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Project: MFI Indicator

MFI User Manual

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Section 1: Introduction

AMIR program deals with several microfinance institutions (MFI) that need to submit their financial data to AMIR for review by the end of every month.

The MFI Indicator website is the medium through which data submission and tracking as well as the approval process is carried out. This website allows MFI Users to submit their financial records and to track their financial status based on their monthly submitted data.

The following pages will describe the MFI Indicator website for MFI Users, including the different menus, functionalities and permissions assigned to them.

Section 2: MFI Indicator for MFI Users

MFI Users can access the MFI Indicator website by entering the website's URL (<http://www.amir-jordan.org/mfireports>). This opens the website's main page, which includes the **User ID** and **Password**:

Enter the **User ID** and **Password** assigned to you by the system Admin then click on the *Submit* button. This opens the **MFI User** personal page:

This page contains a welcome note to MFI users, in addition to a declaration that the December 2002 data was used as preliminary data **ONLY**, which was required to initiate the MFI Data submission for January 2003. The MFI User personal page includes six menus:

- Change Password
- Data Submission
- Tracking Submitted Data
- MFI Data Report
- Detailed Report
- Logout

In addition, a Help Index is provided for MFI Users that contains help screens for quick reference. By clicking on the () link, a new window is displayed containing MFI Data Help Summary.

Section 2.1: Change Password

Clicking the *Change Password* link on the top menu of the MFI – Indicator website opens the **Change Password** page:

To change the current password:

1. Enter the old password in the **Old Password** field
2. Enter a new password in the **New Password** field
3. Reenter new password in the **Confirm Password** field
4. Click on the *Save* button

Section 2.2: Data Submission

Clicking the *Data Submission* link on the top menu of the MFI – Indicator website opens the welcome page for data submission:

The welcome note includes a brief description of the MFI – Indicator website. To start submitting data, click on *Start*. This opens the **MFI Data Submission** page:



This page allows MFI Users to select the desired period (year and month) for the data they want to submit. It contains two dropdown fields: Year and Month.

1. Select a year from the **Year** dropdown menu
2. Select a month from the **Month** dropdown menu
3. Click on the *Next* button to proceed



Note:

1. *If you click the Next button before selecting a year or month, an error message will be displayed prompting you to select a valid year or month!*
2. *If you select a period whose data has already been submitted before, an error message will be displayed stating that the selected period has been submitted previously*

Section 2.2.1: MFI Data Submission Step 1

After selecting a year and month from the MFI Data Submission page, and clicking on the *Next* button, the **MFI Data – Step 1** page is displayed:

	Help		Actual	Actual (Year To Date)	Budget	Budget (Year to Date)	Budget Annual
1		Gross Portfolio Outstanding (Including Past due) as of end of the period	<input type="text"/>	0.000	<input type="text"/>	0.000	3.000
2		Average Gross Portfolio Outstanding as of end of the period	0.000	0.000	N/A	N/A	N/A
3		Amount of Loans Disbursed During the Period	<input type="text"/>	4.000	<input type="text"/>	5.000	6.000
4		Outstanding Balance of Loans with Payments Past Over 30 Days (Principle)	<input type="text"/>	0.000	N/A	N/A	N/A
5		Amount of Installments Loans Past due Over 30 Days (Principle)	<input type="text"/>	0.000	N/A	N/A	N/A
6		Amount Written-Off during the Period	<input type="text"/>	0.000	N/A	N/A	N/A

This page contains the first table, **Part A. Raw Data**, of the data submission form, which includes the following items:

1. Gross portfolio outstanding (including past due) as of end of the period
2. Average gross portfolio outstanding as of end of the period [*computed!*]
3. Amount of loans disbursed during the period
4. Outstanding balance of loans with payments past over 30 days (Principle)
5. Amount of installments loans past due over 30 days (Principle)
6. Amount written off during the period
7. Total amount received during the period
8. Total amount due during the period
9. Operating income during the period (excluding donations, investments, etc.)
10. Operating costs during the period
11. Financing costs during the period
12. Loan loss provision during the period
13. Total equity as of end of the period
14. Total average equity as of end of the period [*computed!*]
15. Total fixed assets as of end of the period
16. Total average fixed assets as of end of the period [*computed!*]

17. Inflation Rate (according to central bank for the period) [*computed!*]
18. Funding liabilities as of end of the period
19. Average Funding Liabilities as of end of the period [*computed!*]
20. Market Interest Rate [*computed!*]
21. Net Income [*computed!*]
22. Total debt as of end of the period [*computed!*]
23. Total assets as of end of the period
24. Average total assets as of end of the period [*computed!*]

