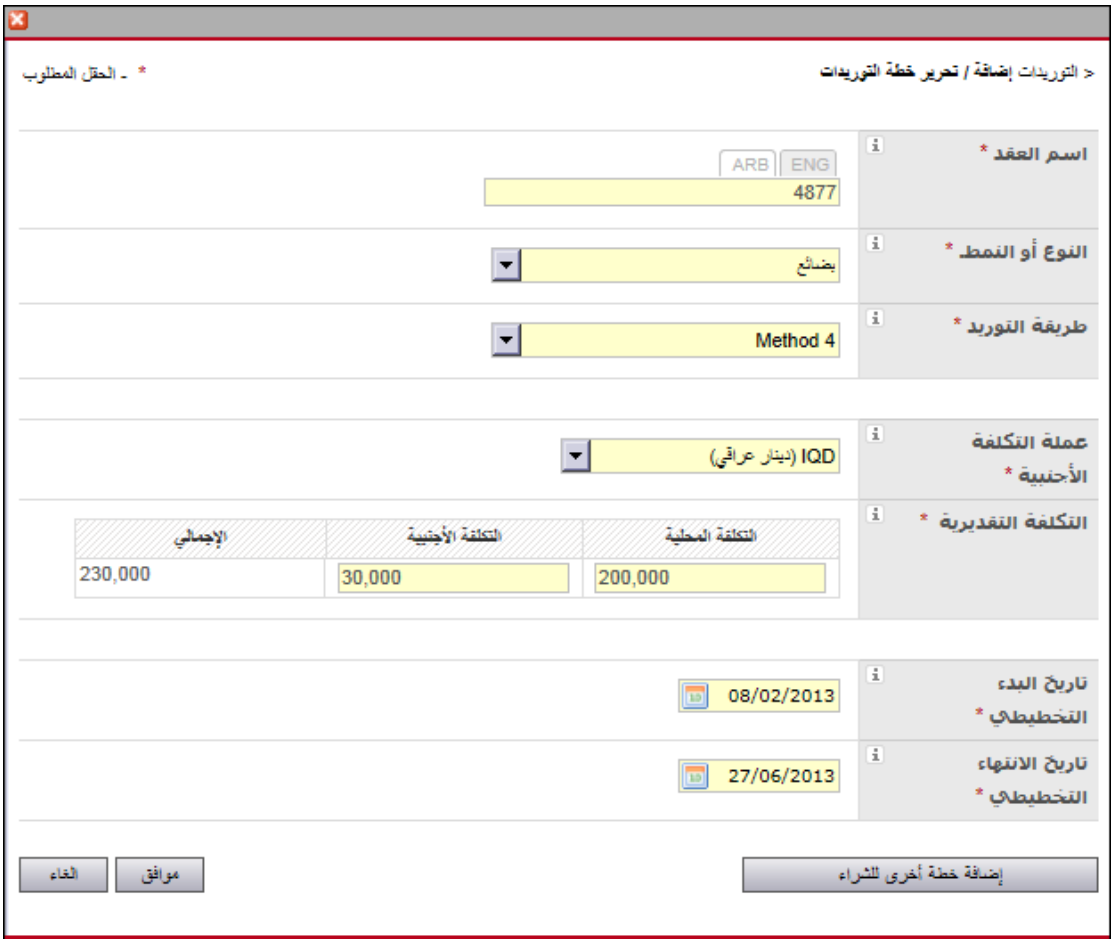

Figure 19: Adding a Procurement Plan Record

2. Provide the following information:

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Contract Name	Indicate the **Contract Name** in the English and Arabic languages. *This field is mandatory.*
Type	Indicate the procurement **Type** by selecting the appropriate instance from the drop-down list. The following values are available: • Goods • Services • Works *This field is mandatory.*
Method of Procurement	Indicate the **Method of Procurement** by selecting the appropriate instance from the drop-down list. *This field is mandatory.*
Foreign Cost Currency	Indicate the **Foreign Cost Currency** by selecting the appropriate instance from the drop-down list. *This field is mandatory.* **Note:** Once the appropriate currency is selected, the default exchange rate per 1 USD is provided in accordance with the project start date. However, you can change it, if this is necessary. The exchange rate is used when converting the amounts into USD.
Estimated Cost	In the **Local Cost** field, provide the procurement expenses made in the local currency. In the **Foreign Cost** field, provide expenses made in the foreign currency. The **Total** cost will automatically be calculated. *This field is mandatory.*
Planned Start Date	Indicate the procurement **Planned Start Date**. A calendar popup is available for this input, see Figure 3: Calendar. *This field is mandatory.*
Planned End Date	Indicate the procurement **Planned End Date**. A calendar popup is available for this input, see Figure 3: Calendar. *This field is mandatory.*

3. Click the **OK** button to confirm the information input. Or, click **Cancel** to terminate the operation.

In order to add another procurement plan record click the **Add Another Procurement Plan** button and provide the information requested as described in the paragraphs above.

5.1.2 Editing Procurement Plan Records

In order to edit an existing procurement plan record, follow the steps below:

1. Click the record that needs to be modified. You will be directed to the *Add/Edit Procurement Plan* sub-section.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button to save the changes made. Or, click **Cancel** to discard them.

5.1.3 Removing Procurement Plan Records

In order to remove an existing contract record, use the ✘ **(Remove from the list)** button to the left of the selected contract record.

5.2 Managing Contracts

This chapter outlines how to add, edit and remove project contracts.

5.2.1 Adding a Contract

In order to add a new contract record, follow the steps below:

1. Click the **Add** button in the *Contracts* section. You will be directed to the *Add Contract* sub-section (Figure 20).

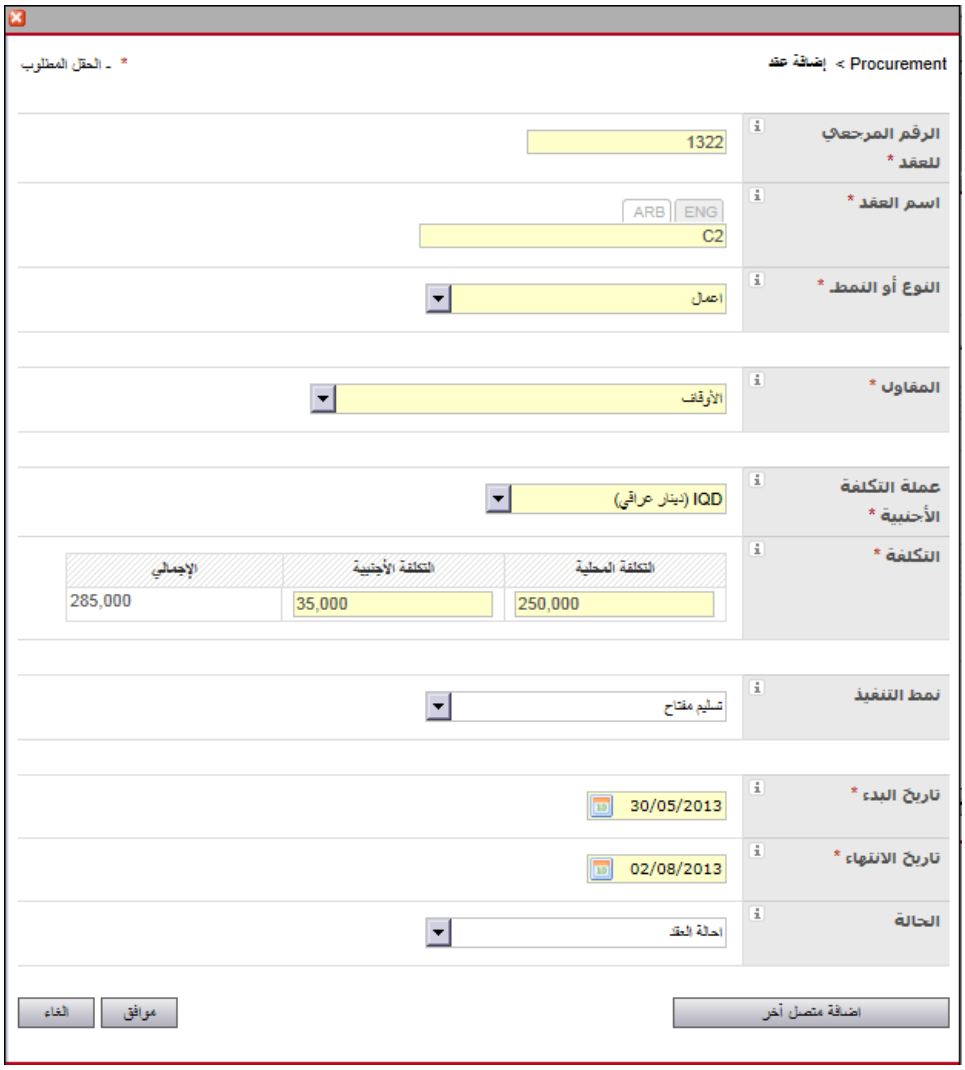

Figure 20: Adding a Contract Record

2. Provide the following information:

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Contract Ref. #	Indicate the **Contract Reference number**. *This field is mandatory.*
Contract Name	Indicate the **Contract Name** in the English and Arabic languages. *This field is mandatory.*
Type	Indicate the contract **Type** by selecting the appropriate instance from the drop-down list. The following values are available: • Goods • Services • Works *This field is mandatory.*
Contractor	Indicate the **Contractor** agency responsible for the procurement. *This field is mandatory.*
Foreign Cost Currency	Indicate the currency in which the *Foreign Cost* below will be defined. *This field is mandatory.* **Note:** Once the appropriate currency is selected, the default exchange rate per 1 USD is provided in accordance with the project start date. However, you can change it, if this is necessary. The exchange rate is used when converting the amounts into USD.
Cost	In the **Cost** field, provide the contract expenses made in the local currency and in the **Foreign Cost** field provide expenses made in the foreign currency. The **Total** cost will automatically be calculated. *This field is mandatory.*
Implementation Style	Indicate the type of the implementation. The following values are available: • Contract • Direct • Final hand-over • Secretariat
Start Date	Indicate the contract **Start Date**. A calendar popup is available for this input, see Figure 3: Calendar. *This field is mandatory.*
End Date	Indicate the contract **End Date**. A calendar popup is available for this input, see Figure 3: Calendar. *This field is mandatory.*
Status	Indicate the contract status by selecting the appropriate instance from the drop-down list.

3. Click the **OK** button to confirm the information input. Or, click **Cancel** to terminate the operation.

In order to add another contract record click the **Add Another Contract** button and provide the information requested as described in the paragraphs above.

5.2.2 Editing Contract Records

In order to edit an existing contract record, follow the steps below:

1. Click the record that needs to be modified. You will be directed to the *Add Contract* sub-section.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button to save the changes made. Or, click **Cancel** to discard them.

5.2.3 Removing Contract Records

In order to remove an existing contract record, use the ✘ **(Remove from the list)** button to the left of the selected contract record.

6. IMPACT ANALYSIS

In the *Impact Analysis* section (Figure 21), you can provide information on the competitive advantages, environmental impacts, social indicators and expected quantitative indicators of the project.

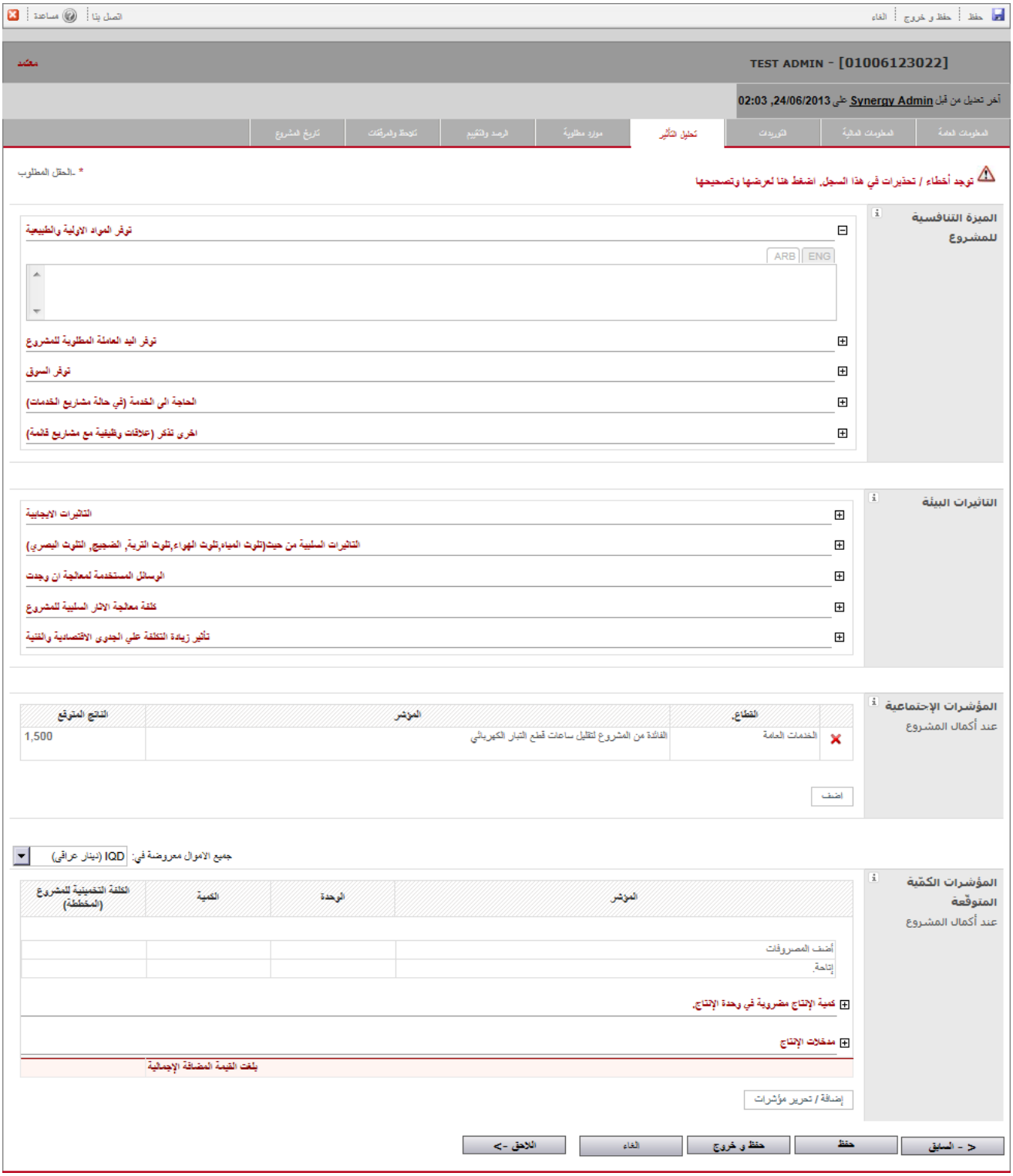

Figure 21: Impact Analysis Section

For more details on how to provide the information requested in the *Impact Analysis* section, refer to the table below.

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Competitive Advantage	Provide information about the competitive advantages of the project. In order to do so, provide information about the availability of natural resources and raw materials, man-power, market needs, service needs (for service projects only) in the English and Arabic languages. **Note:** At least one field should be provided.
Environmental Impacts	Provide information about project environmental impacts. In order to do so, provide information about the positive and negative environmental effects, means used to address negative effects, if such exist, their cost, and the effect of this cost on economic and technical feasibility in the English and Arabic languages. **Note:** At least one field should be provided.
Social Indicators *at completion of project*	At completion of the project, provide information about social indicators for the project. For more details, see Managing Social Indicators.
Expected Quantitative Indicators *at completion of project*	At completion of the project, provide information about the expected quantitative indicators. For more details, see Managing Expected Quantitative Indicators.

6.1 Managing Social Indicators

This chapter outlines how to add, edit and remove social indicators.

6.1.1 Adding a Social Indicator Record

In order to add a new indicator record, follow the steps below:

1. Click the **Add** button at the bottom of the field. A new record will appear (Figure 22).

Figure 22: Adding a Social Indicator Record

2. Select the **Sector** and **Indicator** from the respective drop-down lists.

Please note that selection of Social Indicators is carried out in a Step-by-Step way. Once the appropriate sector is selected, the list of all indicators pertaining to the selected sector becomes available in the *Indicator* field.

3. Specify the **Expected Output** for the Indicator selected.
4. Click the ✓ **(OK)** button to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to terminate the operation.

6.1.2 Editing Social Indicator Records

In order to edit an existing indicator record, follow the steps below:

1. Click the record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click the ✓ **(OK)** button to save the changes made. Or, click ⊘ **(Cancel)** to discard them.

6.1.3 Removing Social Indicator Records

In order to remove an existing indicator record, use the ✕ **(Remove from the list)** button to the left of the selected record.

6.2 Managing Expected Quantitative Indicators

This chapter outlines how to add, edit and remove expected quantitative indicators.

6.2.1 Adding an Expected Quantitative Indicator Record

In order to add a new quantitative indicator record, follow the steps below:

1. Click the **Add/Edit Indicators** button at the bottom of the field. You will be directed to *Add/Edit Expected Quantitative Indicator* sub-section (Figure 23).
2. Provide the following information:

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Currency	Specify the **Currency** the indicator is expressed in by selecting the appropriate instance from the drop-down list. *This field is mandatory.* **Note:** Once the appropriate currency is selected, the default exchange rate per 1 USD is provided in accordance with the project start date. However, you can change it, if this is necessary. The exchange rate is used when converting the amounts into USD.
Design Capacity	Provide information about the **Design Capacity** by filling in the **Unit**, **Quantity** and **Value** fields.
Availability	Provide information on the **Availability** of the requested **Unit**, **Quantity** and **Value**.

Production Quantity by Production Unit	Provide **Production Quantity by Production Unit**. For more details, see Managing Production Quantity.
Production Inputs	Provide **Production Inputs** details. For more details, see Managing Production Inputs.

3. Click the **OK** button to confirm the information input. Or, click **Cancel** to terminate the operation.

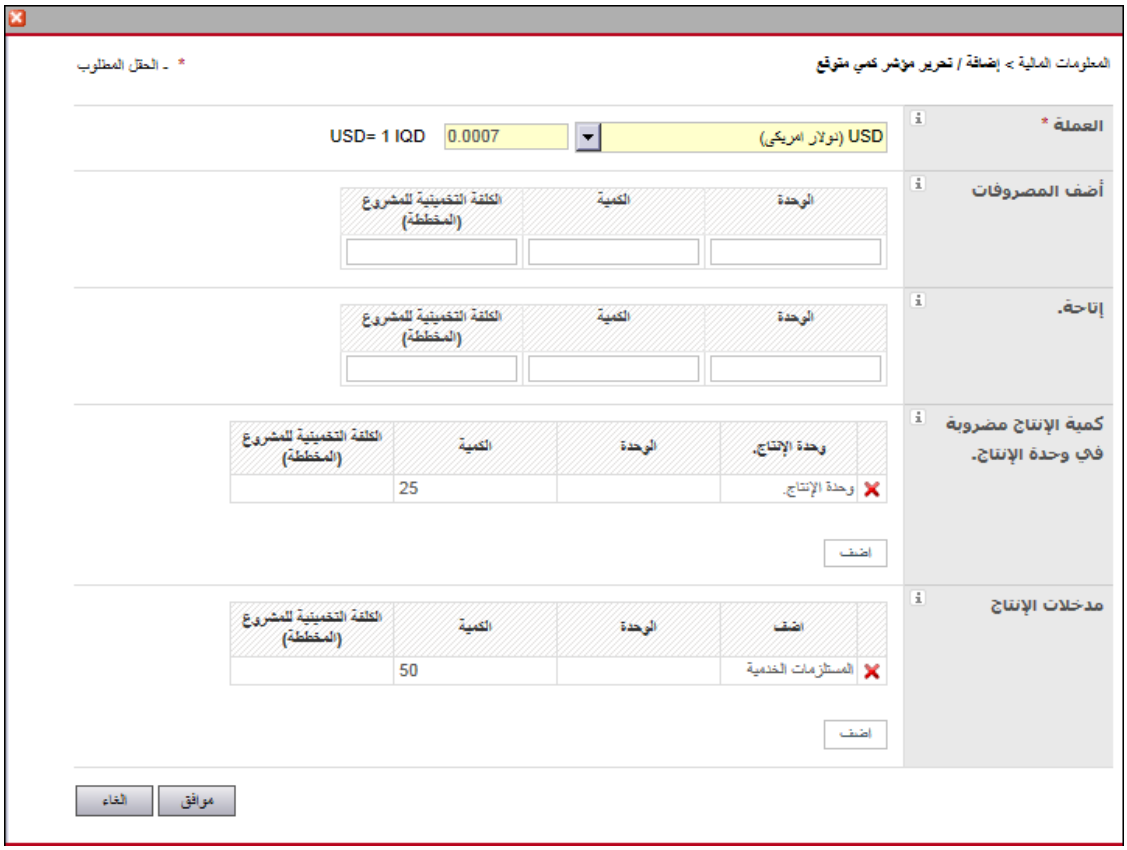

Figure 23: Adding an Expected Quantitative Indicator Record

6.2.2 Editing Quantitative Indicator Records

In order to edit an existing indicator record, follow the steps below:

1. Click the **Add/Edit Indicators** button at the bottom of the field. You will be directed to *Add/Edit Expected Quantitative Indicator* sub-section.
2. Make the necessary changes in the data displayed.
3. Click the **OK** button to save the changes made. Or, click **Cancel** to discard them.

6.2.3 Removing Quantitative Indicator Records

In order to remove an existing indicator record, use the ✖ **(Remove from the list)** button to the left of the selected record.

6.3 Managing Production Quantity

This chapter outlines how to add, edit and remove the production quantity records.

6.3.1 Adding a Production Quantity Record

In order to add a production quantity record, follow the steps below:

1. Click the **Add** button at the bottom of the field. A new record will appear (Figure 24).

Figure 24: Adding a New Production Quantity Record

2. Enter the **Production Unit** name in the English and Arabic languages.
3. Specify the **Unit**, **Quantity** and **Value**.
4. Click the ✓ **(OK)** button to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to terminate the operation.

6.3.2 Editing Production Quantity Records

In order to edit an existing production quantity record, follow the steps below:

1. Click the record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click the ✓ **(OK)** button to save the changes made. Or, click ⊘ **(Cancel)** to discard them.

6.3.3 Removing Production Quantity Records

In order to remove an existing production quantity record, use the ✕ **(Remove from the list)** button to the left of the selected record.

6.4 Managing Production Inputs

This chapter outlines how to add, edit and remove the production input records.

6.4.1 Adding a Production Input Record

In order to add a production input record, follow the steps below:

1. Click the **Add** button at the bottom of the field. A new record will appear (Figure 25).\

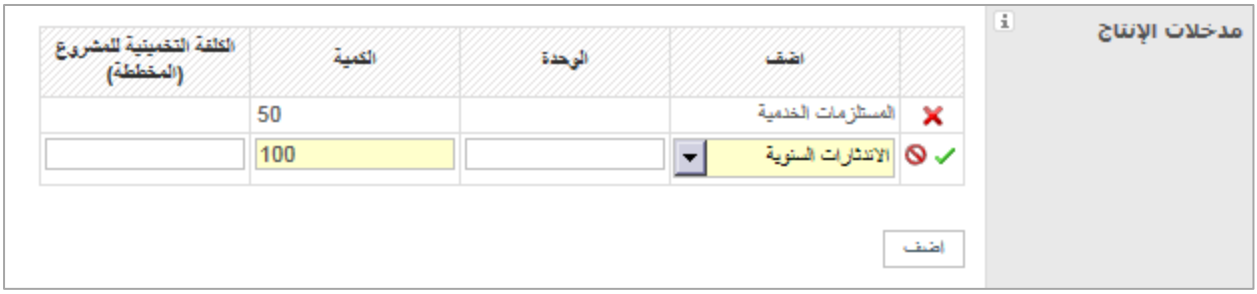

Figure 25: Adding a New Production Input Record

2. Select the **Input** from the respective drop-down list.
3. Specify the **Unit, Quantity** and **Value** for the selected input.
4. Click the ✓ **(OK)** button to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to terminate the operation.

6.4.2 Editing Production Input Records

In order to edit an existing production input record, follow the steps below:

1. Click the record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click the ✓ **(OK)** button to save the changes made. Or, click ⊘ **(Cancel)** to discard them.

6.4.3 Removing Production Input Records

In order to remove an existing production input record, use the ✕ **(Remove from the list)** button to the left of the selected record.

7. REQUIRED RESOURCES

In the *Required Resources* section (Figure 26), you can provide information about construction materials, as well as man-power and energy resources required during the project implementation.

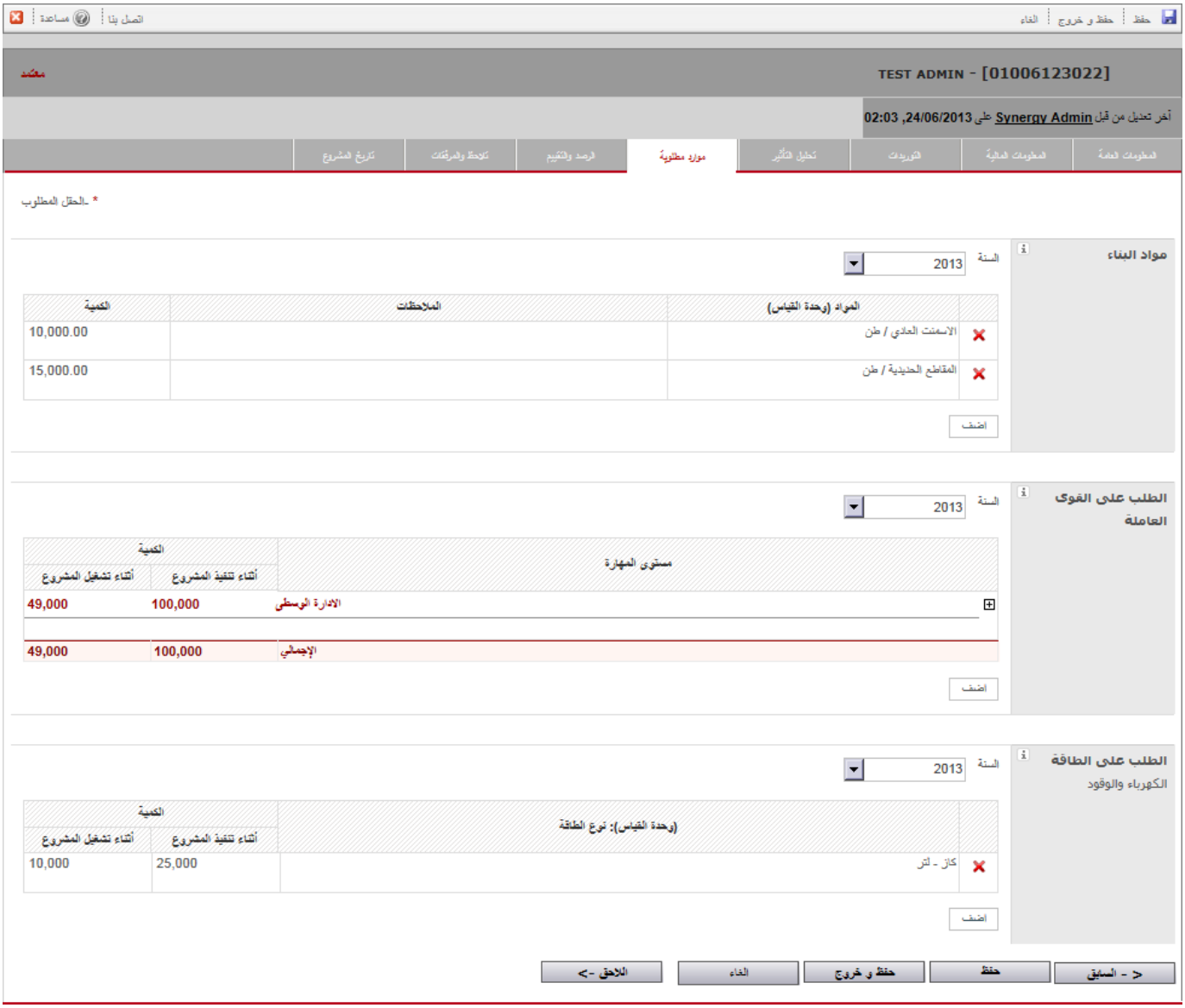

Figure 26: Required Resources Section

For more details on how to provide the information requested in the *Required Resources* section, refer to the table below.

Field Name	Instructions
Construction Materials	Provide information about the required **Construction Materials**. For more details, see Managing Construction Materials.
Man-power Resources	Provide detailed information about the **Man-power Resources**. For more details, see Managing Man-power Resources.

Energy Resources *Electricity and Fuel*	Provide detailed information about the **Energy Resources**. For more details, see Managing Energy Resources.

7.1 Managing Construction Materials

This chapter outlines how to add, edit and remove construction material records.