The table contains only three editable fields, which the MFI User should fill out. These are:

- Actual
- Budget
- Budget Annual

MFI Users should fill out these three fields for every applicable item in the Raw Data table. However, the **Budget Annual** field is entered **ONLY ONCE**, at the beginning of every year. I.e., if the selected month is a month other than January, the Budget Annual field becomes **READ ONLY!**

After filling out all the fields in the Raw Data table, do one of the following:

1. Click on “*Next Step*” to proceed to Step 2 of the MFI data submission form;
2. Click on “*Save*” to save your data and continue working on the current page (i.e., MFI Data – Step 1);
3. Click on “*Save And Exit*” to save your data and close the page, in which case, the system will open the **Tracking Submitted Data** page, displaying a message at the bottom of the page that the new data has been saved successfully.

This new record will be displayed in the *List of Submitted Data* with “*Incomplete*” status.

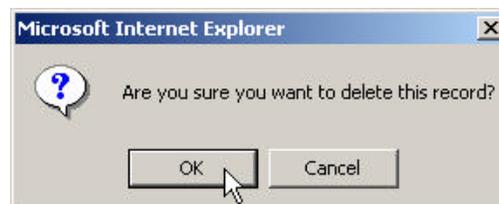


The screenshot shows the 'Tracking Submitted Data' page of the MFI-Indicator system. At the top, there is a navigation menu with options: Change Password, Data Submission, Tracking Submitted Data, MFI Data Report, Detailed Report, and Logout. Below the navigation is a search form with fields for 'Period' and 'Status' (set to 'All kinds') and a 'Search' button. A table titled 'List of Submitted Data' displays the following records:

Data Period	Status	Admin Message	Action	Details
April-30-2003	New			
June-30-2002	New			
July-31-2002	New			
December-31-2002	New			
February-28-2003	Updated			
January-31-2002	Updated			
February-28-2002	Approved			
January-31-2003	Approved			
June-30-2003	Incomplete		Delete	Details
May-31-2003	Incomplete		Delete	Details

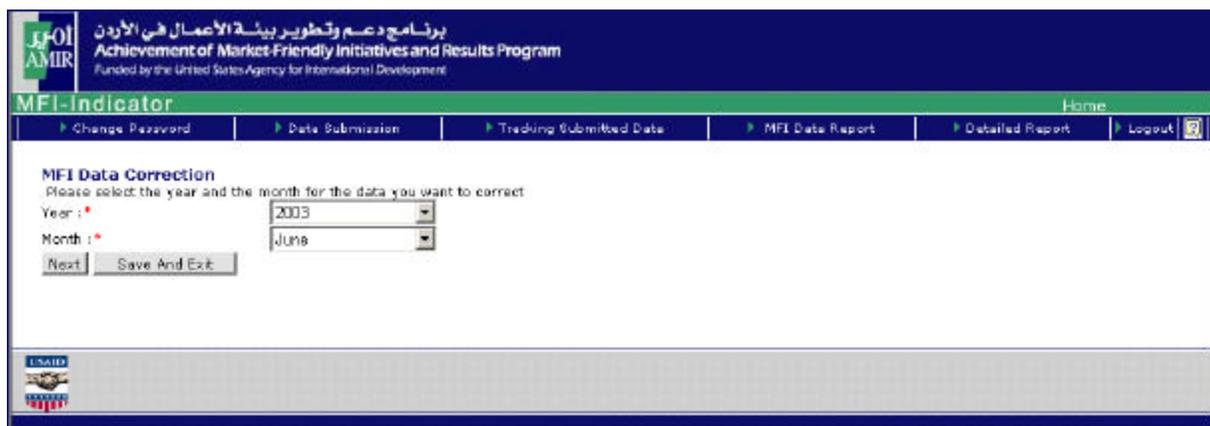
A red message at the bottom of the page states: 'New Data Has Been Saved Successfully'. The page number 'Pages 1' is visible in the bottom right corner.

To delete this new record, click on the *Delete* link in the **Action** column, in which case the system will display a message box prompting you to confirm the deletion action:



Click *OK* to delete the record or click *Cancel* to cancel the operation.

To view the details of this new record, click on the *Details* link in the **Details** column, the system will then open the **MFI Data Correction** page:



The screenshot shows the 'MFI Data Correction' page of the MFI-Indicator system. The page title is 'MFI Data Correction' and it contains the instruction: 'Please select the year and the month for the data you want to correct.' There are two dropdown menus: 'Year' (set to '2003') and 'Month' (set to 'JUN'). Below the dropdowns are two buttons: 'Next' and 'Save And Exit'. The USAID logo is visible in the bottom left corner.