7.1.1 Adding a Material Record

In order to add a new material record for the project, follow the steps below:

1. Click the **Add** button at the bottom of the field. A new record will appear (Figure 27).

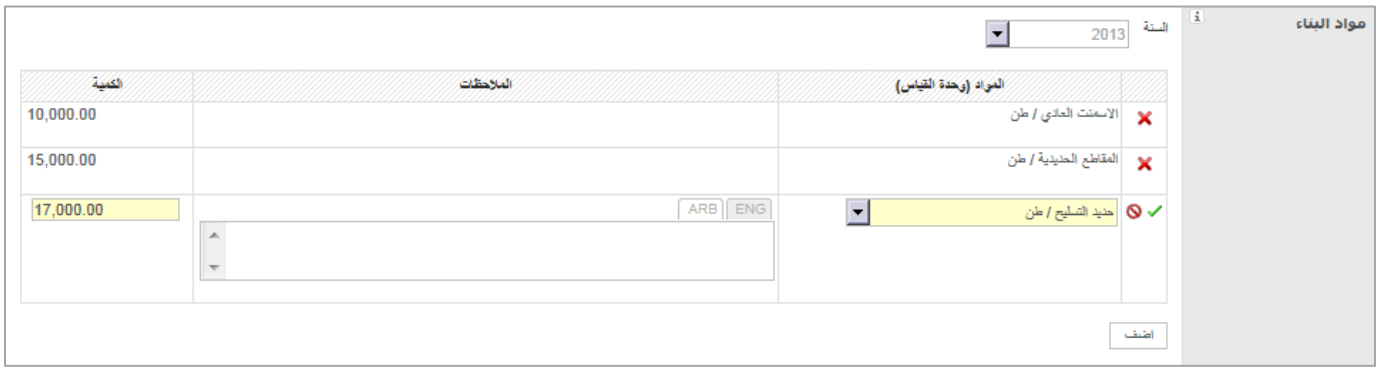

Figure 27: Adding a Constructive Materials Record

2. Select the **Material (unit of measure)** from the respective drop-down list.
3. Add **Notes** in the English and Arabic languages.
4. Specify the **Quantity** of the selected material.
5. Click the ✓ **(OK)** button to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to terminate the operation.

7.1.2 Editing Material Records

In order to edit an existing material record, follow the steps below:

1. Click the record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click the ✓ **(OK)** button to save the changes made. Or, click ⊘ **(Cancel)** to discard them.

7.1.3 Removing Material Records

In order to remove an existing material record, use the ✕ **(Remove from the list)** button to the left of the selected record.

7.2 Managing Man-power Resources

This chapter outlines how to add, edit and remove man-power resources.

7.2.1 Adding a Man-power Resource Record

In order to add a new man-power resource record, follow the steps below:

1. Click the **Add** button at the bottom of the field. You will be directed to the *Man-power Resources* sub-section (Figure 28).

Figure 28: Adding a Man-power Resource Record

2. Specify the **Skill Level** of the man-power resource by selecting it from the respective drop-down lists. *This field is mandatory*.
3. Specify the man-power resources **Quantity** during the construction and during operation. *This field is mandatory*.
4. Click the **OK** button to confirm the information input. Or, click **Cancel** to terminate the operation.

In order to add another man-power resource record, click the **Add another Man-power Resource** button at the bottom of the page.

7.2.2 Editing Man-Power Resource Records

In order to edit an existing man-power resource record, follow the steps below:

1. Click the man-power resource record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button to save the changes made. Or, click **Cancel** to discard them.

7.2.3 Removing Man-Power Resource Records

In order to remove an existing man-power resource record, use the ✘ (**Remove from the list**) button to the left of the selected record.

7.3 Managing Energy Resources

This chapter outlines how to add, edit and remove energy resources.

7.3.1 Adding an Energy Resource Record

In order to add a new energy resource record for the project, follow the steps below:

1. Click the **Add** button at the bottom of the field. A new record will appear (Figure 29).

Figure 29: Adding an Energy Resource Record

2. Select the **Energy Type (unit of measure)** from the respective drop-down list.
3. Specify the **Quantity** of the selected energy resource during construction and operation.
4. Click the ✓ **(OK)** button to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to terminate the operation.

7.3.2 Editing Energy Resource Records

In order to edit an existing energy resource record, follow the steps below:

1. Click the energy resource record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click the ✓ **(OK)** button to save the changes made. Or, click ⊘ **(Cancel)** to discard them.

7.3.3 Removing Energy Resource Records

In order to remove an existing energy resource record, use the ✖ **(Remove from the list)** button to the left of the selected record.

8. MONITORING AND EVALUATION

In the *Monitoring & Evaluation* section (Figure 30), you should provide information on the target and overall progress of the project, the key performance indicators of the project, progress on the contracts, and factors that may be delaying the project implementation.

Note: This section is available for approved projects only.

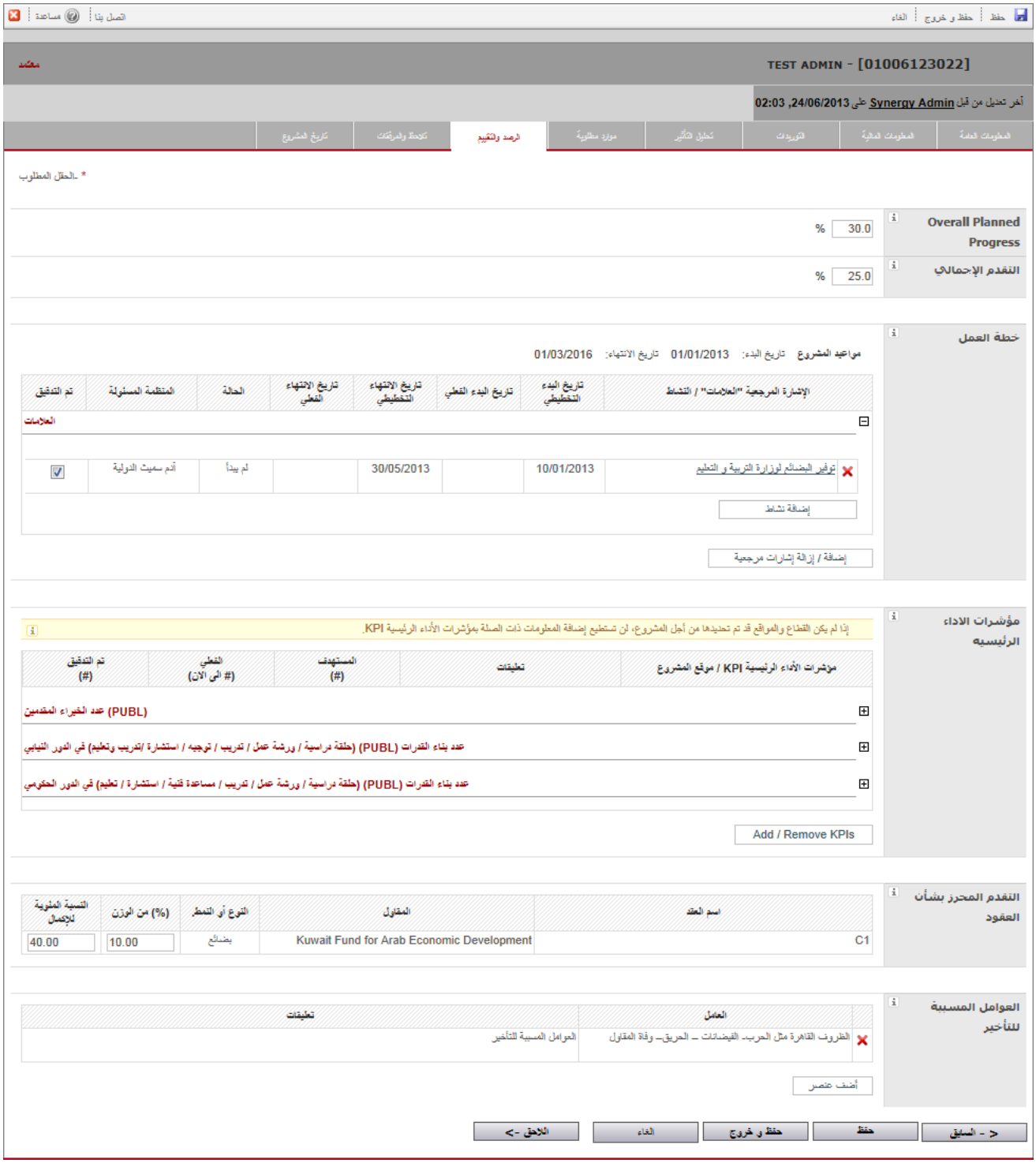

Figure 30: Monitoring & Evaluation Section

For more details on how to provide the information requested in the *Monitoring & Evaluation* section, refer to the table below.

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Overall Planned Progress	Enter percentage of the **Overall Planned Progress** made by the project as of the date.
Overall Progress	Enter percentage of the **Overall Progress Made** by the project as of the date.
Work Plan	Provide information about the project activities and benchmarks. For more details, see Managing Work Plan Records.
Key Performance Indicators	Provide information about the **Key Performance Indicators** used to evaluate and monitor the progress of the project. For more details, see Managing Key Performance Indicators.
Progress on Contracts	The information in this section is generated according to the procurement plan and contract records defined in the PROCUREMENT section. To update the contract progress information, indicate the *Weight (%)* and *Percent of Completion*.
Factors Causing Delays	Provide information about the **Factors Causing Delays** in the project implementation. For more details, see Managing Delay Factors.

8.1 Managing Work Plan Records

This chapter outlines how to manage benchmarks and assign activity(-ies) to each benchmark created.

8.1.1 Adding a Benchmark Record

In order to add a benchmark record, follow the steps below:

1. Click the **Add/Remove Benchmarks** button at the bottom of the field. You will be directed to *Add/Remove Benchmarks* sub-section (Figure 31).
2. Insert a name for the **Benchmark** in the English and Arabic languages. *This field is mandatory*.
3. Click the ✔ **(OK)** button to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to terminate the operation.
4. Click the **OK** button to confirm the information input and return to the MONITORING AND EVALUATION section. Or, click **Cancel** to terminate the operation.

Figure 31: Adding a Benchmark Record

8.1.2 Editing Benchmark Records

In order to edit an existing work plan record, follow the steps below:

1. Click the **Add/Remove Benchmarks** button at the bottom of the field. You will be directed to *Add/Remove Benchmarks* sub-section where all benchmarks added for the project will be listed.
2. Click the benchmark record that needs to be modified. This will activate the selected record.
3. Make the appropriate changes in the data displayed.
4. Click the ✓ **(OK)** button to the left of the record to save the changes made. Or, click ⊘ **(Cancel)** to discard them.
5. Click the **OK** button to return to the MONITORING AND EVALUATION section. Or, click **Cancel** to terminate the operation.

8.1.3 Removing Benchmark Records

In order to remove an existing benchmark record, follow the steps below:

1. Click the **Add/Remove Benchmarks** button at the bottom of the field. You will be directed to *Add/Remove Benchmarks* sub-section where all benchmarks added for the project will be listed.
2. Click the ✗ **(Remove from the list)** button to the left of the selected record.

8.2 Managing Activity Records

This chapter outlines how to add, edit and remove activity records.

8.2.1 Adding an Activity Record

In order to add an activity record, follow the steps below:

1. Expand the benchmark record that you want to add an activity to.
2. Click the **Add Activity** button at the bottom of the field. You will be directed to *Add/Edit Activity* sub-section (Figure 32).

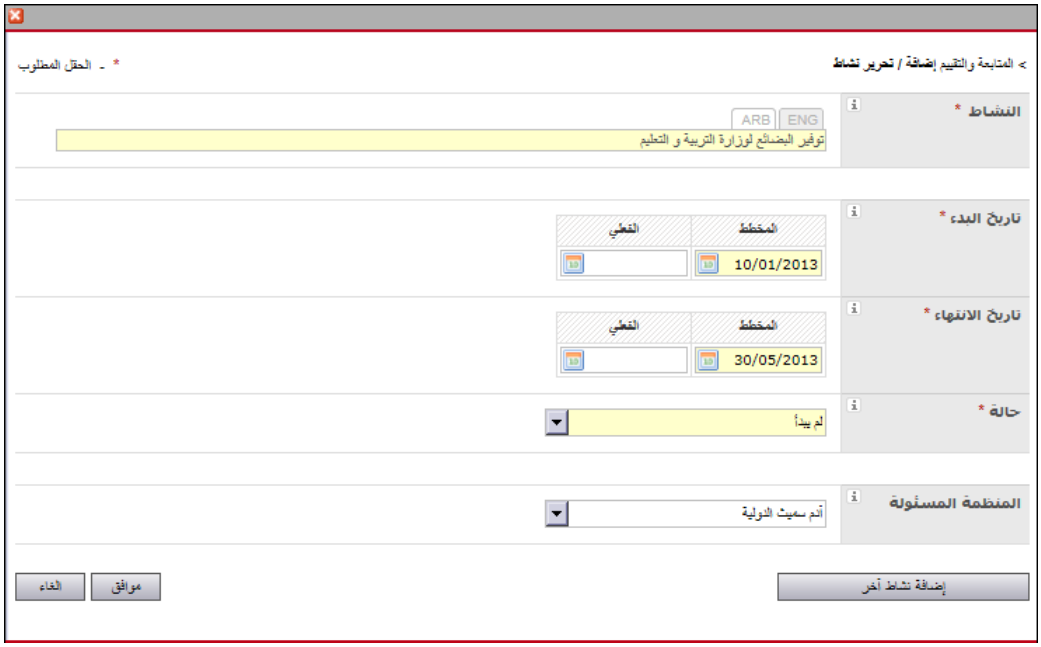

Figure 32: Adding an Activity Record

3. Provide the following information:

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Activity	Insert a name for the **Activity** in the English and Arabic languages. *This field is mandatory.*
Start Date	Indicate the activity **Start Date**. *This field is mandatory.* A calendar popup is available for this input, see Figure 3: Calendar.
End Date	Indicate the activity **End Date**. *This field is mandatory.* A calendar popup is available for this input, see Figure 3: Calendar.
Status	Indicate the activity **Status** by selecting the appropriate instance from the drop-down list. The following values are available: • Not Started • Ongoing • Completed • Delayed *This field is mandatory.*
Responsible Organisation	Indicate the organisation responsible for the activity from **Responsible Organisation** drop-down list.

4. Click the **OK** button to confirm the information input. Or, click **Cancel** to cancel the operation.

5. In the MONITORING AND EVALUATION section, select the **Verified** checkbox if the project manager approves all the data provided for the benchmark.

8.2.2 Editing Activity Records

In order to edit an existing work plan record, follow the steps below:

1. Click the activity record that needs to be modified. You will be directed to *Add/Edit Activity* sub-section.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button to save the changes made. Or, click **Cancel** to discard them.

8.2.3 Removing Activity Records

In order to remove an existing activity record, use the ✘ **(Remove from the list)** button to the left of the selected record.

8.3 Managing Key Performance Indicators

This chapter outlines how to add, edit and remove Key Performance Indicators (KPI).

8.3.1 Adding a KPI Record

In order to add a new KPI record, follow the steps below:

1. Click the **Add/Remove KPIs** button at the bottom of the field. You will be directed to the *Add / Remove KPIs* sub-section (Figure 33).

   Note: You must first add a sector and location for the project in the GENERAL INFORMATION section in order to be able to record relevant KPIs.

Figure 33: Selecting Key Performance Indicators for the Project

2. Search for the KPI to add to the project by entering the keyword in the search field and clicking the **GO** button. All the KPIs that match the search criteria will be displayed in the *Key Performance Indicator* table.
   Note: Selecting the appropriate instance from the *Sector* drop-down list in the GENERAL INFORMATION section will display only the KPIs that match the selection.
3. Specify the desired KPI(s) for the project by selecting the checkbox to the left of the respective KPI(s).
4. Click the **Add Selected** button. The selected KPI(s) will appear in the *Selected KPIs* table.
5. Click the **OK** button to confirm the information input and return to the MONITORING AND EVALUATION section, where the selected KPI(s) will appear in the respective field.

8.3.2 Providing KPI Progress Information

In order to provide the information requested, follow the steps below:

1. Expand the KPI record for which you want to provide the progress information.
2. Click the **Update KPI Progress** button at the bottom of the KPI record. You will be directed to the *Update KPI Progress* sub-section where the list of locations defined in the GENERAL INFORMATION section is displayed (Figure 34).

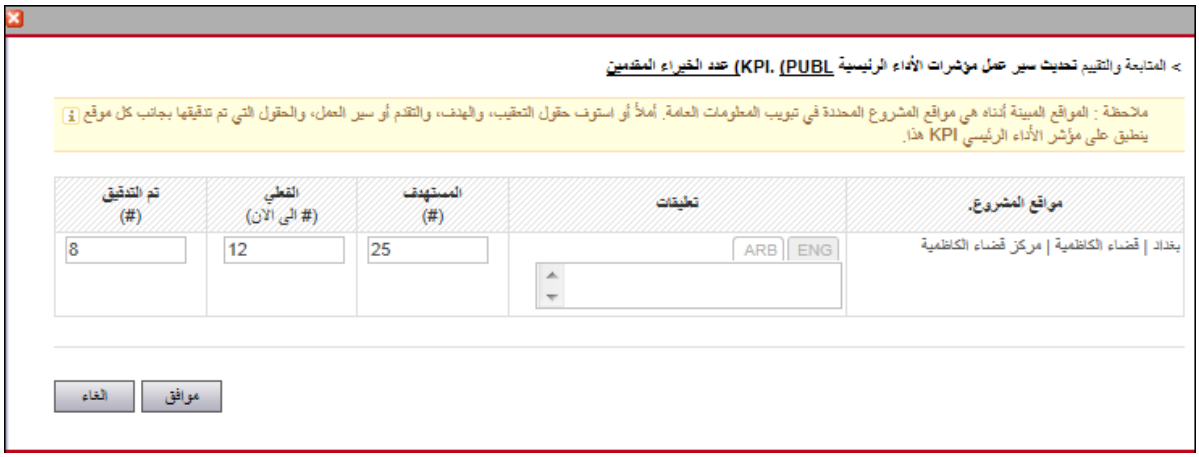

Figure 34: Updating KPI Progress Information

4. Provide additional information about the KPI in the **Comment** field.
5. Enter the total number of targets set by the project.
6. Indicate the number of targets reached as of the date.
7. Specify the number of targets that have been verified.
8. Click the **OK** button to save the information input and return to the MONITORING AND EVALUATION section. Or, click **Cancel** to terminate the operation.

8.3.3 Editing KPI Progress Information

In order to update project progress information, follow the steps below:

1. Expand the KPI record for which you want to edit the progress information.
2. Click the **Update KPI Progress** button at the bottom of the KPI record to modify information for. You will be directed to the *Update KPI Progress* sub-section where the information previously indicated for the KPI is displayed.
3. Make the necessary changes.

4. Click the **OK** button to save the changes made and return to the MONITORING AND EVALUATION section. Or, click **Cancel** to terminate the operation.

8.3.4 Removing KPI Progress Information

In order to remove a KPI progress record, follow the steps below:

1. Expand the KPI record for which you want to remove the progress information.
2. Click the ✖ **(Remove from the List)** button to the left of the selected record.

8.3.5 Removing KPI Records

In order to remove a KPI record, follow the steps below:

1. Click the **Add/Remove KPIs** button at the bottom of the field. You will be directed to the *Add / Remove KPIs* sub-section.
2. Click the ✖ **(Remove from the list)** button to the left of the selected record in the *Selected KPIs* table.

8.4 Managing Delay Factors

This chapter outlines how to add, edit and remove factors causing delays in the project schedule.

8.4.1 Adding a Delay Factor Record

In order to add a new delay factor record, follow the steps below:

1. Click the **Add Factor** button at the bottom of the field. A new record will appear (Figure 35).

Figure 35: Adding Factors Causing Delays

2. Select the appropriate instance from the **Factor** drop-down list.
3. Provide additional **Comments** if it is necessary in the appropriate field.
4. Click the ✓ **(OK)** button to the left of the respective row to confirm the information input. Or, click ⊘ **(Cancel)** to terminate the operation.

8.4.2 Editing Delay Factor Records

In order to edit an existing delay factor record, follow the steps below:

1. Click the delay factor record that needs to be modified. This will activate the selected record.
2. Make the necessary changes.
3. Click the ✓ **(OK)** button to save the changes made. Or, click ⊘ **(Cancel)** to discard them.

8.4.3 Removing Delay Factors

In order to remove an existing delay factor record, use the ✘ **(Remove from the list)** button to the left of the selected record.

9. NOTES AND ATTACHMENTS

In the *Notes & Attachments* section (Figure 36), you can enter additional notes and comments on the project as well as attach project documents such as proposals and reports.

Figure 36: Notes and Attachments Section

For more details on how to provide the information requested in the *Notes and Attachments* section, refer to the table below.

Field Name	Instructions
Notes / Comments	Provide any additional comments that are relevant to the given project in the English and Arabic languages.
Attach Document *(e.g. project document, monitoring reports, and other)*	Attach documents which may contain project-related information. For details on managing attachments, see Managing Attachments.

9.1 Managing Attachments

This chapter outlines how to add, view and remove project attachments.

9.1.1 Adding an Attachment

In order to attach a document, follow the steps below:

1. Click the **Add Attachment** button. You will be directed to the *Add Attachment* sub-section (Figure 37).

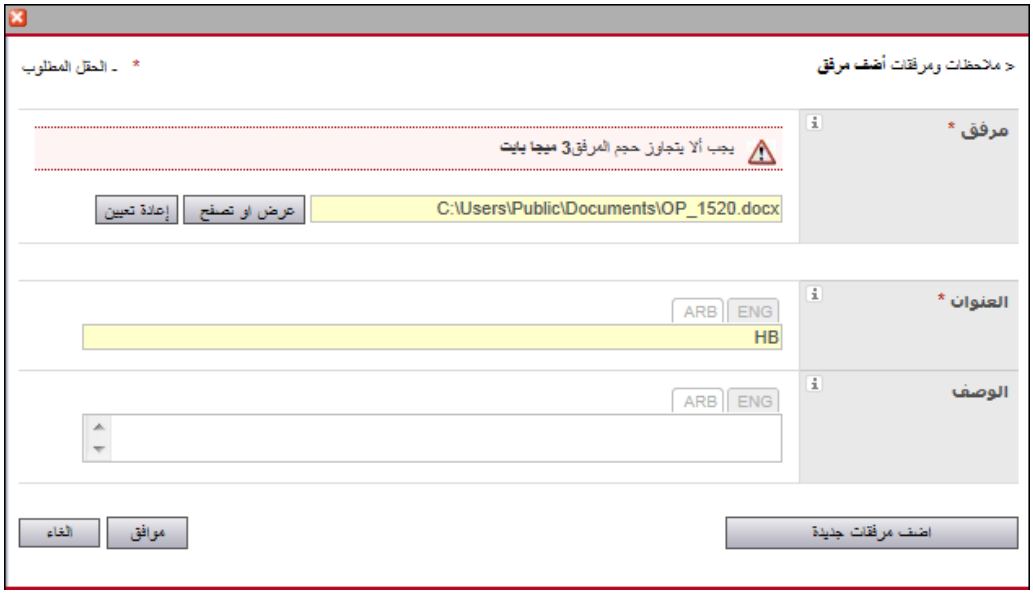

Figure 37: Adding an Attachment

2. Click the **Browse** button to locate the file that needs to be attached. The attachment size is limited to 3MB.
   Note: In order to remove a wrongly attached file, click the **Reset** button.
3. Enter the name for the document to be attached in the **Title** field in the English and Arabic languages. *This field is mandatory*.
4. Provide a brief **Description** for the document in the English and Arabic languages.
5. Click the **OK** button to attach the file. The attached file will appear in the respective table in the NOTES AND ATTACHMENTS section.

In order to attach another file, click the **Add Another Attachment** button and provide the information requested as described in the paragraphs above.

9.1.2 Viewing Attachments

Click the title of the corresponding attachment. The attached file will be displayed in your browser.

9.1.3 Removing Attachments

In order to remove an existing attachment, use the ✘ **(Remove from the list)** button to the left of the selected attachment.

10. PROJECT HISTORY

In the *Project History* section (Figure 38), you can view statistical data on access to the given project.

For more details on what information you can view in the *Project History* section, refer to the table below.

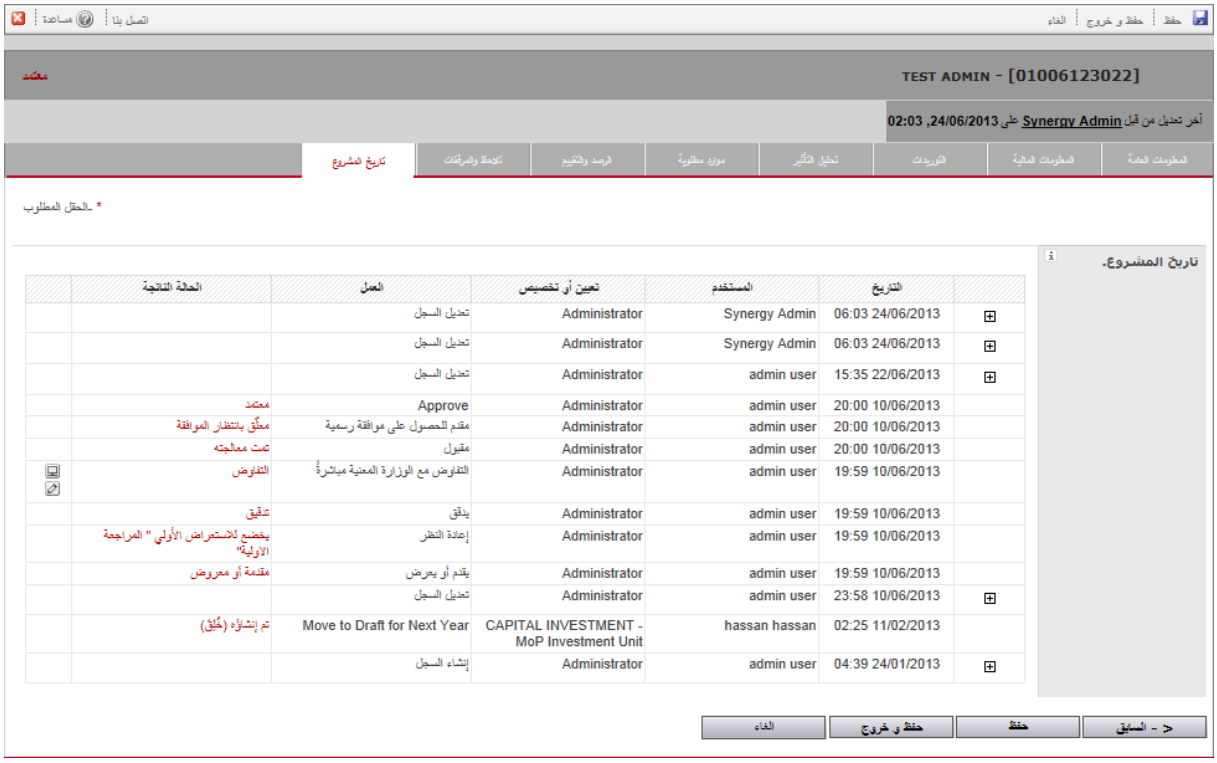

Figure 38: Project History Section

Field Name	Instructions
Project History	Provides information about the recent changes made to the corresponding project. Identifies the user who performed the changes and the date/time when the modifications were made.

11. PROJECT SUBMISSION

Depending on the user permissions, the *Project Form* provides specific actions to manage the request/project.

For details on the project revision cycle, see IDMS Analytics User Manual in REFERENCES.

Depending on the approval stage the project is in, and the permissions you have, the following actions may be available in the top toolbar of the *Project Form*:

1. **Review** – The MoP Sectoral Unit takes this action when they are ready to review the submitted project request. At this stage the project request status in My Workspace of IDMS Analytics (see REFERENCES) will be marked as **UNDER PRIMARY REVIEW**.
2. **Forward to Other Sectoral Unit for Review** - If a specialized review is necessary, the responsible MoP Sectoral Unit may take this action to forward the project request to another MoP Sectoral Unit for further advice. When taking this action, MoP Sectoral Unit should be selected in the **Forward to Other Sectoral Unit** form to forward the project request to (see Forwarding to Other Sectoral Unit). At this stage the project request status will be marked as **UNDER SPECIALIZED REVIEW**.
3. **Send Back to Primary Sectoral Unit** – The revising MoP Sectoral Unit sends back the project request to the Primary Sectoral Unit when the revision is made. Additional comments may be provided when taking this action (see Managing Revision Comments). At this stage the project request status in My Workspace will be marked as **UNDER PRIMARY REVIEW**.
4. **Verify** – Once the revision is done, this action verifies the project request internally within the MoP Sectoral Unit before it is gone for a negotiation with the relevant Line Ministry. Additional comments may be provided when taking this action (see Managing Revision Comments). At this stage the project request status in My Workspace will be marked as **VERIFICATION**.
5. **Negotiate with Line Ministry** – This action sends the project to the negotiation with the relevant Line Ministry. Additional comments may be provided when taking this action (see Managing Revision Comments). At this stage the project request status in My Workspace will be marked as **NEGOTIATION**.
6. **Accept** – This action is used to accept the project in case it was fully revised and agreed with the MoP Sectoral Unit. At this stage the project request status in My Workspace (see REFERENCES) will be marked as **PROCESSED**, if there are enough funds for the project (as defined in the Budget Ceilings for the corresponding Executing Body, see IDMS Analytics User Manual in REFERENCES), and will be marked as **REQUIRING FUNDING** if no enough funds are available for the project.