Click on the *Next* button in the MFI Data Correction page to open the record and update your data. After updating your data, repeat steps 1, 2, or 3 above.

By clicking on the “*Save And Exit*” button described in Step 3 above however, the system will display in the Tracking Submitted Data page that UPDATED data has been submitted successfully:

The screenshot shows the 'Tracking Submitted Data' page of the MFI-Indicator system. At the top, there is a navigation menu with options: Change Password, Data Submission, Tracking Submitted Data, MFI Data Report, Detailed Report, and Logout. Below the menu, there is a search section titled 'Search for Data' with a 'Period' dropdown menu and a 'Status' dropdown menu set to 'All kinds', followed by a 'Search' button. Below the search section is a table titled 'List of Submitted Data' with the following columns: Data Period, Status, Admin Message, Action, and Details. The table contains several rows of data, including dates and their corresponding statuses. At the bottom of the page, a red message reads 'Updated Data Has Been Submitted Successfully' and the page number 'Page: 1' is visible in the bottom right corner.

Data Period	Status	Admin Message	Action	Details
April-30-2003	New			
June-30-2002	New			
June-30-2003	New			
July-31-2002	New			
December-31-2002	New			
February-28-2003	Updated			
January-31-2002	Updated			
February-28-2002	Approved			
January-31-2003	Approved			
May-31-2003	Incomplete		Delete	Details

Section 2.2.2: MFI Data Submission Step 2

Pressing the *Next Step* button in the MFI Data – Step 1 page opens the **MFI Data – Step 2** page:

MFI Data - Step 2 -

MFI Name: MFW
 Contact Person: Zaid Al Refai
 Year: 2003
 Month: April

Part B. Loan Portfolio

Help	Actual	Actual (Year To Date)	Budget	Budget (Year To Date)	Budget Annual
1	Total Number of Active Clients as of end of the period			0.000	41
	Number of Male	0	N/A	N/A	N/A
	Number of Female	0	N/A	N/A	N/A
	% of Women	0.000%	N/A	N/A	N/A
	Total	0	N/A	N/A	N/A
2	Total Number of Active Loans as of end of the period			0	45
	Number of Male	0	N/A	N/A	N/A
	Number of Female	0	N/A	N/A	N/A
	% of Women	0.000%	N/A	N/A	N/A
	Total	0.000	0	N/A	N/A

This page contains the second table of the data submission form: **Part B. Loan Portfolio**, which includes the following items:

1. Total number of active clients as of end of the period
 - *Number of Male*
 - *Number of Female*
2. Total number of active loans as of end of the period
 - *Number of Male*
 - *Number of Female*
3. Total number of new clients during the period
 - *Number of Male*
 - *Number of Female*
4. Total number of repeated clients during the period
 - *Number of Male*
 - *Number of Female*
5. Annual number of micro - small enterprise active credit client
 - *Number of Male*
 - *Number of Female*
6. Total number of loans disbursed during the period
7. Cumulative number of loans disbursed since inception as of the end of the period
 [computed!]

8. Amount of loans disbursed during the period [*computed!*]
9. Cumulative amount of loans disbursed since inception as of the end of the period [*computed!*]
10. Cumulative number of clients since inception as of the end of the period [*computed!*]
 - o *Number of Male*
 - o *Number of Female*
11. Average loan size disbursed during the period [*computed!*]
12. Portfolio in arrears over 30 days as of end of the period % [*computed!*]
13. Portfolio at risk over 30 days as of end of the period % [*computed!*]
14. Loan write off ratio for the period %
15. Loan Loss Reserve Ratio %
16. On time loan repayment ratio %

As in the first submission table, this table also contains three editable fields, which the MFI User should fill out for every applicable item. Again, the **Budget Annual** field is entered ONLY ONCE, at the beginning of every year, after which, this field becomes READ ONLY!

After filling out all the applicable fields in the Loan Portfolio table, do one of the following:

1. Click on “*Back*” to go back to Step 1 (Raw Data) of MFI Data Submission, however, the data entered in Step2 will be lost if the user did not press the “Save” button first (Point 3 below);
2. Click on “*Next Step*” to proceed to Step 3 of MFI Data Submission;
3. Click on “*Save*” to save your data and continue working on the current page (i.e., MFI Data – Step 2);
4. Click on “*Save And Exit*” to save your data and close the page, in which case, the system will open the **Tracking Submitted Data** page, displaying a message at the bottom of the page that updated data has been saved successfully.

This record will be displayed in the *List of Submitted Data* with “*Incomplete*” status.

Section 2.2.3: MFI Data Submission Step 3

MFI Data - Step 3 -

MFI Name: MFW
 Contact Person: Zaid Al Refai
 Year: 2003
 Month: April

Part C. Productivity

Item	Actual	Budget	Budget Annual
1 Total Number of Employees as of end of the period	<input type="text"/>	<input type="text"/>	61
2 Number of Loan Officers/Credit Agents as of end of the period	<input type="text"/>	<input type="text"/>	64
3 % of Loan Officers To the Overall Staff as End of the Month as of end of the period	0.000%	0.000%	N/A
4 Clients per Loan Officer as of end of the period	0	0	N/A
5 Portfolio per Loan Officer as of end of the period	0.000	0.000	N/A

The **MFI Data – Step 3** page contains four tables/parts:

Part C. Productivity: List

This part contains the following items:

1. Total number of employees as of end of the period
2. Number of loan officers/credit agents as of end of the period
3. % of Loan officers to the overall staff as end of the month as of end of the period
4. Clients per loan officer as of end of the period
5. Portfolio per loan officer as of end of the period

Only item (1) and (2) have editable fields, the rest of the items included in this part are computed, i.e., they are automatically calculated by the system.

Part D. Financial: List

This part contains the following items:

1. Operational sustainability %
2. Financial sustainability %
3. Debt to equity ratio % as of end of the period [*Computed!*]
4. Return on equity ratio %
5. Return on total assets ratio %
6. Yield on portfolio %

Part E. Efficiency: List

This part contains the following items:

1. Operating Cost Ratio
2. Cost per Unit Lent
3. Cost per Loan Made

Only item (1) has editable field(s), the rest of the items included in this part are computed, i.e., they are automatically calculated by the system.

Part F. General: List

This part contains the following items:

1. Total number of clients outside Amman during the period
 - *Number of Male*
 - *Number of Female*
2. Number of branches as of end of the period

Fill out the required fields for every applicable item in these tables. Again, as in step 1 and 2 described above, the **Budget Annual** field is entered **ONLY ONCE** at the beginning of every year, after which, this field becomes READ ONLY!

Some of the items in the Data Submission form (Step 1, 2, and 3) are supported with help glossaries that explain some of the terms used in the Data Submission form. To open the help glossary for a certain item, click on the help icon (?) next to the item description; this opens the help window for that item:



After filling out all the required fields for every applicable item in the MFI Data – Step 3 page, do one of the following:

1. Click on “*Back*” to go back to Step 2 of the MFI Data Submission form, however, the data entered in Step3 will be lost if the user did not press the “*Save*” button first (Point 2 below);
2. Click on “*Save*” to save your data and continue working on the same page, i.e., the MFI Data – Step 3 page;
3. Click on “*Save And Exit*” to save your data and close the page, in which case, the system will open the **Tracking Submitted Data** page, displaying a message at the bottom of the page that updated data has been saved successfully.

This record will be displayed in the *List of Submitted Data* with “*Incomplete*” status.

4. Click on “*Submit*” to send the data to the Admin, in which case, a message box is displayed prompting you to confirm your action. Press *OK* to submit the form or press *Cancel* to cancel the operation and go back to Step 3 of the Data Submission form:



By clicking *OK* however, the system will send the data along with a notification email to the Admin and will display a confirmation message in the **Tracking Submitted Data** page stating that submission of data has been successful:

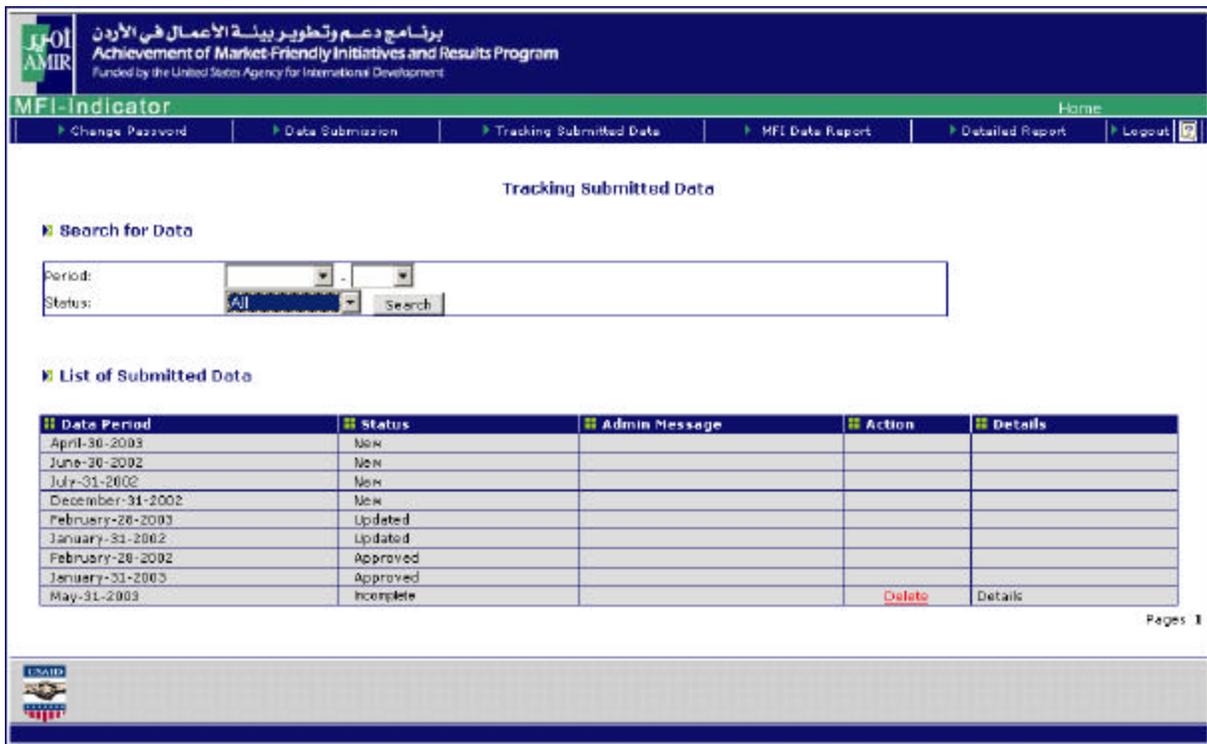
The screenshot shows the "Tracking Submitted Data" page of the MFI-Indicator system. The page header includes the AMIR logo and the text "برنامج دعم وتطوير بيئة الأعمال في الأردن" and "Achievement of Market-Friendly Initiatives and Results Program". The navigation menu includes "Change Password", "Data Submission", "Tracking Submitted Data", "MFI Data Report", "Detailed Report", and "Logout".

The main content area is titled "Tracking Submitted Data" and contains a search form with fields for "Period" and "Status" (set to "All") and a "Search" button. Below the search form is a table titled "List of Submitted Data" with the following data:

Data Period	Status	Admin Message	Action	Details
April-30-2003	New			
June-30-2002	New			
July-31-2002	New			
December-31-2002	New			
February-28-2003	Updated			
January-31-2002	Updated			
February-28-2002	Approved			
January-31-2003	Approved			

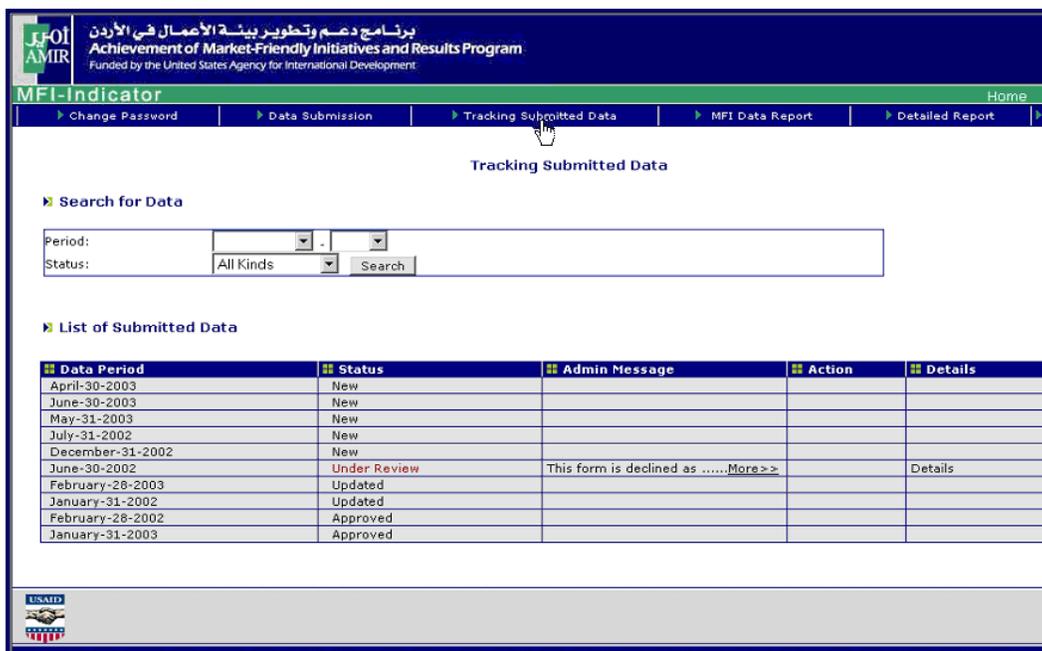
At the bottom of the page, a red message states "Updated Data Has Been Submitted Successfully". The page number "Page 1" is visible in the bottom right corner.