   Note: If the **Project Code** for the project was not defined by the Executing Body (see GENERAL INFORMATION), when taking the **Accept** action, the project code is required to be provided in the opened form (see Providing Project Code).

7. **Reject** – This action rejects the project request. Additional comments may be provided when taking this action (see Managing Revision Comments). At this stage the project request status in My Workspace will be marked as **REJECTED**.

8. **Request Revisions** – When during negotiation additional information is required, this action is used to send the project request back for an additional revision to the MoP Sectoral Unit. Additional comments may be provided when taking this action (see Managing Revision Comments). At this stage the project request status in My Workspace will be marked as **UNDERGOING REVISIONS**.

9. **Check for Funding** – This action is available when the funds requested in the project are more than those dedicated to the corresponding Executing Body. With this action, the project will be sent to the revision of the requested funds. At this stage the project request status in My Workspace will be marked as **REQUIRING FUNDING**.

10. **Create Draft for the Current Year** – This action is available when the project is in the **ABANDONED** or **REJECTED** state and is used to create a new draft project with all the data of the corresponding project for the current year.

    Note: This action is not available if the project already exists in the current year.

11. **Create Draft for the Next Year** - This action is available when the project is in the **ABANDONED** or **REJECTED** state and is used to create a new draft project with all the data of the corresponding project for the next year.

    Note: This action is not available if the project already exists in the next year.

12. **Move to Draft for the Next Year -** This action is available when the project is in the **CREATED** state and additionally, for emergency funding requests only, in the **EMERGENCY FUNDING REJECTED** state. This action is used by Executing Body for moving the funding request to the next year. The funding request will appear in the *My Draft Funding Requests* list for the next year and will disappear from the same list for the current year.

13. **Abandon** – This action is used in case the project needs to be abandoned due to other allocation adjustments made at any stage by either the Council of Ministers or the Parliament. For such a scenario, the system will send an email notification to the user submitting the request notifying about the project request status. At this stage the project request status in My Workspace will be marked as **ABANDONED**.

14. **Process –** This action is available for abandoned projects and is used to process the project again. After taking this action, the funding availability will be checked for the project and if the funding is available, the project request status in My Workspace will be changed to **PROCESSED**, otherwise if no enough funds are allocated to the project, the status will be changed to **REQUIRING FUNDING**.

15. **Approve** – This action is used to approve the submitted projects in case it was fully approved in full by the Council of Ministers and the Parliament. For such a scenario, the system will send an email notification to the user submitting the request notifying about the approval. At this stage the project request status in My Workspace of IDMS Analytics (see REFERENCES) will be marked as **APPROVED**.

16. **Update Financial Progress** – This action appears for approved projects only and is used to update the project's financial progress, i.e. **Payments** and **Expenses** fields in the FINANCIAL INFORMATION section.
17. **Update Physical Progress** - This action appears for approved projects only and is used to update the project's physical progress data in the MONITORING AND EVALUATION section.
18. **Update Attachments** - This action appears for approved projects only and is used to update the project related attachments. When taking this action, it will be necessary to provide additional **Notes/Comments** about the project and **Attach Document**(s) in the Notes & Attachments form (see NOTES AND ATTACHMENTS).
19. **Stop** – This action is only available for approved projects and is used to stop the approved project. At this stage the project request status in My Workspace will be marked as **STOPPED**.
20. **Cancel** – This action is only available for approved projects and is used to cancel the approved project. At this stage the project request status in My Workspace will be marked as **CANCELLED**.
21. **Continue** – This action is only available for stopped and cancelled projects and is used to resume the stopped/cancelled projects. At this stage the project request status in My Workspace will be marked as **APPROVED**.
22. **Copy to Draft for the Next Year** – This action will copy the project to the next year. The project draft will appear in the *My Draft Funding Requests* list for the next year. Copied project will have the same project ID as the original project. However, all other details of the copied project will be individual.
23. **Request Reallocation** – This action appears to Executing Body or Assigned MoP Sectoral Unit users when the project is in the **APPROVED** state and to Executing Body user only when the project is in a **REALLOCATION REVISION REQUESTED** state. With this action, additional funding is requested for the project. Reallocation details should be provided in the *Reallocation Request Form* (see Submitting Reallocation Request). At this stage the project request status in My Workspace will be marked as **REALLOCATION REQUESTED**.

    Note: At this stage, the project from which the reallocation was requested will also change its status to **REALLOCATION REQUESTED**.
24. **Verify** (during reallocation) - This action appears to the MoP Sectoral Unit users when the project is in the **REALLOCATION REQUESTED** state. With this action, the *Reallocation Request Form* (see Submitting Reallocation Request) will appear in the read-only mode.
    - If all the reallocation data is checked to be correct, then the MoP Sectoral Unit user verifies the reallocation request by choosing the **Verified** action from the *Process* list in the right upper side of the *Reallocation Request Form*. At this stage the project request status in My Workspace will be marked as **REALLOCATION VERIFIED**.
    - If the data in the reallocation request is missing or incorrect, then the MoP Sectoral Unit user may send back the reallocation request by choosing the **Request Reallocation Revision** from the *Process* list. This will result in changing the project request status to **REALLOCATION REVISION REQUESTED**. Additional comments may be provided when taking this action (see Managing Revision Comments).

25. **Review** (during reallocation) - This action appears to the MoP Investment Unit users when the project is in the **REALLOCATION VERIFIED** state and is used to approve the reallocation revision. With this action, the *Reallocation Request Form* (see Submitting Reallocation Request) will appear in the read-only mode.
    - The MoP Investment Unit may approve the reallocation by choosing the **Approve Reallocation** action from the *Process* list in the right upper side of the *Reallocation Request Form*. If enough funds are available for reallocation, then at this stage the project request status in My Workspace will be marked as **REALLOCATION APPROVED**. However, if there are no enough funds the project will appear in the **REALLOCATION REQUIRING FUNDING** state.
    - The MoP Investment Unit may approve the reallocation by choosing the **Reject Reallocation** action from the *Process* list. This will result in changing the project request status back to **APPROVED**.
26. **Adjust Reallocation** – This action appears to the Executing Body users when the project is in the **REALLOCATION APPROVED** state and is used to adjust reallocation funds. With this action, the *Adjust Reallocation Request Form* (see Adjusting Reallocation Request) will appear. After submitting this form, the project status will be changed back to **APPROVED** and the yearly allocation and breakdown amounts will be adjusted with the received reallocation funds. The reallocation history will be kept and accessible in the PROJECT HISTORY.

Additionally, for emergency projects only the following actions are available:

1. **Request Emergency Funding** – This action is available when the emergency funding request in the **REQUIRING EMERGENCY FUNDING** state enters reallocation phase. After providing reallocation details in the *Reallocation Request Form* (see Submitting Reallocation Request), this action will move the draft to the **EMERGENCY FUNDING REQUESTED** state.
2. **Verify** (for emergency funding requests) **-** This action appears to the MoP Sectoral Unit users when the emergency funding request is in the **EMERGENCY FUNDING REQUESTED** state. With this action, the *Reallocation Request Form* (see Submitting Reallocation Request) will appear in the read-only mode.
    - If all the emergency funding data is checked to be correct, then the MoP Sectoral Unit user verifies the emergency funding request by choosing the **Verified** action from the *Process* list in the right upper side of the *Reallocation Request Form*. At this stage the emergency funding request status in My Workspace will be marked as **EMERGENCY FUNDING VERIFIED**.
    - If the data in the emergency funding data is missing or incorrect, then the MoP Sectoral Unit user may send back the emergency funding request by choosing the **Request Revision** from the *Process* list. This will result in changing the project request status to **EMERGENCY FUNDING REVISION REQUESTED**. Additional comments may be provided when taking this action (see Managing Revision Comments).
3. **Review** (for emergency funding requests) **-** This action appears to the MoP Investment Unit users when the emergency funding request is in the **EMERGENCY FUNDING VERIFIED**

state and is used to approve the emergency funding. With this action, the *Reallocation Request Form* (see Submitting Reallocation Request) will appear in the read-only mode.

1. The MoP Investment Unit may approve the emergency funding by choosing the **Approve** action from the *Process* list in the right upper side of the *Reallocation Request Form*. At this stage the project request status in My Workspace will be marked as **EMERGENCY FUNDING APPROVED**.
2. The MoP Investment Unit may approve the reallocation by choosing the **Reject** action from the *Process* list. This will result in changing the project request status back to **EMERGENCY FUNDING REJECTED**.

11.1 Managing Revision Comments

This chapter outlines how to add, edit and remove comments made during the revision of the capital investment projects/requests. The *Comments Form* appears automatically when selecting the certain actions in the toolbar of the *Project Form* (see PROJECT SUBMISSION).

11.1.1 Adding a Comment

In order to add a project/request revision comment, follow the steps below:

1. Click the **Add Comment** button at the bottom of the *Comments* form. A new record will appear (Figure 39).

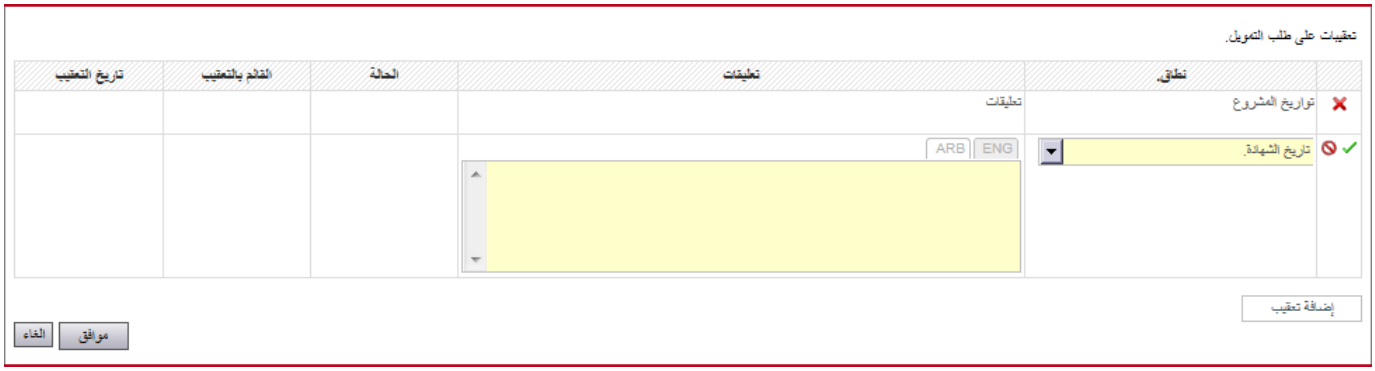

Figure 39: Adding Funding Request Comments

2. Select the field the revision was made on from the **Field** drop-down list. This list contains all fields available in the *Project Form*.
3. Provide **Comments** in the English and Arabic languages.
4. Click the ✓ **(OK)** button to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to terminate the operation.

11.1.2 Editing Comments

Note: Only comments made before submitting the *Comments* form can be edited. Once the revision comments are submitted, they cannot be edited again.

In order to edit an existing comment, follow the steps below:

1. Click the comment that needs to be modified. This will activate the selected record.
2. Make the necessary changes.
3. Click the ✓ **(OK)** button to save the changes made. Or, click ⊘ **(Cancel)** to discard them.

11.1.3 Removing Comments

Note: Only comments made before submitting the *Comments* form can be removed. Once the revision comments are submitted, they cannot be removed.

In order to remove an added comment, use the ✖ **(Remove from the list)** button to the left of the selected record.

11.2 Forwarding to Other Sectoral Unit

When the **Forward to Other Sectoral Unit for Review** action is taken in the *Project Form* (see PROJECT SUBMISSION), the **Forward to Other Sectoral Unit** form appears.

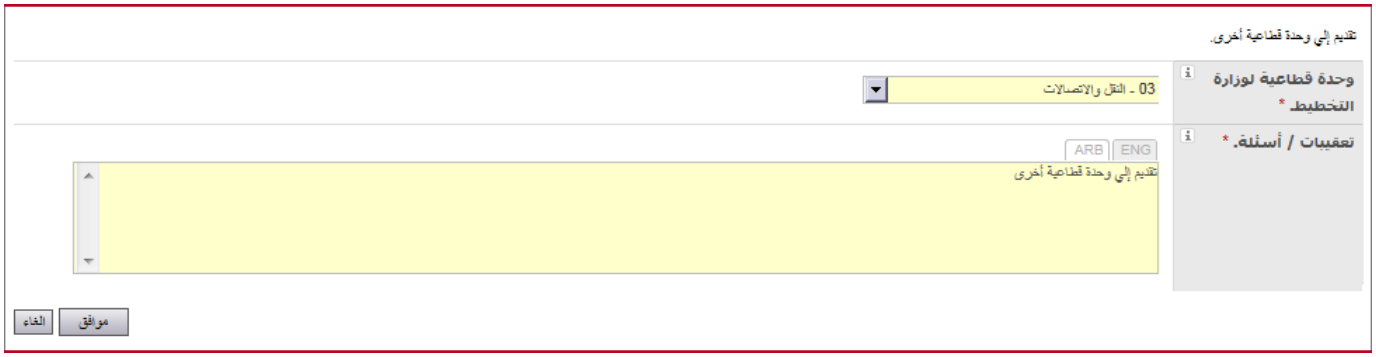

Figure 40: Forward to Other Sectoral Unit Form

1. Select a **MoP Sectoral Unit** to transfer the project to. *This field is mandatory.*
2. Provide any accompanying **Comments/Questions**. *This field is mandatory.*
3. Click the **OK** button to submit the form. Or, click **Cancel** to close this form without submitting.

11.3 Providing Project Code

The **Project Form** appears when **Accept** action is taken in the *Project Form* (see PROJECT SUBMISSION).

Figure 41: Project Code Form

1. Provide the unique identification number of the project in the **Project Code** field. *This field is mandatory.*

To make the project codes informative and easy-to-understand, the following principles are standing behind the code number generation:

- The *Project Code* field should consist of 11 digits.
- The system generates the project code automatically for the first five digits to determine the sector and activity.
- MoP user inputs the remaining six digits manually.

For example:

Project Code			
Sector	Activity	Sub-activity	Sequence
03	001	011	056

2. Click the **OK** button to submit the form. Or, click **Cancel** to close this form without submitting.

11.4 Submitting Reallocation Request

The **Reallocation Request Form** appears when **Request Reallocation** action is taken in the *Project Form* (see PROJECT SUBMISSION).

To submit a reallocation request, follow the steps below:

1. Expand the project for which the reallocation request should be submitted (Figure 42). If you have selected multiple projects to request a reallocation for, the *Reallocation Request Form* will list the data for all those projects.
2. In the *Yearly Allocation* section, define the revised amount for the project in the **Local Currency** and **Foreign Currency** fields. The revised amount represents additional funding required for the implementation of the project. Reallocation request is dedicated for obtaining those funds from other projects of the ministry current project is cared by.
   Note: For regular projects, the revised amount is pending revision of MoP Sectoral Unit and approval by MoP Investment Unit. For emergency funding requests, instead of revised amounts, requested amounts should be defined here.
3. Choose a **Reallocation Funding Type** which will describe the source of the funds where the reallocation is requested from. Following values are available:
   - **Grant** – reallocation requires funds from grant(s).
   - **Transfer** – reallocation requires funds from another project.
   - **Emergency Budget** – reallocation requires funds from ministry's emergency budget.
   - **Oil Revenue** – reallocation requires funds from oil revenue budget.
   - **Petro Dollar** – reallocation requires funds from petro dollar budget.
   - **Border Crossing** – reallocation requires funds from border crossing budget.

   Depending on the selected *Reallocation Funding Type*, different data is required in the *Request Reallocation Form*.
4. If *Grant* was selected as a reallocation funding type, grants from which reallocation funds are required should be defined. For details, see Managing Grants. At least one grant should be defined in this field.

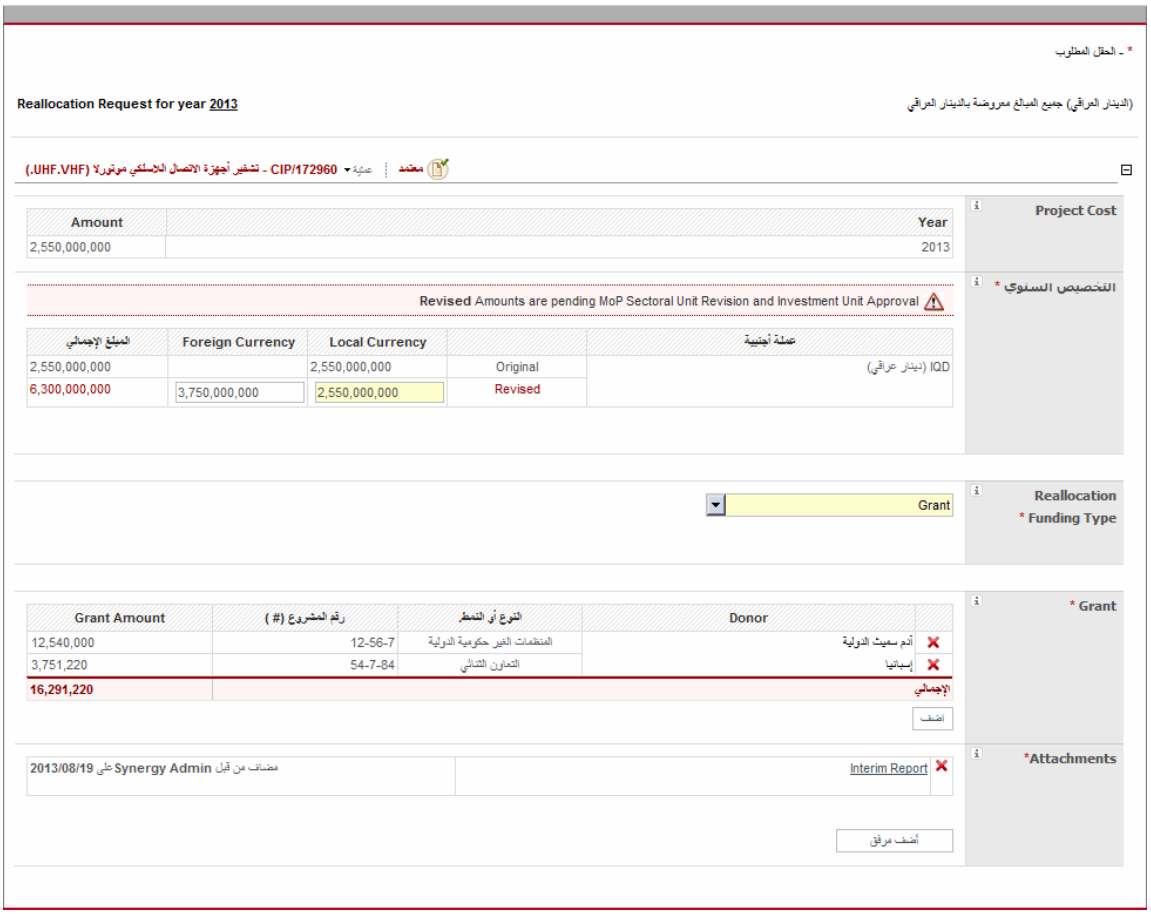

Figure 42: Reallocation Request Form

5. If *Transfer* was selected as a reallocation funding type, the following information should be provided:
   - **Breakdown by Type of Expense** – this field requires the breakdown of the transferred amount among the selected types of expense of the project. For details on adding the types of expenses and defining the breakdowns, see
   - Managing Expense Types. *This field is mandatory.*

     Note: For regular projects, revised amounts are pending revision of MoP Sectoral Unit and approval by MoP Investment Unit. For emergency funding requests, instead of revised amounts, requested amounts should be defined here.
   - **Transfer From** – this field requires sources from which the required amount is required to reallocate. For details on defining funding sources for reallocation, see Managing Transfer Sources. *This field is mandatory.*
   - **Transfer To** – in the details of the project that has provided funds to another project requested reallocation, this field shows the destination project to which selected funds were reallocated.
   - **Transfer Allocation** – this field indicates the breakdowns from which the funds should be transferred to the project that has requested reallocation. For details, see Managing Transfer Allocation. *This field is mandatory for emergency funding requests only.*
6. For all reallocation funding types except *Transfer*, documents verifying reallocation request may be attached in the **Attachments** section. For details on managing attachments, see Managing Attachments.

7. When all the required data is provided in the *Request Reallocation Form*, choose the **Request Reallocation** action from the *Process* list available in the right upper side of the form (Figure 43).

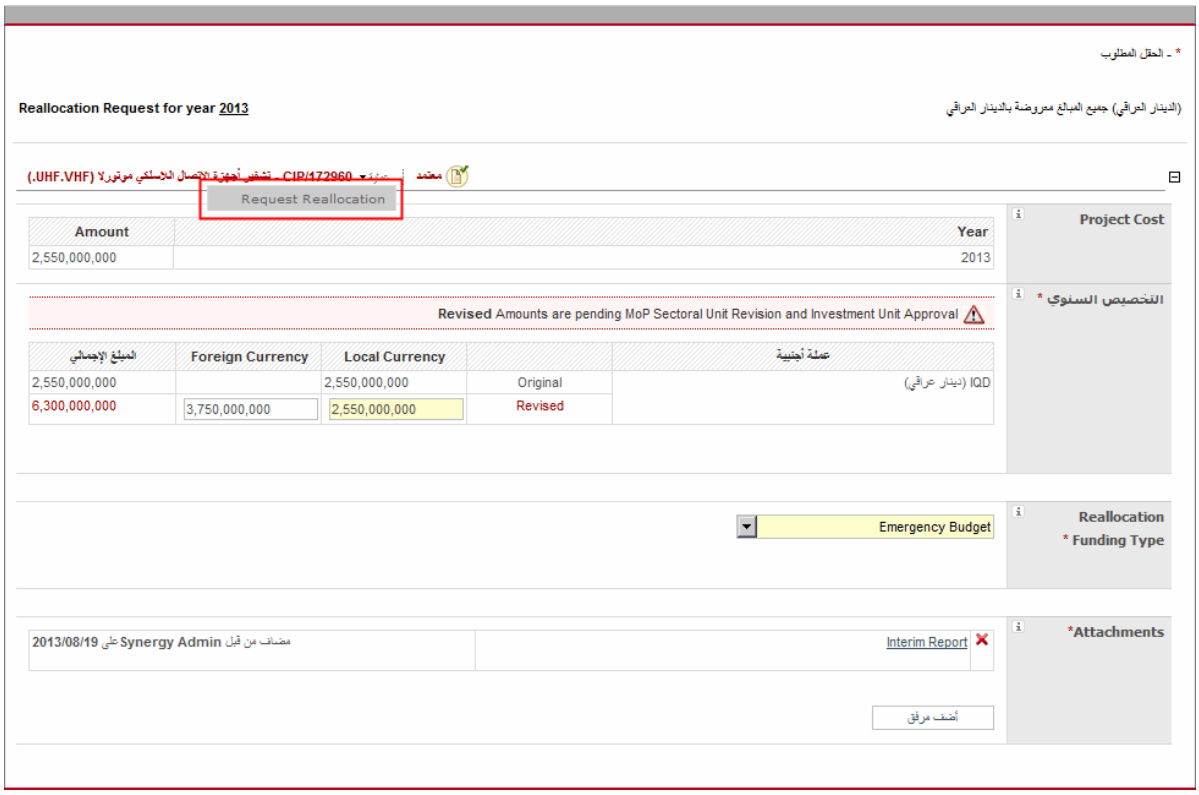

Figure 43: Request Reallocation Action in the Reallocation Request Form

11.5 Managing Grants

This chapter outlines how to add, edit and remove grants in the *Request Reallocation Form* which appears when an approved project is requesting reallocation (see PROJECT SUBMISSION).

11.5.1 Adding a Grant Record

In order to add a grant record, follow the steps below:

1. Click the **Add** button at the bottom of the *Grant* field. A new record will appear (Figure 44).

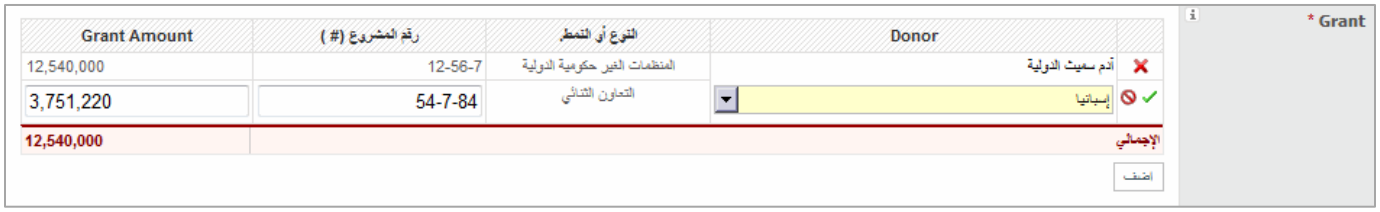

Figure 44: Add Grant Form

2. Choose a **Donor** provided the grant. *Donor Type* will be defined automatically once the record is submitted.
3. In the **Project Ref. #** indicate the project number according to which the grant was made.

4. Provide the **Grant Amount** to be requested for the reallocation.
5. Click the ✓ **(OK)** button to the left of the respective row to confirm the information input. Or, click ⊘ **(Cancel)** to terminate the operation.

11.5.2 Editing Grant Records

In order to edit an existing grant record, follow the steps below:

1. Click the grant record that needs to be modified. This will activate the selected record.
2. Make the necessary changes.
3. Click the ✓ **(OK)** button to save the changes made. Or, click ⊘ **(Cancel)** to discard them.

11.5.3 Removing Grant Records

In order to remove an added grant records, use the ✗ **(Remove from the list)** button to the left of the selected record.

11.6 Managing Transfer Sources

This chapter outlines how to add and remove sources for funds reallocation and define the transfer amount.

11.6.1 Adding a Transfer Source

In order to add a transfer source, follow the steps below:

1. Click the **Add** button at the bottom of the field (Figure 45). The *Add Project for Transfer* form will appear (Figure 46).

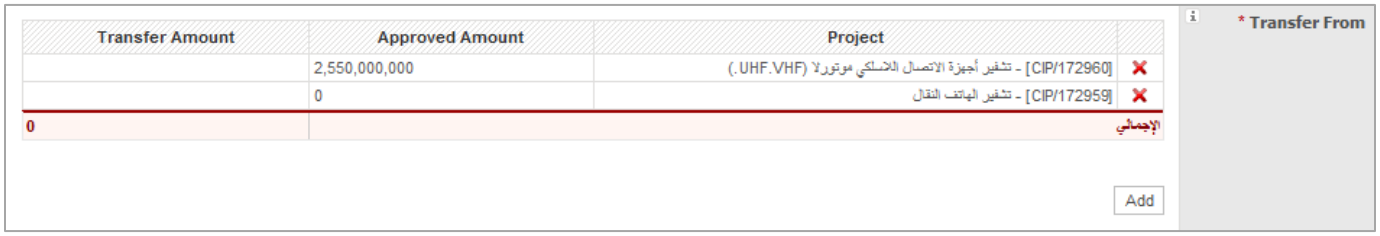

Figure 45: Transfer Sources Form

2. Locate the project to request the funds transfer from.
   Note: To make it easier to locate the appropriate project in the long list, the system has a search capability. To find the relevant **Project Title**, enter the **Project ID** or **Project Code** in the appropriate field and click the **GO** button. The list of all projects matching the criteria will be displayed in the *Projects* table.
3. Add the selected project(s) by ticking the check-box to the left of the appropriate record and clicking the **Add Selected** button. The selected project(s) will appear in the *Selected Project* table.
4. Click the **OK** button to return to the *Request Reallocation Form*, where the selected projects will appear in the respective field. Or, click **Cancel** to terminate the operation.