- Click on "*Cancel*" to cancel the whole operation and close the page. In which case, the system will open the **Tracking Submitted Data** page displaying the record in the *List of Submitted Data* with "*Incomplete*" status:



Section 2.3: Tracking Submitted Data

Clicking the *Tracking Submitted Data* link on the top menu of the MFI – Indicator website opens the **Tracking Submitted Data** page:



This page contains two sections:

Section 2.3.1: Search for Data

This section contains two search filters: **Period** and **Status** used to search for submitted data. Select a month and year from the *Period* dropdown menus and a status from the *Status* dropdown menu, and then click on the Search button. The system will then return search results that match the search criteria which you have selected.

Section 2.3.2: List of Submitted Data

This section contains the MFI User's table of submitted data. It includes the following fields:

Field Name	Description
Data Period:	Displays the date of the submitted data: month, day and year
Status:	Displays the status of the submitted data: <ul style="list-style-type: none"> ➤ New: newly submitted data (no action is taken yet by the Admin) ➤ Under Review: submitted data declined by the Admin. Returns to the MFI User with <i>Under Review</i> status ➤ Updated: submitted data declined by the Admin (sent back to the MFI User with <i>Under Review</i> status) that has been updated and re-submitted by MFI User ➤ Approved: submitted data obtaining the Admin's approval ➤ Incomplete: submission form has not been completed and submitted by the MFI User

Admin Message: If the *Status* of the submitted data is set to "Under Review" this field displays the decline message sent by the Admin. Clicking on *More* opens the message window, which contains the full message sent by the Admin:



Action: Displays the *Delete* link for forms with *Incomplete* status ONLY!

Field Name	Description
Details:	A hyperlink that allows the MFI user to open and update the submitted data (if the status is “Incomplete” or “Under Review” only!)



Note: Whenever the Admin declines the submitted data for any period, the MFI user will be sent a notification email, in which case the status for the declined period will change from “New” or Updated” to “Under Review”.

SECTION 2.3.2.1: MFI DATA CORRECTION

If the status of the submitted data in the *List of Submitted Data* is set to either *Under Review* or *Incomplete*, a *Details* link appears in the *Details* column. Clicking this link opens the **MFI Data Correction** page:

This page allows MFI Users to select the desired period for the data they want to correct. It contains two dropdown fields: Year and Month.

1. Select a year from the **Year** dropdown menu
2. Select a month from the **Month** dropdown menu
3. Click on *Save and Exit* to make changes only to the date without opening the form and making other changes. In which case, the system will display a message at the end of the Tracking Submitted Data page indicating that the updated data has been saved successfully.

The screenshot shows the 'Tracking Submitted Data' page of the MFI-Indicator system. At the top, there is a navigation menu with options like 'Change Password', 'Data Submission', 'Tracking Submitted Data', 'MFI Data Report', and 'Detailed Report'. Below the navigation is a search section with 'Period' and 'Status' dropdown menus and a 'Search' button. The main content area displays a table of submitted data with the following columns: Data Period, Status, Admin Message, Action, and Details. The table lists several entries, some with 'Under Review' status and others with 'Approved' or 'Updated' status. A red message at the bottom of the table states 'Updated Data Has Been Saved Successfully'. The footer features the USAID logo.

Data Period	Status	Admin Message	Action	Details
July-31-2002	New			
December-31-2002	New			
November-30-2003	Under Review			Details
November-30-2003	Under Review			Details
August-31-2003	Under Review			Details
April-30-2003	Updated			
January-31-2002	Updated			
February-28-2002	Approved			
January-31-2003	Approved			

4. Click on *Next* to open **MFI Data Submission – Step 1** page



Note: If you click the Next button before selecting a year or month, an error message will be displayed prompting you to select a valid year or month!

After making the necessary changes in the MFI Data – Step 1 page:

1. Click on “*Next Step*” to proceed to Step 2 of the MFI data submission form;
2. Click on “*Save*” to save your data and continue working on the current page (i.e., MFI Data – Step 1);
3. Click on “*Save And Exit*” to save your updated data and close the page, in which case, the system will open the **Tracking Submitted Data** page, displaying a message at the bottom of the page indicating that the updated data has been saved successfully. However, the status of the record will remain “*Under Review*” for previously submitted and declined data or “*Incomplete*” for records that have never been submitted to the Admin.

By clicking on the *Next Step* button however, the system opens the **MFI Data – Step 2** page. After making all necessary changes:

1. Click on “*Back*” to go back to Step 1 (Raw Data) of MFI Data Submission;
2. Click on “*Next Step*” to proceed to Step 3 of MFI Data Submission;
3. Click on “*Save*” to save your data and continue working on the current page (i.e., MFI Data – Step 2);
4. Click on “*Save And Exit*” to save your updated data and close the page, in which case, the system will open the **Tracking Submitted Data** page, displaying a message at the bottom of the page indicating that the updated data has been saved successfully. Again, the status of the record will remain “*Under Review*” for previously submitted and declined data or “*Incomplete*” for records that have never been submitted to the Admin.

Clicking the *Next Step* button (Number 2 above) opens the **MFI Data – Step 3** page. After making all necessary changes:

1. Click on “*Back*” to go back to Step 2 of the MFI Data Submission form;
2. Click on “*Save*” to save your updated data and continue working on the same page, i.e., the MFI Data – Step 3 page;
3. Click on “*Save And Exit*” to save your updated data and close the page, in which case, the system will open the **Tracking Submitted Data** page, displaying a message at the bottom of the page indicating that the updated data has been saved successfully. Again, as in MFI Data Step 1 and 2 above, the status of the record will remain “*Under Review*” for previously submitted and declined data or “*Incomplete*” for records that have never been submitted to the Admin.
4. Click on “*Submit*” to send the data to the Admin, in which case, a message box is displayed prompting you to confirm your action. Press *OK* to submit the form or press *Cancel* to cancel the operation and go back to Step 3 of the Data Submission form.

If the submitted record is a new record, i.e., its status was set to “*Incomplete*”, the record’s status will change to “*New*” after it is submitted to the Admin, and a message will be displayed at the end of the Tracking Submitted Data page indicating that the submission of the updated data has been successful.

If the submitted record’s status was set to “*Under Review*”, i.e., it has been previously submitted to and declined by the admin, the record’s status will change to “*Updated*” after it is resubmitted to the Admin, and a message will be displayed at the end of the Tracking Submitted Data page indicating that the submission of the updated data has been successful:



5. Click on “Cancel” to cancel the whole operation and close the page. In which case, the system will return to the **Tracking Submitted Data** page.

Section 2.4: MFI Data Report

Clicking on the *MFI Data Report* link on the top menu of the MFI – Indicator website opens the **MFI Data Report Query** page:



This page contains three dropdown menus used to generate MFI data reports either for the MFI User alone or for all MFI’s, in a given period of time:

1. Select a value from the **MFI User** dropdown menu (either your MFI or All MFI’s).

2. Select a year from the **Year** dropdown menu
3. Select a month from the **Month** dropdown menu
4. Click on the *OK* button to proceed or press *Reset* to change the selected values in the dropdown menus



Note: If you click on the OK button before selecting an MFI user, year or month, an error message will be displayed prompting you to select a valid MFI user, year and month!

Section 2.4.1: MFI Data Report for MFI User

If you select your MFI from the *MFI User* dropdown menu, the system generates an MFI Data Report for your MFI for the selected period of time, displaying the MFI name, contact person, and the MFI Data status for the selected year and month:

	Actual	Actual (Year To Date)	Budget	Budget (Year To Date)	Budget Annual
1. Gross Portfolio Outstanding (Including Past due) as of end of the period	1,000	1,000	2,000	2,000	3,000
2. Average Gross Portfolio Outstanding as of end of the period	0.500	0.500	N/A	N/A	N/A
3. Amount of Loans Disbursed During the Period	4,000	4,000	5,000	5,000	6,000
4. Outstanding Balance of Loans with Payments Past Over 30 Days (Principle)	7,000	7,000	N/A	N/A	N/A
5. Amount of Installments Loans Past due Over 30 Days (Principle)	8,000	5,000	N/A	N/A	N/A
6. Amount Written-Off during the Period	9,000	9,000	N/A	N/A	N/A

You can either print a “Print Friendly” version of the MFI Data Report or open the report in MS Excel format.

To print a print-friendly version of the report, click on the print icon (🖨); this opens the print instructions window and changes the format of the MFI Data Report:

AMIR PROGRAM - MFI Data Report

MFI Name: MFI
 Contact Person: Zeid Al Refai
 Year: 2003
 Month: January
 Status: Approved

Part A. Raw Data

	Actual	Budget (Year To Date)	Budget Annual
1. Gross Portfolio Outstanding (Including Past due) as of end of the period		2,000	3,000
2. Average Gross Portfolio Outstanding as of end of the period		N/A	N/A
3. Amount of Loans Disbursed During the Period		5,000	6,000
4. Outstanding Balance of Loans with Payments Past Over 30 Days (Principle)		N/A	N/A
5. Amount of Installments Loans Past due Over 30 Days (Principle)		N/A	N/A
6. Amount Written-Off during the Period	9,000	0,000	N/A

This mode allows MFI Users to print the MFI Data Report with proper page breaks and improved formatting.