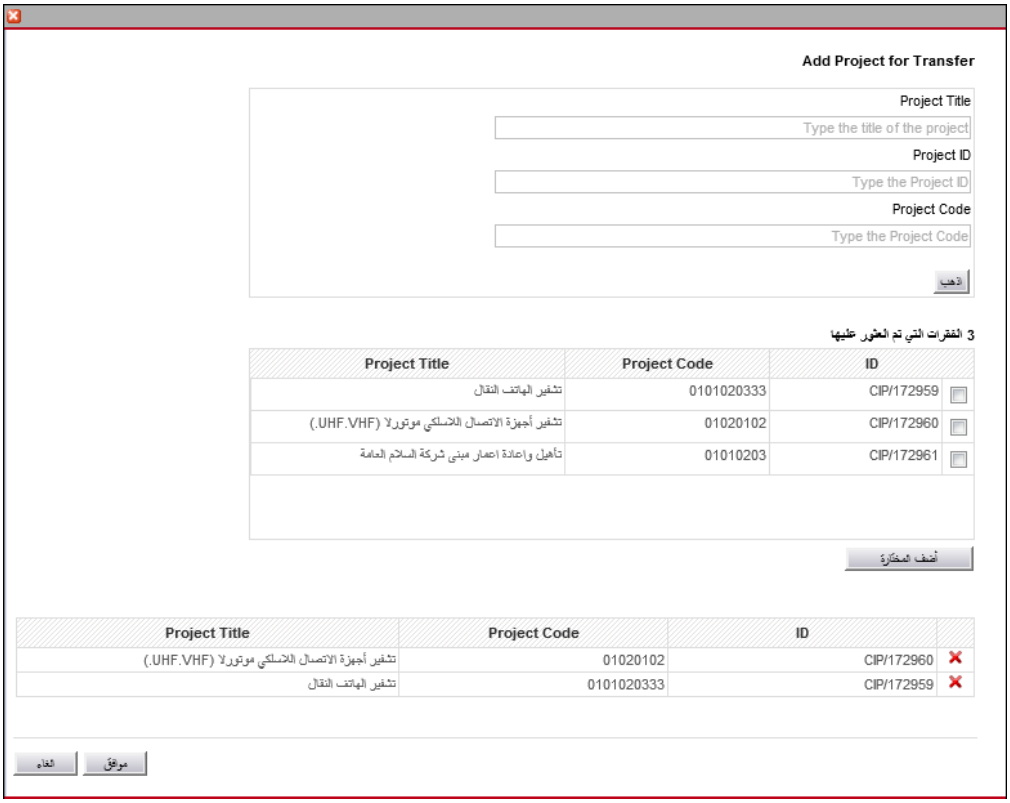

Figure 46: Add Project for Transfer Form

11.6.2 Defining Transfer Amount

To indicate the transfer amount for reallocation, follow the steps below:

1. In the *Request Reallocation Form*, press on the added project. This will activate the record.
2. Indicate the **Transfer Amount** requested from the selected project (Figure 45).
   Note: **Transfer Amount** cannot exceed the **Approved Amount** for the selected project.
3. Do the same for all other projects added in the *Transfer From* field, if any.
4. Click the ✓ **(OK)** button to the left of the respective row to confirm the information input. Or, click ⊘ **(Cancel)** to terminate the operation.

11.6.3 Removing Transfer Sources

In order to remove an added transfer source, use the ✘ **(Remove from the list)** button to the left of the selected project. The same operation can be done from the *Add Project for Transfer* form (see Adding a Transfer Source).

11.7 Managing Transfer Allocation

This chapter outlines how to add and remove sources for funds reallocation and define the transfer amount.

11.7.1 Adding a Transfer Allocation

In order to add a transfer source, follow the steps below:

1. Expand the type of expense listed in the *Transfer Allocation* field for which allocation should be made (Figure 47).
2. Click the **Add** button. The *Adding Transfer Allocation* form will appear (Figure 48).

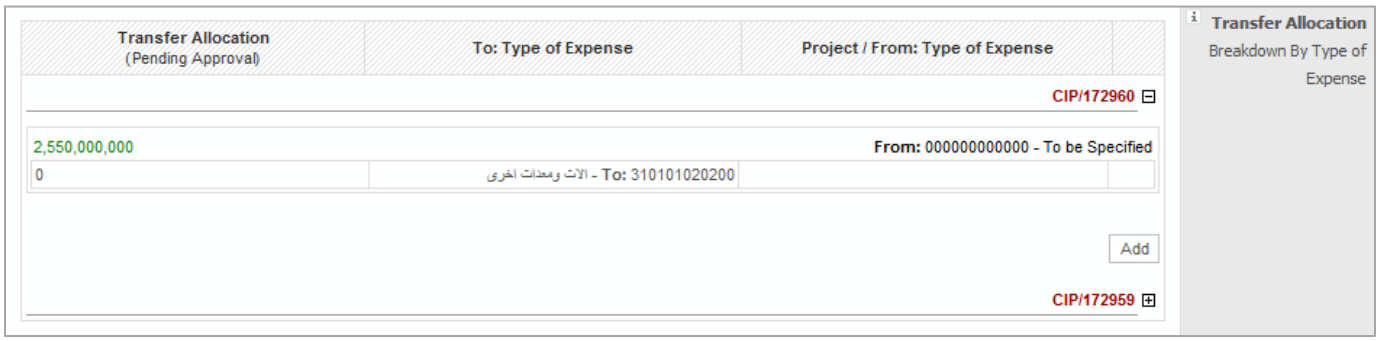

Figure 47: Transfer Allocation Form

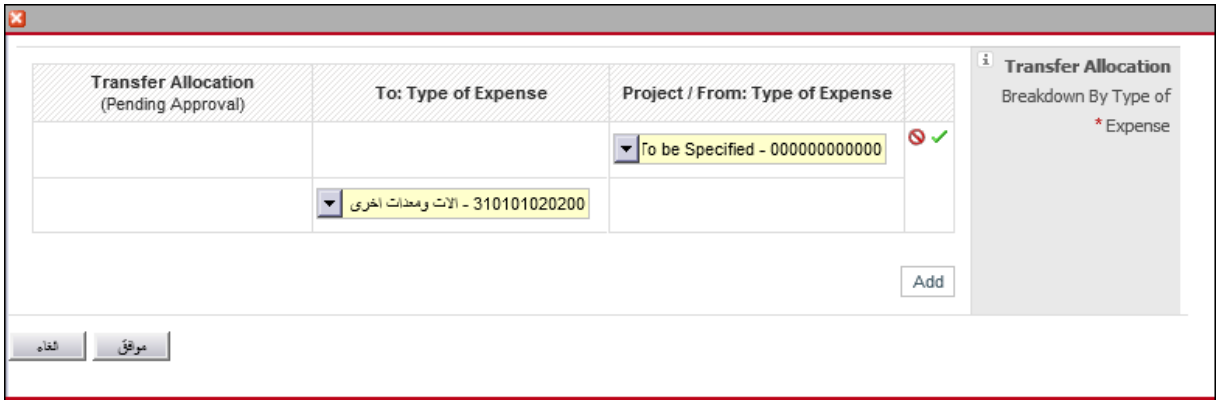

Figure 48: Add Transfer Allocation Form

3. Press **Add** button in the *Adding Transfer Allocation* form. A new record will appear.
4. In the **Project / From: Type of Expense**, choose a project/type of expense from which the funding should be transferred.
5. In the **To: Type of Expense**, choose the type of expense for the project requesting a reallocation the funding should be dedicated to.
6. Click the ✓ **(OK)** button to the left of the respective row to confirm the information input. Or, click ⊘ **(Cancel)** to terminate the operation. The **Transfer Allocation** column will automatically display the funds available for the selected type of expense of the source project, and the transfer amount required for the selected type of expense of the project which requested the reallocation, as defined in *Breakdown by Type of Expense* field (see Submitting Reallocation Request).
   Note: The allocation is pending approval by MoP Sectoral Unit user.
7. Click the **OK** button to return to the *Request Reallocation Form*, where the selected transfer allocation will appear in the respective field. Or, click **Cancel** to terminate the operation.

11.7.2 Removing Transfer Allocation

In order to remove a transfer allocation, follow the steps below:

1. Expand the type of expense listed in the *Transfer Allocation* field for which allocation should be made (Figure 47).

2. Click the **Add** button. The *Adding Transfer Allocation* form will appear (Figure 48).
3. Click the ✖ **(Remove from the list)** button to the left of the selected allocation.
4. Click the **OK** button to apply the changes made.

11.8 Adjusting Reallocation Request

The **Adjust Reallocation Form** (Figure 49) appears when **Adjust Reallocation** action is taken in the *Project Form* (see PROJECT SUBMISSION).

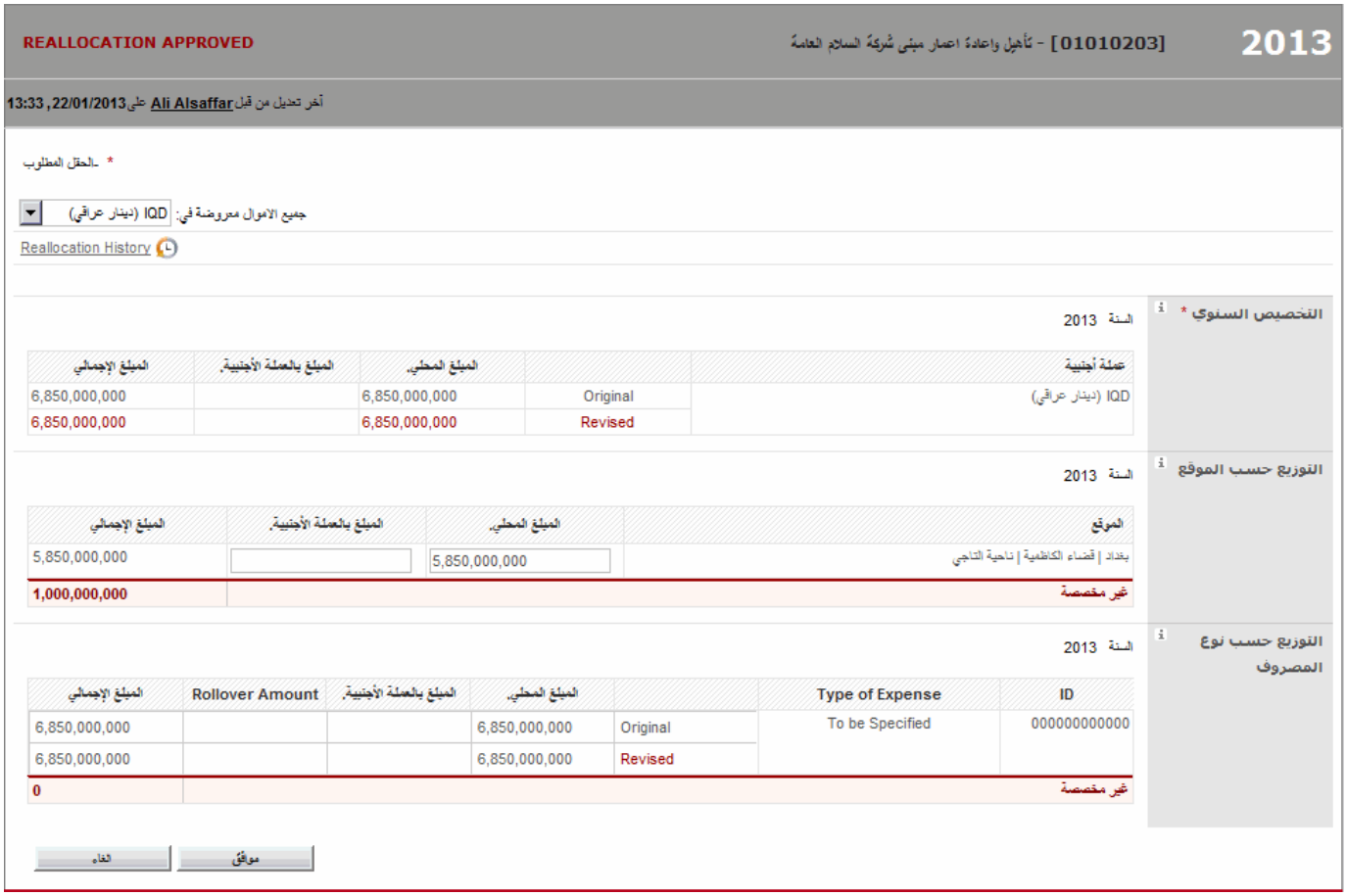

Figure 49: Adjust Reallocation Form

To adjust the reallocation request, follow the steps below:

1. Revise and, if necessary, provide new values of **Local Amount** and **Foreign Amount** in the *Breakdown by Location* field and **Local Amount**, **Foreign Amount** and **Rollover Amount** in the *Breakdown by Type of Expense* field.
   Note: The *Breakdown by Type of Expense* field is not editable for the transfer reallocation type.
2. When all the adjustments are done, click the **OK** button to process the reallocation request, or press **Cancel** to discard the changes. The status for the processed reallocation requests will be changed to **APPROVED** and the reallocation amount will be added to the existing amount. However, PROJECT HISTORY will show the history of the reallocation.

12. SAVING DATA

When you have finished with data input or modification you should save your changes before you leave the page. The following options for saving the data are available both at the top and bottom of the page:

- **Save** - to save the data entered and to remain on the opened page.
  Note: In forms and sub-forms, clicking the **OK** button saves the changes made and navigates you to the previous screen.
- **Save and Close** - to save the information input and leave the opened page.

If you wish to cancel your changes, use the **Cancel** button.

13. REFERENCES

Please refer to the following IDMS related document:

- IDMS External Assistance Projects Application User Manual
- IDMS Donor Profile Application User Manual
- IDMS NDP Indicators Application User Manual
- IDMS Analytics User Manual
- IDMS Administration Center User Manual

IRAQ DEVELOPMENT MANAGEMENT SYSTEM (IDMS)

DONOR PROFILE APPLICATION USER MANUAL

Version 1.3

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1. INTRODUCTION

This document describes the *Donor Profile* application of the *Iraq Development Management System (IDMS)*. It provides the necessary instructions that the user should follow during the data entry process. The document is addressed to those who will use the *IDMS* application to add or modify donor profile information.

2. OVERVIEW

The *Iraq Development Management System (IDMS)* is an automated information management system which is designed to improve efficiency and coordination of donor activities in Iraq. 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 aid data.

The main objective of *IDMS* is to serve as a reliable and credible source of information on overall donor contributions to Iraq's reconstruction, economic recovery and socio-economic development, as well as to support the Government in effectively managing development assistance and promoting the accountable and transparent use of resources.

In the current version of *IDMS*, the following applications are present:

- **External Assistance Projects**
- **Donor Profile**
- **Capital Investments Projects**
- **Iraq Development Projects**
- **NDP Indicators**

The *Donor Profile* application in *IDMS* is designed to track information on the donor organisations providing assistance to the country. Once you have accessed this application, you are able to view the donor profile details and create different types of analytical reports in the *List*, *Chart*, and *Report* modules. Moreover, the *Donor Profile* application contains a built-in on-line data entry subsystem, which is designed to allow entering the donor profile related data remotely via Internet.

This *Donor Profile* application provides a web-based user interface and requires a web browser (Internet Explorer) pre-installed.

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

3. DONOR PROFILE DATA ENTRY FORM

In the *Donor Profile* application (Figure 1), you can provide key information about a donor organisation that acts as an originator of funds for the project. The information to be provided includes the donor organisation / agency name, points of contact within the agency, donor's funding policy, the pledges, etc.

For more information on how to provide the information requested, refer to the table below:

Field Name	Instructions
Mission / Vision	Enter a brief description of the donor organisation / agency **Mission/Vision** statements.
Donor Contributions	Provide financial information on the **Donor Contributions**. For more details, see Managing Donor Contributions. Please note that all contribution in this field will be grouped according to the channels that the contributions are intended for. All amounts in the *Donor Contributions* field can be viewed either in USD (US Dollar) or IDQ (Iraqi Dinar). To switch between these options, select the appropriate value from the **All amounts are displayed in:** drop-down list above the field. **Note:** For all total amounts displayed in this field, you may see the amount converted to IDQ or USD by hovering the mouse cursor on the corresponding amount. If the IDQ amount is displayed, the tooltip will show the USD equivalent; and vice versa, if the USD amount is displayed, the tooltip will show the IDQ equivalent.
Pledges	Provide information about the funds pledged by the donor organisation. For more details, see Managing Pledges.
Offices	Provide information about the different **Offices** of the selected donor organisation / agency. For more details, see Managing Offices.
Contacts	Indicated the **Contacts** for the donor organisation / agency. They will be contacted with questions, suggestion, and/or comments. For more details, see Managing Contacts.
Funding Policy	Describe the **Funding Policy** adopted by the donor organisation / agency.
Source of Funds	Provide information about the **Source of Funds** for the donor organisation / agency.

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لقد وضعنا في البنك الدولي أهدافاً طموحة يمكن تحقيقها لتحفيز الجهود الدولية والوطنية لإنهاء الفقر المدقع على مستوى العالم خلال جيل واحد وتعزيز "الرخاء المشترك" من أجل تحقيق زيادة مستدامة في رفاهة القطاعات الأكثر فقراً من المجتمع.

جميع الاموال معروضة في: USD (دولار أمريكي)

مشاركات المانحين

القناة/ القطاع	السنة	نوع التمويل	التزام
		DGTTF	74,125,630
		Bilateral	532,200,000
		الإجمالي	606,325,630

إضافة مساهمة

تعهدات.

السنة / القطاع	الحدث	نوع التمويل	المبلغ
		2009	16,542,000
		الإجمالي	16,542,000

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		هل المكتب رئيسي؟
البنك الدولي H Street, NW 1818 Washington, DC 20433 USA (202) 473-1000 info@worldbank.org		◉

اضافة / تعديل الدوائر

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منى زياد البنك الدولي 900 987 1-961 + mziade@worldbank.org		◉

أضف/ عدل المتصل

سياسة التمويل

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مصدر الأموال.

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الغاء | حفظ و خروج | حفظ

Figure 1: Donor Profile Data Entry Form

3.1 Managing Donor Contributions

This chapter outlines how to add, edit and remove donor contribution records.

3.1.1 Adding a Contribution Record

In order to add a contribution record, follow the steps below:

1. Click the **Add Contribution** button at the bottom of the field. You will be directed to the *Add/Edit Contribution* sub-section (Figure 2).
2. Provide the information requested in the form.

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Year	Select the **Year** when the contribution is made from the drop-down list. *This field is mandatory*.
Channel	Indicate the **Channel** to which the contribution is made by selecting the appropriate instance from the drop-down list. *This field is mandatory*.
Sector	Specify the **Sector** of economy that the contribution supports. *This field is mandatory*. Please note that selection of a sector filters the list in the *Sub-Sector* field and displays only those instances that are related to the selected sector.
Sub-Sector	Indicate the **Sub-Sector** of economy that the contribution supports.
Currency	Select the **Currency** in which the contribution is made. *This field is mandatory*. If you have selected the currency different from USD, the default exchange rate per 1 USD is provided in the field. However, you can change it, if this is necessary. The exchange rate is used when converting the amounts into USD.
Amount	Enter the **Amount** contributed in the currency selected in the previous field. *This field is mandatory*.
Funding Type	Specify the **Funding Type** for the contribution. The following options are available: • Grant • Loan *This field is mandatory*.
Comments	Provide additional **Comments** both in the English and Arabic languages, if needed.

3. Click the **OK** button to confirm the information input. Or, click **Cancel** to terminate the operation.

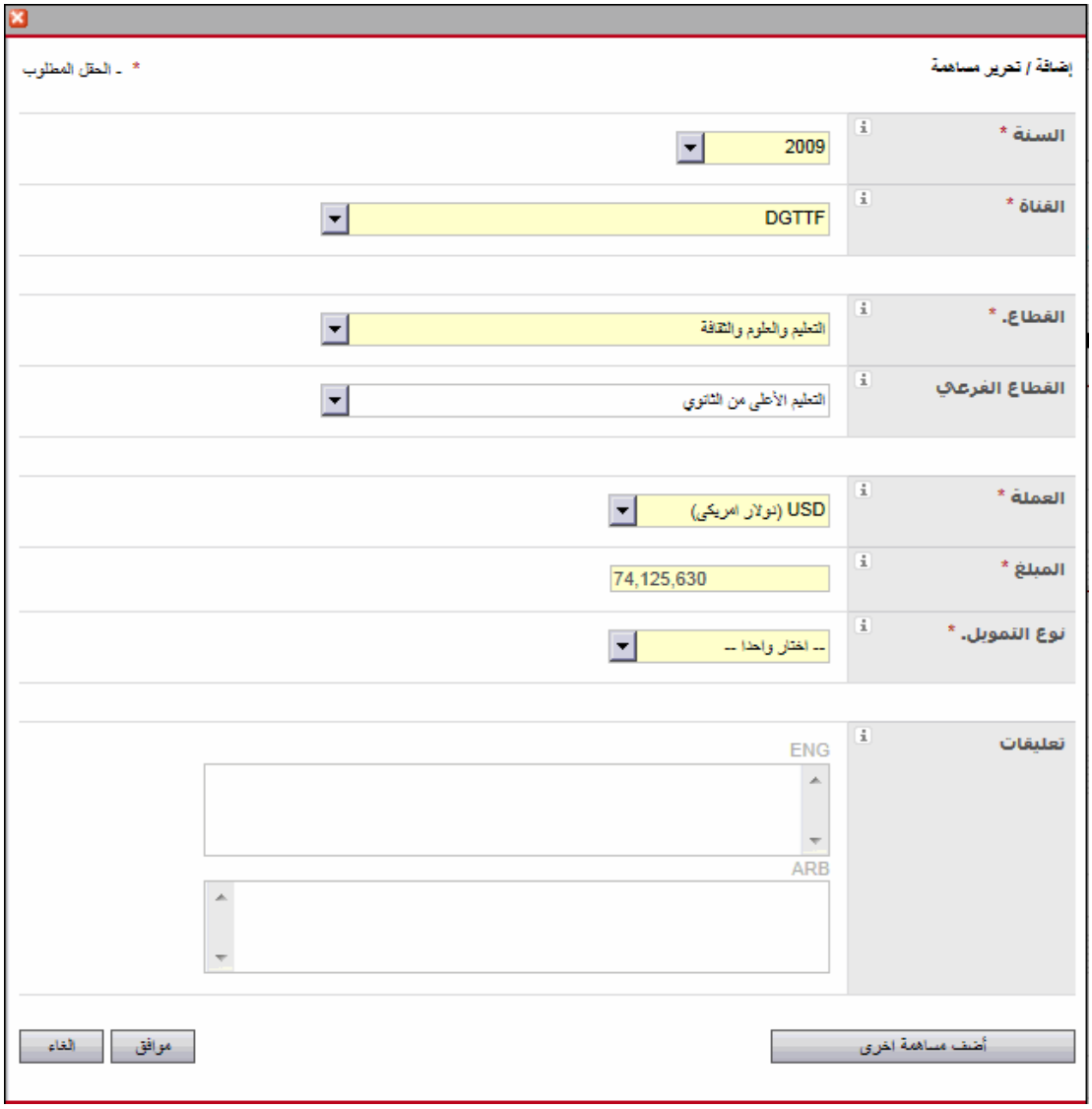

Figure 2: Adding a Donor Contribution Record

In order to add another contribution, click the **Add Another Contribution** button and provide the information requested as described in the paragraphs above.

3.1.2 Editing Contribution Records

In order to edit an existing donor contribution record, follow the steps below:

1. Click the record that needs to be modified. You will be directed to the *Add/Edit Contribution* sub-section.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button to apply the changes made. Or, click **Cancel** to discard them.

3.1.3 Removing Contribution Records

In order to remove an existing donor contribution record, click ✖ **(Remove from the list)** to the left of the selected record.

3.2 Managing Pledges

This chapter outlines how to add, edit and remove pledge records.

3.2.1 Adding a Pledge Record

In order to add a new pledge record, follow the steps below:

1. Click the respective **Add Pledge** button at the bottom of the field. You will be directed to the *Add/Edit Pledges* sub-section (Figure 3).
2. Provide the information requested in the form.

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Year	Select the **Year** when the pledge is made from the drop-down list. *This field is mandatory*.
Event	Specify the **Event** during which the pledge is made. *This field is mandatory*.
Sector	Specify the **Sector** of economy that the pledge supports. *This field is mandatory*. Please note that selection of a sector filters the list in the *Sub-Sector* field and displays only those instances that are related to the selected sector.
Sub-Sector	Indicate the **Sub-Sector** of economy that the contribution supports.
Currency	Select the **Currency** in which the contribution is made. *This field is mandatory*. If you have selected the currency different from USD, the default exchange rate per 1 USD is provided in the field. However, you can change it, if this is necessary. The exchange rate is used when converting the amounts into USD.
Amount	Enter the pledge **Amount** in the currency selected in the previous field. *This field is mandatory*.
Funding Type	Specify the **Funding Type** for the pledge. The following options are available: • Grant • Loan *This field is mandatory*.

Comments	Provide additional **Comments** both in the English and Arabic languages, if needed.

3. Click the **OK** button to confirm the information input. Or, click **Cancel** to terminate the operation.

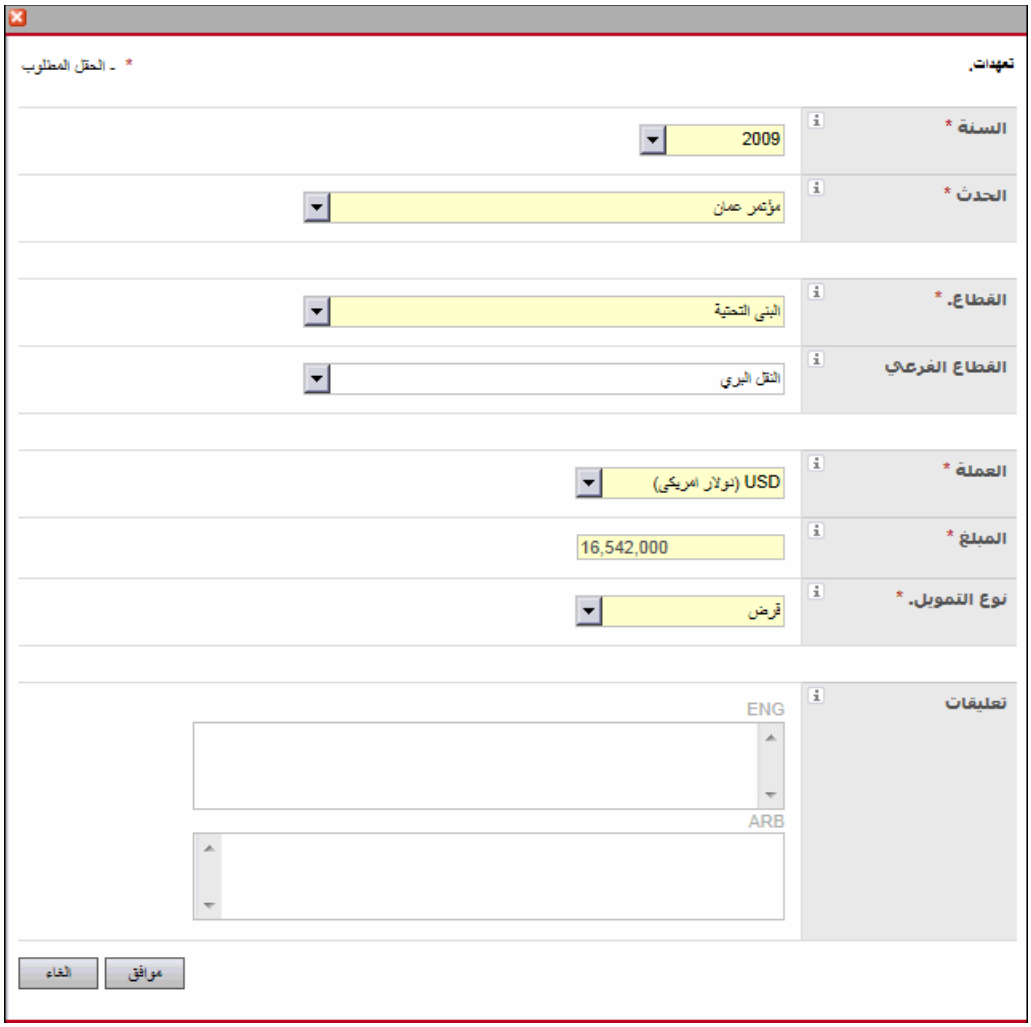

Figure 3: Adding a Pledge Record

3.2.2 Editing Pledge Records

In order to edit an existing pledge record, follow the steps below:

1. Click the pledge record that needs to be modified. You will be directed to the *Add/Edit Pledges* sub-section.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button to apply the changes made. Or, click **Cancel** to discard them.

3.2.3 Removing Pledge Records

In order to remove an existing pledge record, should click ✖ **(Remove from the list)** to the left of the selected record.

3.3 Managing Offices

This chapter outlines how to add, edit and remove office records.

3.3.1 Adding an Office Record

In order to add a new office record, follow the steps below:

1. Click the **Add Office** button at the bottom of the field. You will be directed to the *Add/Edit Office* sub-section (Figure 4).
2. Specify the **Office Name** in the English and Arabic languages.
3. Provide the postal **Address** for the office in the English and Arabic languages.
4. Indicate the **Mobile** phone number of the office in the respective field.
5. Specify the **E-mail** address for the office.
6. Click the **OK** button to confirm the information input. Or, click **Cancel** to terminate the operation.
7. In the DONOR PROFILE DATA ENTRY FORM, specify which office serves as a primary one for the donor organisations.

Figure 4: Adding an Office Record

In order to add another office record, click the **Add Another Office** button and provide the information requested as described in the paragraphs above.

3.3.2 Editing Office Records

In order to edit an existing office record, follow the steps below:

1. Click the donor organisation office record that needs to be modified. You will be directed to the *Add/Edit Office* sub-section.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button to apply the changes made. Or, click **Cancel** to discard them.

3.3.3 Removing Office Records

In order to remove an existing office record, click ✖ **(Remove from the list)** to the left of the selected record.

3.4 Managing Contacts

This chapter outlines how to add, edit and remove contacts.

3.4.1 Adding Contacts

In order to add a donor organisation contact record, follow the steps below:

1. Click the **Add/Edit Contacts** button at the bottom of the field. You will be directed to the *Add/Edit Contact* sub-section (Figure 5).

Figure 5: Selecting a Contact

2. Locate the appropriate contact(s) in the list displayed.
   Note: To make it easier to locate the appropriate contact in the long list, the system has a search capability. To find the relevant contact, enter the search criteria in the respective field and define what field to look in. Then click the **GO** button. The list of all contacts matching the criteria will be displayed in the *Contacts* table.

3. Add the selected contact(s) by ticking the check-box to the left of the contact name and clicking the **Add Selected** button. The selected contact(s) will appear in the *Selected Contacts* table.
   Note: If the desired contact does not exist, you can create a new contact record. For more details, see Creating a New Contact.
4. In the DONOR PROFILE DATA ENTRY FORM, specify which contact(s) serves as the focal point for the donor organisation.

3.4.2 Creating a New Contact

In order to add a new contact, follow the steps below:

1. Click the **Create New** link at the bottom of the *Contacts* table. A new window will appear (Figure 6).

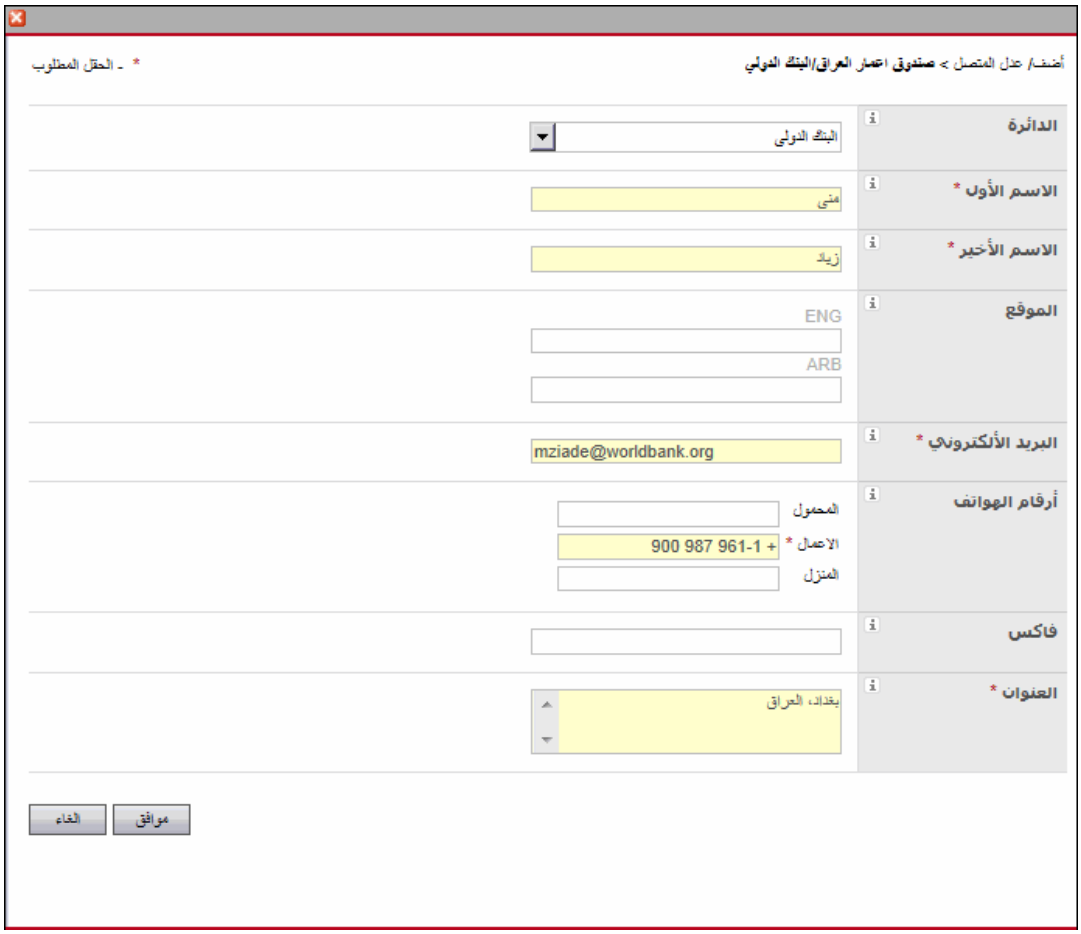

Figure 6: Adding a Contact Record

2. Indicate the donor organisation **Office** that the contact represents.
3. Fill in the contact's **First Name** and **Last Name** in the respective fields. *These fields are mandatory.*
4. Indicate the **Position** that the contact occupies in the organization in the English and Arabic languages.
5. Specify the contact's **E-mail** address in the appropriate field.

6. Indicate the contact's **Phone Numbers** (**Mobile**, **Business**, and **Home**) in the respective fields. *The Business phone is mandatory.*
7. Enter the contact's **Fax** number in the respective field.
8. Provide the contact's address in the **Address** field. *This field is mandatory.*
9. Click the **OK** button to confirm the information input. Or, click **Cancel** to terminate the operation.

3.4.3 Editing Contact Records

In order to edit an existing donor organisation contact record, follow the steps below:

1. Click the contact record that needs to be modified. You will be directed to the *Add/Edit Contact* sub-section.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button to apply the changes made. Or, click **Cancel** to discard them.

3.4.4 Removing Contact Records

In order to remove an existing donor organisation contact record, should click ✘ **(Remove from the list)** to the left of the selected record.

4. SAVING DATA

When you have finished with data input or modification, you should save your changes before you leave the page. The following options for saving the data are available both at the top and bottom of the page:

- **Save** - to save the data entered and to remain on the opened page.
  Note: In sub-sections, clicking the **OK** button will save the changes made and to navigate you to the previous screen.
- **Save and Close** - to save the information input and leave the opened page.

If you wish to cancel your changes, use the **Cancel** button.

5. REFERENCES

Please refer to the following IDMS related documents:

- IDMS External Assistance Projects Application User Manual
- IDMS Capital Investments Projects Application User Manual
- IDMS NDP Indicators Application User Manual
- IDMS Analytics User Manual
- IDMS Administration Center User Manual

IRAQ DEVELOPMENT MANAGEMENT SYSTEM (IDMS)

EXTERNAL ASSISTANCE PROJECTS APPLICATION

USER MANUAL

Version 1.3

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1. INTRODUCTION

This document describes the *External Assistance Projects* application of the *Iraq Development Management System (IDMS).* It provides the necessary instructions to follow during the data entry process. The document is addressed to those who will use the *IMDS* application to add or modify project information.

2. OVERVIEW

The *Iraq Development Management System (IDMS)* is an automated information management system which is designed to improve efficiency and coordination of donor activities in Iraq. 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 aid data.

The main objective of *IDMS* is to serve as a reliable and credible source of information on overall donor contributions to Iraq's reconstruction, economic recovery and socio-economic development, as well as to support the Government in effectively managing development assistance and promoting the accountable and transparent use of resources.

In the current version of *IDMS*, the following applications are present:

- **External Assistance Projects**
- **Donor Profile**
- **Capital Investments Projects**
- **Iraq Development Projects**
- **NDP Indicators**

The *External Assistance Projects* application in the *IDMS* is designed to track the projects that have been approved for the implementation and the projects that are currently being implemented. Once you have accessed this application, you are able to view project details, track aid flows to the country, and create different types of analytical reports in the *List*, *Chart*, *Map*, and *Report* modules. Moreover, the *External Assistance Projects* application contains a built-in online data entry subsystem, which is designed to allow entering the project related data remotely via Internet. The online data entry form allows for entering new and modifying the existing information.

In the current design, the *External Assistance Projects* application consists of the following sections:

- **General Information** section requires general information on the project in this section. This includes the title; the project description; the start date; the end date; the duration. Additionally, information about sector(s) and sub-sector(s) that best describe the project and the location(s) of the project are defined here.

- **Organisations and Contacts** section requires information about the entity(ies) in the recipient country with overall responsibility for the implementation of the given project.

Additionally, contacts within the selected organisations that serve as focal points for the project are defined here.

- **Financial Information** section requires information about the project costs and funding. The expected costs over time using the selected currency should be defined. All financial transactions are also to be recorded here.

- **Project Outputs** section requires information about the key performance indicators, factors that may cause the delay in the project implementation, etc.

- **Paris Declaration Indicators** section requires information related to the Paris Declaration on Aid Effectiveness so that the commitments of both the Government and its partners to ensure more effective aid management can be monitored in line with the indicators included in the Declaration.

- **Notes and Attachments** section requires additional comments / notes about the project. You may also attach project documents, monitoring reports and other relevant documentation.

- **Project History** section displays statistical data on access to the given project.

To navigate from one section to another, use of the respective tab controls found at the top of the screen. Also, click the respective **Next / Previous** button at the bottom of the screen to go to the next / previous section.

The *External Assistance Projects* application provides a web-based user interface and requires a web browser (Internet Explorer) pre-installed.

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

3. GENERAL INFORMATION

In the *General Information* section (Figure 1 and Figure 2) you can access general information about the project. This includes the project title, description, start and end dates, the implementation status of the project, etc.

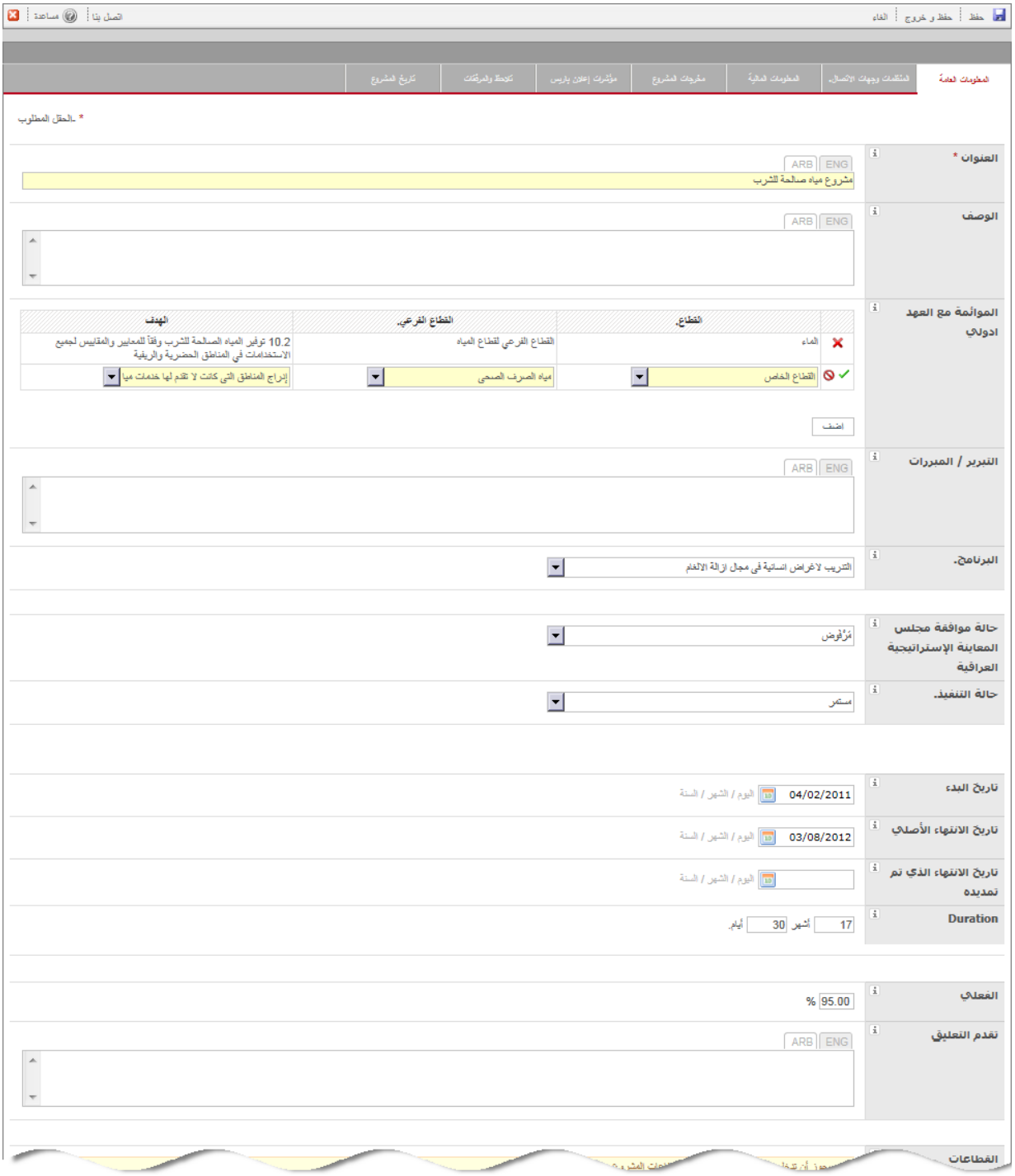

Figure 1: General Information Section (Part 1)

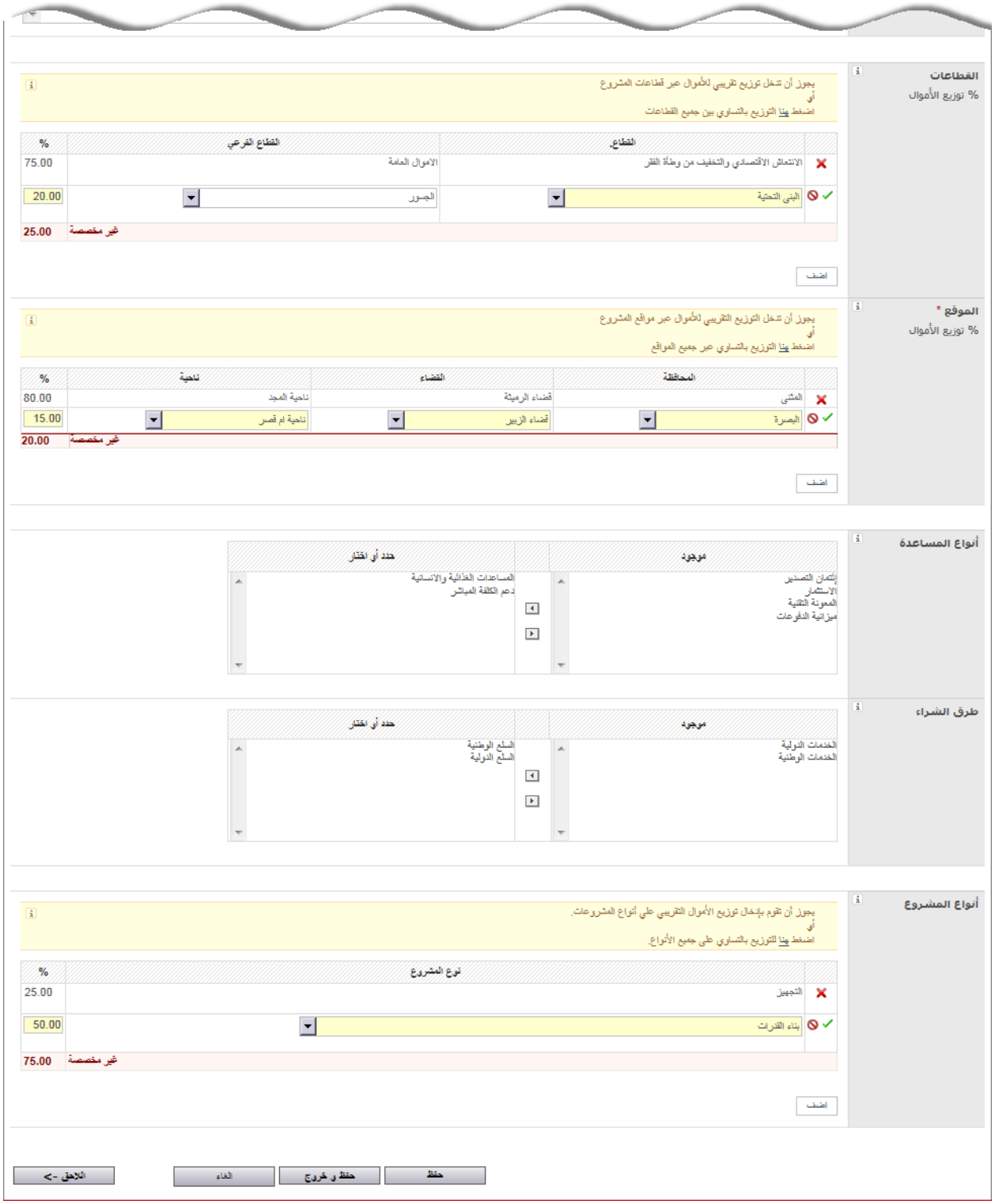

Figure 2: General Information Section (Part 2)

For more details on what information is requested in the *General Information* section, see the table below:

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Title	Indicate here the official **Title** of the project used in project documents and approved by the competent agency both in the English and Arabic languages. *This field is mandatory.* In case that a pre-determined official title does not exist, please create a one-line synopsis of the project. Please note that the title is the information that users see when displaying the search results.
Description	Provide a brief **Description** of the project, understandable for the general public both in the English and Arabic languages. It may include objectives of the project, mention of the main project activities, and rationale behind needs, activities, outputs and outcomes. The project description, should preferably consist of: • Contexts/background, • Goals/objectives, • Key activities/components.
Alignment with NDP	Indicate the **Alignment with NDP**. For more details, see Managing Alignments with NDP.
Justification / Rationale	Define the reasoning that justifies the implementation of the project in the English and Arabic languages.
Programme	Select the appropriate instance for the umbrella **Programme** (Grant in Kinds, Project Aid, NGO Support Program, etc.) under which the project falls from the drop-down list.
ISRB Approval Status	Specify the **ISRB Approval Status** of the project (e.g. submitted, under review, sent back for resubmission, etc.) by selecting the appropriate instance from the drop-down list. If the *ISRB Approval Status* is set to *Approved*, you will have to indicate the I**SRB Approval Date**. A calendar popup is available for this field, see Figure 3: Calendar.
Implementation Status	Specify the **Implementation Status** (e.g. ongoing, completed, etc.) of the project by selecting the appropriate instance from the drop-down list.
Start Date	Define the date on which the implementation of project activities begins or is supposed to begin. A calendar popup is available for this field, see Figure 3: Calendar.
Original End Date	Indicate the date by which the implementation of project activities is to be completed according to the approved project document. A calendar popup is available for this field, see Figure 3: Calendar.
Extended End Date	Indicate the date by which the implementation of project activities is to be completed. A calendar popup is available for this field, see Figure 3:

	Calendar. **Note:** If the project end date is provided, the project duration is automatically calculated by the system as soon as you navigate away from the field.
Duration	Indicate the actual or planned time-span for the project implementation. **Note:** If the project duration is provided, the project end date is automatically calculated by the system as soon as you navigate away from the field.
Progress	Indicate the approximate percentage of the **Progress** made for the implementation of the project.
Comment on Progress	Add comments on the status of project implementation in the English and Arabic languages.
Sectors *% distribution of funds*	Indicate the sectors/sub-sectors of the economy to which the project contributes. Also, specify the portion (in %) of the total project cost that will be contributed to support the current sector/sub-sector. **Note:** When indicating what % of the total project cost will be spent in a definite sector/sub-sector, choose between two options: • Enter the approximate project cost distribution across sectors/sub-sectors. • Choose to evenly distribute the project cost across all sectors/sub-sectors. Please note that the selection of the sectors/sub-sectors is carried out in a Step-by-Step way. Once the appropriate sector of economy is selected, the list of all sub-sectors pertaining to the selected sector becomes available in the *Sub-Sector* field. For more details, see Managing Sectors.
Locations *% distribution of funds*	Specify the geographic locations in the recipient country that are intended to benefit from the project activities. *This field is mandatory*. Also, specify the portion (in %) of the total project cost that will be contributed to support the current location. **Note:** When indicating what % of the total project cost will be spent in a definite location, choose between two options: • Enter the approximate project cost distribution across governorates/qadhas/nahias. • Choose to evenly distribute the project cost across all governorates/qadhas/nahias. Please note that the selection of the project location is carried out in a Step-by-Step way. Once the appropriate governorates are selected, the list of all qadhas pertaining to the selected governorate becomes

	available in the *Qadha* field. For more details, see Managing Locations.
Assistance Types	Indicate the **Assistance Types** offered by selecting the appropriate instance from *Available* panel. Please, note that it is possible to select several available instances (Figure 4). Click the **(Select)** button. The selected instances will appear in the *Selected* panel. In order to remove the selected instances, select the instance that needs to be removed from the *Selected* panel. Click the **(Unselect)** button. The selected instance will be removed from the *Selected* panel.
Procurement Methods	Indicate the **Procurement Methods** used to provide the kind of assistance offered by selecting the appropriate instance from *Available* panel. Please, note that it is possible to select several available instances (Figure 5). Click the **(Select)** button. The selected instances will appear in the *Selected* panel. In order to remove the selected instances, select the instance that needs to be removed from the *Selected* panel. Click the **(Unselect)** button. The selected instance will be removed from the *Selected* panel.
Project Types	Indicate the **Project Type** (e.g. capacity building, construction, etc.) the given project falls under. **Note:** When indicating what % of funds will be spent on a definite project type, choose between two options: • Enter the approximate funds distribution across the project types. • Choose to evenly distribute funds across all project types. For more details, see Managing Project Types.

Figure 3: Calendar

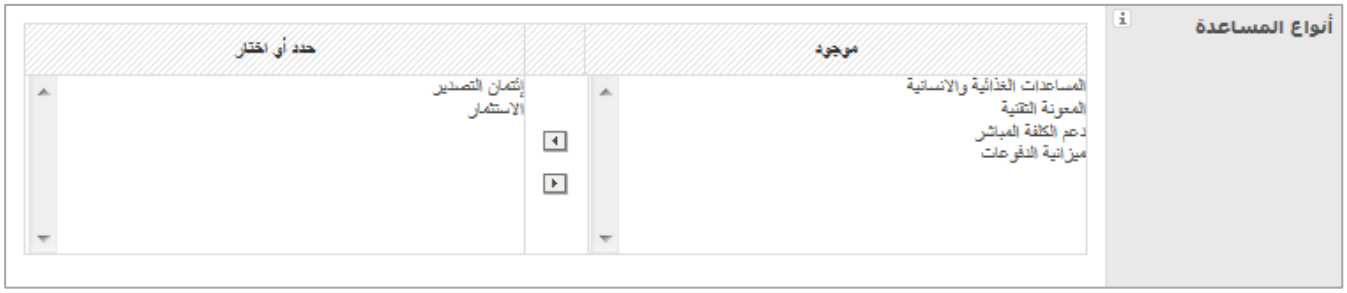

Figure 4: Selecting Assistance Type

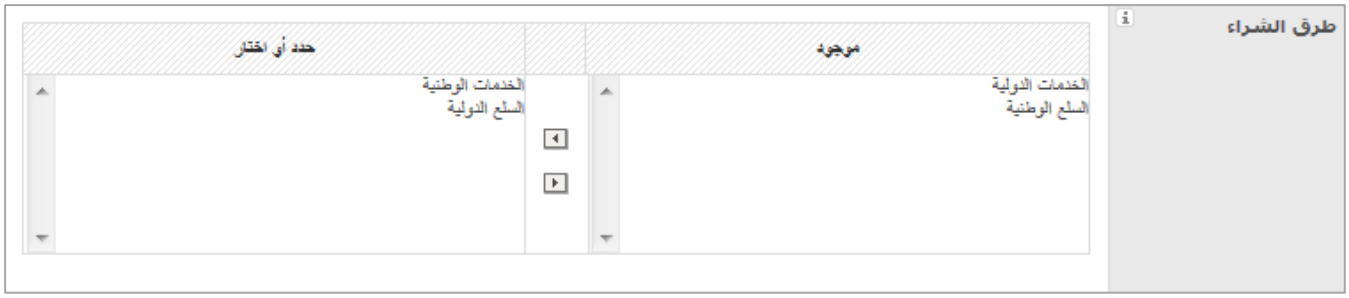

Figure 5: Selecting Procurement Methods

3.1 Managing Alignments with NDP

This chapter outlines how to add, edit and remove alignments with NDP.

3.1.1 Adding an Alignment Record

In order to add a new alignment record, follow the steps below:

1. Click the **Add** button at the bottom of the field. A new record will appear (Figure 6).

Figure 6: Adding an NDP Alignment Record

2. Select the appropriate **Sector** from the corresponding drop-down list.
3. Select the appropriate **Sub Sector** from the corresponding drop-down list.
4. Select the appropriate **Objective** from the corresponding drop-down list.
5. Click the ✓ **(OK)** button to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to terminate the operation.

3.1.2 Editing Alignment Records

In order to edit an existing alignment record, follow the steps below:

1. Click the record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.

3. Click the ✓ **(OK)** button to save the changes made. Or, click ⊘ **(Cancel)** to discard them.

3.1.3 Removing Alignment Records

In order to remove an existing alignment record, use the ✘ **(Remove from the list)** button to the left of the record.

3.2 Managing Sectors

This chapter outlines how to add, edit and remove sectors/sub-sectors.

3.2.1 Adding a Sector/Sub-Sector Record

In order to add a new sector/sub-sector record, follow the steps below:

1. Click the **Add** button at the bottom of the field. A new record will appear (Figure 7).

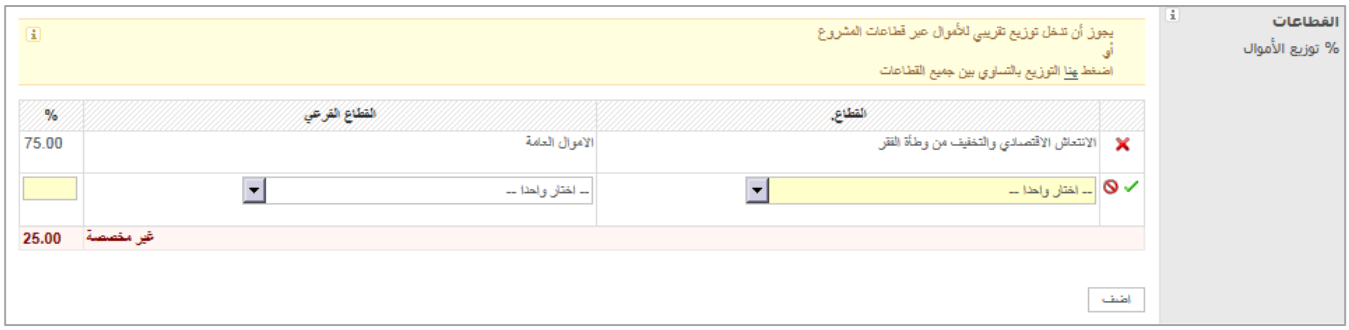

Figure 7: Adding a Sector Record

2. Select the appropriate **Sector** from the corresponding drop-down list containing all sectors stored in the database.
3. Select the appropriate **Sub-Sector** from the corresponding drop-down list. This is optional.
4. Define what % of the total project cost will be spent in a particular sector/sub-sector.
5. Click the ✓ **(OK)** button to the left of the record to confirm the information input. Or, click the ⊘ **(Cancel)** to terminate the operation.

3.2.2 Editing Sector/Sub-Sector Records

In order to edit an existing sector/sub-sector record, follow the steps below:

1. Click the sector/sub-sector record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click the ✓ **(OK)** button to save the changes made. Or, click ⊘ **(Cancel)** to discard them.

3.2.3 Removing Sector/Sub-Sector Records

In order to remove an existing sector/sub-sector record, use the ✘ **(Remove from the list)** button to the left of the record.

3.3 Managing Locations

This chapter outlines how to add, edit and remove locations.

3.3.1 Adding a Location Record

In order to add a new location record for the project, follow the steps below:

1. Click the **Add** button at the bottom of the field. A new record will appear (Figure 8).

Figure 8: Adding a Location Record

2. Select the appropriate **Governorate** from the corresponding drop-down list.
3. Indicate the appropriate **Qadha** by selecting the respective instance from the *Qadha* drop-down list.
4. Specify the **Nahia** by selecting the respective instance from the *Nahia* drop-down list.
5. Define what % of the total cost will be spent in the particular location.
6. Click the ✓ **(OK)** button to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to terminate the operation.

3.3.2 Editing Location Records

In order to edit an existing location record, follow the steps below:

1. Click the location record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click the ✓ **(OK)** button to save the changes made. Or, click ⊘ **(Cancel)** to discard them.

3.3.3 Removing Location Records

In order to remove an existing location record, use the ✘ **(Remove from the list)** button to the left of the record.

3.4 Managing Project Types

This chapter outlines how to add, edit and remove project types.

3.4.1 Adding a Project Type Record

In order to add a new project type record, follow the steps below:

1. Click the **Add** button at the bottom of the field. A new record will appear (Figure 9).

Figure 9: Adding a Project Type Record

2. Select the appropriate **Project type**.
3. Define what % of the funds will be distributed to a particular project type.
4. Click the ✓ **(OK)** button to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to cancel the operation.

3.4.2 Editing Project Type Records

In order to edit an existing project type record, follow the steps below:

1. Click the record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click the ✓ **(OK)** button to save the changes made. Or, click ⊘ **(Cancel)** to discard them.

3.4.3 Removing Project Type Records

In order to remove an existing project type record, use the ✘ **(Remove from the list)** button to the left of the record.

4. ORGANISATIONS & CONTACTS

In the *Organisations & Contacts* section (Figure 10), you can provide information about the entity(-ies) in the recipient country with the overall responsibility for the implementation of the given project. Additionally, you should specify the contacts within the selected organisations that serve as focal points for the project.

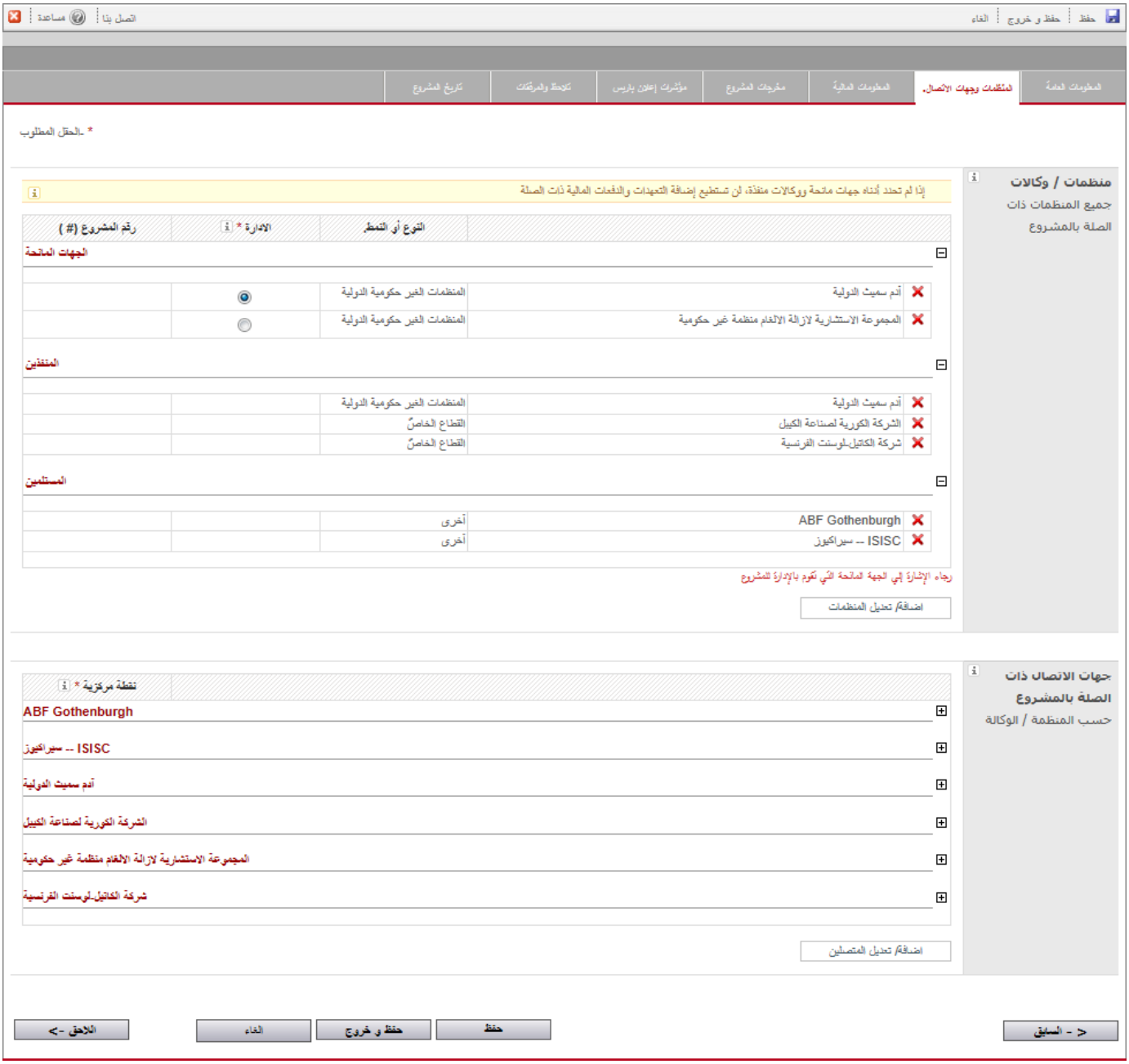

Figure 10: Organisations & Contacts Section

For more details on how to provide the information requested in the *Organisations & Contacts* section, see the table below:

Field Name	Instructions
Organisations / Agencies *all organisations relevant to the project*	Specify all the organisations that are relevant to the project according to the role they play in the project implementation. For more details, see Managing Organisations.
Relevant Project Contacts *by Organisation/Agency*	Specify the contact for the Project per Organisation/Agency that is relevant to the project (as selected before). **Note:** You will not be able to add a project contact unless at least one organisation record is indicated. For more details, see Managing Contacts.

4.1 Managing Organisations

This chapter outlines how to add and remove organisation records.

4.1.1 Adding an Organisation Record

In order to add an organisation record, follow the steps below:

1. Click the **Add/Edit Organisations** button at the bottom of the field. You will be directed to the *Add/Edit Organisations* sub-section (Figure 11).

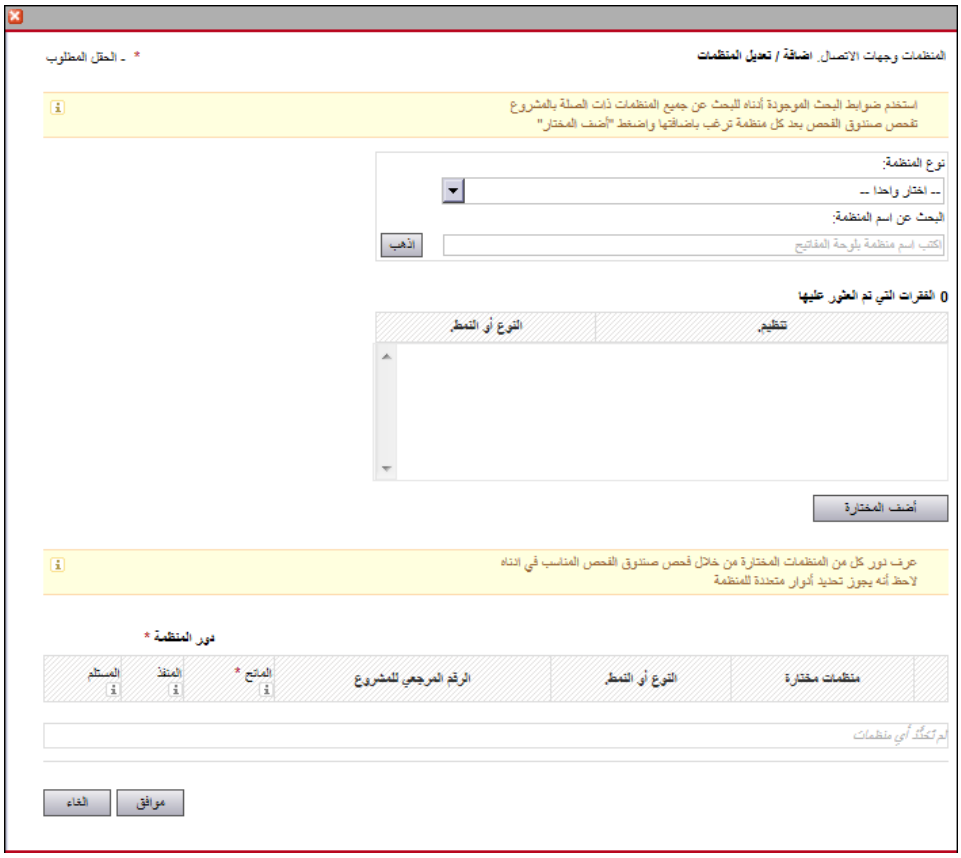

Figure 11: Adding an Organisation Record

2. Indicate the **Organisation Type** (Academic Institutions, Bilateral, Government Agency, etc.) being added by selecting the appropriate instance from the drop-down list (Figure 12). All the organisations matching the selection will be displayed in the *Organisations* table.
3. Locate the organisation(s) to be added for the project.
   Note: To make it easier to locate the appropriate organisation in the long list, the system has a search capability. To find the relevant organisation, enter the organisation name in the *Search Organisation Name* field and click the **GO** button. The list of all organisations matching the criteria will be displayed in the *Organisations* table.

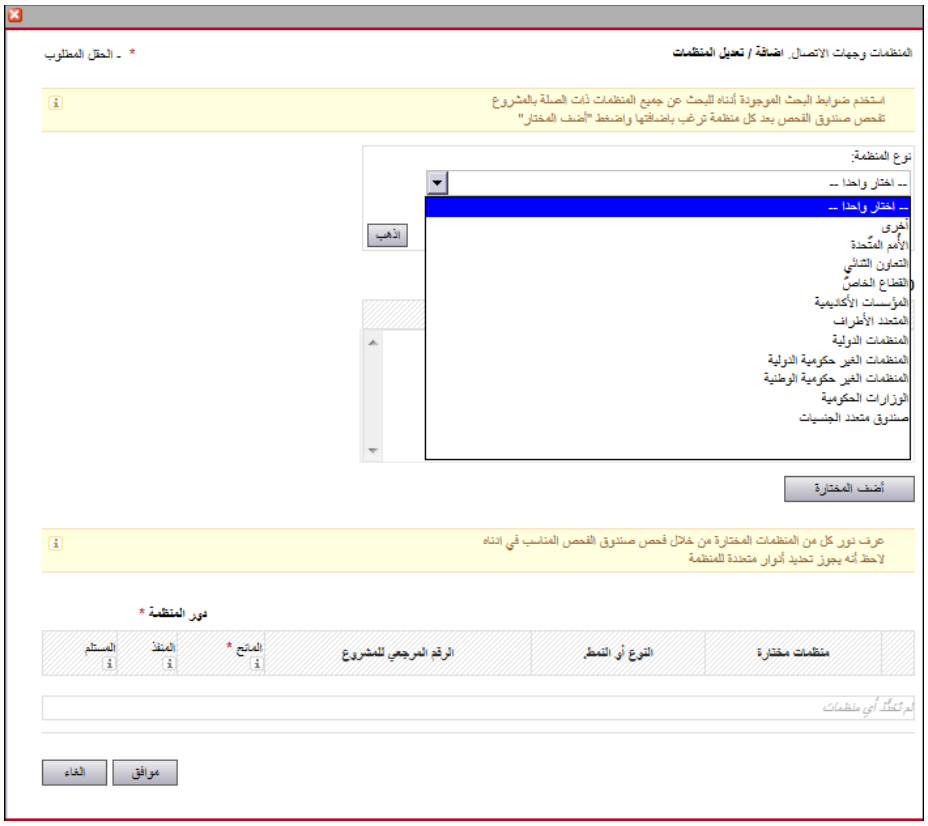

Figure 12: Displaying the List of Organisations

4. Add the selected organisation(s) as one(s) relevant to the project by ticking the check-box to the left of the organisation name and clicking the **Add Selected** button. The selected organisation(s) will appear in the *Selected Organisations* table (Figure 13).
5. For each of the selected organisation provide additional information (reference number assigned to the project by the given organisation, whether the selected organisation is the funding agency for the project or its Implementer, etc.) as applicable.
6. Click the **OK** button to return to the ORGANISATIONS & CONTACTS section, where the selected organisations will appear in the respective fields according to their roles. Or, click **Cancel** to discard the changes.

Figure 13: Selecting Project Organisations

4.1.2 Removing Organisation Records

In order to remove an organisation record, use the ✘ **(Remove from the list)** button to the left of the record.

4.2 Managing Contacts

This chapter outlines how to add, edit and remove contacts in the organisations.

4.2.1 Adding a Contact Record

In order to specify a contact within the organisation, follow the steps below:

1. Click the **Add/Edit Contacts** button at the bottom of the field. You will be directed to the *Add/Edit Contacts* sub-section (Figure 14).

Figure 14: Adding a Contact Record

2. Select the organisation/agency to add a contact record for from the *Organisation* drop-down list. Please note that the list contains only those organisations that have been specified in the previous section. The list of all existing contacts within the selected organisation will be displayed in the *Contacts* table.
3. Locate the appropriate contact(s) in the list displayed.
   Note: To make it easier to locate the appropriate contact in the long list, the system has a search capability. To find the relevant contact, enter the search criteria in the respective field and define what field to look in. Then click the **GO** button. The list of all contacts matching the criteria will be displayed in the *Contacts* table.
4. Add the selected contact(s) by ticking the check-box to the left of the contact name and clicking the **Add Selected** button. The selected contact(s) will appear in the *Selected Contacts* table.
   Note: If the desired contact does not exist, you can create a new contact record.
5. Click the **OK** button to return to the ORGANISATIONS & CONTACTS section, where the selected contacts will appear in the *Relevant Project Contacts* field. Or, click **Cancel** to discard the changes.
6. In the ORGANISATIONS & CONTACTS section, specify which contact serves as the focal point for the organisations.

4.2.2 Creating a New Contact

In order to add a new contact, follow the steps below:

1. Click the **Create New** link at the bottom of the *Contacts* table. A new window will appear (Figure 15).

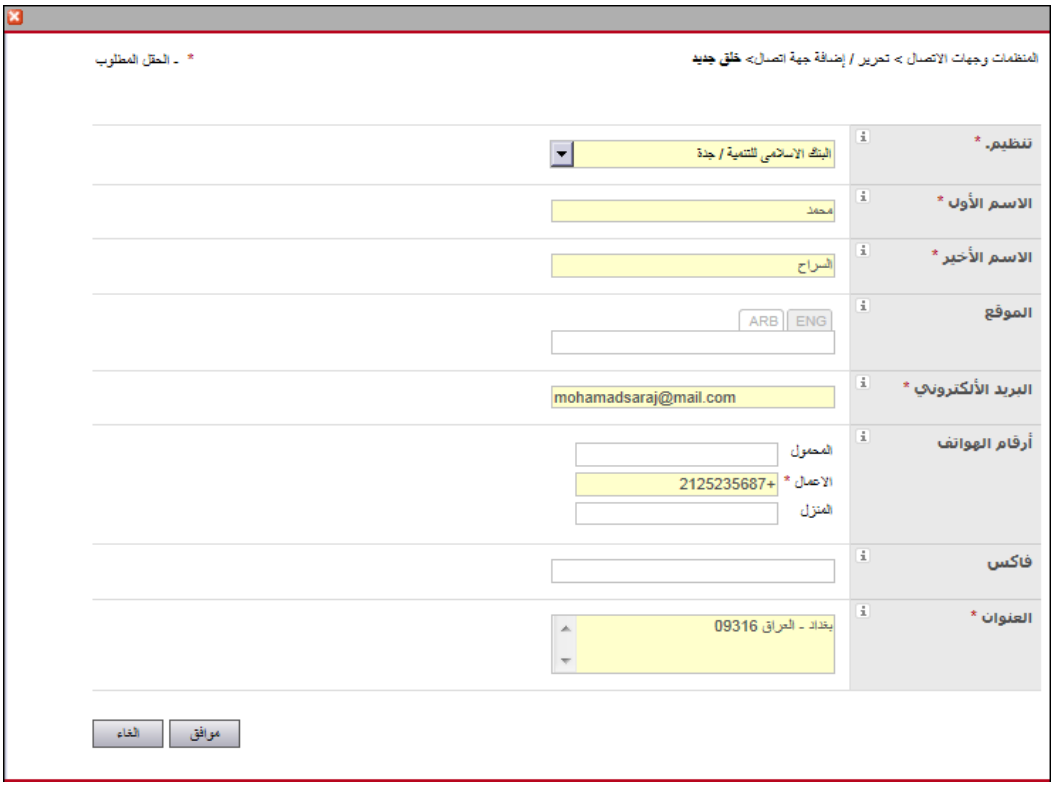

Figure 15: Creating a New Contact

2. Indicate the **Organisation** that the contact represents by selecting the appropriate instance from the *Organisation* drop-down list. *This field is mandatory*. Please note that the list contains only those organisations that have been specified in the previous section (see Managing Organisations).
3. Fill in the contact's **First Name** and **Last Name** in the respective fields. *These fields are mandatory*.
4. Indicate the **Position** that the contact occupies in the organisation in the English and Arabic languages.
5. Specify the contact's **E-mail** address in the appropriate field. *This field is mandatory*.
6. Indicate the contact's **Phone Numbers** (mobile, business, and home) in the respective fields. *The Business phone is mandatory.*
7. Enter the contact's **Fax** number.
8. Provide the contact's postal **Address**. *This field is mandatory*.
9. Click the **OK** button to save the information input and return to the *Add/Edit Contacts* sub-section. Or, click **Cancel** to terminate the operation.

4.2.3 Editing Contact Records

In order to edit the information provided for each of the selected contacts, follow the steps below:

1. Expand the project organisation record to locate the contact that needs to be edited,
2. Click the contact name link. You will be directed to the *Edit Contact* sub-section where the information provided for the selected contact can be edited.
3. Make the appropriate changes.
4. Click the **OK** button to save the changes made. Or, click the **Cancel** button to discard them.

Note: The **Organisation**, **First Name** and **Last Name** fields cannot be edited. They will appear in the read-only mode.

4.2.4 Removing Contact Records

In order to remove a contact record, use the ✕ **(Remove from the list)** button to the left of the contact record.

5. FINANCIAL INFORMATION

In the *Financial Information* section (Figure 16), information about project costs, commitments and disbursements and funds contributed by Iraq Regional Government can be defined. Additionally, here you may provide expected costs over time using the selected currency and the information for each funding agency – implementer combination and for funds committed and disbursed.

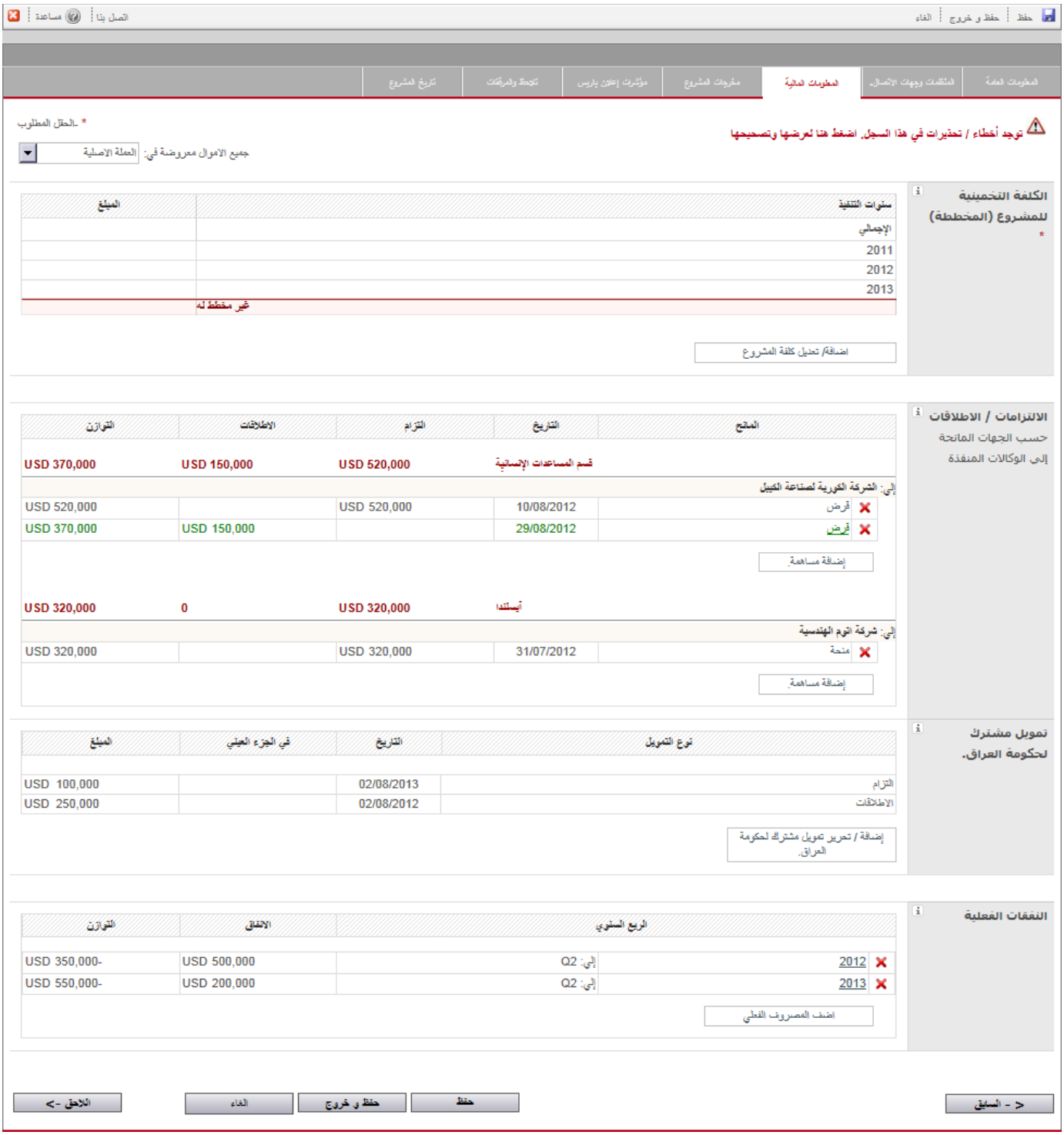

Figure 16: Financial Information Section

For more details on how to provide the information requested in the *Financial Information* section, see the table below:

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Planned Project Cost	Specify the amount requested for the project implementation. This should include contributions of all parties, i.e. Funding Agencies, Government Bodies, etc. *This field is mandatory.* For more details, see Managing Project Cost.
Commitments and Disbursements *by Donors to Implementers*	Provide detailed financial information on the project commitments and disbursements grouped by each Donor that was selected for the project. For more details, see Managing Commitments and Disbursements.
Government of Iraq Co-Financing	Provide detailed information on funds contributed by the Government of Iraq for the project implementation. For more details, see Managing GoI Co-Financing.
Actual Expenditures	Provide information about the funds expended. For more details, see Managing Expenditures.

5.1 Managing Project Cost

This chapter outlines how to add and edit project cost.

5.1.1 Adding a Project Cost Record

In order to add a project cost record, follow the steps below:

1. Click the **Add/Edit Planned Project Cost** button at the bottom of the field. You will be directed to the Add/*Edit Planned Project Cost* sub-section (Figure 17).
2. Specify the **Currency** the project cost is expressed in by selecting the appropriate instance from the drop-down list. *This field is mandatory*.
   Note: If you have selected the currency different from USD, the default exchange rate per 1 USD is provided in the *Rate to 1 USD* field. However, you can change it, if this is necessary. The exchange rate is used when converting the amounts into USD.
3. Enter the project cost **Amount**. It should be entered in the currency indicated. *This field is mandatory*.
4. Specify how the recorded project cost is planned to be expended throughout the project duration in the **Yearly Breakdown** field. Please note that the years in this field depend on the Project Start and End Dates indicated in the GENERAL INFORMATION section.
   Note: When indicating the yearly project cost breakdown, choose between two options:
   - Enter the approximate project cost distribution across the project implementation years.

- Choose to evenly distribute the project cost across all project implementation years.

5. Click the **OK** button to save the information input and return to the FINANCIAL INFORMATION section. Or, click **Cancel** to terminate the operation.

Figure 17: Adding a Project Cost Record

5.1.2 Editing a Project Cost Record

In order to edit a project cost record, follow the steps below:

1. Click the **Add/Edit Planned Project Cost** button at the bottom of the field. You will be directed to the *Add/Edit Planned Project Cost* sub-section, where the provided project cost information can be edited.
2. Make changes in the data displayed.
3. Click the **OK** button to save the changes made. Or, click the **Cancel** button to discard them.

5.2 Managing Commitments and Disbursements

This chapter outlines how to add, edit and remove project funding records, i.e. commitments and disbursements.

5.2.1 Adding a Project Funding Record

In order to add a project funding record, follow the steps below:

1. Click the **Add Contribution** button at the bottom the field representing the Donor Agency that provides the financial means for the project.
2. Indicate whether the new record will be for a commitment or a disbursement. The appropriate

window will open in accordance with the selection.

Note: You will not be able to add a disbursement record unless there is at least one commitment record added.

If the commitment was selected, the following information should be provided (Figure 18):

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Description
Implementer	Specify the **Implementer** to which the commitment is made by selecting the appropriate instance from the drop-down list. Please note that the list will contain the *Implementers* selected in the ORGANISATIONS & CONTACTS**Error! Reference source not found.** section. *This field is mandatory.*
Date	Indicate the **Date** when the commitment is made. *This field is mandatory.* A calendar popup is available for this input, see Figure 3: Calendar.
Currency	Select the **Currency** in which the commitment is made. *This field is mandatory.* If you have selected the currency different from USD, the default exchange rate per 1 USD is provided in the *Rate to 1 USD* field. However, you can change it, if this is necessary. The exchange rate is used when converting the amounts into USD.
Amount	Enter the commitment **Amount** in the currency selected in the previous field. *This field is mandatory.*
Funding Type	Specify the commitment **Funding Type**. The following options are available: • Grant • Loan *This field is mandatory.*

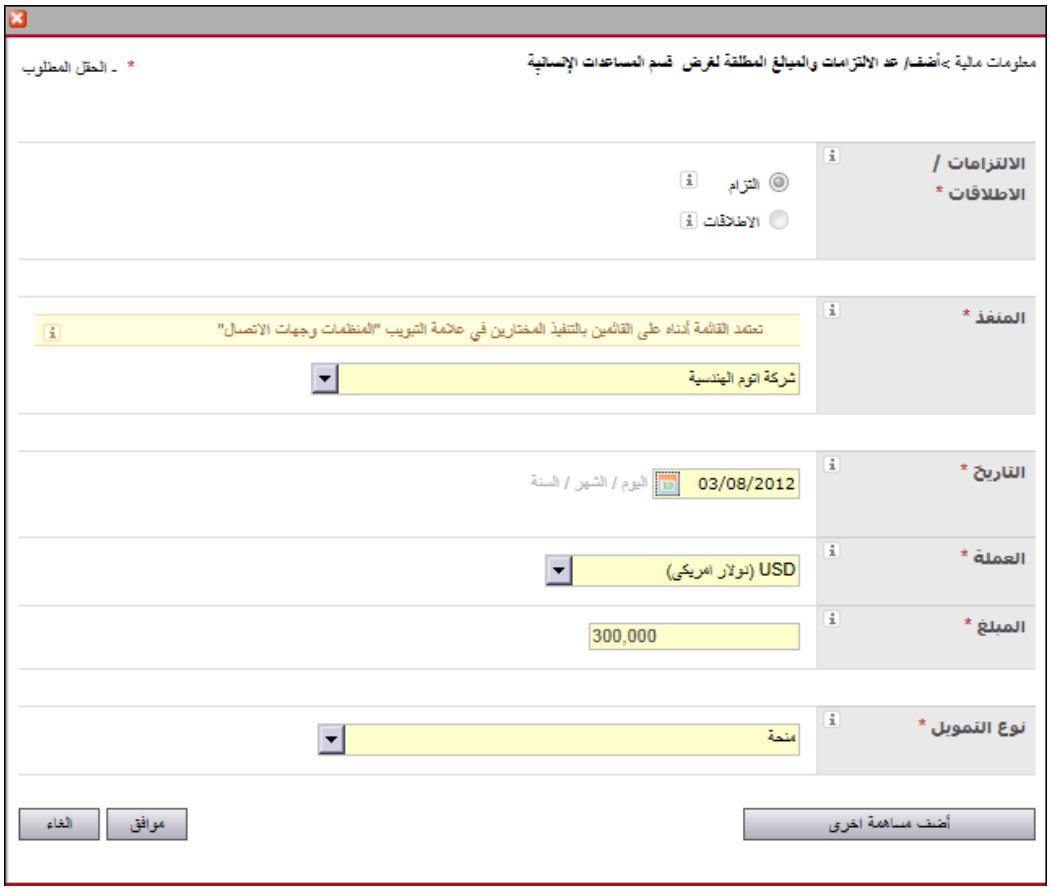

Figure 18: Adding a Commitment Record

If the disbursement was selected, indicate the following information (Figure 19):

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Description
Implementer	Select the combination of the **Implementer** | **Funding Type** that links the disbursement to a set of valid (recorded) commitments. *This field is mandatory.*
Date	Indicate the **Date** when the disbursement is made. *This field is mandatory.* A calendar popup is available for this input, see Figure 3: Calendar.
Currency	Select the **Currency** in which the disbursement is made. *This field is mandatory.* If you have selected the currency different from USD, the default exchange rate per 1 USD is provided in the *Rate to 1 USD* field. However, you can change it, if this is necessary. The exchange rate is used when converting the amounts into USD.
Amount	Enter the disbursement **Amount** in the currency selected in the previous field. *This field is mandatory.*

3. Click the **OK** button to save the information input. Or, click the **Cancel** button to terminate the operation.

In order to add a new project funding record, click the **Add Another Contribution** button and provide the information requested as described in the paragraphs above.

Figure 19: Adding a Disbursement Record

5.2.2 Editing Project Funding Records

In order to edit an existing project funding record, follow the steps below:

1. Click the project funding (commitment or disbursement) record that needs to be edited. You will be directed to the *Add/Edit Commitments and Disbursements* sub-section where the details of the selected record can be edited.
2. Make the appropriate changes.
3. Click the **OK** button to save the changes made. Or, click the **Cancel** button to discard them.

5.2.3 Removing Project Funding Records

In order to remove a project funding record, use the ✘ **(Remove from the list)** button to the left of the selected record.

5.3 Managing GoI Co-Financing

This chapter outlines how to add, edit and remove GoI co-financing records.

5.3.1 Adding a Financing Record

In order to add a GoI co-financing record, follow the steps below:

1. Click the **Add/Edit GoI Co-Financing** button at the bottom of the field. You will be directed to the *Add/Edit GoI Co-Financing* sub-section (Figure 20).

Figure 20: Proving GoI Co-financing Information

2. Indicate whether the new record will be for a commitment or disbursement.
   Note: You will not be able provide any disbursement record unless there is at least one commitment record added.
3. Provide the information requested as it is described in the table below.

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Description
Date	Indicate the **Date** when the co-financing is made. *This field is mandatory.* A calendar popup is available for this input, see **Error! Reference source not found.**.
Currency	Select the **Currency** in which the co-financing is made. *This field is mandatory.* If you have selected the currency different from USD, the default exchange rate per 1 USD is provided in the *Rate to 1 USD* field. However, you can change it, if this is necessary. The exchange rate is used when converting the amounts into USD.
Amount	Enter the co-financing **Amount** in the currency selected in the previous field. *This field is mandatory.*

In-Kind Portion	Indicate the value of the **In-Kind Portion** of the co-financing.

5.3.2 Editing Financing Records

In order to edit an existing GoI co-financing record, follow the steps below:

1. Click the GoI co-financing (commitment or disbursement) record that needs to be edited. You will be directed to the *Add/Edit GoI Co-financing* sub-section where the details of the selected record can be edited.
2. Make the appropriate changes.
3. Click the **OK** button to save the changes made. Or, click **Cancel** to discard them.

5.3.3 Removing Financing Records

In order to remove an existing GoI co-financing record, use the ✖ **(Remove from the list)** button to the left of the selected record.

5.4 Managing Expenditures

This chapter outlines how to add, edit and remove expenditures.

5.4.1 Adding an Expenditure Record

In order to add an expenditure record, follow the steps below:

1. Click the **Add Actual Expenditure** button at the bottom of the field. You will be directed to the *Add/Edit Actual Expenditure* sub-section (Figure 21).
2. Specify the time period the information pertains to by selecting the appropriate year and **Quarter** from the respective drop-down lists. *These fields are mandatory.*

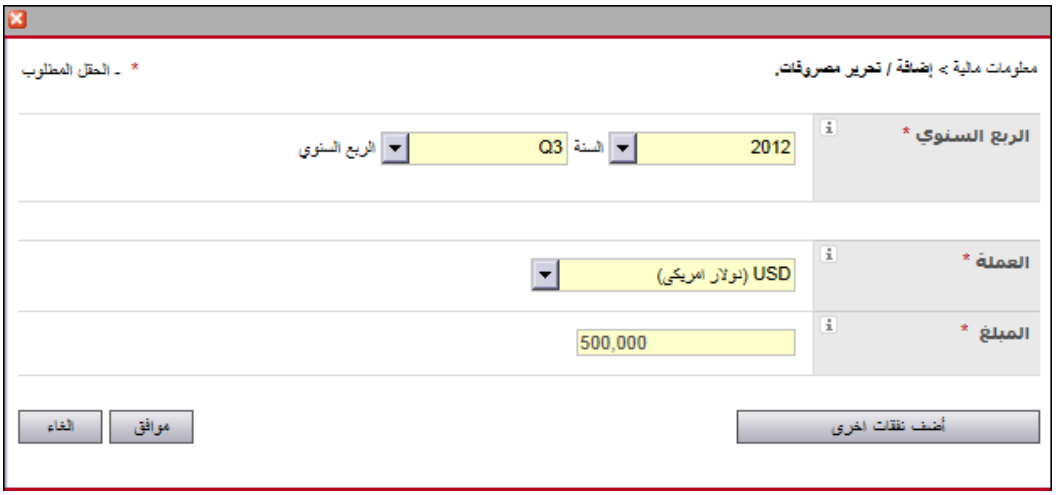

Figure 21: Adding an Expenditure Record

3. Specify the **Currency** by selecting the appropriate instance from the drop-down list. *This field is mandatory.*

Note: If you have selected the currency different from USD, the default exchange rate per 1 USD is provided in the *Rate to 1 USD* field. However, you can change it, if this is necessary. The exchange rate is used when converting the amounts into USD.

4. Enter the expenditure **Amount** in the currency indicated. *This field is mandatory.*

In order to add a new expenditure record, please click the **Add Another Expenditure** button and provide the information requested as described in the paragraphs above.

5.4.2 Editing Expenditure Records

In order to edit an expenditure record, follow the steps below:

1. Select the record that needs to be edited. You will be redirected to the *Add/Edit Actual Expenditure* form.
2. Make the appropriate changes.
3. Click the **OK** button to save the changes made. Or, click **Cancel** to discard them.

5.4.3 Removing Expenditure Records

In order to remove an existing expenditure record, use the ✕ **(Remove from the list)** button to the left of the selected record.

6. PROJECT OUTPUTS

In the *Project Outputs* section (Figure 22), you should enter information about the key performance indicators, factors that may cause the delay in the project implementation, etc.

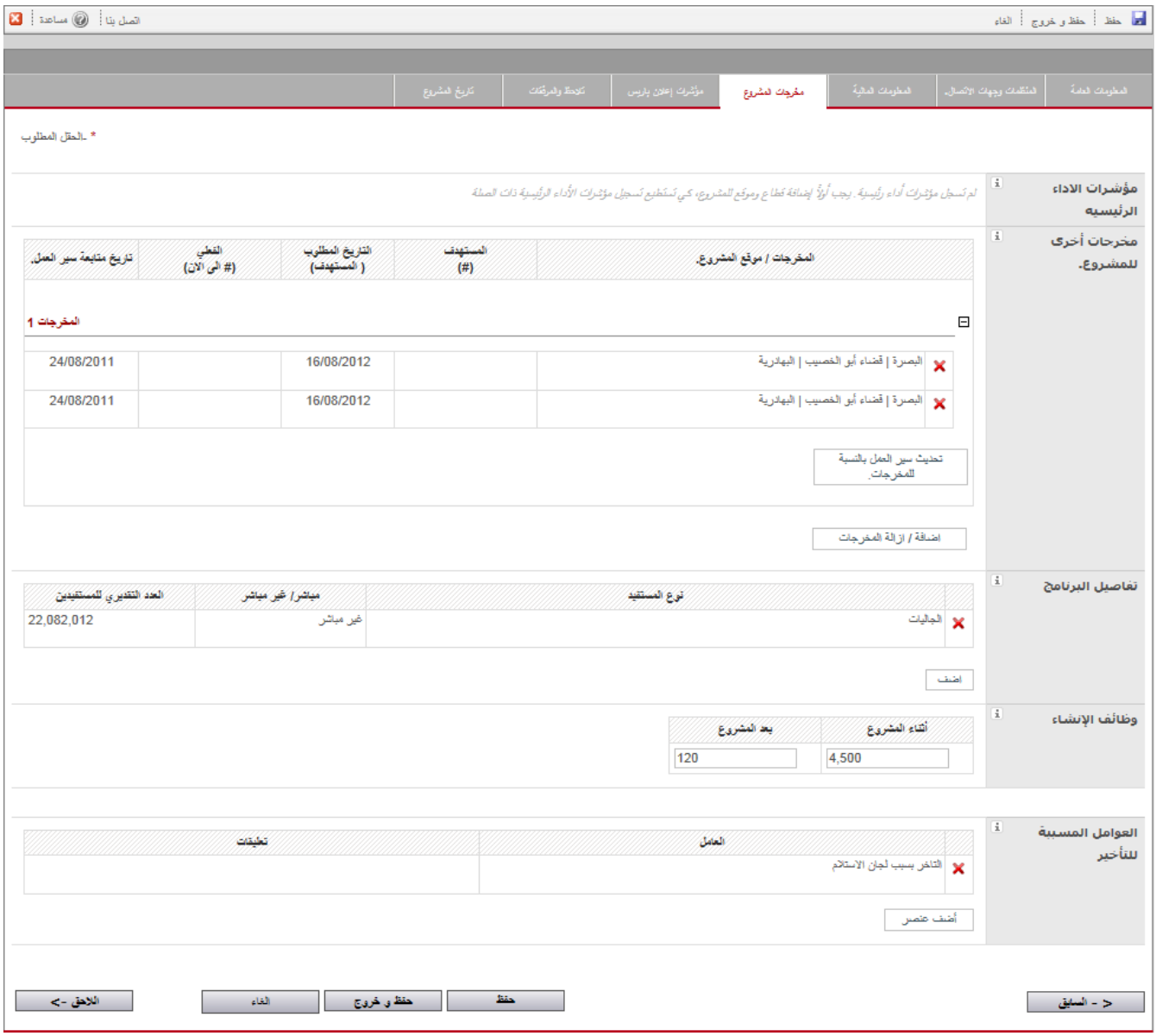

Figure 22: Project Outputs Section

For more details on how to provide the information requested in the *Project Outputs* section, see the table below:

Field Name	Instructions
Key Performance Indicators	Indicate the **Key Performance Indicators** used to measure the project performance.

	For more details, see Managing KPIs.
Other Project Outputs	Provide information about **Other Project Outputs** expected from the project implementation. For more details, see Managing Project Outputs.
Beneficiaries	Provide information about the individuals or groups that will directly or indirectly benefit after the completion of the project. For more details, see Managing Beneficiaries.
Jobs Created	Indicate the number of job openings created during project implementation. Also, indicate the number of job openings that are or will be created after the completion of the project.
Factors Causing Delays	Provide information about factors that may be delaying the progress of the project implementation. For more details, see Managing Delay Factors.

6.1 Managing KPIs

This chapter outlines how to add, edit and remove project related KPI records.

6.1.1 Adding a KPI Record

In order to add a new KPI record, follow the steps below:

1. Click the **Add/Remove KPIs** button at the bottom of the field. You will be directed to the *Add/Remove KPIs* sub-section (Figure 23).
2. Select the KPI to add to the project by entering the keyword in the search field and clicking the **GO** button. All the KPIs that match the search criteria will be displayed in the *Key Performance Indicator* table.
   Note: Selecting the appropriate instance from the *Sector* drop-down list will display only the KPIs that are related to the selected sector.
3. Specify the desired KPI(s) for the project by ticking the check-box to the left of the respective KPI(s).
4. Click the **Add Selected** button. The selected KPI(s) will appear in the *Selected KPIs* table.
5. Click the **OK** button to save the data input and return to the PROJECT OUTPUTS section, where the selected KPI(s) will appear in the respective fields. Or, click **Cancel** to terminate the operation.

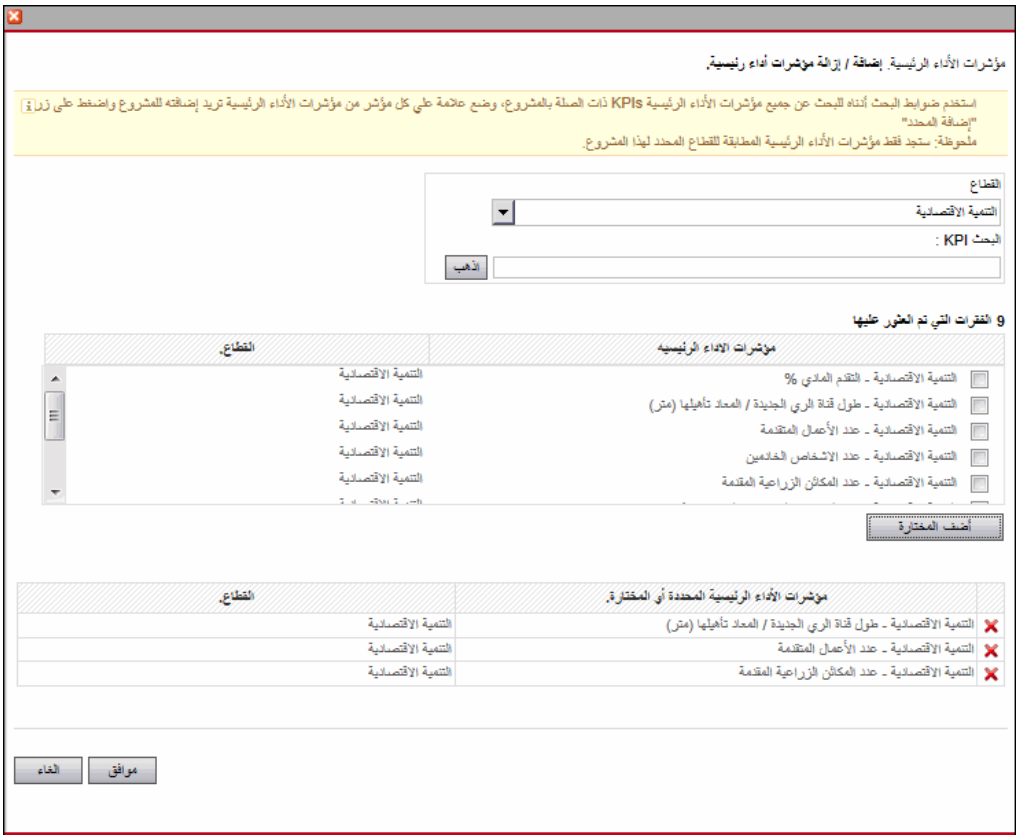

Figure 23: Adding a KPI Record

6.1.2 Providing KPI Progress Details

In order to provide the information requested, follow the steps below:

1. Click the **Update KPI Progress** button at the bottom of the KPI record to add progress information to. You will be directed to the *Update KPI Progress* sub-section where the list of locations defined in the GENERAL INFORMATION section is displayed (Figure 24).

Figure 24: Updating KPI Progress

2. Provide comments on how the output progress is evaluated in the **Evaluation** field.
3. Enter the total number of targets set by the project in the respective field.

4. Indicate the date when the project targets are expected to be reached. A calendar popup is available for this field, see Figure 3: Calendar.
5. Indicate the number of targets reached as of the date in the **Progress (# to date)** field.
6. Indicate the date when the progress information is provided in the **Progress Date** field. A calendar popup is available for this field, see Figure 3: Calendar.
7. Click the **OK** button to save the information input and return to the PROJECT OUTPUTS section. Or, click **Cancel** to terminate the operation.

6.1.3 Editing KPI Progress Information

In order to edit KPI progress information, follow the steps below:

1. Click the **Update KPI Progress** button at the bottom of the KPI record to modify information for. You will be directed to the *Update KPI Progress* sub-section where the information previously indicated for the KPI is displayed.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button save the changes made. Or, click **Cancel** to discard them.

6.1.4 Removing KPI Progress Information

In order to remove KPI progress information, use the ✖ **(Remove from the list)** button to the left of the selected record.

6.1.5 Removing KPI Records

In order to remove a KPI record, follow the steps below:

1. Click the **Add/Remove KPIs** button at the bottom of the field. You will be directed to the *Add/Remove KPIs* sub-section (Figure 23).
2. Click the ✖ **(Remove from the list)** button to the left of the KPI record in the *Selected KPIs* table.

6.2 Managing Project Outputs

This chapter outlines how to add, edit and remove project outputs.

6.2.1 Adding a Project Output Record

In order to add a new output record, follow the steps below:

1. Click the **Add/Remove Outputs** button at the bottom of the field. You will be directed to the *Add/Remove Outputs* sub-section (Figure 25).
2. Specify the **Output** for the project in the English and Arabic languages.
3. Click the **Add Output** button to add a new output.
   Click the **OK** button to save the information input and return to the PROJECT OUTPUTS section, where the selected output(s) will appear in the respective fields. Or, click **Cancel** to terminate the operation.

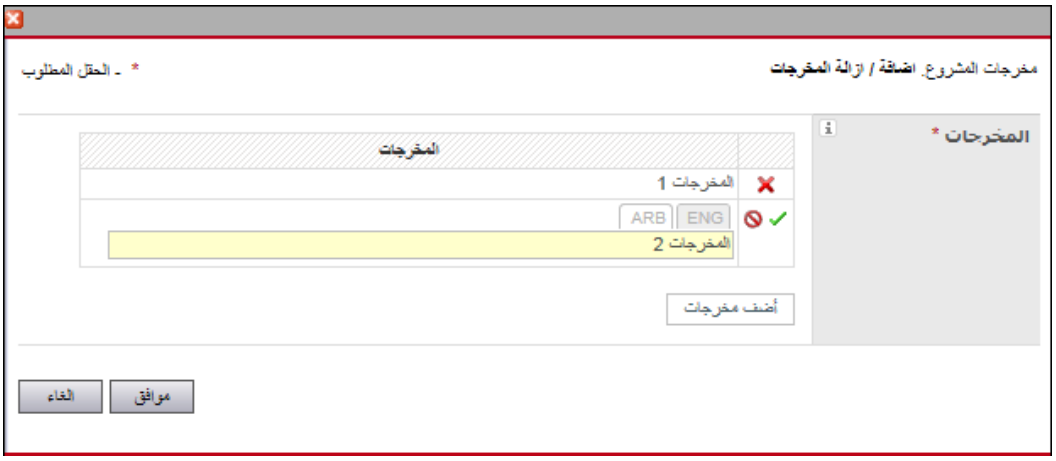

Figure 25: Adding an Output Record

6.2.2 Providing Output Progress Details

In order to provide output progress details, follow the steps below:

1. Expand the added output to provide information about its progress.
2. Click the **Update Output Progress** button at the bottom of the output record to add progress information to. You will be directed to the *Update Output Progress* sub-section where the list of locations defined in the GENERAL INFORMATION section is displayed.
3. Provide comments on how the output progress is evaluated in the **Evaluation** field.
4. Enter the total number of targets set by the project in the respective field.
5. Indicate the date when the project targets are expected to be reached in the **Target Date** field. A calendar popup is available for this field, see Figure 3: Calendar.
6. Indicate the number of targets reached as of the date in the **Progress (# to date)** field.
7. Indicate the date when the progress information is provided in the **Progress Date** field. A calendar popup is available for this field, see Figure 3: Calendar.
8. Click the **OK** button to save the information input and return to the PROJECT OUTPUTS. Or, click **Cancel** to terminate the operation.

6.2.3 Editing Project Output Progress Information

In order to edit project output progress information, follow the steps below:

1. Click the **Update Output Progress** button at the bottom of the output record to modify information for. You will be directed to the *Update Output Progress* sub-section where the information previously indicated for the output is displayed.
2. Make the appropriate changes in the data displayed.
3. Click the **OK** button to save the changes made. Or, click **Cancel** to discard them.

6.2.4 Removing Project Output Progress Records

In order to remove project output record, use the ✘ **(Remove from the list)** button to the left of the selected record.

6.2.5 Removing Project Output Records

In order to remove a KPI record, follow the steps below:

1. Click the **Add/Remove Outputs** button at the bottom of the field. You will be directed to the *Add/Remove Outputs* sub-section (Figure 25).
2. Click the ✘ **(Remove from the list)** button to the left of the selected output record.

6.3 Managing Beneficiaries

This chapter outlines how to add, edit and remove beneficiary records.

6.3.1 Adding a Beneficiary Record

In order to add a project beneficiary record, follow the steps below:

1. Click the **Add** button at the bottom of the field. A new record will appear (Figure 26).

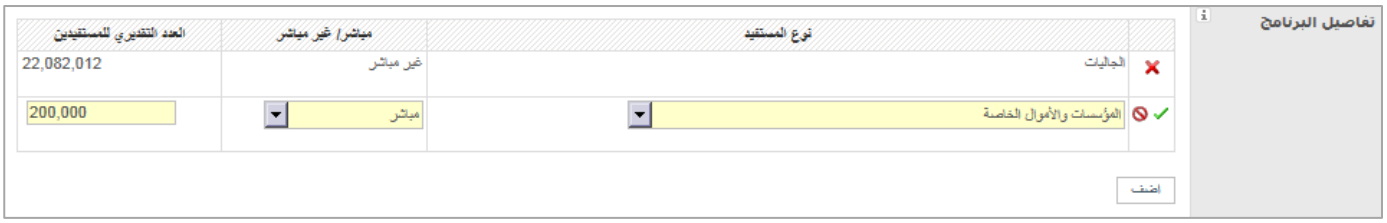

Figure 26: Adding a Project Beneficiary Record

2. Specify the type of organisations or individuals to be benefited from the project.
3. Indicate whether the selected entity will benefit directly or indirectly.
4. Enter the **Estimated Number of Benefited People**.
5. Click the ✓ **(OK)** button to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to terminate the operation.

6.3.2 Editing Beneficiary Records

In order to edit an existing beneficiary record, follow the steps below:

1. Click the beneficiary record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click the ✓ **(OK)** button to save the changes made. Or, click ⊘ **(Cancel)** to discard them.

6.3.3 Removing Beneficiary Records

In order to remove an existing beneficiary record, use the ✘ **(Remove from the list)** button to the left of the selected record.

6.4 Managing Delay Factors

This chapter outlines how to add, edit and remove project related delay factors.

6.4.1 Adding a Delay Factor Record

In order to add a delay factor record, follow the steps below:

1. Click the **Add Factor** button at the bottom of the field. A new record will appear (Figure 27).

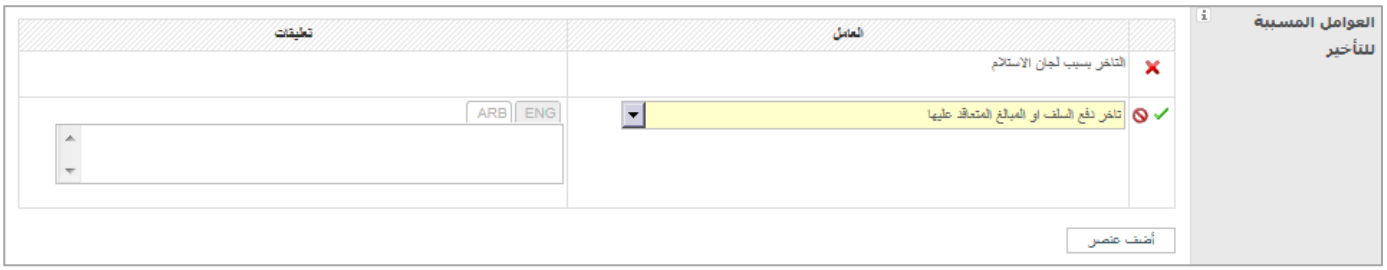

Figure 27: Adding a Delay Factor Record

2. Select the appropriate instance from the **Factor** drop-down list.
3. Provide additional comments if it is necessary in the English and Arabic languages.
4. Click the ✓ **(OK)** button to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to terminate the operation.

6.4.2 Editing Delay Factor Records

In order to edit an existing delay factor record, follow the steps below:

1. Click the delay factor record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes.
3. Click the ✓ **(OK)** button to save the changes made. Or, click ⊘ **(Cancel)** to discard them.

6.4.3 Removing Delay Factor Records

In order to remove an existing delay factor record, use the ✕ **(Remove from the list)** button to the left of the selected record.

7. PARIS DECLARATION INDICATORS

In the *Paris Declaration Indicators* section (Figure 28), you can enter information related to the Paris Declaration on Aid Effectiveness so that the commitments of both the Government and its partners to ensure more effective aid management can be monitored in line with the indicators included in the Declaration.

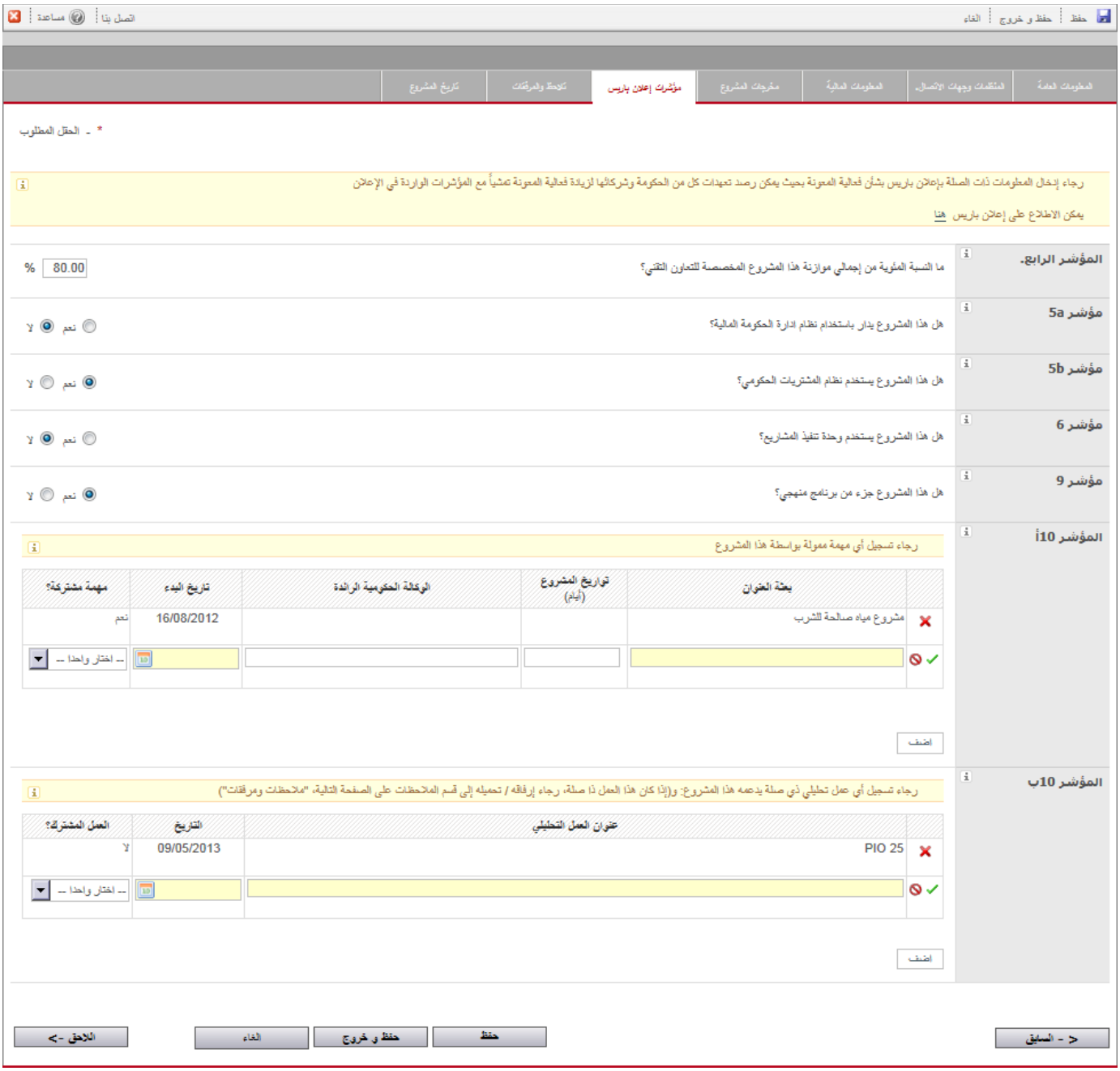

Figure 28: Paris Declaration Indicators Section

For more information on how to provide the information requested in the *Paris Declaration Indicators* section, see the table below:

Field Name	Instructions
Indicator 4	Indicate what percentage of the total budget of the project is allocated to technical cooperation.
Indicator 5a	Indicate whether the project is managed using the Government's financial management system. You can achieve this by activating the relevant radio button.
Indicator 5b	Indicate whether the project is managed using the Government's procurement system. You can achieve this by activating the relevant radio button.
Indicator 6	Indicate whether the project uses the Project Implementation Unit. You can achieve this by activating the relevant radio button.
Indicator 9	Indicate whether the project is part of a programme-based approach. You can achieve this by activating the relevant radio button.
Indicator 10a	Record any missions funded by the project. For details on missions' management, see Managing Mission Records.
Indicator 10b	Record any analytical works supported by the project. For details on analytical works management, see Managing Analytical Work Records.

7.1 Managing Mission Records

This chapter outlines how to add, edit and remove project missions.

7.1.1 Adding a Mission Record

In order to add a new mission record, follow the steps below:

1. Click the **Add** button at the bottom of the field. A new record will appear (Figure 29).

Figure 29: Adding a Mission Record

2. Fill in the **Mission Title** in the respective field.
3. Indicate the duration for the mission in the **Project Dates (Days)** field.
4. Type the name of the **Government Lead Agency** for the mission.

5. Indicate the **Start Date** for the mission. A calendar popup is available for this field, see Figure 3: Calendar.
6. Indicate whether this is a joint mission or not by selecting the appropriate instance from the drop-down list.
7. Click the ✓ **(OK)** button to the left of the respective row to confirm the information input. Or, click ⊘ **(Cancel)** to terminate the operation.

7.1.2 Editing Mission Records

In order to edit an existing mission record, follow the steps below:

1. Click the mission record that needs to be edited. This will activate the selected record.
2. Make the appropriate changes.
3. Click the ✓ **(OK)** button to save the changes made. Or, click ⊘ **(Cancel)** to discard them.

7.1.3 Removing Mission Records

In order to remove an existing mission record, use the ✕ **(Remove from the list)** button to the left of the selected record.

7.2 Managing Analytical Work Records

This chapter outlines how to add, edit and remove analytical work records.

7.2.1 Adding an Analytical Work Record

In order to add a new analytical work record, follow the steps below:

1. Click the **Add** button at the bottom of the field. A new record will appear (Figure 30).

Figure 30: Adding an Analytical Work Record

2. Fill in the **Title of Analytical Work** in the respective field.
3. Indicate the **Date** when the analytical work was started. A calendar popup is available for this field, see Figure 3: Calendar.
4. Indicate whether this is a **Joint Work** or not by selecting the appropriate instance from the drop-down list.
5. Click the ✓ **(OK)** button to the left of the respective row to confirm the information input. Or, click ⊘ **(Cancel)** to terminate the operation.

7.2.2 Editing Analytical Work Records

In order to edit an existing analytical work record, follow the steps below:

1. Click the analytical work record that needs to be edited. This will activate the selected record.
2. Make the appropriate changes.
3. Click the ✓ **(OK)** button to save the changes made. Or, click ⊘ **(Cancel)** to discard them.

7.2.3 Removing Analytical Work Records

In order to remove an existing analytical work record, use the ✘ **(Remove from the list)** button to the left of the selected record.

8. NOTES AND ATTACHMENTS

In the *Notes and Attachments* section (Figure 31), you can provide additional comments / notes about the project, attach project documents, monitoring reports and other relevant documentation.

Figure 31: Notes and Attachments Section

For more details on how to provide the information requested in the *Notes and Attachments* section, see the table below:

Field Name	Instructions
Notes / Comments	Provide any additional comments that are relevant to the given project.
Attach Document (e.g. project document, monitoring reports, and other)	Attach documents which may contain project-related information. For details on managing attachments, see Managing Attachments.

8.1 Managing Attachments

This chapter outlines how to add, view and remove project related attachments.

8.1.1 Adding an Attachment

In order to attach a document, follow the steps below:

1. Click the **Add Attachment** button. You will be directed to the *Add Attachment* sub-section (Figure 32).

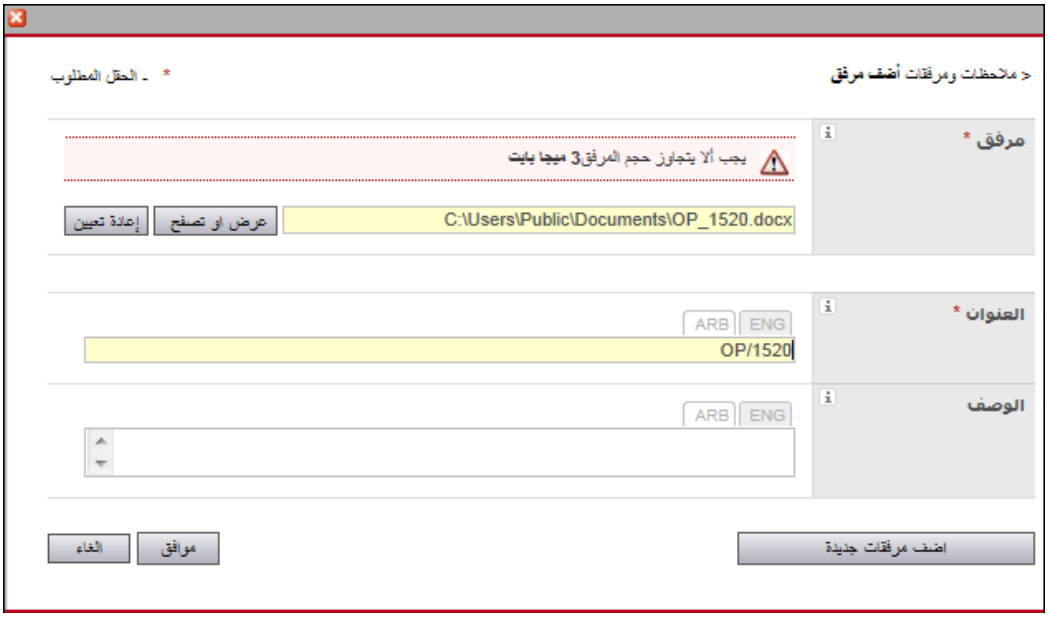

Figure 32: Adding an Attachment

2. Click the **Browse** button to locate the file that needs to be attached. *This field is mandatory*.
   Note: In order to reset a wrongly attached file, click the **Reset** button.
3. Enter the name for the document to be attached in the **Title** field in the English and Arabic languages. *This field is mandatory*.
4. Provide a brief **Description** for the document in the English and Arabic languages.
5. Click the **OK** button to attach the file. The attached file will appear in the respective table in the NOTES AND ATTACHMENTS section.

In order to attach another file, please click the **Add Another Attachment** button and provide the information requested as described in the paragraphs above.

8.1.2 Viewing Attachments

Click the title of the corresponding attachment. The attached file will be displayed in your browser.

8.1.3 Removing Attachments

To remove an attachment from the list, use the ✘ **(Remove from the list)** button to the left of the attachment title.

9. PROJECT HISTORY

In the *Project History* section (Figure 33), you can view statistical data on access to the given project.

For more information on *Project History* section, see the table below:

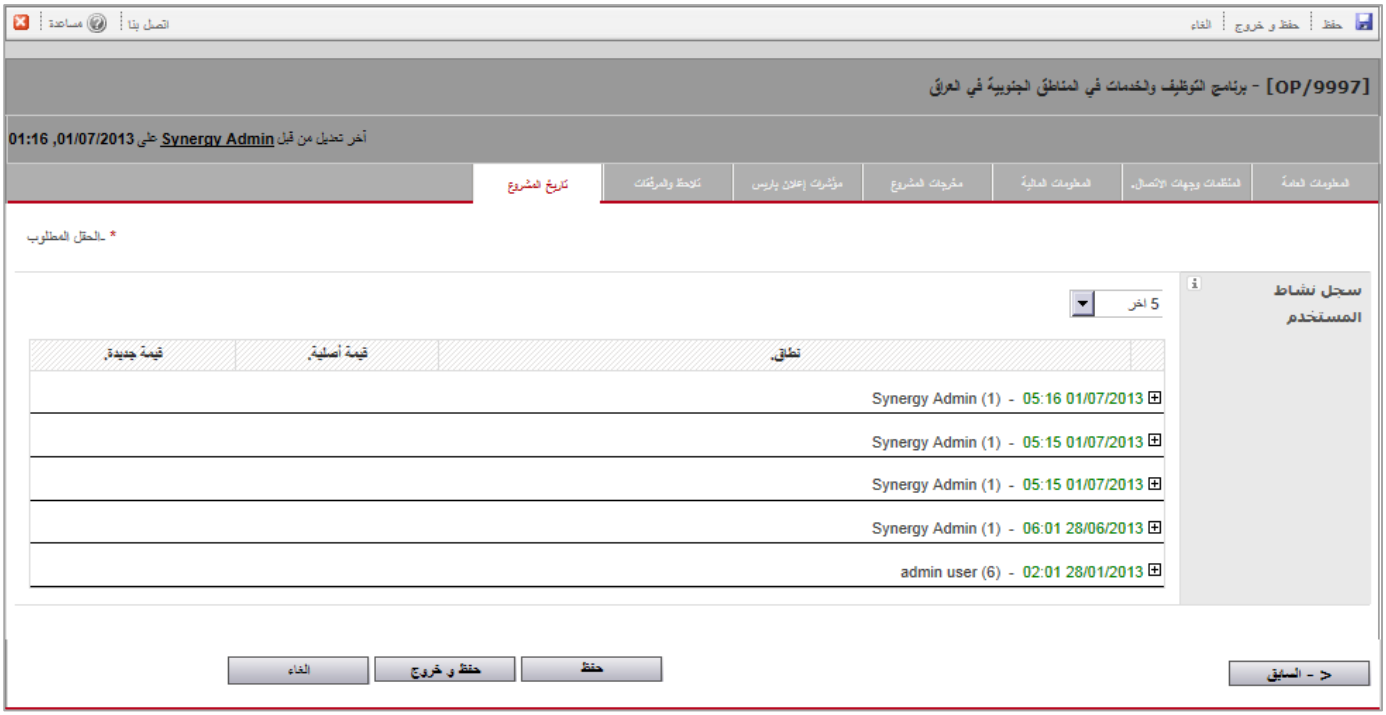

Figure 33: Project History Section

Field Name	Instructions
User Activity Log	Provides information about the recent changes made to the corresponding project. Identifies the user who performed the changes and the date/time when the modifications were made. **Note:** In the right side you may select the number of latest updates to be displayed or you may choose to display whole modification history on the particular project.

10. SAVING DATA

When you have finished with data input or modification you should save your changes before you leave the page. The following options for saving the data are available both at the top and bottom of the page:

- **Save** - to save the data entered and to remain on the opened page.
  Note: In sub-sections, clicking the **OK** button will save the changes made and to navigate you to the previous screen.
- **Save and Close** - to save the information input and leave the opened page.

If you wish to cancel your changes, use the **Cancel** button.

11. REFERENCES

Please refer to the following IDMS related documents:

- IDMS Capital Investments Projects Application User Manual
- IDMS Donor Profile Application User Manual
- IDMS NDP Indicators Application User Manual
- IDMS Analytics User Manual
- IDMS Administration Center User Manual

IRAQ DEVELOPMENT MANAGEMENT SYSTEM (IDMS)

NDP INDICATORS APPLICATION USER MANUAL

Version 1.3

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1. INTRODUCTION

This document describes the *NDP Indicators* application of the *Iraq Development Management System (IDMS)*. It provides the necessary instructions that the user should follow during the data entry process. The document is addressed to those who will use the *IDMS* application to add or modify NDP indicator information.

2. OVERVIEW

The *Iraq Development Management System (IDMS)* is an automated information management system which is designed to improve efficiency and coordination of donor activities in Iraq. 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 aid data.

The main objective of *IDMS* is to serve as a reliable and credible source of information on overall donor contributions to Iraq's reconstruction, economic recovery and socio-economic development, as well as to support the Government in effectively managing development assistance and promoting the accountable and transparent use of resources.

In the current version of *IDMS*, the following applications are present:

- **External Assistance Projects**
- **Donor Profile**
- **Capital Investments Projects**
- **Iraq Development Projects**
- **NDP Indicators**

The *NDP Indicators* application in *IDMS* is designed to collect and display information related to a particular NDP indicator. Once you have accessed the application, you can view the indicator details and create different types of analytical reports in the *List*, *Chart, Map,* and *Report* modules. Moreover, the *NDP Indicators* application contains a built-in on-line data entry subsystem, which is designed to allow entering the indicator related data remotely via Internet.

In the current design, the *NDP Indicators* application consists of the following sections:

- **General Information** section is used to provide basic information about the indicator. The information to be provided in this section includes the indicator name, baseline year, description, indicator type, etc.

- **Progress** section is used to record indicator progress details.

To navigate from one section to another, use the respective tab controls found at the top of the screen. Also, click respective **Next / Previous** button at the bottom of the screen to go to the next / previous section.

The *NDP Indicators* application provides a web-based user interface and requires a web browser (Internet Explorer) pre-installed.

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

3. GENERAL INFORMATION

In the *General Information* (Figure 1) section, you can provide basic information about the indicator. This includes the indicator name, baseline, year, description, sectors and locations where it will be used, reporting frequency, etc.

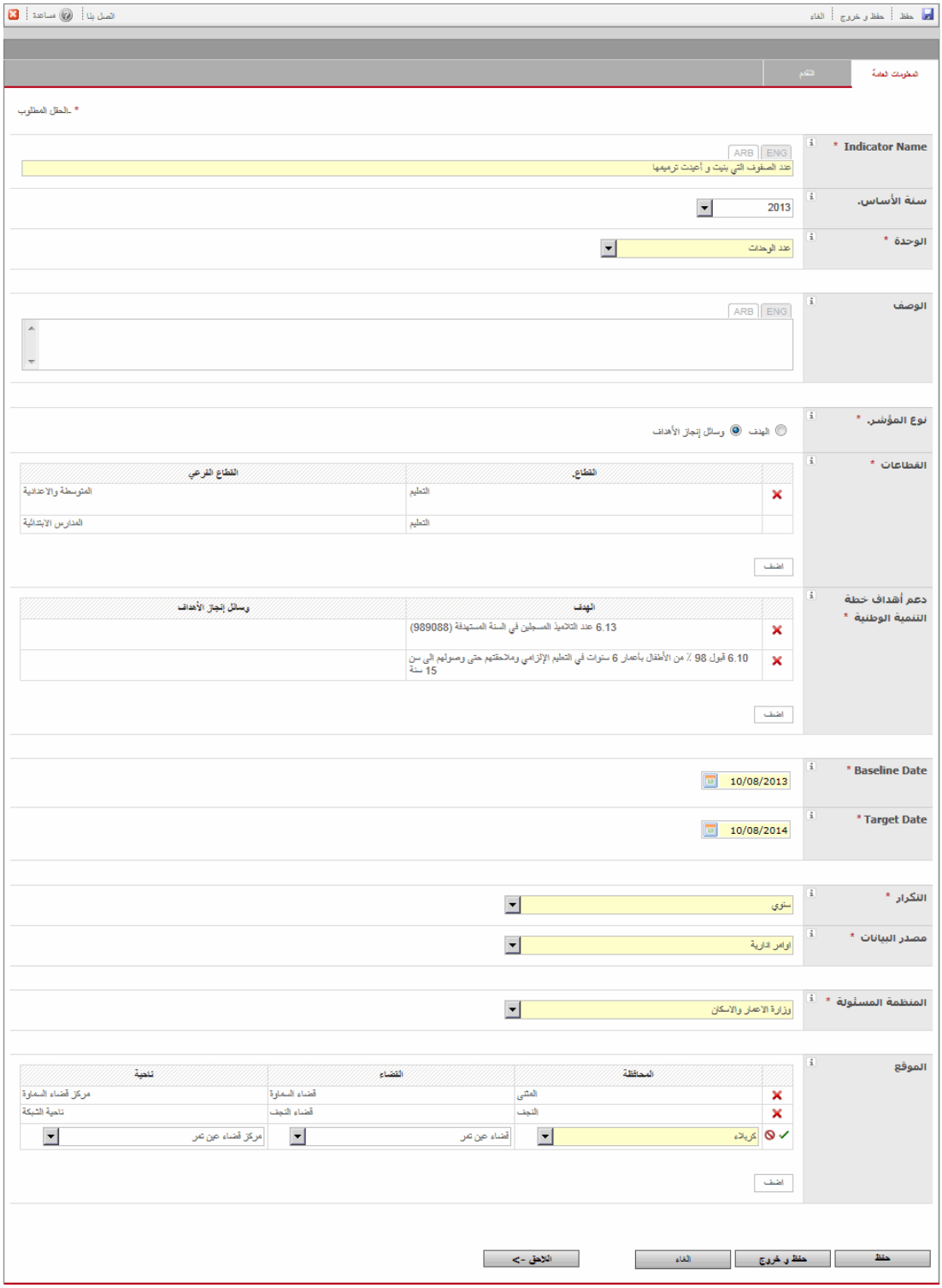

Figure 1: General Information Section

For more details on how to provide the information requested in the *General Information* section, refer to the table below:

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Instructions
Indicator Name	Enter the **Indicator Name** in the English and Arabic languages. *This field is mandatory*.
Baseline Year	Select the **Baseline Year** that will be used as a reference year against which the indicator progress will be measured. Please note that you will not be able to provide the information requested in this field unless you indicate *Baseline Date* and *Target Date* for the indicator.
Unit	Select the **Unit** of measurement for the indicator. The following values are available: • IQD (Iraqi Dinar) • Months • Number Count • Percentage • Ratio • USD (US Dollar) • kW (kilowatt) • km (kilometer) *This field is mandatory*.
Description	Enter a brief **Description** for the indicator in the English and Arabic languages.
Type of Indicator	Indicate whether the NDP indicator details should be provided on the *Objective* or *Means of Achieving Objectives* level. Depending on the selection in this field, objective and/or means of achieving objectives should be provided. *This field is mandatory*.
Sectors	Indicate the **Sectors** of economy where the indicator is implemented. For more details, see

	Figure 2: Calendar *Managing Sectors*. *This field is mandatory*.
National Development Plan Objectives Supported	Indicate the **National Development Plan Objectives Supported** by the indicator. *This field is mandatory*. If you have selected *Means of Achieving Objectives* as *Type of Indicator*, the **Means of Achieving Objectives** should be additionally provided for each selected objective. For more details, see Managing Objectives.
Baseline Date	Indicate the **Baseline Date** for the indicator. This is the date starting from which the terms outlined by the indicator will apply. *This field is mandatory*. A calendar popup is available for this input, see Figure 2: Calendar.
Target Date	Indicate the **Target Date** for the indicator. This is the date by which the objectives outlined by the indicator will be reached. *This field is mandatory*. A calendar popup is available for this input, see Figure 2: Calendar.
Frequency	Select the **Frequency** with which the indicator progress will be measured. The following options are available: • Annually • Monthly • Quarterly. *This field is mandatory*.
Data Source	Indicate the **Data Source** for the indicator. The following options are available: • Administrative orders • Administrative reports • GoI gazettes • Ministry records • Surveys *This field is mandatory*.
Responsible Organisation	Select the agency responsible for the indicator implementation. *This field is mandatory*.
Locations	Specify the geographic **Locations** in Iraq where the indicator is implemented. For details on managing locations, see Managing Locations.

Figure 2: Calendar

3.1 Managing Sectors

This chapter outlines how to add, edit and remove sector records.

3.1.1 Adding a Sector Record

In order to add a new sector record for the project, follow the steps below:

1. Click the **Add** button in the *Sectors* section. An empty record will appear (Figure 3).

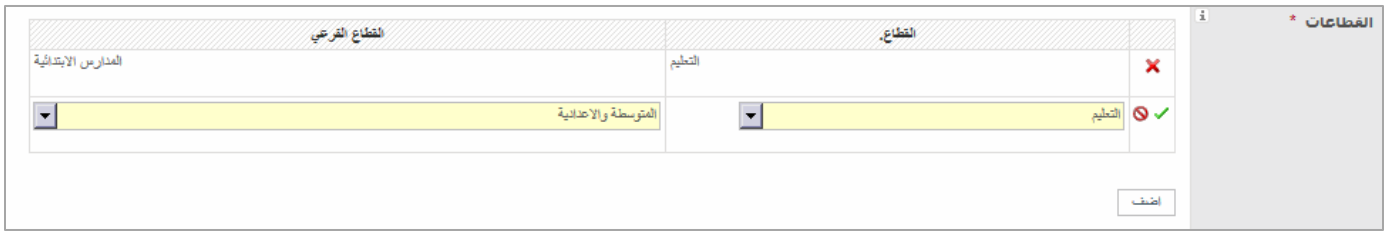

Figure 3: Adding a Sector Record

2. Select a **Sector** and **Sub-Sector** where the indicator is implemented. Please note that selection of a sector will filter the list in the *Sub-Sector* field and display only those instances that are related to the selected sector.
3. Click ✓ **(OK)** to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to terminate the operation.
4. Add another sector record, if necessary.

3.1.2 Editing Sector Records

In order to edit an existing sector record, follow the steps below:

1. Click the sector record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click ✓ **(OK)** to the left of the respective row to confirm the changes made. Or, click ⊘ **(Cancel)** to discard them.

3.1.3 Removing Sector Records

In order to remove an existing sector record, click ✖ **(Remove from the list)** to the left of the selected record.

3.2 Managing Objectives

This chapter outlines how to add, edit and remove National Development Plan objective records.

3.2.1 Adding an Objective Record

In order to add a new objective record, follow the steps below:

1. Click the **Add** button. An empty record will appear (Figure 4).

Figure 4: Adding an Objective Record

2. Select the **Objective** for the NDP indicator from the corresponding drop-down list.
3. Select the **Means of Achieving Objectives** for each selected objective. Please note that this field will become available if you have selected *Means of Achieving Objectives* as a *Type of Indicator* (see

4. GENERAL INFORMATION).
5. Click ✓ **(OK)** to the left of the respective row to confirm the information input. Or, click ⊘ **(Cancel)** to terminate the operation.
6. Add another objective record, if necessary.

3.2.2 Editing Objective Records

In order to edit an existing objective record, follow the steps below:

1. Click the record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click ✓ **(OK)** to the left of the respective row to confirm the changes made. Or, click ⊘ **(Cancel)** to discard them.

3.2.3 Removing Objective Records

In order to remove an existing objective record, click ✘ **(Remove from the list)** to the left of the selected record.

3.3 Managing Locations

This chapter outlines how to add, edit and remove location records.

3.3.1 Adding a Location Record

In order to add a new location record, follow the steps below:

1. Click the **Add** button in the *Locations* section. An empty record will appear (Figure 5).

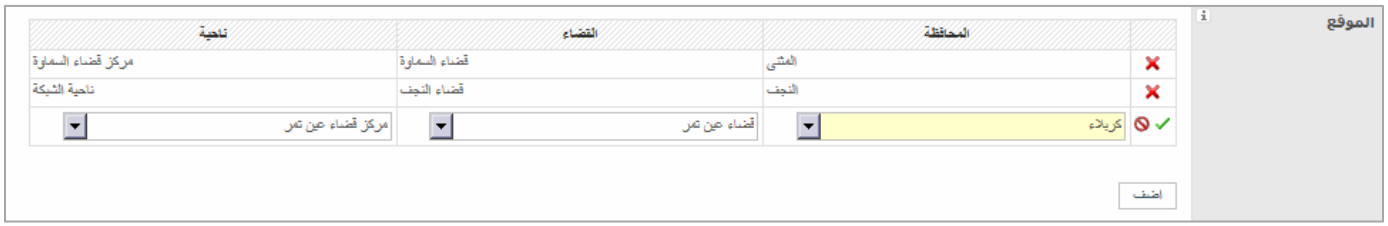

Figure 5: Adding a Location Record

2. Select the appropriate **Governorate** from the list. *This field is mandatory.*
3. Indicate the appropriate **Qadha** and **Nahia** by selecting them from the corresponding drop-down lists.
   Note: Selection of a governorate will filter the list in the *Qadha* field and display only those instances that are related to the selected governorate. In the same way, selection of a qadha will filter the list in the *Nahia* field.
4. Click ✓ **(OK)** to the left of the record to confirm the information input. Or, click ⊘ **(Cancel)** to terminate the operation.
5. Add another location record, if necessary.

3.3.2 Editing Location Records

In order to edit an existing location record, follow the steps below:

1. Click the location record that needs to be modified. This will activate the selected record.
2. Make the appropriate changes in the data displayed.
3. Click ✓ **(OK)** to the left of the respective row to confirm the changes made. Or, click ⊘ **(Cancel)** to discard them.

3.3.3 Removing Location Records

In order to remove an existing location record, click ✕ **(Remove from the list)** to the left of the selected record.

4. PROGRESS

In the *Progress* section (Figure 6), you may enter information about the progress made by the indicator throughout its duration as well as provide details on the indicator baseline and supportive evidence.

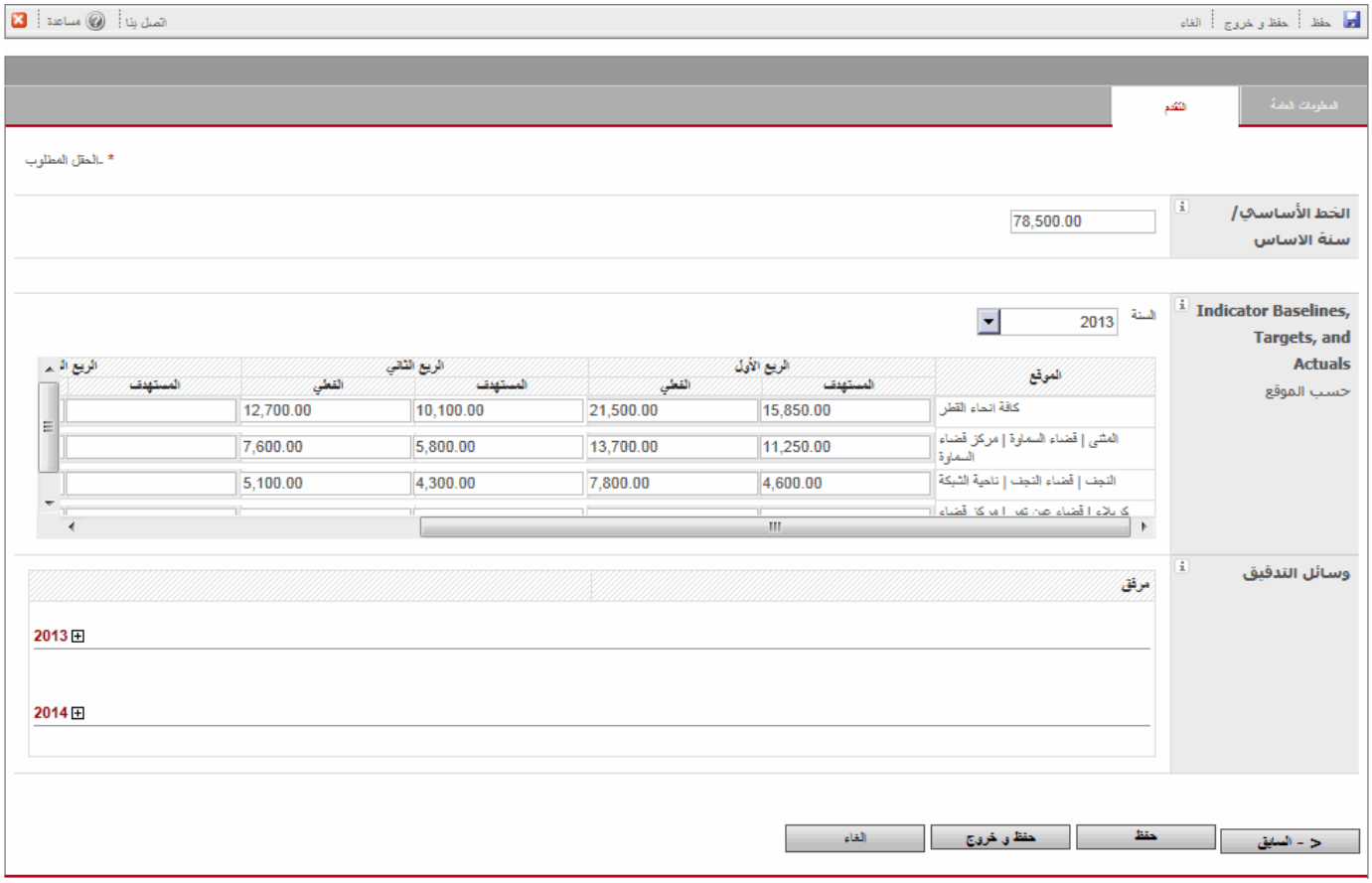

Figure 6: Progress Section

For more details on how to provide the information requested in the *Progress* section, refer to the table below.

Field Name	Instructions
Baseline	Define the **Baseline** value for the indicator. Please note that the value in this field should be provided in accordance with the *Baseline Year* selected in the GENERAL INFORMATION section.
Indicator Baselines, Targets, and Progress *by location*	Select the **Year** for which the indicator progress is provided from the drop-down list and then define the indicator **Actual** and **Target** values on the quarterly basis for each location selected in the GENERAL INFORMATION. The *Nationwide* location expresses a summary value of all selected locations.

	Note: The *Year* drop-down will contain only the years that are outlined by the indicator baseline and target years specified in the GENERAL INFORMATION section.
Means of Verification	Upload here all indicator related attachments on the yearly basis. For more details, see Managing Attachments.

6.1 Managing Attachments

This chapter outlines how to add and remove the indicator attachments.

6.1.1 Adding an Attachment

In order to attach a document, follow the steps below:

1. Expand the **Year** for which the attachment should be added.
2. Click the **Add Attachment** button. You will be directed to the *Add Attachment* sub-section (Figure 7).

Figure 7: Adding an Attachment

3. Click the **Browse** button to locate the file that needs to be attached.
   Note: In order to remove a wrongly attached file, click the **Reset** button.
4. In the **Title** field enter the name for the document in the English and Arabic languages. *This field is mandatory.*
5. Provide a brief **Description** for the document in the English and Arabic languages.
6. Click the **OK** button to attach the file. The attached file will appear in the respective table in the *Progress* section.

In order to attach another file, click the **Add Another Attachment** button and provide the information requested as described in the paragraphs above.

6.1.2 Viewing Attachments

In order to view an attachment, follow the steps below:

1. Expand the **Year** for which you want to view an attachment.
2. Click the attachment title. The attached file will be displayed in your browser.

6.1.3 Removing Attachments

In order to remove an existing attachment, click ✘ **(Remove from the list)** to the left of the selected file.

5. SAVING DATA

When you have finished with data input or modification you should save your changes before you leave the page. The following options for saving the data are available both at the top and bottom of the page:

- **Save** - to save the data entered and to remain on the opened page.
  Note: In forms and sub-forms, clicking the **OK** button will save the changes made and navigates you to the previous screen.
- **Save and Close** - to save the information input and leave the opened page.

If you wish to cancel your changes, use the **Cancel** button.

6. REFERENCES

Please refer to the following IDMS related document:

- IDMS External Assistance Projects Application User Manual
- IDMS Capital Investment Projects Application User Manual
- IDMS Donor Profile Application User Manual
- IDMS Analytics User Manual
- IDMS Administration Center User Manual