To open the MFI Data Report in MS Excel format, click on the (📄) icon; this displays the **File Download** message, allowing you the option of either opening the file or saving it to your computer:

File Download

Some files can harm your computer. If the file information below looks suspicious, or you do not fully trust the source, do not open or save this file.

File name: MFI_Report_Print.xls
 File type: Microsoft Excel Worksheet
 From: 10.0.0.31

Would you like to open the file or save it to your computer?

Open Save Cancel More Info

Always ask before opening this type of file



Note: Depending on your browser settings, the system might open the Excel sheet directly without displaying the File Download message!

Section 2.4.2: MFI Data Report for All MFI's

If you select All MFI's from the *MFI User* dropdown menu, the system generates an MFI Data Report for all MFI's, including your own institution. The MFI Data Report status will always appear as APPROVED for any selected period of time:

The screenshot shows the 'MFI-Indicator' dashboard. The main content area is titled 'MFI Data Report' and displays the following information:

- MFI Name: ALL MFI's
- Contact Person: -
- Year: 2002
- Month: January
- Status: Approved

Below this information, there are links for a 'Print Friendly Version' and an 'Excel Version'. The main data is presented in a table under the heading 'Part A. Raw Data'.

	Actual	Actual (Year To Date)
1. Gross Portfolio Outstanding (Including Past due) as of end of the period	0.000	0.000
2. Average Gross Portfolio Outstanding as of end of the period	0.000	0.000
3. Amount of Loans Disbursed During the Period	0.000	0.000
4. Outstanding Balance of Loans with Payments Past Over 30 Days (Principle)	0.000	0.000
5. Amount of Installments Loans Past due Over 30 Days (Principle)	0.000	0.000
6. Amount Written-Off during the Period	0.000	0.000
7. Total Amount Received During the period	0.000	0.000
8. Total Amount due During the period	0.000	0.000
9. Operating Income During the period (Excluding Donations, Investments ,etc.)	0.000	0.000
10. Operating Costs During the period	0.000	0.000
11. Financing Costs During the period	0.000	0.000
12. Loan Loss Provision During the period	0.000	0.000
13. Total Equity as of end of the period	0.000	0.000

Unlike the MFI Data Report generated for a single MFI, this report displays only the **Actual** and **Year to Date** fields for all MFI's. This type of report can be very useful to compare your own MFI's data with other MFI's for a selected period of time.

This report can be printed in a "Print Friendly" version or opened in MS Excel format just like the MFI Data Report generated for a single MFI.

Section 2.5: MFI Detailed Report

Clicking on the *Detailed Report* link on the top menu of the MFI – Indicator website opens the **MFI Detailed Report Query** page:



This page contains two fields:

- **MFI User:** This is a grayed out field that displays all the MFI's
- **Year:** A dropdown menu from which the MFI User can select a year to generate a detailed report

Click on the *OK* button to proceed or press *Reset* to change the selected value in the **Year** dropdown menu.



Note: If you click on the OK button before selecting a year, an error message will be displayed prompting you to select a valid value from the Year field!

By clicking on the *OK* button however, the system generates an MFI Detailed Report for all the MFI's for the selected year. This report displays the MFI's Data for all the months of a given year (showing only Part B through Part F) of the MFI Data Submission items:

MFI Detailed Report

MFI Name: ALL MFI's
Year: 2003

For a Print Friendly Version Click on

Part B. Loan Portfolio

		Months					
		Jan	Feb	Mar	Apr	May	Jun
1	▶ Total Number of Active Clients as of the end of the period						
	▶ Number of Males	42	0	0	0	0	0
		Jul	Aug	Sep	Oct	Nov	Dec
		0	0	0	0	0	0
	▶ Number of Females	43	0	0	0	0	0
		Jul	Aug	Sep	Oct	Nov	Dec
		0	0	0	0	0	0
	▶ % of Women	50.588%	0.000%	0.000%	0.000%	0.000%	0.000%
		Jul	Aug	Sep	Oct	Nov	Dec
		0.000%	0.000%	0.000%	0.000%	0.000%	0.000%

Section 2.6: Logout

Clicking on the *Logout* link on the top menu of the MFI – Indicator website logs out the MFI User from the website, and prepares the website to be used by someone else:

