This page has intentionally been left blank.
1. **BRIEF INTRODUCTION TO THE IMS**
   1.1 WHAT IS THE IMS?
   1.2 WHAT IS THE EIMS?
   1.3 WHAT WAS THE PPBR?
   1.4 BRIEF OVERVIEW OF IMS SECURITY
   1.5 BRIEF DESCRIPTION OF IMS DEVELOPMENT
   1.6 IMS ADVANTAGES
   1.7 IMS COMPONENTS
   1.8 EIMS ENTITY CONCEPT

2. **START USING THE EIMS**
   2.1 HOW DO YOU LOG INTO THE EIMS FOR THE FIRST TIME?
      2.1.1 eIMS Access via IPPF Extranet
      2.1.2 eIMS Access via Secretariat Intranet
      2.1.3 Applying for an eIMS Log In
      2.1.4 IMS Access Policy
   2.2 NAVIGATION FEATURES OF THE IMS
      2.2.1 Button Definition
      2.2.2 Links
      2.2.3 Menu Navigation
   2.3 LOGGING INTO IMS
      2.3.1 Welcome Page
      2.3.2 Default Settings
      2.3.3 Is it Possible to Change the Entity Without Changing the Default or Home Entity?
      2.3.4 Can the User Change their Home Entity?

3. **LINKED PROJECTS**
   3.1 PROJECT
      3.1.1 Adding and Amending a Linked Project
      3.1.2 Select Country and Entity to Add Projects
   3.2 MULTI ENTITY TRANSFERS
   3.3 COMMODITIES (RO)
   3.4 COMM

4. **MEDICAL INFO**
   4.1 BRAND SEARCH
   4.2 COMPOSITION SEARCH
   4.3 COUNTRY SEARCH
   4.4 MANUFACTURER SEARCH
   4.5 TYPE SEARCH

5. **DATA ENTRY**
   5.1 TIME LINE STATUS
      5.1.1 Programmatic
      5.1.1.1 What is Programmatic Time Line Status?
      5.1.1.2 Adding and Editing Programmatic Information
      5.1.1.3 Implementation Issues of Programmatic Time Line Status
5.1.2 Financial
   5.1.2.1 What is Financial Time Line Status
   5.1.2.2 Adding and Editing Financial Information
   5.1.2.3 Implementation Issues of Financial Time Line Status
5.1.3 Entity Work
   5.1.3.1 What is Entity Work Time Line Status?
   5.1.3.2 Adding and Editing Entity Work Information
   5.1.3.3 Implementation Issues of Entity Work Time Line Status

5.2 SITUATION ANALYSIS
   5.2.1 What is ‘Situation Analysis’?
   5.2.2 Adding or Editing Situation Analysis Information

5.3 STRATEGIC PLAN
   5.3.1 Mission Statement
      5.3.1.1 What is a Mission Statement?
      5.3.1.2 Adding or Editing a Mission Statement
      5.3.1.3 Can a ‘Mission Statement’ be changed once submitted?
   5.3.2 Strategic Goals
      5.3.2.1 What are Strategic Goals?
      5.3.2.2 Adding or Editing Strategic Goals
      5.3.2.3 Can Strategic Goals be changed once submitted?
   5.3.3 Strategic Objectives
      5.3.3.1 What are Strategic Objectives?
      5.3.3.2 Adding and Editing Strategic Objectives
      5.3.3.3 Can Strategic Objectives be changed once submitted?

5.4 ENTITY SUMMARY
   5.4.1 General Info
   5.4.2 Qualitative Programme Analysis
      5.4.2.1 What is Qualitative Programme Analysis
      5.4.2.2 Adding Qualitative Programme Analysis Details

5.5 PROJECTS
   5.5.1 Adding a New Project
      5.5.1.1 What is a ‘Project’?
      5.5.1.2 Navigation
      5.5.1.3 Adding a New Project Profile
   5.5.2 Project Summary
   5.5.3 Main
   5.5.4 Specific Objectives
      5.5.4.1 What is a ‘Specific Objective’?
      5.5.4.2 Specifying Expected Results by Following SMART Guidelines
      5.5.4.3 Guidelines for Writing a Good Specific Objective
      5.5.4.4 Specific Objectives and their Relationship with the IMS
      5.5.4.5 Adding New Specific Objectives
      5.5.4.6 Indicators
      5.5.4.7 Selecting Indicators
      5.5.4.8 Process vs Results Indicators
      5.5.4.9 Guidelines for Writing Good Indicators
5.5.4.10 Adding a New Indicator
5.5.4.11 What does ‘Qualitative’ and ‘Quantitative’ Mean?
5.5.4.12 Adding a Qualitative Indicator
5.5.4.13 Adding a Quantitative Indicator
5.5.4.14 X Labels Feature
5.5.4.15 Lessons Learned
5.5.5 Activities
5.5.5.1 What is an Activity?
5.5.5.2 Guidelines for Writing a Good Activity
5.5.5.3 Adding a New Activity
5.5.6 Financial Aspects and Assets
5.5.6.1 Financial Aspects of a Project
5.5.6.2 Organization of Financial Information – Chart of Accounts
5.5.6.3 Multi-year Projects and their Budget Allocation within the eIMS Assets
5.5.6.4 What is an Asset?
5.5.6.5 Adding Assets to a Project
5.5.7 Income
5.5.7.1 What is Income?
5.5.7.2 Income and Mapping Local Chart of Accounts
5.5.7.3 Adding Income to Project
5.5.8 Expenses
5.5.8.1 What is an Expense?
5.5.8.2 Adding Expenses to a Project
5.5.9 Transfers
5.5.9.1 What is a transfer?
5.5.9.2 How do transfers take place?
5.5.9.3 How do these ‘Budget Amendments’ appear within ‘Transfers’?
5.5.10 Staff Allocation
5.5.10.1 Ways to Record Personnel and Professional Fees
5.5.10.2 What is Staff Allocation?
5.5.10.3 Allocating Staff to a Project
5.5.10.4 Staff Allocation Budget Amendments
5.5.11 Project Reports
5.5.11.1 Viewing Project Reports
5.5.11.2 Types of Project Reports
5.5.11.3 Detailed Description of Project Reports
5.5.12 Qualitative Analysis
5.5.13 Comment Variance

5.6 INDIRECT COSTS
5.6.1 What are Indirect Costs?
5.6.2 Functionality of Indirect Costs in the IMS
5.6.3 Indirect Cost Recovery

5.7 STAFF ALLOCATION (FOR ENTIRE ENTITY)
5.7.1 Difference Between Staff Allocation for an Entity and Staff Allocation for a Project
5.7.2 Functionality of Staff Allocation for an Entire Entity
5.7.3 What Happens if Human Resource Details Change?
5.7.4 Adding Staff Allocation for an Entire Entity

5.8 FUNDS
5.8.1 Fund Details
5.8.1.1 Definition and Types of Funds
5.8.1.2 Funds with Indirect Income
5.8.1.3 Creating a New Fund
5.8.2 Main
5.8.3 Balance
5.8.4 Opening Balance
5.8.4.1 What is an Opening Balance
5.8.4.2 Creating an Opening Balance

5.9 BUDGET AMENDMENTS
5.9.1 Aspects of Budget Amendments
5.9.1.1 What is a Budget Amendment?
5.9.1.2 Adding a New Budget Amendment
5.9.2 Main
5.9.3 Details
5.9.4 Approval Signatures
5.9.4.1 What are Approval Signatures?
5.9.4.2 Adding Approval Signatures
5.9.5 Signature Dates
5.9.6 Approval
5.9.6.1 What is the Approval of a Budget Amendment?
5.9.6.2 How are Budget Amendments Approved?
5.9.7 Types of Budget Amendments
5.9.7.1 Project to Project
5.9.7.2 Project to Fund
5.9.7.3 Fund to Project
5.9.7.4 Fund to Fund
5.9.7.5 Addition
5.9.7.6 Reduction

5.10 LEDGER
5.10.1 Copy Ledger by Project
5.10.1.1 Function of Copy Ledger By Project
5.10.1.2 How to Copy a Ledger by Project
5.10.1.3 How can the user check the budget has been copied?
5.10.2 Copy Ledger All Projects
5.10.2.1 Function of Copy Ledger All Projects
5.10.2.2 How to Copy a Ledger for All Projects
5.10.3 Programmatic Data
5.10.3.1 Function of Programmatic Data Copy
5.10.3.2 How to Copy Programmatic Information
5.10.4 Situation Analysis
5.10.4.1 Function of Situation Analysis Copy
5.10.4.2 How to Copy Situation Analysis Information
5.10.5 Import Data
5.10.6 Export Data
<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.10.6.1</td>
<td>Why would Data need to be Exported?</td>
</tr>
<tr>
<td>5.10.6.2</td>
<td>How to Export Data</td>
</tr>
<tr>
<td><strong>5.11 STATISTICS</strong></td>
<td></td>
</tr>
<tr>
<td>5.11.1</td>
<td>Services</td>
</tr>
<tr>
<td>5.11.2</td>
<td>IEC</td>
</tr>
<tr>
<td>5.11.2.1</td>
<td>What is IEC?</td>
</tr>
<tr>
<td>5.11.2.2</td>
<td>Adding an IEC Record</td>
</tr>
<tr>
<td>5.11.3</td>
<td>Global Indicators</td>
</tr>
<tr>
<td>5.11.3.1</td>
<td>What are Global Indicators?</td>
</tr>
<tr>
<td>5.11.3.2</td>
<td>How to Answer a Global Indicator Question</td>
</tr>
<tr>
<td><strong>5.12 COMMODITIES (FPA)</strong></td>
<td></td>
</tr>
<tr>
<td><strong>5.13 HUMAN RESOURCES</strong></td>
<td></td>
</tr>
<tr>
<td>5.13.1</td>
<td>Staff</td>
</tr>
<tr>
<td>5.13.1.1</td>
<td>Definition of Staff</td>
</tr>
<tr>
<td>5.13.1.2</td>
<td>Adding a Staff Member to Human Resources</td>
</tr>
<tr>
<td>5.13.2</td>
<td>Staff Costs</td>
</tr>
<tr>
<td>5.13.2.1</td>
<td>Definition of Staff Costs</td>
</tr>
<tr>
<td>5.13.2.2</td>
<td>Adding Staff Costs to a Staff Member</td>
</tr>
<tr>
<td>5.13.3</td>
<td>Prof Svc/Temp</td>
</tr>
<tr>
<td>5.13.3.1</td>
<td>Definition of Prof Svc/Temp</td>
</tr>
<tr>
<td>5.13.3.2</td>
<td>Adding Prof Svc/Temp to Human Resources</td>
</tr>
<tr>
<td>5.13.4</td>
<td>Prof Svc/Temp Costs</td>
</tr>
<tr>
<td>5.13.4.1</td>
<td>Definition of Prof Svc/Temp Costs</td>
</tr>
<tr>
<td>5.13.4.2</td>
<td>Adding Prof Svc/Temp Costs to a Prof Svc/Temp</td>
</tr>
<tr>
<td><strong>5.14 ACCREDITATION</strong></td>
<td></td>
</tr>
<tr>
<td>5.14.1</td>
<td>Aspects of Accreditation</td>
</tr>
<tr>
<td>5.14.1.1</td>
<td>Definition of Accreditation</td>
</tr>
<tr>
<td>5.14.1.2</td>
<td>Permissions to Accreditation</td>
</tr>
<tr>
<td>5.14.1.3</td>
<td>Adding Accreditation Details</td>
</tr>
<tr>
<td>5.14.2</td>
<td>Member’s Guide</td>
</tr>
<tr>
<td>5.14.2.1</td>
<td>Functionality of the Member’s Guide</td>
</tr>
<tr>
<td>5.14.2.2</td>
<td>Using the Member’s Guide</td>
</tr>
<tr>
<td>5.14.3</td>
<td>FPA Self-Assessment (F1)</td>
</tr>
<tr>
<td>5.14.3.1</td>
<td>Functionality of FPA Self-Assessment</td>
</tr>
<tr>
<td>5.14.3.2</td>
<td>Adding and Viewing FPA Self-Assessment Details</td>
</tr>
<tr>
<td>5.14.4</td>
<td>Review Team Assessment</td>
</tr>
<tr>
<td>5.14.4.1</td>
<td>Functionality of Review Team Assessment</td>
</tr>
<tr>
<td>5.14.4.2</td>
<td>Adding and Viewing Review Team Assessment Details</td>
</tr>
<tr>
<td>5.14.5</td>
<td>RO Assessment (Format 2)</td>
</tr>
<tr>
<td>5.14.5.1</td>
<td>Functionality of RO Assessment (Format 2)</td>
</tr>
<tr>
<td>5.14.5.2</td>
<td>Adding and Viewing Regional Office Assessment Details</td>
</tr>
<tr>
<td><strong>5.15 ENTITY DETAILS</strong></td>
<td></td>
</tr>
<tr>
<td>5.15.1</td>
<td>Contact Details</td>
</tr>
<tr>
<td>5.15.1.1</td>
<td>Definition of Contact Details</td>
</tr>
<tr>
<td>5.15.1.2</td>
<td>Adding and Amending Contact Details</td>
</tr>
</tbody>
</table>
5.15.1.3 Components of Contact Details
5.15.2 Membership
  5.15.2.1 What is Membership?
  5.15.2.2 Adding and Amending Membership Details
5.15.3 Administrators
5.15.4 Units
  5.15.4.1 What are Units?
  5.15.4.2 Adding and Amending Unit Details
5.15.5 Role
5.15.6 Delivery Points
5.15.7 Services
5.15.8 Chart of Accounts

6. DOCUMENTATION
6.1 GENERAL
6.2 POLICIES
6.3 IMS TRAINING
6.4 SYSTEM DOCUMENT
6.5 ACCREDITATION
6.6 USER MANUAL

7. SEARCH
7.1 BASIC
  7.1.1 What is a Basic Search?
  7.1.2 How to Perform a Basic Search
7.2 ADVANCED
  7.2.1 What is an Advanced Search?
  7.2.2 How to Perform an Advanced Search
7.3 FREE TEXT
  7.3.1 What is a Free Text Search?
  7.3.2 How to Perform a Free Text Search
7.4 BY ACTIVITIES
  7.4.1 What is a By Activity Search?
  7.4.2 How to Perform a By Activity Search
7.5 BY DONOR
  7.5.1 What is a By Donor Search?
  7.5.2 How to Perform a By Donor Search

8. REPORTS
8.1 TYPES OF INSTITUTIONAL REPORTS
8.2 REPORT SELECTORS AND FILTERS
8.3 REPORT TIPS AND SPECIAL DIALOG BOXES
8.4 PRINTING REPORTS
8.5 EXPORTING REPORTS

9. SYSTEM DATA
9.1 REFERENCE DATA (ATT)
9.2 COUNTRIES
  9.2.1 Details - Country Identification
9.2.2 Extension – Additional Country Details
9.2.3 Donors

9.3 CURRENCIES

10. ADMINISTRATION

10.1 USERS
  10.1.1 User Details
    10.1.1.1 Viewing, Adding and Amending User Details
    10.1.1.2 User Details Profile Page
  10.1.2 Groups
    10.1.2.1 What are Group Permissions?
    10.1.2.2 Granting Group Permissions
    10.1.2.3 Group Definitions
  10.1.3 Entity
    10.1.3.1 What are Entity Permissions?
    10.1.3.2 Granting Entity Permissions
  10.1.4 Units
    10.1.4.1 What are Unit Permissions?
    10.1.4.2 Granting Unit Permissions

10.2 CHART OF ACCOUNTS

10.3 SERVICES
  10.3.1 Service Details
    10.3.1.1 Function of Service Details
    10.3.1.2 Adding/Editing a Service
  10.3.2 Service Types
    10.3.2.1 What are Service Types?
    10.3.2.2 Adding a New Service Type –
  10.3.3 Service Type Report Groups
    10.3.3.1 What are Service Type Report Groups?
    10.3.3.2 Adding a New Service Type Report Group
  10.3.4 Report Groups
    10.3.4.1 What are Report Groups?
    10.3.4.2 Adding a New Report Group
  10.3.5 CYP
    10.3.5.1 What is CYP?
    10.3.5.2 Adding CYP information

10.4 GLOBAL INDICATORS
  10.4.1 Indicators
    10.4.1.1 What are Indicators?
    10.4.1.2 Adding/Amending Global Indicators
  10.4.2 Questions
    10.4.2.1 What are Questions?
    10.4.2.2 Adding/Amending Global Indicator Questions

10.5 GROUP ACCESS

10.6 GROUP DEFINITION

10.7 TABLES

10.8 MENUS

10.9 MENU TIPS

10.10 HELP

10.11 LABELS (DATDIC)
10.12 TIPS FOR PAGES
10.13 USER MANUAL
   10.13.1 Header Section
   10.13.2 Subheader Section Level 1
   10.13.3 Subheader Section Level 2
10.14 ERROR MESSAGES
10.15 INTERNAL MESSAGES
   10.15.1 Managing Internal Messages
      10.15.1.1 What are Internal Messages?
      10.15.1.2 Adding and Amending Internal Messages
      10.15.1.3 Posting a Message
      10.15.1.4 Replying to Internal Messages
   10.15.2 Tasks
      10.15.2.1 Adding and Amending Tasks
      10.15.2.2 Replying to a Task
   10.15.3 News
      10.15.3.1 What is News?
      10.15.3.2 Adding News
10.16 TIME SHEET
   10.16.1 Time Sheet Entry
   10.16.2 Time Sheet Report
11. APPENDIX 1
12. APPENDIX 2
13. APPENDIX 3
14. APPENDIX 4
15. APPENDIX 5
16. APPENDIX 6
17. APPENDIX 7
18. APPENDIX 8
Preface

1. The manual describes all of the electronic Integrated Management System functions and features. Some features described in the guide may not be available and viewable by all users. Access to features is established by your organization's eIMS administrator using the User Group Administration functions.

2. Information in this manual is subject to change as enhancements are added to the system. If any information in the manual is considered by the reader to be incorrect or unclear, please communicate your suggestions to the eIMS administrator and/or write to the eIMS team using the systems eIMS Messages option or directly via email to ims@ippf.org.

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1. Brief Introduction to the IMS

1.1 What is the IMS?

The IMS is an integrated, results-based management system that brings together components of modern management covering the entire IPPF federation. The IMS promotes continuous planning, programming, monitoring, evaluation, and implementation as well as results reporting of the 13 programmes of the Vision 2000 Strategic Plan.

The Integrated Management System (IMS) combines all features and functionalities required by the International Planned Parenthood Federation to implement policies and strategies successfully. Assists integrated management through interaction between organisational levels (FPAs, regional, central and secretariat levels).

Facilitates updating and modification of programmes in light of assessed experience and progress. IMS provides accurate, timely and relevant information thus assisting decision-making and fulfilling donor and other participant information requirements.

1.2 What is the eIMS?

The eIMS provides web-based and worldwide access to a single database server, which fulfils all requests and processes all details entered into the IMS. The electronic Integrated Management System provides the electronic computerised system support.

1.3 What was the PPBR?

The PPBR system will be familiar to some readers. The PPBR (Programming, Planning, Budgeting and Reporting) system has been used by the IPPF since 1982, but has not changed in correlation with the IPPF environment, Vision 2000 programmes and strategic plans. The PPBR system is based on local activity planning, budgeting and reporting without consideration of global program areas and objectives of the Vision 2000 strategic plan. Consequently, it did not report on the results of these programs and their progress toward Vision 2000 strategic objectives. The system possessed a weak monitoring and evaluation component and lacked a strong link between expenditure and results.

In the past 20 years, although the direction of the IPPF has evolved, the PPBR system has not been modified in line with these transformations. The eIMS is designed with the current focus of the IPPF in mind and addresses the shortcomings of the PPBR system.

1.4 Brief Overview of IMS Security

The Internet provides the platform for IMS worldwide access. Unauthorised access is prevented via password protection and data transfer based on SSL encryption.
Users must complete a registration form and notification is sent to the local administrator, which requests activation of the new users account. Security works on the basis of local administrators. An administrator can create at highest another administrator within his/her own entity (entities are FPAs, ROs, COs and Special Funds), not in other entities. For example, FPA Kenya cannot create an administrator in FPA Brazil. Administrators can authorise users and carry out local system maintenance.

Login can occur anywhere in the world via the Internet under: www.ippf.org/ims (which will redirect to the eIMS secure portal https://ims.ippf.org)

This is just a brief summary and details of logging in will be provided shortly.

1.5 Brief Description of IMS Development
Vision 2000 Strategic plan was adopted in 1992. The task force for Monitoring and Evaluation of Vision 2000 identified detailed indicators for Vision 2000 in the 1996-1998 period. Between 1998-1999 a task force reviewed the PPBR system, identified problems within the PPBR system and listed improvements that were later incorporated into the IMS.

In March 1999 the outline of the IMS was approved by the CEC and in August of the same year IMS Guidelines and Monitoring and Evaluation Guidelines for the IMS were produced.

The design of spreadsheet and word processing forms, tools for testing, IMS training materials and handbooks were agreed and completed in the November 2000 training of trainers workshop. During January to April 2001, training and piloting of IMS was run in selected FPAs. Development of the computerized eIMS began in January 2001 and continued during the IPPF’s Secretariat’s training and testing in the second half of 2001. Adaptation and testing for use by IPPF members and affiliates continued in 2002 with IPPF’s adoption of global indicators.

1.6 IMS Advantages
The IMS has been well received by FPAs as it focuses on current needs and requirements of IPPF and fulfills them effectively. The system:
1. Integrates into one system the components of modern management.
2. Links programme and financial information.
4. Results based system through the use of performance indicators.
5. Integrates monitoring and evaluation.
6. Improves reporting of achievements.
7. Uses modern information technology.
1.7 IMS Components

The basic components of the IMS that fulfil the requirements of the IPPF and FPAs are

1. Situation Analysis
2. Policy and Strategy
3. Medium and short-term programming
4. Programmes of action and programme budgeting based on 13 programmes of vision 2000
5. Projects
6. Monitoring and Evaluation
7. Reporting the findings of evaluation studies
8. Information Systems support for all the above components - eIMS

Not all of the above components can be managed by a computer system, the eIMS manages the following components -

1. Programmes and Projects are 100% managed by the eIMS
2. The results of the Situation Analysis and the Strategic Plan are summarised using eIMS forms
3. The findings and results from monitoring and evaluation are reported within the context of project objectives and indicators within the eIMS.
4. Reporting of IPPF’s achievements is facilitated by the online questionnaire of the global indicators

1.8 eIMS Entity Concept

Every organization or association is identified within the eIMS by a unique, three character code. Depending on the region where an organization is located, its unique entity identifier will begin with a different number.

0 xx - Africa Region (AR)
1 xx – Arab World Region
2 xx – South Asia Region
3 xx – East South East Asia and Oceanic Region (ESEAOR)
4 xx – Western Hemisphere Region (WHR)
5 xx – European Network

Generally, entities include Associations (at all levels of membership status) and Secretariat Offices, but may also include other non-governmental private organizations, where special, restricted grants exist. Contact the eIMS administrator to arrange for a new entity to be included in the list.
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2. Start Using the eIMS

2.1 How do you Log into the eIMS for the First Time?

2.1.1 eIMS Access via IPPF Extranet

The eIMS is part of IPPF’s Extranet (extranet.ippf.org). If you already use the Extranet for the IPPF travel database or contraceptives database and cannot access IMS sections, please send a request to your local IMS administrator.

Direct access to the eIMS can occur anywhere in the world via the Internet under: www.ippf.org/extranet. Frequent eIMS users might want to add www.ippf.org/extranet to their favourites of Internet Explorer – the only Web browser currently supporting eIMS.

If this the first time the user is signing into the system, they should click on the “Sign Up Now” hyperlink.

Figure 2-1 www.ippf.org/extranet Home Page

2.1.2 eIMS Access via Secretariat Intranet

Users that belong to the unified IPPF secretariat can access eIMS via the Intranet (www.ippf.net). In the below figure as in the previous log in page a request for the ‘Username’, ‘Password’ and selected language is displayed. The link to the right of these fields ‘Apply for an eIMS log on’, when activated will result in the ‘eIMS Registration Form’ appearing.

Figure 2-2 Link to Apply for eIMS Log In
2.1.3 Applying for an eIMS Log In

1. If the user has registered previously in eIMS they need to enter the requested information and click on the ‘Enter eIMS’ button. A new user will not have a ‘username’ or ‘password’ for the eIMS and should initiate the link ‘Apply for an eIMS log on’ (as displayed in Fig 2-3 below).

2. The ‘eIMS Registration Form’ will appear once the ‘Apply for an eIMS log on’ link has been activated (as presented in Fig 2-4).

3. The new user is required to enter all or as much information as possible. A brief explanation of these fields is as follows -
• **User Id** – This will be the users first initial and surname in full, all in lowercase format and with no spaces. Maximum length 25 characters. For example, Mary Barnett’s ‘User Id’ would be *mbarnett*.

• **Password** – This can be alphabetic (a, b, c,...) or numeric (1, 2, 3,...) or a combination of these. Must be 7 or more, maximum 15 characters, IMS does not accept the use of special characters (&, space, @, £). The password should be something the user will remember easily.

• **Confirm Password** – Re-enter password

• **Gender** – Select appropriate gender.

• **Date of Birth** – Enter date of birth (dd/mm/yyyy).

• **First Name** – Enter first name.

• **Last Name** – Enter last name or surname in full.

• **Email** – The IPPF email address of the new user should be entered in this field (e.g.: user@ippf.org).

• **Job Title** – Enter job title.

• **Role** – The role should be selected from the dropdown list, make approximations if necessary. Please refer to the following table for ‘Role’ definitions. First identify the type of office Central, Regional or FPA if appropriate and then the associated level of responsibility.

<table>
<thead>
<tr>
<th>ROLE</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central Office/Director</td>
<td>Position in charge of <em>all</em> operations, incorporating <em>all</em> units (finance, IT etc) within Central Office.</td>
</tr>
<tr>
<td>Central Office/Manager</td>
<td>Position in charge of operations within one unit within Central Office (Finance), reports to CO/Director.</td>
</tr>
<tr>
<td>Central Office/Officer</td>
<td>Position within a unit within the Central Office, responsible for a specific task, reports to CO/Manager.</td>
</tr>
<tr>
<td>Consultant</td>
<td>Working for IPPF on temporary basis to perform specific task.</td>
</tr>
<tr>
<td>Donor</td>
<td>Incorporates governments, companies, individuals whom donate funds or aide of any kind to IPPF.</td>
</tr>
<tr>
<td>FPA/Volunteer</td>
<td>Position performing duties for FPA (Family Planning Association) (sub organisation of Regional Office) without payment.</td>
</tr>
<tr>
<td>FPA/Director</td>
<td>Position in charge of <em>all</em> operations, incorporating <em>all</em> units (finance, IT etc) within FPA (sub organisation of regional office).</td>
</tr>
<tr>
<td>FPA/Manager</td>
<td>Position in charge of operations within one unit within FPA (Finance), reports to FPA/Director.</td>
</tr>
<tr>
<td>FPA/Officer</td>
<td>Position within a unit within the FPA, responsible for a specific task, reports to FPA/Manager.</td>
</tr>
<tr>
<td>Regional Office/Volunteer</td>
<td>Position performing duties for Regional Office (sub organisation of Central Office) without payment.</td>
</tr>
<tr>
<td>Regional Office/Director</td>
<td>Position in charge of <em>all</em> operations, incorporating <em>all</em> units (finance, IT etc) within Regional Office.</td>
</tr>
<tr>
<td>Regional Office/Manager</td>
<td>Position in charge of operations within one unit within Regional Office (Finance), reports to RO/Director.</td>
</tr>
<tr>
<td>Regional Office/Officer</td>
<td>Position within a unit within the Regional Office, responsible for a specific task, reports to RO/Manager.</td>
</tr>
</tbody>
</table>
• **Language** - Select preferred language to be displayed by the eIMS from the dropdown list. Upon eIMS completion, the language options will include English, French, Spanish, and Arabic and up to 6 more languages.

• **Select Country** - The user should select the country in which they are working.

• **Select Entity** - Once a country is selected the list of associated entities, the user should select the entity that employs their services. Once selected this becomes the user’s default or home entity (the entity the user belongs to). Please note this can be changed and is explained later.

4. Once all details have been entered the submit button should be activated, this will initiate the administration process required to permit the new user access to the IMS. Definition of these buttons will proceed from left to right.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submit</td>
<td>Saves information entered and sends details in an email to IMS administrator, will also send a mail to new user to confirm application has been forwarded.</td>
</tr>
<tr>
<td>Reset</td>
<td>Adjusts all field values to their default settings, for some fields this maybe ‘blank’.</td>
</tr>
</tbody>
</table>

5. The IMS administrator will reply to the new user as soon as their application has been processed and will advise that they are now able to log in and use the IMS.

### 2.1.4 IMS Access Policy

1. All consultants need to sign non-disclosure statements regarding eIMS data content and intellectual property - before receiving access. Statements should be filed with the regional office personnel director.

2. Consultants in the region can be given access to any entity by the eIMS administrator of the association, upon executive director approval.

3. Donors in the region should not be given access to any eIMS entity data without the permission of the association – at least not for another year when training is completed and the quality of the data can be assessed and corrected.

4. Individuals in the region not employed by the IPPF or an association should not be given access to the eIMS.

5. Volunteers in the associations and the region should be given access by the eIMS administrator of the association.

### 2.2 Navigation Features of the IMS

#### 2.2.1 Button Definition

All buttons that appear within the IMS generally have the same functionality, therefore it is easier if the buttons are defined here at the beginning of the manual and any exceptions noted for each individual situation.
### 2.2.2 Links

As with buttons it is simpler to define these at the beginning of the manual and note any exception in individual situations.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete</td>
<td>Removes the record adjacent to the link. Once ‘Delete’ has been activated a dialog box will appear asking the user ‘Are you sure you want to delete this record’, the user is then required to select ‘OK’ or ‘Cancel’. If OK is selected a dialog box will appear informing the user ‘Record Deleted Successfully’, the user is then required to click the ‘OK’ button.</td>
</tr>
<tr>
<td>Edit</td>
<td>Displays the page where the record details were entered by the user, changes to the record can be made and submitted.</td>
</tr>
</tbody>
</table>

The IMS is a web based application please note the following user tips

- To access any menu, submenu item or hyperlink requires only a single click on the desired object.
- A hyperlink or link can be identified by the change in shape of the mouse from arrow to hand and a change in the colour of the text.
- Activation of a hyperlink will display the desired page or trigger the appropriate action.
- To shut the IMS down always select ‘Log Out’ from the left menu bar.

### 2.2.3 Menu Navigation

The menu options to the left of the screen are the *Main Menu Categories* and when selected present additional *Sub Menu Options*. When a Main Menu Option is selected the system will display a second level of Sub Menus under the Main Menu option and when a Sub Menu option is selected Upper Menu options appear in the right pane.
For purposes of this manual we will refer to the Main Menu and Sub Menu Categories as Main Menu and Sub Menu Options. The SubSubMenu Options across the top of the screen will be known as Upper or Top Menu Options.

If a user cannot view a menu option described in this manual, it may be due to the group access rights of the user. Please check with your eIMS administrator to determine if the user administration is appropriately defined.

The eIMS session expires if no data entry or report activity occurs within a 120 minute period. If the session expires, the user must log into the eIMS again with their userid and password.

### 2.3 Logging into IMS

Select the Internet Explorer from the desktop or Start Menu. If you are outside the IPPF Intranet and have not bookmarked the eIMS site as your favourite, type in the following address: [www.ippf.org/ims](http://www.ippf.org/ims)
If you are an IPPF employee and access the system via the Intranet (www.ippf.net), log into the IMS from the Extranet (IMS) section located between Web Mail and Terminal Services.

Enter the eMS userid and password. Select the language to be displayed on the screen (currently English, French, Spanish or Arabic).

Note - It is also possible to hit the enter key

2.3.1 **Welcome Page**

The system will open to the Entity initially chosen by the user as defined within their eMS login profile. The eMS will display important user information on the welcome page in the center pane a brief introduction on IMS navigation and the default transaction year and ledger, news articles in the right pane and menu options on the left.

2.3.2 **Default Settings**

A welcome page is displayed when the user logs onto the IMS as presented in figure 2-6 (above). The default year, ledger and colours are preselected by the IMS and displayed when the user first logs onto the IMS. The user can change these default settings via the ‘Default Settings’ main menu option located between ‘Administration’ and ‘Log Off’.
1. The default entity can be changed within ‘Default Settings’, this does not change the home entity (please note these are separate entity selections). Changing the default entity (initially set to the home entity) is very useful if the user is working in another entity for a period of time, saves the hassle of changing the entity via Data Entry/Select Entity each time the user enters the IMS. Once the work is finished the user can change the default entity back to the home entity. ‘Default Entity’ works like a temporary ‘Home Entity’.

2. Default Transaction Year – Select from dropdown list.

3. Default Transaction Ledger – Select from dropdown list.

Please Note – It will not be possible to set the default year and ledger if the entity administrator/local IMS controller has not entered financial and programmatic timelines.

4. Preferred Colour Pattern – The colour pattern in which the user wishes to view the IMS needs to be selected by clicking on the adjacent circle to the left of the preferred choice of colours.

5. User default settings are saved upon submission and will be loaded each time the user logs into the IMS.

These default settings can be changed anytime the user logs into the IMS. The user is reminded of the default transaction year and ledger on the welcome page, home entity appears in the upper right corner as the user moves between menu options and the default colour choice is obvious from screen appearance. Once default settings are submitted they take immediate effect, the colour on the left panel of the screen changes according to selection once a main or sub menu option is selected.

2.3.3 Is it Possible to Change the Entity Without Changing the Default or Home Entity?

If the user needs to view an Entity other than one specified as the Home or Default Entity and has necessary access rights to other entities it is possible to utilize the ‘Select Entity’ main menu option under ‘Data Entry’.

A list of submenu items will be displayed below the ‘Data Entry’ main menu option upon selection.

Activate the ‘Select Entity’ submenu item, the screen in figure 2.9 will display.
1. Select Country First - The user is required to select the country in which the entity is located from the dropdown list.

2. Select Entity - Once a country has been selected the register of entities residing in the specific country will be present in the dropdown list.

1. Select Year - Select appropriate year.

2. Select Ledger - Select required ledger.
After the user has submitted their request to substitute the entity, the system will display a screen allowing default data entry parameters for year and ledger to be specified.

The left side menu bar is the key to the IMS functionality. ‘Data Entry’ is the core menu that deals with project details, human resources, situation analysis and budgets.

Please Note - The medical section is free of use for FPAs and the secretariat and is always accessible if you can access IMS. Users outside the federation will have to create an extranet profile.

### 2.3.4 Can the User Change their Home Entity?

1. It is possible for the user to change their home entity by activating the link at the bottom left of the user’s screen ‘Logged in as “user id”’.

![Figure 2-11 Link to Change Home Entity](image)

2. The user can select the required home entity from the dropdown list, located at the bottom of the screen.

![Figure 2-12 Changing Home Entity](image)

3. To save changes the submit button must be activated, please refer to button definition (2.2.1).
Please Note - The Home Entity is quite different from Default Entity, Home Entity is the entity the user belongs to, Default Entity changes the entity the IMS opens at when the user logs in. This can be changed to any entity the user has access to.
This page has intentionally been left blank.
3. Linked Projects

‘Linked Projects’ is a set of individual eIMS projects with similar goals, objectives, themes, or any other common attributes. These projects maybe from more than one entity or represent a cluster of projects within an entity. When established by the Secretariat, they may be reviewed by a staff members within the central and regional office. Each ‘super’ or ‘linked’ project will have their own mentor, reviewing procedures and will be monitored. The mentor will review the progress of the individual projects toward the objectives of the linked project and will liaise with the individual project personnel to address implementation issues/problems.

‘Linked Project’ is located on the left menu bar and is situated between ‘Extranet Home’ and ‘Data Entry’.

3.1 Project

3.1.1 Adding and Amending a Linked Project

1. ‘Linked Projects’ index page is displayed when the ‘Linked Projects’ menu item is activated from the left menu bar and the submenu option ‘Project’ is selected. ‘Linked Projects’ title is displayed above the index table, which lists Linked Project’s according to their Linked Project Name and Linked Home Entity.

Figure 3-1 Linked Project Table

<table>
<thead>
<tr>
<th>Linked Project</th>
<th>Home Entity of Linked Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>SHAPPADEP</td>
<td>팽항기용때로인재보배</td>
</tr>
<tr>
<td>DIES I (1999)</td>
<td>팽항기용때로인재보배</td>
</tr>
<tr>
<td>DIES II (1999)</td>
<td>팽항기용때로인재보배</td>
</tr>
<tr>
<td>DIES III (1999)</td>
<td>팽항기용때로인재보배</td>
</tr>
<tr>
<td>DIES IV (1999)</td>
<td>팽항기용때로인재보배</td>
</tr>
<tr>
<td>DIES V (1999)</td>
<td>팽항기용때로인재보배</td>
</tr>
<tr>
<td>DIES VI (1999)</td>
<td>팽항기용때로인재보배</td>
</tr>
<tr>
<td>DIES VII (1999)</td>
<td>팽항기용때로인재보배</td>
</tr>
<tr>
<td>DIES VIII (1999)</td>
<td>팽항기용때로인재보배</td>
</tr>
</tbody>
</table>

2. To add a new ‘Linked Project’ the ‘Add New’ button should be selected; this button is located beneath the ‘Linked Project’ index table and displays a new data entry page for the a new Linked Project.
3. Linked Project Name – This is a mandatory field. Enter the name of the ‘Linked Project’, ensure that the name is meaningful and reflects the contents and associated projects.

4. Select Country First – This is a mandatory field. Before entering any other information, select the country of management or origin for the Linked Project from the dropdown list provided.

5. Home Entity – This is a mandatory field. Select the home entity responsible for the management of the Linked Project from the dropdown list provided. The eIMS will display only those entities users have access to.

6. Goal/Overall Objective – The project’s purpose should be entered here, including the goals and objectives that the project’s originator intends to achieve.

7. Summary - This field requires an outline of the project, including the following:
   - who is in charge of the project,
   - who the project will be working with or partnering with,
   - what the overall approach of the project is in terms of concentration of activities,
   - who the audience or beneficiary of the project activities will be,
   - where it will be implemented,
   - project duration,
   - a brief statement of overall goal or project aim,
   - name or names of donors that are supporting project, or if it is funded locally the entity should identify major sources of funding.

8. Justification - This is a free text area where the project originator enters evidence to support the endorsement of the project, including lessons learned from other projects and experiences supporting the successful conclusion of the project. The relevance of the project to context should be explained; articulate why...
implementation is poised to fill gaps in knowledge or meet heretofore unmet need.

### 3.1.2 Select Country and Entity to Add Projects

9. Select Country First – This is a mandatory field. Select the country the projects to be added to the Linked Project originate.

10. Select Entity – This is a mandatory field. Select the entity the projects to be added to the Linked Project originate. As in the previous ‘Select Entity’ field entities displayed in the list are directly correlated with the country that was selected in the ‘Select Country First’ field. Therefore different home entities will be displayed for different countries selected.

When this button is activated an index table of all projects originating in the selected country and entity are displayed. The project name is listed, to the left of the name is a tick box, if the project is to be added to the linked project this box should be turned on.

Please Note – It is possible to view the associated project details by clicking on the view link located to the right of the project name. Details will be in read-only format.

Figure 3-3 Linked Project Form

Please note when editing a linked project (edit link is selected on the linked project index table figure 3-1) the format of the project display changes.
Figure 3-4 Editing a Linked Project

The tick box is located to the right of the ‘View’ link and the functionality of the tick box in this instance is not to add the project to the linked project but to remove it.

3.2 Multi Entity Transfers

3.3 Commodities (RO)

3.4 COMM
4. Medical Info

This main menu option provides a link to IPPFs contraceptive database ‘Directory of Hormonal Contraceptives’, and presents associated information about each contraceptive.

**Searching ‘Medical Info’**

Hormonal Contraceptives can be researched by Brand, Composition, Country, Manufacturer and Type. All these options are accessible from the home page of ‘Medical Info’.

Figure 4-1 Search Options

![Search Options](image)

**4.1 Brand Search**

1. The user is required to locate the brand name from the dropdown list. To make this easier the user can quickly locate the brand name by typing the first letter of the brand, the list automatically scrolls to the first brand name that begins with this letter.

2. ‘Find Brand’ button will display composition, manufacturer, type and list of countries where the contraceptive is available.

Figure 4-2 Brand Search

![Brand Search](image)
4.2 Composition Search

1. This search is very useful if the user is looking for a contraceptive containing a particular element or combination of elements. Progesterone and/or Oestrogen constituents can be selected.

Figure 4-3 Composition Search

2. Activation of ‘Find a Composition’ button displays a list of contraceptives with the selected elements.

Figure 4-4 Brand List

3. Each brand name operates as a link to further information about the brand.
4.3 Country Search

1. This search is very useful when the user wishes to find available contraceptives in a specific country. This search operates in much the same way as the Composition search.

2. A list of contraceptives is displayed once the user has located the country and activated the ‘Find Contraceptives By Country’ button. Information about the each contraceptive can be obtained by clicking on the brand name.
4.4 Manufacturer Search

1. This search function provides the details of contraceptive manufacturers, the user is required to select the name of the manufacturer from the dropdown list and click on the ‘Find’ button.

2. Address, Telephone, Email, Website, Fax and Products are the particulars displayed for the selected manufacturer.
4.5 *Type Search*

1. This search provides a list of all contraceptives that are of the chosen type. Users can select the type of hormonal contraceptive they are seeking from the dropdown list.

2. The result of the search will be a list of contraceptives fitting the selected type. Once again as in ‘Composition’ and ‘Country’ searches the brand name acts as a link to further information about each contraceptive.
## Figure 4-11 Brand List

![Directory of Hormonal Contraceptives](image)

### Combined Pills

<table>
<thead>
<tr>
<th>Name</th>
<th>Manufacturer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abessa</td>
<td>Wyeth Pharmaceuticals</td>
</tr>
<tr>
<td>Addisett*</td>
<td>Wyeth Pharmaceuticals</td>
</tr>
<tr>
<td>Adna</td>
<td>The Hoechst-Farabab</td>
</tr>
<tr>
<td>Androcin 1mg</td>
<td>Lederle Pharma</td>
</tr>
<tr>
<td>Anovulative Microdose</td>
<td>China</td>
</tr>
<tr>
<td>Anzor</td>
<td>Tanabe Pharma</td>
</tr>
<tr>
<td>Anovette 30</td>
<td>Merck</td>
</tr>
<tr>
<td>Anovette C.D.</td>
<td>Merck</td>
</tr>
<tr>
<td>Anovette*</td>
<td>Merck</td>
</tr>
<tr>
<td>Anovette &quot;</td>
<td>Merck</td>
</tr>
<tr>
<td>Apil</td>
<td>Gadoi</td>
</tr>
<tr>
<td>Bolar</td>
<td>Generali GmbH</td>
</tr>
<tr>
<td>Branda 35</td>
<td>Schering-Ploetz</td>
</tr>
<tr>
<td>Brencon</td>
<td>G.i. Schering &amp; Co. - neo-Pharmacia</td>
</tr>
<tr>
<td>Brencon 0.5 + 35</td>
<td>G.i. Schering &amp; Co. - neo-Pharmacia</td>
</tr>
</tbody>
</table>

Page 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21
5. Data Entry

‘Data Entry’ represents the functionality of this main menu option. The operation of the IMS relies on users entering information in a timely and accurate manner. The IMS manages and summarises these details to produce required output. Entry provides the environment and support for the entry of these particulars.

For more details and information regarding the submenu options within ‘Data Entry’ please read below.

5.1 Time Line Status

Please Note – ‘Time Line Status’ functionality is essential to the operation of all parts of the eIMS. Even though this is only the beginning of the manual and very little of the IMS has been explained, it is necessary to go through this section, as this knowledge will assist the users understanding of IMS functionalities.

‘Time Line Status’ is divided into 3 separate areas ‘Programmatic’, ‘Financial’ and ‘Entity Work’. ‘Time Line Status’ refers to the status of transactions for example actual and expected results, actual and approved budgets and entity working or labour information. It defines the periods of time when data can be entered and when data is finalised. In financial terms you would refer to the time line section as ledger activation functionality.

Example: You want to enter financial data for the Annual Programme Budget 2004, but this ledger and year combination does not appear anywhere in the system. Reason: This ledger and year combination has to be defined first under the financial time line status section.

<table>
<thead>
<tr>
<th>TYPE OF TIME LINE STATUS</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Programmatic</td>
<td>Expected and actual results of project objectives and activities.</td>
</tr>
<tr>
<td>Financial</td>
<td>Preliminary, proposed and approved project budgets, as well as all actual income, expenses, funds, assets and appropriations</td>
</tr>
<tr>
<td>Entity Work</td>
<td>Staff allocation and human resource issues.</td>
</tr>
</tbody>
</table>

‘Time Line Status’ is located on the left menu, within the ‘Data Entry’ main menu between ‘Accreditation’ and ‘Entity Details’. When this menu item is activated (it will be active depending on your access rights) a top menu bar appears with ‘Programmatic’, ‘Financial’ and ‘Entity Work’ options. Once closed, transactions cannot be entered by the entity. The change in time line status should not be made until the user is positive the information is complete and accurate.

Figure 5-1 Time Line Top Menu Options
5.1.1 Programmatic

5.1.1.1 What is Programmatic Time Line Status?
This information relates to Indicators and Activities of projects within a particular entity. ‘Programmatic’ records deal directly with results and are the part of the IMS that opens and close actual and expected results for identified transactions and years.

5.1.1.2 Adding and Editing Programmatic Information

1. When the ‘Programmatic’ menu item is selected from the top menu bar an index table is displayed presenting all previously entered programmatic information. The information provided is Transaction Type, Transaction Year and Status.

   Figure 5-2 Programmatic Time Line Table

<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>Transaction Year</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual Results</td>
<td>2000</td>
<td>Close</td>
</tr>
<tr>
<td>Expected Results</td>
<td>2000</td>
<td>Close</td>
</tr>
<tr>
<td>Actual Results</td>
<td>2001</td>
<td>Close</td>
</tr>
<tr>
<td>Expected Results</td>
<td>2001</td>
<td>Open</td>
</tr>
<tr>
<td>Actual Results</td>
<td>2002</td>
<td>Open</td>
</tr>
<tr>
<td>Expected Results</td>
<td>2002</td>
<td>Open</td>
</tr>
</tbody>
</table>

2. Entity – The entity ID will appear next to the field name, this is the ID of the entity the user is currently accessing.

3. Transaction Type – This is a mandatory field and requires selection from the dropdown list provided.

<table>
<thead>
<tr>
<th>TRANSACTION TYPE</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expected Results</td>
<td>The results the originator expects the projects to yield during the transaction year.</td>
</tr>
<tr>
<td>Actual Results</td>
<td>The actual outcomes and results of the projects within an entity.</td>
</tr>
</tbody>
</table>

4. Transaction Year – This is a mandatory field. The transaction year should be entered here.

5. Status – This is a mandatory field and requires the selection of the transaction status from the dropdown list. The only options are open or closed.
### 5.1.1.3 Implementation Issues of Programmatic Time Line Status

‘Time Line Status’ records perform a significant functionality within the IMS. For example within a project record of activities and specific objectives, if the expected results for that particular year are closed no details are permitted to be added to the expected quantitative or qualitative indicators, results or activity details planned. This essentially “freezes” the data in time, and allows it to be used as appoint of comparison with actual results at the end of the reporting period. Similarly when actual results are closed, the data for a period is considered final and cannot be subsequently altered. This prevents inadvertent data entry in the wrong transaction year and ledger.

Entity and information management is controlled via ‘Time Line Status’. These features are provided to enhance IPPF and individual entity effectiveness.

### 5.1.2 Financial

#### 5.1.2.1 What is Financial Time Line Status

‘Financial’ time line information incorporates assets, incomes, expenses, funds, staff allocation and human resource costs. ‘Financial’ ‘Time Line Status’ has similar functionality to ‘Programmatic’, and provides both date range and data entry control for financial transactions.

‘Financial Time Line Status’ can be accessed by means of the ‘Time Line Status’ menu underneath ‘Data Entry’ on the left. Financial information is located in the middle of the upper menu bar.

<table>
<thead>
<tr>
<th>Expected Results</th>
<th>OPEN</th>
<th>CLOSED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expected outcomes can be entered.</td>
<td>Expected outcomes cannot be entered.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Actual Results</th>
<th>OPEN</th>
<th>CLOSED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual results can be entered.</td>
<td>Actual results cannot be entered, end of year usually.</td>
<td></td>
</tr>
</tbody>
</table>
5.1.2.2 Adding and Editing Financial Information

1. When the ‘Financial’ menu item is activated from the top menu bar an index page appears with all financial information entered to date, this is in table format. The financial time line details from left to right as listed in the table are as follows: Report Type, Report Year, Currency, Exchange Rate, Status and Inflation.

Figure 5-4 Financial Time Line Table

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Report Year</th>
<th>Currency</th>
<th>Exchange Rate</th>
<th>Status</th>
<th>Inflation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved Budget</td>
<td>2001</td>
<td>Indian Rupees</td>
<td>5.6</td>
<td>Open</td>
<td>?</td>
</tr>
<tr>
<td>Approved Budget</td>
<td>2002</td>
<td>Mexican Peso</td>
<td>9.5</td>
<td>Close</td>
<td>5</td>
</tr>
<tr>
<td>Proposed Budget</td>
<td>2012</td>
<td>POUND</td>
<td>1.5</td>
<td>Open</td>
<td>3</td>
</tr>
</tbody>
</table>

When the user activates the ‘Add New’ button a financial data entry page is displayed.

Figure 5-5 Financial Time Line Form

This page has a layout that is similar to the programmatic entry page, except there are more fields that require values.

2. Entity/FPA – The value for this field is determined by the entity that is being amended and is automatically entered in this field.

3. Transaction Type – This is a mandatory field and is similar to Programmatic Transaction Type except refers to financial information and therefore the contents of the dropdown list is different. The user is required to select the type of ledger required for the financial transactions.

<table>
<thead>
<tr>
<th>TRANSACTION TYPE</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actuals</td>
<td>End of year actual income and expenses.</td>
</tr>
<tr>
<td>Approved Budget</td>
<td>Estimated income, expenses and fund balances proposed by the Association in the APB and approved</td>
</tr>
<tr>
<td>term</td>
<td>description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Audited Actuals</td>
<td>Actual income and expense examined by the external auditors of an organization.</td>
</tr>
<tr>
<td>Preliminary Budget</td>
<td>Budget prepared within an organization for internal discussion.</td>
</tr>
<tr>
<td>Proposed Budget</td>
<td>Budget proposed by an Entity (organization) for IPPF's consideration.</td>
</tr>
<tr>
<td>Interim Actuals</td>
<td>Interim expense and income information released during a 12 month calendar period and corresponding to monthly, quarterly, or half yearly resource use and generation.</td>
</tr>
<tr>
<td>Proposed Amendments</td>
<td>Expense and Income amendments to a closed ledger</td>
</tr>
</tbody>
</table>

### Important information regarding Interim Actuals

Logic has been applied exclusively to the ledger type interim actuals. When a project is defined (refer to section 5.5.1.3) the user is required to select a ‘Financial Reporting Frequency’, which can be Annual, Monthly, Quarterly and Semi Annual. The reporting frequency defined here in Project Profile Definition (projects main page) determines the ‘Financial Periods’ available when adding income, expense and asset transactions to the project. For example if quarterly is selected then 4 options for the ‘Financial Period’ will be available in the data entry screen for income, assets and expenses. The transaction can be entered under any of these options. Monthly 12 choices will be available, semi annual 2 and annual 1.

Figure 5-6 Project Main Page (Project Definition)

When a user enters transactions the ledger type requires selection from the upper right dropdown list (refer to point 2 in 5.5.6.5). The logic explained above applies to all ledger types except ‘Interim Actuals’. This may be confusing at the moment as projects have yet to be explained, when the user progresses to project profile definition it will become much clearer and the manual will refer back to these notes.
In the situation where a project has an annual financial period (as defined on the project profile main page) and the selected ledger is interim actuals the financial periods available for selection on the transaction data entry page will be monthly, quarterly or semi annually. The default period is first half semi annual, which of course can be changed. If the financial reporting frequency period selected for the project is monthly, quarterly or semi annually the financial period options will be once again monthly, quarterly or semi annually as in the previous interim actuals example. The default financial period will be as selected on the projects main page.

In summary, if the ledger selected for an income, expense or asset transaction is any other than ‘Interim Actuals’, the financial period that appears for the transaction will be as selected on the projects main page. For interim actuals with annual financial period selected on the projects main page, the financial periods available will include monthly, quarterly and semi annually. Where monthly, quarterly or semi annually has been selected as the financial reporting frequency on the project main page monthly, quarterly and semi annually will be the transaction financial periods available for selection in the case of ledger interim actuals.

4. Transaction Year – This is a mandatory field and the year the ledger is required should be entered here.
5. Currency – Select from a drop down list the name of the currency used by the organization during transaction data entry. This is generally the currency used in the organization’s ledger and the currency of the entity’s country. The default currency in the dropdown list is the United States Dollar.

6. Exchange Rate (to US$) – If the selected currency is not United States Dollars, the exchange rate for the selected currency’s conversion to USD is required. This exchange rate should be the average rate of exchange for the transaction period. In the case of proposed budgets, it should be the projected average rate of exchange based on estimates provided by authoritative financial sources. For reports of actual income and expenses, it should be the actual average rate of exchange and based on actual remittances and their conversion to local currency.

7. Status – This is a mandatory field and requires the status of the financial report/transaction to be selected from the dropdown list provided.

<table>
<thead>
<tr>
<th>Actuals</th>
<th>OPEN</th>
<th>CLOSED</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Actuals can be entered, end of year, once approved is closed.</td>
<td>Actuals cannot be entered.</td>
</tr>
<tr>
<td>Approved Budget</td>
<td>Approved Budget can be entered, once proposed budget is closed.</td>
<td>Approved Budget cannot be entered.</td>
</tr>
<tr>
<td>Audited Actuals</td>
<td>Audited Actuals can be entered, once actuals is closed.</td>
<td>Audited Actuals cannot be entered.</td>
</tr>
<tr>
<td>Preliminary Budget</td>
<td>Preliminary Budget can be entered.</td>
<td>Preliminary Budget cannot be entered.</td>
</tr>
<tr>
<td>Proposed Budget</td>
<td>Proposed Budget can be entered, once preliminary is closed.</td>
<td>Proposed Budget cannot be entered/</td>
</tr>
<tr>
<td>Interim Actuals</td>
<td>Interim Actuals can be entered.</td>
<td>Interim Actuals cannot be entered.</td>
</tr>
<tr>
<td>Proposed Amendments</td>
<td>Proposed Amendments can be entered.</td>
<td>Proposed Amendments cannot be entered.</td>
</tr>
</tbody>
</table>

8. Inflation – This field requires the entry of the inflation rate for the country where the entity is located. The inflation rate should reflect only the cost of living increases that directly affect the personnel and operational expenses of the entity. Inflation rates are stated as whole numbers with two decimals.

9. Suppress Control Account - The user should activate this tick box if they wish to suppress (not display) major account codes within their entity for the specific transaction year.

For example – If this option is not ticked, when an expense (income, asset) is added all account codes including control codes will appear (500000 Personnel), if this tick box is activated only the detailed account codes will appear (500001 Basic Salary, 500002 Housing Allowance etc.) this forces users to choose specific account codes for their expenses, income and assets.
10. Note for FX and Inflation Rates - Enables Associations to record sources of information, rationale, and where appropriate calculation of exchange and inflation rates for a specific year and ledger/report type. If the projected rates for the 2003 proposed budget period are different from the rates specified in the 2002 work program budget, Associations should complete this field.

Figure 5-9 Financial Time Line Form - Completed

![Financial Time Line Form](image)

Actuals, Approved Budget, Audited Actuals, Preliminary Budget, Proposed Budget and Interim Actuals results are initially set to open and later adjusted to reflect that the results have been closed.

5.1.2.3 Implementation Issues of Financial Time Line Status

‘Time Line Status’ records relate to the permitted functionality of the IMS. For example if the proposed budget for 2002 is closed for a particular entity then no further expenses, income or asset additions will be permitted. The details of the year, report type and status are located within the financial entry pages (income, assets and expenditure) in the title bar on the right and often appear as part of a dropdown list. All details mentioned in this dropdown list are controlled via the ‘Financial’ ‘Time Line Status’ menu.

5.1.3 Entity Work

5.1.3.1 What is Entity Work Time Line Status?

Entity work identifies the annual standard number of hours and days worked by staff and contract personnel. This section provides the “rules” or parameters for the distribution and calculation of labour costs. Data defined in this section is essential to the eIMS in order to allow the system to perform calculations based on the staff allocation matrix.

5.1.3.2 Adding and Editing Entity Work Information

1. Entity work is located within ‘Time Line Status’ under ‘Data Entry’ and is located on the far right of the top menu. When this menu item is activated an index table appears which lists all entity work records previously entered. The details displayed from left to right are Transaction Year, Status, No of Working Hours Per Week, No of Working Days Per Week and No of Working Days Per Year.
2. Activation of the ‘Add New’ button displays a data entry page.

Figure 5-11 Entity Work Time Line Form

2. Entity/FPA Code - The value for this field will be determined by the entity that is being amended and will automatically be entered within this field.

3. Transaction Year – This is a mandatory field. The user is required to enter the year in which the transaction is to be recorded.

4. Status – This is a mandatory field and requires selection of the status of the transaction from the dropdown list that is whether the transaction is open or closed.

5. No of Working Hours Per Week – The number of standard working hours per week for the specific entity is required to be entered by the user.

6. No of Work Days Per Week – Enter the number of standard working days per week for the entity.

7. No of Working Days Per Year – The user is required to enter the number of standard working days per year for the specific entity. (The formula to determine this is based on 365 days per year minus the number of legal holidays, minus the number of weekend days in a year.)
8. Calculate HR Based on Staff Allocation Matrix – This is a tick box option. When activated, the HR costs are calculated by the system based on the percent of staff time allocated to the project. The results of the calculations are automatically posted to the expenses for the project.

9. Calculate Prof Svc/temps based on Staff Allocation Matrix – This is a tick box option and is similar to item 8 above, except it is for Professional Service Providers and Temps rather than Staff members. The expense of the prof svc/temps depends on their rate and the time their services are required, the calculation is made when all these variables are entered and the expense is automatically assigned to the report.

10. Remove all Staff Accounts from Expenses – This is a tick box option. This option prevents personnel expenses from being added manually to a project. When this option is activated, the system will not display within the Project Expense section any eIMS chart of account codes (500001 through 500099) associated with Personnel expenses (such as salaries, social security, medical insurance, allowances, etc.)

11. Remove all Prof Svc/Consultant from Expenses – This is a tick box option. When this option is activated it removes from view in the Project Expense section the account codes associated with Professional Fees (505001 through 505099). This prevents Prof Svc/Consultant expenses from being added manually.

12. Account Code for Staff – If the eIMS is going to calculate the Human Resource cost distribution to projects, the user is required to select the account code from the dropdown list where the system should post the allocated staff expenses. At the budgeting stage, if the entity wants to allocate salaries, then the IMS account code 500001(Basic Salaries) should be selected. However if at the budgeting stage, the entity wants to allocate both salaries and social benefits automatically, then the control Personnel account number, 500000, may be selected. Note: Even if your entity is on a local chart of accounts, the system will need the (global) IMS chart of account codes.

13. Account Code for Prof Svc/Temps – Select the account code from the dropdown list the Prof Svc/Temps expenses should be allocated to by the eIMS. For example, if you are allocating fees associated with medical service providers, utilize the eIMS account code 505004 (Sessional Fees – Medical Clinical) for this purpose.

14. Global Staff Entry – This is a tick box option. When this option is activated all staff expenses are summarised into one figure for each fund type. If this option is not activated each staff entry is listed separately.

15. Global Consultant Entry – This is a tick box option. When this option is activated all consultant expenses are summarised into one figure for each fund type. If this option is not activated each consultant entry is listed separately, this is identical in operation to ‘Global Staff Entry’.
5.1.3.3 Implementation Issues of Entity Work Time Line Status

The entity administrator/IMS controller or personnel in charge of a specific entity's IMS information standards should complete 'Entity Work' details. When the entity work record is created it should be set to the open status which allows for possible future changes. Once the entity work record is closed it is not possible to amend any details. Not all users will have access to 'Time Line Status', which reduces the risk of settings being tampered with. There is no reason to close the entity settings until all aspects have been carefully considered.
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5.2 Situation Analysis

5.2.1 What is a ‘Situation Analysis’?

A situation analysis provides an information basis for the formulation of policy and preparation of strategies. A situation analysis consists of two categories of information:

1. Key National Demographic, Social and Health Information
2. Information Relating to the Components of IPPF’s Policy and Strategy

This analysis improves the understanding of the sexual and reproductive health environments in which IPPF and FPAs operate, and helps FPAs at regional and central levels to adopt relevant roles. A ‘Situation Analysis’ identifies unmet needs, justifies the presence of the association and is the basis of strategic planning.

‘Situation Analysis’ is the first submenu option within ‘Data Entry’. When ‘Situation Analysis’ is selected a data reference page is displayed.

5.2.2 Adding or Editing Situation Analysis Information

1. There is a title bar located at the top of the ‘Situation Analysis’ page, which displays the programmatic transaction year in dropdown list format, this can be altered if required.

2. Beneath the title bar is a list of required statistics, they cover topics including population, fertility, and mortality.

3. Two statistics are required for each instance, both are compulsory. On the left, are statistics from world organisations such as UNICEF, World Population Data Sheet and on the right, are entity statistics from nationally published sources.

4. When the user selects the title of one of the statistics a data entry page is displayed which enables information pertaining to the specific statistic to be added, edited or deleted.
5. The first required statistic from world organisations has the source predefined, amount and year need to be added. The second statistic requires amount, year, and the nationally published data source to be entered.

6. When the user activates submit, all information is saved and stored in the ‘Situation Analysis’ index table.

Please note – Ensure the correct transaction year is selected prior to viewing or amending ‘Situation Analysis’ information. It is possible to copy ‘Situation Analysis’ information from one year to another, for instructions please refer to section 5.10.4.

### 5.2.3 Definitions of Required Statistics

<table>
<thead>
<tr>
<th>Statistic</th>
<th>Definition</th>
<th>Definition Source</th>
<th>Required Entry Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total population</td>
<td>The de facto population, which includes all people actually present in a given area at a given time.</td>
<td>UNDP Human Development Report</td>
<td>2 decimal places allowed (e.g. 67.87)</td>
</tr>
<tr>
<td>Number of women of reproductive age</td>
<td>The population of women of reproductive age includes all women, 15-49 years of age in a given area.</td>
<td><a href="http://www.prb.org/pdf/PopHandbook_Eng.pdf">http://www.prb.org/pdf/PopHandbook_Eng.pdf</a> PRB: 2003 World Population Data Sheet</td>
<td>2 decimal places allowed (e.g. 67.87)</td>
</tr>
<tr>
<td>Percentage of the population under age 15</td>
<td>The population under the age of 15 as a percentage of total population.</td>
<td>UNDP Human Development Report</td>
<td>2 decimal places allowed (e.g. 67.87)</td>
</tr>
<tr>
<td>Percentage of the urban population</td>
<td>The population living in areas termed “urban” by that country as a percentage of total population. Typically, the population living in towns of 2,000 or more or in national and provincial capitals is classified as “urban.”</td>
<td>PRB: 2003 World Population Data Sheet UNDP Human Development Report</td>
<td>2 decimal places allowed (e.g. 67.87)</td>
</tr>
<tr>
<td>Percentage of the population aged 10-24</td>
<td>The population of youth (boys and girls ages, 10-24) as a percentage of total population. Youth or young people include pre-teens, teenagers, and adolescents (ages 10-19), and young adults (ages 20-24).</td>
<td><a href="http://www.prb.org/Content/NavigationMenu/Measure_Communication/Documents/WorldsYouth_Eng.pdf">http://www.prb.org/Content/NavigationMenu/Measure_Communication/Documents/WorldsYouth_Eng.pdf</a> PRB: 2003 Youth Data Sheet</td>
<td>2 decimal places allowed (e.g. 67.87)</td>
</tr>
<tr>
<td>Statistic</td>
<td>Definition</td>
<td>Definition Source</td>
<td>Required Entry Format</td>
</tr>
<tr>
<td>--------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>Annual rate of natural population increase/annual population growth rate (%)</td>
<td>The birth rate minus the death rate, implying the annual rate of population growth without regard for migration. Also known as the Rate of Natural Increase (RNI)</td>
<td>PRB: 2003 World Population Data Sheet</td>
<td>2 decimal places allowed (e.g. 67.87)</td>
</tr>
<tr>
<td>Total fertility rate (e.g. 3.2)</td>
<td>The average number of children a woman would bear if current age-specific birth rates remained constant throughout her lifetime.</td>
<td>UNDP Human Development Report</td>
<td>2 decimal places allowed (e.g. 67.87)</td>
</tr>
<tr>
<td>Percentage of women (ages 15-19) giving birth each year</td>
<td>The number of women (ages 15-19) giving birth annually as a percentage of the number of women of reproductive age (15-49). Fertility rates can also be calculated for specific age groups to see differences in fertility behavior at different ages or for comparison over time.</td>
<td><a href="http://www.prb.org/pdf/PopHandbook_Eng.pdf">http://www.prb.org/pdf/PopHandbook_Eng.pdf</a></td>
<td>2 decimal places allowed (e.g. 67.87)</td>
</tr>
<tr>
<td>Contraceptive prevalence rate [all methods] (%)</td>
<td>The percentage of women of reproductive age (15-49) who are using, or whose partners are using, any form of contraception, whether modern or traditional. Calculate, the number of female (ages 15-49) contraceptive users as a percentage of the number of women of reproductive age (15-49).</td>
<td>PRB: 2003 World Population Data Sheet</td>
<td>2 decimal places allowed (e.g. 67.87)</td>
</tr>
<tr>
<td>Contraceptive prevalence rate [modern methods] (%)</td>
<td>The percentage of women of reproductive age (15-49) who are using, or whose partners are using modern forms of contraception. Modern methods include clinic and supply methods such as the pill, IUD, condom, and sterilization.</td>
<td>PRB: 2003 World Population Data Sheet</td>
<td>2 decimal places allowed (e.g. 67.87)</td>
</tr>
<tr>
<td>Maternal mortality ratio</td>
<td>The annual number of deaths of women from pregnancy-related causes in a given year per 100,000 live births in that year.</td>
<td>PRB: 2003 World Population Data Sheet</td>
<td>2 decimal places allowed (e.g. 67.87)</td>
</tr>
<tr>
<td>Infant mortality rate</td>
<td>The number of deaths of infants under 1 year of age in a given year per 1,000 live births in that year.</td>
<td>PRB: 2003 World Population Data Sheet</td>
<td>2 decimal places allowed (e.g. 67.87)</td>
</tr>
<tr>
<td>Prevalence of sexually transmitted infections (%)</td>
<td>The number adults (ages 15-49) with sexually transmitted infections that are asymptomatic and persistent, as a percentage total adult population in a given year.</td>
<td><a href="http://www.who.int/hiv/pub/sti/en/who_hiv_2002_14.pdf">http://www.who.int/hiv/pub/sti/en/who_hiv_2002_14.pdf</a></td>
<td>2 decimal places allowed (e.g. 67.87)</td>
</tr>
</tbody>
</table>
### Statistic Definition

- **Prevalence of HIV/AIDS (%)**
  - The estimated percentage of the total population living with HIV/AIDS in a given year.
  - Human Development Report
  - 2 decimal places allowed (e.g. 67.87)

- **Unsafe abortion rate (estimated)**
  - The number of unsafe abortions per 1,000 women of reproductive age (15-49) per year. Another approach to the estimation is the ratio of abortions (both induced and spontaneous) treated in hospitals to live births in the same hospitals.
  - Unsafe abortions are characterized by the lack or inadequacy of skills of the provider, hazardous techniques, and unsanitary facilities. What constitutes adequate facilities and/or providers will vary according to the legal and medical standards of each country.
  - http://www.who.int/reproductive-health/publications/MSM_97_16/MSM_97_16_chapter2.en.htm
  - 2 decimal places allowed (e.g. 67.87)

- **Adult male literacy rate (%)**
  - The percentage of males aged 15 and above who can, with understanding, both read and write a short, simple statement on their everyday life.
  - Human Development Report
  - 2 decimal places allowed (e.g. 67.87)

- **Adult female literacy rate (%)**
  - The percentage of females aged 15 and above who can, with understanding, both read and write a short, simple statement on their everyday life.
  - Human Development Report
  - 2 decimal places allowed (e.g. 67.87)

- **Population per doctor**
  - The number of physicians per 100,000 people in a given country.
  - Human Development Report
  - 2 decimal places allowed (e.g. 67.87)

- **Population without access to health services**
  - The number of people with no access to local health services within a one-hour journey as a percentage of the total population.
  - WHO: The World Health Report
  - 2 decimal places allowed (e.g. 67.87)

- **GDP per capita (PPP US$)**
  - The Gross Domestic Product (GDP) is the total output of goods and services produced within a country over the course of a year.
  - UNDP: Human Development Report
  - 2 decimal places allowed (e.g. 67.87)
<table>
<thead>
<tr>
<th>Statistic</th>
<th>Definition</th>
<th>Definition Source</th>
<th>Required Entry Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>services for final use produced by an economy, by both residents and non-residents, regardless of the allocation to domestic and foreign claims.</td>
<td>The Purchasing Power Parity (PPP) is a rate of exchange that accounts for price differences across countries allowing international comparisons of real output and incomes. At the PPP US$ rate, PPP US$1 has the same purchasing power in the domestic economy as $1 has in the United States.</td>
<td>Report</td>
<td></td>
</tr>
<tr>
<td>Health expenditure per capita</td>
<td>Health expenditure per capita is the sum of public and private expenditure (in PPP US$), divided by the population. Health expenditure includes the provision of health services (preventive and curative), family planning activities, nutrition activities, and emergency aid designated for health (but does not include provision of water and sanitation).</td>
<td>UNDP: Human Development Report</td>
<td>2 decimal places allowed (e.g. 67.87)</td>
</tr>
<tr>
<td>Percentage of population below income poverty line</td>
<td>The percentage of the population living below the specified poverty line, such as $1 a day (at 1985 international prices, equivalent to $1.08 at 1993 international prices, adjusted for purchasing power parity), or the national poverty line approved by a country’s authorities.</td>
<td>UNDP: Human Development Report</td>
<td>2 decimal places allowed (e.g. 67.87)</td>
</tr>
<tr>
<td>Percentage of seats in parliament held by women</td>
<td>Refers to the number of seats held by women in a lower or single house or an upper house or senate, where relevant as a percentage of total parliamentary seats in that country.</td>
<td>UNDP: Human Development Report</td>
<td>2 decimal places allowed (e.g. 67.87)</td>
</tr>
<tr>
<td>Human Development Index (HDI) Ranking</td>
<td>A composite index measuring average achievement in three basic dimensions of human development—a long and healthy life, knowledge and a decent standard of living.</td>
<td>UNDP: Human Development Report</td>
<td>2 decimal places allowed (e.g. 67.87)</td>
</tr>
</tbody>
</table>
This page has intentionally been left blank.
5.3 Strategic Plan

What is a ‘Strategy’?
A strategy stipulates operational objectives and actions to be taken by personnel to stimulate the execution of policies (a ‘Policy’ consists of a set of decisions to pursue a variety of courses of action for achieving various goals). IPPF’s strategies are extremely complex and are contained in its Vision 2000 Strategic Plan, its function is to facilitate the implementation of the Vision 2000 Policy. Associations have national strategies that can differ in level and detail to Vision 2000 Objectives, ‘Strategies’ is a method IMS offers to organise national and Vision 2000 areas. Examples include: Increasing access to low cost clinical services or Resource Mobilization to increase sustainability.

The user can enter ‘Strategy’ details by employing the ‘Data Entry’ main menu option located within the left menu bar. ‘Strategic Plan’ is the second submenu option positioned between ‘Situation Analysis’ and ‘Projects’. When this menu item is chosen a blank screen appears with three menu alternatives listed across the upper part of the display.

From left to right these options are explained below –

5.3.1 Mission Statement

5.3.1.1 What is a Mission Statement?

This is a statement that relates directly to the entity’s aspirations and visions for the country in which they work and serve. The mission statement also includes what the entity hopes to achieve and the changes they wish to make in certain regions.

The ‘Mission Statement’ menu option is located in the middle of the top menu bar under ‘Strategy’ in the ‘Data Entry’ main menu option. When ‘Mission Statement’ option is activated a new page is displayed (see fig 5-16).

Figure Error! No text of specified style in document. 1 Mission Statement Entry Form
5.3.1.2 **Adding or Editing a Mission Statement**

Mission Statement (Original Language) – Enter a mission statement for the entity in the entity's own language. This is a free text field and as much or as little can be entered as required.

Mission Statement (IPPF Language) – Enter the mission statement for the entity in one of the official IPPF languages (English, French, Spanish or Arabic). This is a free text field and as much or as little can be entered as required.

5.3.1.3 **Can a 'Mission Statement' be changed once submitted?**

Yes, it is possible to change the contents of the 'Mission Statement' once it has been submitted, and this is can be done by following the same method as described when changing 'Strategy Details'.

The user should activate the Mission Statement menu option and then change the 'Mission Statement' in both the original and IPPF languages.

5.3.2 **Strategic Goals**

5.3.2.1 **What are Strategic Goals?**

The menu option ‘Strategic Goals’ allows the user to view and enter strategic goals in IMS. An index table is displayed once this menu option has been selected. The index table lists all strategic goals that have previously been added. The details that appear within this table relating to these 'Strategic Goals' from left to right are 'Entity Strategic Goal (Short Title in Original Language)', 'Year of Strategic Goal' and 'Complete Entity Strategic Goal (Original Language)'.

5.3.2.2 **Adding or Editing Strategic Goals**

1. Year of Strategic Goal – This is a mandatory field and the user should enter the year the strategic goal is going to be introduced.

2. Entity Strategic Goal (Short Title in Original Language) – This is a mandatory field. The strategic goal should be concise, meaningful and entered in this field employing the entity's original language.
3. **Entity Strategic Goal (Short Title in English)** – This is a mandatory field. The strategic goal should be concise, meaningful and entered in this field employing the English language.

4. **Complete Entity Strategic Goal (Original Language)** – Extensive strategic goal details are not essential, however any particulars including activities and approach entered here will assist with comprehension of established ‘Strategic Goals’.

5. **Complete Entity Strategic Goal (in English)** – Extensive strategic goal details are not essential, however any particulars including activities and approach entered here will assist with comprehension of established ‘Strategic Goals’.

Figure **Error! No text of specified style in document.** - 4 Strategic Goal Form - Completed

### 5.3.2.3 Can Strategic Goals be changed once submitted?

Yes, strategic goal details can be changed after the strategic goal has been submitted. These simple instructions will guide the user through a ‘Strategic Goal’ amendment.

1. From the index table, displayed when the user selects ‘Strategic Goals’ from the top menu bar, the user should position their mouse over the title of the ‘Strategic Goal’ which is the first column from the left (‘Entity Strategic Goal’).

2. When the cursor is over the title the letters will appear blue, the user should then click their left mouse button.

3. This will display the ‘Strategic Goals’ entry page with the details of the ‘Strategic Goal’ the user wishes to amend.

4. The user is free to change any or all of the information relating to the strategy and once complete submit these to be saved to the database.

Please Note – Strategic Goals can be deleted only if they do not have strategic objectives assigned. If objectives have not been assigned to a goal a delete link will appear to the right of the strategic goal details on the index page, if objectives have been assigned this link will not appear and hence prevent the goal from being deleted. If strategic objectives have been assigned the user will need to reassign or delete the objectives (this will results in the delete link appearing) and then the goal.
However, Strategic Goal details can be changed even if strategic objectives have been assigned.

**5.3.3 Strategic Objectives**

**5.3.3.1 What are Strategic Objectives?**

This menu option allows the user to enter ‘Strategic Objectives’ for each ‘Strategic Goal’ entered. This fragments a strategic goal into smaller measurable, comprehensible, obtainable sectors.

**5.3.3.2 Adding and Editing Strategic Objectives**

1. The ‘Strategic Goal’ for which the ‘Strategic Objective’ is to be entered needs to be selected from the dropdown list provided. If ‘Strategic Objectives’ have already been entered for the selected goal they will appear in an index table. The details displayed relating to these ‘Strategic Objectives’ left to right are ‘Strategic Objective Year’, ‘Strategic Objective of Entity Goal (Short in Original Language)’ and ‘Strategic Objective of Entity Goal (Short in English)’.

2. A dialog box will appear once the ‘Add New’ button has been activated. Details of the new ‘Specific Objective’ should be entered as requested.

3. Strategic Objective Year – This is a mandatory field. The user should enter the year in which the ‘Strategic Objective’ is going to be introduced.

4. Strategic Objective of Entity Goal (Short in Original Language) – This is a mandatory field. A concise and meaningful description of the ‘Strategic Objective’ should be entered in this field utilising the entities original language.

5. Strategic Objective of Entity Goal (Short in English) - This is a mandatory field. A concise and meaningful description of the ‘Strategic Objective’ should be entered in this field utilising the English language.
6. Strategic Objective of Entity Goal (Full Text in Original Language) – Extensive details regarding the ‘Strategic Objective’ is not essential, however any details of activities or plans will assist in the achievement of the objective.

7. Strategic Objective of Entity Goal (Full Text in English) – Extensive details regarding the ‘Strategic Objective’ is not essential, however any details of activities or plans will assist in the achievement of the objective.

5.3.3.3 Can Strategic Objectives be changed once submitted?

Yes, Strategic Objectives can be changed after they have been submitted, this is done in a similar way to changing strategic goal information. The user is required to select the strategic objective by moving the mouse over and clicking on the strategic objective year, which acts as a link to the objective’s details. Changes to the objective can then be made and submitted.

Please Note – Strategic Objectives can be deleted by activating the delete link located to the right of each strategic objective on the index page.
This page has intentionally been left blank.
5.4 Entity Summary

5.4.1 General Info

Under Construction

5.4.2 Qualitative Programme Analysis

5.4.2.1 What is Qualitative Programme Analysis

‘Qualitative Programme Analysis’ is similar to ‘Qualitative Analysis’ under ‘Data Entry/Projects’, except this analysis takes into consideration the entity as a whole with projects grouped by Vision 2000 Objectives.

5.4.2.2 Adding Qualitative Programme Analysis Details

1. Qualitative Programme Analysis is the upper right menu option under the submenu ‘Entity Summary’.

Figure Error! No text of specified style in document.

2. The screen above is the navigating interface for entering information about Programme Analysis and is displayed once the ‘Qualitative Programme Analysis’ upper menu is activated.

3. The user is able to change the transaction year by utilising the dropdown list in the title bar and the programme areas for each entity can be selected from ‘Programme Areas’ dropdown list provided.

4. All projects assigned to the selected programme area within the entity listed by project title in the next field ‘Projects’ under ‘Programme Areas’.

5. Analysis information for the programme area is entered in the next section. Please note the instruction ‘Click on question to Add/Edit Answer’, as it appears there is no area to enter information this action will provide the necessary interface.

6. Each qualitative analysis question has a separate interface, to enter information each question needs to be selected, answered and submitted individually.
7. Once the question has been answered according to the projects/programmes and
submitted the answer is displayed on the reference page adjacent to the
question.

8. The same interface appears for the last two questions ‘Have you been able to
overcome them?’ and ‘If yes, how?/If not, why not?’. The first question can be
answered selecting the correct option and the last by entering the required
information.
5.5 Projects

5.5.1 Adding a New Project

5.5.1.1 What is a ‘Project’?
In the past ‘Projects’ were often dictated by specific donor interests, their formulation often lacked strategy and vision. Recently 13 well-defined programme areas have been designed to attain IPPF specific objectives, strategies and policies. ‘Projects’ are groups of related activities that form part of the 13 programme areas, and are often referred to as programme building blocks. ‘Projects’ are a discrete set of activities, objectives and indicators.

5.5.1.2 Navigation
The submenu item ‘Projects’ located within the main menu option of ‘Data Entry’ allows viewing, editing and the addition of project information.

Once the user selects the ‘Projects’ menu item a list appears presenting all the projects that have been registered within the entity. Refer to Fig 2-5 for page layout.

A menu also appears across the top of the screen, the menu items and their functionalities are described as follows -

- Vision 2000 Programme – Lists all projects categorising them in accordance with the selected ‘Vision 2000 Programme’.
- Entity Strategy – Lists all projects categorising them in accordance with the selected ‘Entity Strategy’.
- 1st Programme Theme – Lists all projects categorising them in accordance with the ‘1st Programme Theme’ defined within the project.
- Unit – Is the default listing of all the projects for a specific entity when ‘Projects’ is selected from the Data Entry menu.
- Add New Project – Opens a data entry form that allows the user to enter the details of a new project.

Selection of a project is as easy. The user moves the mouse over the ‘Project Title’ (the title will appear blue at this stage) and clicks the left mouse button. A new page will open displaying all project details.
To the right of the project list is a ‘jump menu’. This menu allows the user to jump to a set or category of projects without the need to scroll down the register of individual projects. Whether the user is utilising ‘Vision 2000 Programme’, ‘Entity Strategy’, ‘1st Programme Theme’ or ‘Unit’ menu options, the jump menu will always be available listing the programmes, strategies, themes or units depending on the menu option that is currently active. Once the user has selected a jump menu option the project index page will scroll to the chosen category.

**Figure Error! No text of specified style in document.-2 Jump Menu**

Within this index page it is possible for the user to change the transaction year for which the projects are displayed. A dropdown list entitled ‘Select Year’ is located to the right and above the jump menu, the user can navigate throughout the various transaction years.

**5.5.1.3 Adding a New Project Profile**

The user can add a new project and its details by activating the ‘Add New Project’ top menu option, located on the far right of the top menu bar. Once the user has activated ‘Add New Project’ a new page will appear (refer to Fig 5-26). Requested details of the new project should be entered within this page as described below.

**Figure Error! No text of specified style in document.-3 New Project Form**
1. **Vision 2000 Programme** – This is a mandatory field, which requires the user to assign the project to one of the IPPF Programmes. For a Project to be assigned to a specific Programme the Project must be make a significant contribution to the goal of the Programme. The Vision 2000 Programme can be selected from the dropdown list provided. For additional information about the Vision 2000 objectives of the IPPF, please refer to the "IPPF Vision 2000 Strategic Plan" document which describes V2K program area objectives.

2. **Other ID/No** – An alternative ID or number can be entered into this field for specific entity project recognition. For example this could be used to record the local accounting system's account code for the project.

3. **Entity Unit** – This is a mandatory field. A unit is required to be selected within the entity, this unit will be held accountable for the project's progress and results. It is possible that there are no units identified within a particular entity, in this case it is required that **none** is selected from the dropdown list, in this situation the entity as a whole is responsible for the project.

4. **Strategic Goal and Strategic Objective** – These fields allow the project to be assigned to a strategic goal and strategic objective. It is quite possible that there may be no strategic goals or objectives within the entity or the project may not fit within the strategies outlined, if so it is not necessary to make a selection.

5. **Project Title** – This is a mandatory field. The user is required to enter a name for the project. If this is a project funded by restricted funds, the name in this field should be the official title of the project as it appears in the grant agreement. If this is a project supported by unrestricted funds, the name should be meaningful and representative of the project's proposed actions. [Tip: Since projects are listed alphabetically in the project index page within categories, it is sometimes it is helpful to precede the project title with the donor's name as this assists with manual searching.

6. **Goal/Overall Project Objective** – The project goal indicates the overall change or effect that your project will address. The goal can be general and lofty and may
refer to large issues or problems. Usually, a single project will not be able to achieve the goal by itself, but will contribute to the achievement of the goal.

**Tips for writing goals:**
- Refer to the major health or social problem
- Refer to your focus population and location
- Utilize clear terminology

Be mindful of the terminology that you use. A particular term or phrase may be understood by your organization, but not by others outside of it. In this case, place a definition in parentheses.

<table>
<thead>
<tr>
<th>Example of a poorly written goal</th>
<th>Increase knowledge about sexual and reproductive health in Mexico</th>
</tr>
</thead>
<tbody>
<tr>
<td>Why is this goal poorly written?</td>
<td>• This goal does not refer to the major health or social problem to be addressed. The organization should ask themselves, “Why is it important to increase knowledge? What do we think will happen if knowledge is increased?” • This goal does not provide information about the focus population.</td>
</tr>
<tr>
<td>How can this goal be improved?</td>
<td>Improve the sexual and reproductive health of young people ages 15 to 24 in the city of Guanajuato, Mexico, through the reduction of unwanted pregnancy, STIs and HIV.</td>
</tr>
</tbody>
</table>

Examples of well written Goals -

Example 1. Emergency Contraception Project
To reduce unwanted pregnancy, unsafe abortion, and maternal morbidity among women experiencing gender-based violence in x community/city

Example 2. HIV Project
Reduced incidence of HIV infection among young people ages 15 to 24 in Haiti

Example 3. Abortion Project
Reduce maternal mortality and morbidity related to unsafe abortion by changing laws and policies to favor access to safe and legal abortion services for women in Brazil.

7. Project Summary – Information entered in this field will appear on many reports and should be comprehensive. Provide an overview of project information, including the following:
   - who is in charge of the project,
   - who the project will be working with or partnering with,
   - what is the overall approach of the project in terms of concentration of activities,
   - who is the audience or beneficiary of the project activities,
   - where it will be implemented,
   - project duration,
   - a brief statement of overall goal or project aim,
   - name or names of donors that are supporting project, or if it is funded locally the entity should identify major sources of funding.
8. Manager/Co-ordinator – The person who is organising the project needs to be either selected from the dropdown list or entered in the free text field to the right.

9. Frequency Financial Reporting – This is a mandatory field and requires the user to select the frequency of financial reporting required by the entity and project associates. Financial reporting includes budget, asset, income and expenditure summations. Annual is the default reporting frequency to allow for entry of annual total amounts. Note: If your project is e.g. restricted and a donor requires you to report monthly, you will have to enter all financial transactions for each month – this can be very time consuming.

Please Note – Refer to section 5.1.2.2 for an important note regarding the Frequency of Financial Reporting and Interim Actuals ledger type.

10. Preferred Fund Type – The preferred fund type should be selected from the dropdown list, it is possible to select ‘to be identified’ this allows time for a fund type to be determined (e.g. if the project is still seeking a donor). The available fund types are –

<table>
<thead>
<tr>
<th>FUND TYPE</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restricted</td>
<td>All financial resources donated to the Association that are limited to a specific purpose, project or activity. The restrictions are described by a grant agreement issued by the donor. Restricted funds are generally returned to the donor if unused, unless the donor instructs otherwise in writing. Generally, restricted income should equal the amount of expenses incurred by a specific project or activity.</td>
</tr>
<tr>
<td>Unrestricted Core</td>
<td>Funds provided to the Entity by IPPF or other donors as a general support grant to an institution. This concept also includes financial resources (income) generated nationally from operations of the Entity in support of any organisational project or unit.</td>
</tr>
<tr>
<td>Unrestricted Earmarked</td>
<td>Funds from the Equity side of an organisation’s balance sheet that are designated by the Association’s own board for a specific purpose – ex: building fund. Generally, unrestricted earmarked funds are derived from prior year excess of income over expenses (surplus).</td>
</tr>
<tr>
<td>Unrestricted Core Governance</td>
<td>Funds provided by IPPF from general support funds that are applied to institutional government by volunteer bodies.</td>
</tr>
</tbody>
</table>

Note: This is just the ‘preferred fund type’. Expenses, Income and Assets can have individually assigned differing fund types.

11. Frequency Programmatic Reporting – This is a mandatory field and the user is required to select the frequency of programmatic reporting required by the entity and project associates. Programmatic reporting incorporates expected and actual results. Annual is the default reporting frequency to allow for entry of total annual results.
12. Start Date – Designation of a start date requires the user to select a day, month and year from the dropdown lists provided. Projects started before 2000 should have the default year 2000 selected.

13. Finish Date – The user should propose a finish date by selecting a day, month and year from the dropdown lists provided. A finish date should not be selected if the project is on going (i.e. the box is ticked to the right of the Finish Date select boxes). Once the ongoing box is ticked the Finish Date becomes inactive.

14. Ongoing – If the project has been defined as ongoing, the user should activate this tick box. Activating the Ongoing tick box will cause Finish Date, Extension Date and Real End Date to become deactivated, in which case no dates can be selected or entered for these fields. Examples of ongoing projects include clinical services and human resources.

15. Extension Date – If the project is to be extended, the user is required to enter the date the extension was authorised.

16. Real End Date – The user should select the day, month and year that the project was completed.

Please note – Transactions can only be entered from the start date year to the end date year.

17. Management Location – The location where the project is being managed should be entered here. This is the base of project administration.

18. Location of Implementation – This is a mandatory field. The location where the project is operational should be entered in this field. It is quite possible that there will be more than one implementation location all should be listed. Apart from listing the city or sector of the country, it is helpful to specify the neighbourhood or site name(s) of the project activities.

There are also 4 tick boxes located under Management Location and Location of Implementation, they are labelled Urban, Peri-Urban (outskirts of city), Rural and Not Applicable. By ticking “Not Applicable”, the system will deactivate Urban, Peri-Urban and Rural. The user should activate one, all or none of these tick boxes, as appropriate.

19. Programme Theme (Primary) – This is a mandatory field. The Programme Theme is also known as the Primary Keyword. Allocating a primary keyword to the project from the dropdown list enables effective searching and identifying when it comes to finding projects relating to a particular endeavour.

Tip: The selection of a particular theme keyword will determine which activity keywords are available within the activity section of the project. Consult the list of keywords, both program themes and their related activity keywords, before finalizing your selection of the Program Theme keywords.

20. Programme Theme (Secondary) – It is not essential to select a Secondary Programme Theme. This field allows the user to select another theme (keyword)
from the dropdown list in the case that there is more than one Theme that defines a project.

21. Special Client Focus (1<sup>st</sup>) - This field allows the user to select the client focus for the project. The dropdown list displays a list of possible clients the project could be focused towards. It is not essential to select a client focus, and not necessary if the client type does not appear in the list, but if possible a client type should be selected as it adds definition to the project.

Tip: By using the age and sex fields, the entity can identify client groups such as women of reproductive age or male adolescents. For this reason, the special client focus groups do not include age and gender related groupings.

22. Special Client Focus (2<sup>nd</sup>) - This field permits the selection of a second ‘Special Client Focus’ by the user. Selection of a second client focus is not necessary if there is only one client for the project. If there is, however, another primary special client focus or one of a secondary focus it can be indicated within this field.

23. Client Income Classification - The user is required to select the generalised income of the client focus from the dropdown list provided. Once again, although it is not necessary to select an income classification, particularly in the situation where client focus incomes are widespread, if it is possible to select a ‘Client Income Classification’ this supports the project definition. Use and meaning of the criteria should be based on authoritative sources in the entity’s country.

24. Sex - This field is similar to those above as it is related to ‘Special Client Focus’. Female, Male, Male and Female or N/A should be selected from the dropdown list.

25. Age Range Not Applicable – This tick box relates to the age range of the client focus, if this is not of significance then this box should be ticked. This action will disable the next two fields that relate to age range.

26. Age Range – This is not a mandatory field, and will only be active if the previous tick box (Age Range Not Applicable) has not been ticked. The user should select the age range relating to the special client focus.

27. Justification and Background – This is a free text area where the orginator (user) enters evidence from a review of literature. Also they should explain the relevance of the project to context/need. This section must articulate why implementation is poised to fill gaps in knowledge or meet heretofore unmet need. This also allows the user to enter lessons learned from previous projects and experience providing evidence in favour of a successful conclusion.

5.5.2 Project Summary

Provides a read only summary of main project information upon selection of the upper menu option ‘Project Summary’.
5.5.3 Main

This is the top menu option first from the left on the new menu bar and is displayed when project information is submitted or is being viewed. It is the default view when a project is selected from the index page. The top menu item ‘Main’ is not displayed when initially adding a project from the Add New Project menu item.

The ‘Main’ menu item displays all information, which is entered when adding a new project. When this information is being viewed, there are three additional options –

- **Update**: The user should select this button to save the changes that have been made to the project’s details on the main page. Whether this button appears depends on the user’s data access rights.

- **Delete**: Once a new project is submitted and added to the project index page, each time the project’s main information page (this same page, activated by clicking on the project from the index page) is accessed a delete button will appear, which allows the deletion of a project. Once again the appearance of this button depends on the user’s level of permissions. Prior to deleting the IMS will ask the user ‘Are you sure you want to delete the project?’ The user has the options of OK or Cancel.

- **Copy**: Generates a copy of the project, the information copied is only the main section details and names the copy `copy: project name`.

It is important to note that a project cannot be deleted if there are any associated activities or objectives. All information relating to the project has to be deleted first. If it is not deleted the message below will appear.

Figure Error! No text of specified style in document.-5 Deleting a Project

There is hidden information for this project in database please use following steps to delete a project:
- Delete all objectives for this project
- Delete all Activities for this project
- Delete all Financial Entries for this project
- Delete all Staff allocation

Finish
Please Note – Check all transaction years for information pertaining to the project to be deleted not just the default log in year. For example if the users default log in transaction year is 2002, and the user deletes all project associated information in 2002. There is an income transaction in 2003, the system will display the message above as there is still data relating to the project within the IMS. Please go through each transaction year.

If the user has deleted all the data in the project sections to the right of the top Main menu option prior to selecting project deletion, a message will appear informing the user ‘Project Deleted Successfully’, the user should activate the ‘OK’ button, which will display the project index page minus the recently deleted project.

5.5.4 Specific Objectives

5.5.4.1 What is a ‘Specific Objective’?
Objectives refer to the intermediate changes desired among the focus population or their environment, and describe the expected results for your project. Objectives are more specific than goals/overall objective and refer to a specific location and time period. Well-written objectives identify:

- WHO will be reached
- WHAT change will be achieved
- IN WHAT TIME PERIOD the change will be achieved
- WHERE (What location)

5.5.4.2 Specifying Expected Results by Following SMART Guidelines

Unlike a goal, which the project will only contribute to achieving, the project objectives do need to be achievable within the time period specified. The project objectives will need to be measured by the project. Objectives should be S.M.A.R.T.:

- Specific … to avoid differing interpretations
- Measurable … to monitor and evaluate progress (preferably numerical)
- Appropriate … to the problems, goal and your organization
- Realistic … achievable, yet challenging and meaningful
- Time-bound … with a specific time for achieving them

5.5.4.3 Guidelines for Writing a Good Specific Objective

When writing objectives, choose action verbs that indicate a change and the direction that change will take. Avoid verbs that refer to activities or implementation strategies.

Appropriate and inappropriate verbs are presented in the table that follows.

<table>
<thead>
<tr>
<th>Appropriate Verbs for Objectives</th>
<th>Inappropriate Verbs for Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Decrease</td>
<td>• Train</td>
</tr>
<tr>
<td>• Increase</td>
<td>• Provide</td>
</tr>
<tr>
<td>• Strengthen</td>
<td>• Produce</td>
</tr>
<tr>
<td>• Improve</td>
<td>• Establish/Create</td>
</tr>
<tr>
<td>• Enhance</td>
<td>• Conduct</td>
</tr>
</tbody>
</table>
In project objectives, targets should be justified
When writing objectives it is sometimes possible to specify the amount of change expected to occur, in other words, to define a specific target. Some donors, in fact, may require the project to define specific targets. Where this is not a requirement, targets should be specified only if baseline data are available and/or the target is based on prior experience.

For example, if a Demographic and Health Survey or other population-based survey revealed that the contraceptive prevalence among women of reproductive age is 10% in a given area and a similar project in the past achieved a 5% increase over two years, it may be realistic to choose a similar increase (from 10% to 15%) or a slightly higher increase if you hypothesize that the strategies in your new project will lead to a greater increase (for example, from 10% to 20%). If you do not have reliable data or strong prior experience on which to base your targets, do not include them.

Be careful when specifying a target amount of change in an objective. If the target is not realistic, your project may be considered a failure if it is not met – even if the results achieved are impressive.

| Example of a poorly written Specific Objective | Train 60 peer promoters to promote the ability to practice safe sex. |
| Why is this Objective poorly written? | • This objective refers to a strategy or activity, not a change sought among a focus population. Why does the organization want to train peer promoters - what change will be achieved? |
| | • This objective is not time-bound: in what time period is the change expected to occur? |
| | • The focus population is not specified: among whom and where will the change occur? For this project, is the change to be achieved among the peer promoters or among the people the promoters reach? |
| | • The terminology is not clear: what does the ability to practice safe sex mean for this organization? How will the organization recognize it when it occurs - for example, will it be that the focus population is abstaining, is having sex with one faithful partner only, or is using a condom? |
| How can this objective be improved? | At the end of the three-year project, increase condom use among sexually active young people (ages 15 to 24) in City X, Country Y. |

Tips for writing objectives:
- Refer to the focus population and the desired change among the population.
- Decide what success means for your project and how you would show that success. Refer to the intermediate outcomes of your conceptual model.

Examples of well written Specific Objectives -

Example 1. Emergency Contraception Project
Increase access to emergency contraception among women screened for gender-based violence in service delivery sites in X community over a 2 year period.

Example 2. HIV Project
By the end of the first project year, increase knowledge and skills of staff in five Port-au-Prince clinics in how to counsel young clients (ages 15 to 24) about HIV prevention, with particular emphasis on negotiating and using condoms.

Example 3. Abortion Project
At the end of the three-year project, increase awareness among national policymakers (legislators and ministry of health officials), women’s groups and other NGOs of the consequences and extent of unsafe abortion in Brazil and strategies to address it (emergency contraception, post-abortion care, and safe abortion services).

5.5.4.4 Specific Objectives and their Relationship with the IMS

‘Specific Objectives’ is located second from the left in the top menu bar and is displayed when either a new project has been submitted or project details are being viewed.

‘Specific Objectives’ are listed on an index page for each project. They are presented in table format with Delete, Edit and Indicators links located next to each ‘Specific Objective’ registered.

Once the ‘Specific Objectives’ menu option has been activated a new page will be displayed with the Objective No and Project Specific Objective details listed. When viewing an existing project Specific Objectives appear in table format as described in the preceding paragraph, if the project is new no ‘Specific Objectives’ will be listed.

Are the expected and actual results for the year open or closed?
This is determined in the Time Line Status section, which is located under Data Entry. If closed, you will not be able to add or change as described in section 5.1.1.

5.5.4.5 Adding New Specific Objectives

1. To add a new ‘Specific Objective’ the user is required to proceed to the ‘Specific Objective’ index page. This page should be accessed via the ‘Project’ requiring the ‘Specific Objectives’. From the main menu ‘Data Entry’ the user is required to select the submenu option ‘Projects’, then choose the project from the index page for which ‘Specific Objectives’ are to be added.
2. Activate ‘Specific Objective’ menu option from the top menu bar and select the ‘Add New’ button.

3. Beneath the ‘Specific Objective’ title, there is a dialog box that allows the text entry of a ‘Specific Objective’. ‘Suggested Objectives’ are located after ‘Specific Objectives’ and there is often one or more suggested objectives listed. These suggestions are based on the Vision 2000 Program Area selected for the project. It is possible to either select one of the suggested objectives or manually enter a ‘Specific Objective’. Each objective should be entered and submitted individually.

4. The year(s) the specific objective is valid need to be selected from the fields ‘From Year’ and ‘To Year’. If the project is ongoing an ongoing tick box will appear and selecting this will ensure the ‘Specific Objective’ appears for each year the project appears. If the specific objective is applicable in 2002 only, if the user selects From Year 2002 and To Year 2002, the specific objective will appear only in 2002 project information. If the specific objective is applicable over 2002 and 2003, if the user selected From Year 2002 and To Year 2003, the specific objective will appear in 2002 and 2003. The user can add and amend specific objectives as long as the programmatic time line status is open. Please Note – Prior to copying indicators from the previous transaction year ensure all specific objectives have a ‘To Year’ equal to, beyond or ongoing. This guarantees the indicators have a location to be copied to.

5. To add multiple objectives the user should repeat steps 1 to 4. It is customary to add a specific objective and its indicators before adding further objectives. It is not essential to follow this method. Indicators are directly related to a specific objective and will be discussed in the following section.

The Specific Objective table contains all ‘Specific Objectives’ entered. Each ‘Specific Objective’ has a sequential number allocated according to the order they were added (1, 2, 3......). The project ‘Specific Objective’ consists of information typed in as a ‘Specific Objective’ or the chosen ‘Suggested Objective’.

Note: Manually entered objectives must always be **SMART** (specific, measurable, appropriate, realistic and time-bound). Suggested objectives get time bound through the transaction year and frequency of their indicators.

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**Indicators**

Presents ‘Indicator’ entry page, to be discussed in the next section.
5.5.4.6 **Indicators**

An indicator is a measure of concept, phenomenon or behavior. It is not necessarily the phenomenon itself, but a reflection of that phenomenon. There are three principal types of indicators: process, results (output/outcome) and impact.

- **Process indicators.** These indicators provide evidence of whether the project is moving in the right direction to achieve an objective. Process indicators give information about the activities being implemented, such as what activities were done, how many activities were done and who participated in the activities. 
  
  *Process information* about the quality of activities (answering the question, how well were the activities carried out?) can also be collected. However, since change cannot be measured by qualitative data, process information is not technically an indicator. Nonetheless, the quality of services and activities is an important issue that can relate to the achievement of objectives; thus including qualitative information can be a vital part of data collection. Process indicators provide information about implementation of activities. They should be collected throughout the life of the project. An example is “number of service providers trained in providing youth-friendly SRH services”.

- **Results indicators (output/outcome).** These indicators provide information about whether an expected change occurred, either at the program level (output) or at the population level (outcome). Results indicators measure the changes that your program’s activities are trying to produce in your focus population. This type of indicator is often stated as a percentage, ratio or proportion to allow you to see what was achieved in relation to the total possible number (the denominator). It is important that both the numerator and the denominator are clear in the wording of the indicator.

  Because results indicators tell whether or not an objective was achieved, every objective must include at least one results indicator. An example is “percent of sexually active young men (age 15-24) who participated in the project activities and who reported using a condom at last intercourse”.

- **Impact indicators.** These indicators measure the impact of your project. They are similar to results indicators except that the evaluation is designed in such a way that enables you to measure the extent to which the change can be directly attributed to the project. *Measuring impact requires an experimental design or a longitudinal study, which is not feasible for most projects.* Note that the word “impact” has a very specific meaning in evaluation; thus, you should avoid using it unless your project design includes an experimental or longitudinal evaluation component.

Indicators should be clear and precise. If indicators are written as a percentage, they should specify the numerator and denominator. Definitions for terminology should also be provided. While indicators measure change, they should not indicate the direction of the change. For example, rather than write “increase in age at first intercourse”, write “age at first intercourse among males and females aged 10 to 19 in City X”. (Later on, the data will suggest if this age increased, decreased, or stayed the same.)
Think about which indicators will truly provide information that will be useful for project staff in knowing if the project is on the way to meeting the objectives (process indicators) and whether the objectives have been achieved (results indicators).

In seeking a gender perspective, your project may need to disaggregate indicators by gender, where appropriate. For example, an indicator may be, “Number of youth aged 15-24, by gender, who complete the 6-week educational sessions about HIV prevention. This will help you know whether you are attracting more women than men, or vice versa, allowing your project to adjust your recruitment strategies as needed.

5.5.4.7 Selecting Indicators

Issues to Consider When Selecting Indicators:
- Relevance
- Availability of information
- Ease in measuring
- Understandability
- Resources (money and personnel expertise and time)
- Donor interest
- Gender Perspective

It is best to select several indicators for each objective since objectives usually have different dimensions. However, a manageable number of indicators should be selected – keeping in mind the availability of information and the resources that will be available during your project (both human and monetary). After a discussion with the project staff and other collaborators, choose the best indicators.

It is not necessary to have an indicator for every activity, for two reasons. Process indicators relate directly to activities, but often the project has too many process indicators. Results indicators should relate directly to your objectives, and provide program managers and donors with information on changes that occurred among the focus population. It is necessary to have at least one results indicator for each objective.

5.5.4.8 Process vs Results Indicators

Sometimes it is difficult to determine if an indicator is a process or results indicator, because an indicator that is a process indicator for one objective may be a results indicator for a different objective. For example, the indicator, “number of clinical services provided to youth aged 15 to 24” may be a process indicator (since it gives information about the activities being implemented), but if the objective is to increase access to clinical services, the number of services provided could be an results indicator. The important thing to remember is that the indicator relates to the objective.

5.5.4.9 Guidelines for Writing Good Indicators
Whenever possible, utilize the many indicators that have already been devised for sexual and reproductive health projects. The following documents provide such indicators:

- *Plan for Monitoring and Evaluation of IPPF’s Vision 2000 Indicators*

### Example of a poorly written Indicator

**Increase in % of people using a condom.**

**Why is this Indicator poorly written?**

- The indicator should not specify the direction of change (this is included in the objective).
- This indicator is imprecise because it does not specify the point in time at which condom use will be measured - will condom use at first intercourse, last intercourse, or at every intercourse be examined?
- The denominator (base population) is not clear: among whom will condom use be measured - all people in the world, all people in Mexico, all people in the community, all people participating in the project, people of a certain age? Will it include only those people who are already sexually active?

**How can this indicator be improved?**

% of sexually active young people (ages 15 to 24) participating in the project who report using a condom at last intercourse, by gender.

### When writing indicators, avoid these common problems:

- Focus population is not specified.
- Indicators are vague or imprecise
- Too little attention paid to results indicators
- Denominators are not specified
- Indicators are not realistic
- Too many indicators to be useful

### Examples of well written Indicators -

**Example 1. Emergency Contraception Project**

*Process -*

- # of people sensitized/trained in emergency contraception by type (peer educators, women who experienced gender-based violence), service providers, counselors, women's groups, police, legal)
- # of IEC materials newly designed or adapted integrating EC with SRH, HIV/STI, GBV etc.

*Results -*

- # of SRH consultations
- # of kits (including condom, emergency contraception packet, IEC materials) distributed by type of organization or service delivery site
- % of women screened for gender-based violence receiving emergency contraception

Example 2. HIV Project

Results Indicators:

- % of staff participating in training sessions with favorable attitudes concerning HIV issues (as indicated by a score of at least 150 on the Attitudes About AIDS Scale), by clinic

- % of clinic staff participating in training sessions who correctly demonstrate how to use a condom, by clinic

Process Indicators:

- HIV prevention counseling checklist developed

- # and % of clinic staff participating in training sessions, by position, by clinic

Example 3. Abortion Project

Process:

- Number of media spots conducted by project staff and partners about abortion issues, by topic and media type (print, television and radio)

- Number of people participating in awareness-raising activities, by type of activity (community forums, media events, policy discussion groups) and participant (policymaker, women’s group representative, NGO representative)

Results:

- % of people participating in awareness-raising activities who can identify three consequences of unsafe abortion, by type of participant

- % of people participating in awareness-raising activities who can identify three strategies to address unsafe abortion, by type of participant

- % of people participating in awareness-raising activities who report having discussed the issue of unsafe abortion with others, by type of participant

On the programmatic side, the indicators and results of a multi-year project should reflect only those that can be achieved in a 12 month transaction period. For example, if an 21 month project begins in 1 March 2002 and runs through 31 December 2003 of the following year, the entity will need to open two transaction years in the programmatic and financial timelines. Expected results for the first 10 months of the project in 2002 will be recorded in the first year, and the remaining 11 months of expected results will be entered in the second year of the project.

The row on the far right of the ‘Specific Objective’ index table provides the link to ‘Indicators’ for each individual ‘Specific Objective’.
5.5.4.10 Adding a New Indicator

1. The user is required to click on the ‘Indicator’ link adjacent to the objective that requires indicators to be added.

2. The page that is now displayed is the ‘Indicators’ index page for the distinct ‘Specific Objective’. The same top menu is present, the title bar at the top of the page displays the objective on the left, and whether the actual and expected results are open or closed (this relates directly to the transaction year as discussed in section 5.1). This title bar incorporates a drop down menu for the transaction year.

3. As with specific objectives the system will suggest Indicators based on the selected specific objective. If the user enters a specific objective manually eIMS will not suggest any Indicators and will expect the user to state their own.

4. There are three buttons located beneath the title bar, if indicators have already been added then they will be listed in a table format prior to the buttons being displayed. This will become evident once an indicator has been added.

Figure Error! No text of specified style in document. - 8 Indicators

5.5.4.11 What does ‘Qualitative’ and ‘Quantitative’ Mean?

You will most likely use both quantitative and qualitative methodologies in collecting data for your indicators. While both methodologies provide important information about your project, donors often expect some quantitative evidence that your project objectives were achieved. The following table illustrates characteristics of quantitative and qualitative methods, the purpose of each, and examples of data sources.

Characteristics of Quantitative and Qualitative Methodologies

<table>
<thead>
<tr>
<th>Distinctions</th>
<th>Quantitative Methodologies</th>
<th>Qualitative Methodologies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Characteristics</td>
<td>• Require relatively large sample sizes</td>
<td>• Do not require large sample sizes</td>
</tr>
</tbody>
</table>
Can be used to generalize findings to the larger focus population (when probability sampling is used)
- Require some knowledge of statistics

- Cannot be used to generalize findings to the larger focus population
- Do not require experts in statistics (but should utilize a systematic analysis)

**Purpose**

Quantitative data measures actions, tendencies and levels of knowledge. With this type of data, you can determine: *How many? How much? How often?* Quantitative data is typically closed-ended; that is, variables or themes are pre-defined before data collection begins.

Qualitative data provides information about attitudes, perceptions and motivations. This type of data can be used to answer *Why?* and thus is usually structured in an open-ended fashion so that information arises spontaneously.

**Data Sources/Means of Verification**

- Program records
- Service statistics
- Surveys at the program-level (with providers, clients, etc.)
- Surveys at the population-level (local, regional or national)

- In-depth interviews
- Case studies
- Focus groups
- Observation studies
- Mystery client studies

### 5.5.4.12 Adding a Qualitative Indicator

1. When the ‘Add Qualitative’ button is activated a new page is displayed which requests the entry of qualitative indicator details. The top section of the page is the same as the Indicator index page with the objective listed, whether the actual and expected results are open or closed and the dropdown list for the transaction year.

Figure *Error! No text of specified style in document.* - 9 Qualitative Indicator Form
2. The next part of the form displays ‘Qualitative Indicator’ as the title, to the right of that is a tick box. The question associated with the tick box is 'Is this a Yes/No Indicator'. 'Is this a Yes/No indicator' describes the situation where the originator can say yes, the indicator was achieved or no, it wasn’t. A Yes/No indicator indicates if something simply exists or occurred. For example, if the indicator is ‘strategic planning process conducted within the past five years’, this indicator is Yes/No, as it is either achieved or not. If the Yes/No box is not checked, the findings and the extent or level of achievement will be described in the text box for expected qualitative results. For example, if the indicators is ‘use of evaluation research and monitoring data for program planning’, this would not be considered a Yes/No indicator and would require the user to state the expected qualitative results and subsequent findings in the appropriate text boxes. If the Indicator is set as a YES/NO you can not enter text into the expected results, because the only data required is whether yes or no.

3. To the right of the ‘Yes/No Indicator’ tick box is a dropdown list for ‘Type’ of Indicator. There are two types listed and their definitions follow -

<table>
<thead>
<tr>
<th>TYPE OF INDICATOR</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process</td>
<td>Refers to multiple activities that are carried out to achieve the objectives of the program. It includes both what is done and how well it is done.</td>
</tr>
<tr>
<td>Output</td>
<td>Refers to the results of these efforts at a program level.</td>
</tr>
</tbody>
</table>

4. Under the Qualitative Indicator title bar there maybe a list of suggested qualitative indicators. If the objective has been chosen from the list of suggested objectives then there will be a list of suggested indicators. If the objective has been entered in free text then the user will need to define their own indicator. A suggested indicator can be selected by clicking the circle to the left of the indicator or an indicator may be entered in the free text field. (The Indicator title is always mandatory, regardless or whether the indicator is selected from the suggested list or entered by the user in the free text box.)

5. Activity - The user may wish to link the indicator to an activity, if so the activity can be selected from the dropdown list.

The following section consists of a table with five areas to enter information.

6. If the indicator is a ‘Yes/No Indicator’ then ‘Means of Verification’ is inactive. Whether or not the expected results have been achieved is recorded within ‘Results Achieved’ by clicking on the appropriate circle.

7. Expected Qualitative Results - This is a mandatory field and requires the entry of expected indicator results. For example, Staff sufficiently trained in eIMS to prepare annual plan and budget for 2003. This qualitative results would imply staff training, course exam of staff competency, and assessment of completeness of APB 2003. This field is generally completed at the time of the annual plan preparation.

8. Means of Verification (M&E Tools) - This is a mandatory field. The data source of the indicator requires definition at the beginning of the project and should be
specified in each annual plan submission. In order to be able to collect the data required by the indicator that measures the specific objective, it is important to identify what data collection tools will be utilized. Refer to Quantitative/Qualitative Methodologies table for examples of data collection tools for the different methodologies.

9. Qualitative Findings – The user is required to enter the results periodically using the tools and standards described in the means of verification. Means of verification defines how the indicator is to be assessed, ‘Qualitative Findings’ communicates the assessment findings. This section is usually completed at report time (i.e. half-year report, annual report, etc.)

10. Assumptions/Constraints – This section allows users to include additional information that will facilitate the understanding of the context in which the qualitative indicator is being measured, as well as its scope to describe the change being assessed.

11. Explanation of Variances/Comments on Results – In this section the user is required to explain any variances between expected and actual results. Changes in circumstances and other factors can be described within this section.

12. Frequency/Timing - When deciding on how frequently data will be collected for your project, consider the resources available (human and financial resources). It will take time to develop evaluation tools and instruments, administer them and analyze and interpret the data. Data collection should be frequent enough to identify and correct problems, but should not be so frequent that you are unable to use the data. You may wish to collect data more often at the initial stages of implementation so that data can be used to inform project planning. As you finalize your logical framework, you should also think about who will collect and analyze the data; these activities should be included in your project workplan.

In the needs assessment section we discussed baseline data collection. To reiterate, baseline data:
- Provide information about the pre-intervention situation
- Can come from multiple sources (such as service statistics or surveys)
- Imply a comparison between pre- and post-intervention (Baseline → Final).
Remember to do a endline or final evaluation.

Enter Frequency/Timing
This is a mandatory field. ‘Annual’ is the standard period for project results. This field provides a dropdown list, which allows the user to select the frequency they wish to track the results.

<table>
<thead>
<tr>
<th>FREQUENCY/TIMING REPORTS</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual</td>
<td>Allows information to be entered for an entire calendar year.</td>
</tr>
<tr>
<td>Semi Annual</td>
<td>Allows information to be entered half yearly, January-June and July-December.</td>
</tr>
<tr>
<td>Monthly</td>
<td>Allows information to be entered for each</td>
</tr>
</tbody>
</table>
Quarterly

Allows information to be entered for each quarter or three month period in a calendar year.

When the selection is made the chosen number of sections will be presented below this field where findings may be reported. The annual section will remain as above as this is for the annual expected and actual results.

5.5.4.13 Adding a Quantitative Indicator

1. An indicator can be created by selecting the hypertext 'Indicator' to the right of the objective in the table/index of project specific objectives. The system will then display at the top of the page a title bar with the objective on the left, and whether the programmatic actual and expected results are open or closed for the specified transaction year. The transaction year may be changed by selecting another year from the dropdown list.

2. If you have previously defined indicators for the objective they will appear in a list below the title bar. If this is the first indicator for the objective, only two buttons will appear below the title bar: Add New Qualitative Indicator, and Add New Quantitative Indicator. By selecting Add New Quantitative Indicator, an indicator data entry screen will be displayed. The page displays the objective, the programmatic timeline status for a specified transaction year.

Add Qualitative

Displays 'Qualitative Indicator' detail entry page.

Add Quantitative

Displays 'Quantitative Indicator' detail entry page.

Figure Error! No text of specified style in document. 10 Quantitative Form
3. To the right of the form title ‘Quantitative Indicator’, is a dropdown list for the ‘Unit of Measure’. A unit of measure is always required; there are two options: numeric or percentage.

4. Select a ‘Type of Indicator’ from the drop down menu.

<table>
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<tr>
<td>Output</td>
<td>Refers to the results of these efforts at a program level.</td>
</tr>
</tbody>
</table>

5. Frequency/Timing -

When deciding on how frequently data will be collected for your project, consider the resources available (human and financial resources). It will take time to develop evaluation tools and instruments, administer them and analyze and interpret the data. Data collection should be frequent enough to identify and correct problems, but should not be so frequent that you are unable to use the data. You may wish to collect data more often at the initial stages of implementation so that data can be used to inform project planning. As you finalize your logical framework, you should also think about who will collect and analyze the data; these activities should be included in your project workplan.

In the needs assessment section we discussed baseline data collection. To reiterate, baseline data:
- Provide information about the pre-intervention situation
- Can come from multiple sources (such as service statistics or surveys)
- Imply a comparison between pre- and post-intervention (Baseline → Final).

Remember to do a endline or final evaluation.

**Entering Frequency/ Timing**

This is a mandatory field. ‘Annual’ is the standard period for project results. This field provides a dropdown list, which allows the user to select the frequency they wish to track the indicator results.

<table>
<thead>
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<td>Allows information to be entered half yearly, January – June and July – December.</td>
</tr>
<tr>
<td>Monthly</td>
<td>Allows information to be entered for each calendar month, January through December.</td>
</tr>
<tr>
<td>Quarterly</td>
<td>Allows information to be entered for each quarter of the calendar year: January – March, April – June, July – September, and October through December.</td>
</tr>
</tbody>
</table>
When the selection is made the chosen number of sections will be presented below this field. The annual section will remain as above as this is for the overall expected and actual results for the indicator.

6. Label - If indicator is xlabel this needs to be selected from the dropdown list.

7. Under the 'Quantitative Indicator' title, there maybe a list of suggested quantitative indicators. If the objective has been chosen from the list of 'Suggested Objectives' then there will be a list of suggested indicators. If the indicator has been entered in the free text field then the system will not suggest an indicator and the user will be required to enter an indicator. A suggested indicator is selected by clicking the circle to the left of the indicator or an indicator is entered in the free text field. Whether the user selects an indicator from the suggested list of indicators or types an indicator into the free text box, this field is mandatory and cannot be left blank.

8. Activity - The user may wish to link the indicator to an activity, if so the activity can be selected from the dropdown list.

The following section consists of a table with five areas requiring information.

9. Baseline - This is not a mandatory field. It is not always the case that there is a baseline format the start of a project. Baseline can be determined based on past year's performance or from the results of pre-project surveys. However, some evaluation and innovative projects may not have baseline data, since their objective may be to collect data for the first time in a particular area or on a topic.

10. Expected Quantitative Results - This is a mandatory field and requires the user to enter expected numeric or percentage results for the objective. This field is completed at the time of the annual work plan.

11. Actual Results - This is a mandatory field. The user should enter actual results of quantitative indicators, assessed by means of verification. This field is entered at the end of each reporting period according to the report frequency selected.

12. Means of Verification (M&E Tools) - This is a mandatory field. The data source of the indicator requires definition at the beginning of the project and should be specified in each annual plan submission. In order to be able to collect the data required by the indicator that measures the specific objective, it is important to identify what data collection tools will be utilized. Refer to Quantitative/Qualitative Methodologies table for examples of data collection tools for the different methodologies.

13. Assumptions/Constraints - This section allows users to include additional information that will facilitate the understanding of the context in which the qualitative indicator is being measured, as well as its scope to describe the change being assessed.

14. Explanation of Variances/Comments on Results - In this section the user is required to explain any variances between expected and actual results. Changes
5.5.4.14  **X Labels Feature**

There is an additional indicator feature that allows users to specify # of outputs or processes BY TYPE. This is called an X label and you may add as many TYPE or “X” classifications as necessary to a project indicator. Below are a few examples of the X label’s use for tracking project results:

- # and type of dual protection material disseminated by audience
- X label - # of factsheets distributed to youth groups
- X label - # of factsheets distributed to health care workers
- X label - # of posters appearing in health posts
- # of professional contacts by organization
- X label - # of contacts through nursing/midwife association
- X label - # of contacts through physician association
- X label - # of contacts through school counselor association
- X label - # of contacts through public health care system
- # and type of SRH services available to youth.
- X label - # pregnancy tests to youth
- X label - # of STI/RTI tests given to youth
- X label - # of condoms distributed to youth
- X label - # of counseling sessions for youth

Please consider this when entering and revising projects in order to more efficiently and effectively convey results critical for the success of the project.

To utilize this feature ...

1. Define a qualitative or quantitative indicator and submit the indicator to the database.
2. State the title of the indicator, the baseline, expected results, MOV, and any assumption or constraints.
3. After you ‘Submit’ the indicator, an ‘X Label’ button will appear at the bottom of the screen. When you select it with your mouse, the system will present an ‘X label description’ field, and an optional, ‘Baseline’ data field.
4. Enter the information, then click on ‘Submit’ to update the database. Repeat these steps as often as necessary until your list of X labels are complete for the indicator.

5.5.4.15  **Lessons Learned**

The user can utilise Lessons to document various features of a specific objective, including -

- Conclusions: Synthesis and interpretation of actual results reported against an objective. This is especially helpful when the project is an innovative effort or evaluation project. Also, where there are numerous indicators for a specific objective and a lot of data reported, synthesis and interpretation is important.

- Statement on limitations and recommendations concerning the projects replication.
• Answers the question of ... if one were to "rerun" the project from beginning to end, what input, process, or design aspect should be modified to improve results/achievement against objectives.

• Answers the question of.... what were the critical features of the project inputs, process or design that most contributed to its achievements.

Well crafted key Lesson from a youth project –
• Linking information and services must involve not only a referral system but also strategies that take into account a clinic's capacity to provide youth-friendly services

If the lessons are multiple and cover a range of themes, you can present them by theme:

**Operational Definitions**
• In spite of the importance of having mutually exclusive definitions of types of gender based violence, it is important to realize that cases of gender-based violence do not always fall into neat categories and that, consequently, the project should be flexible about continually monitoring the adequacy of the definitions chosen.

**Sensitization and Training**
• The results of the baseline knowledge, attitudes, and practices survey revealed that many health providers at the Associations still hold inaccurate information and negative attitudes toward victims of gender based violence. Therefore, it is unlikely that initial sensitization effort will be able to overcome these negative aspects entirely. To this end, ongoing sensitization and trainings will be essential to ensure quality of care for Association clients who experience gender based violence.

**Adding Lessons Learned**

1. A lesson can be added by activating the 'Lessons' link next to the specific objective for which the lesson is to be added.

Figure Error! No text of specified style in document. -11 Lessons Link

2. A new screen is then displayed with any lessons learned previously entered in table format, with edit and delete links located next to each lesson.
3. The Add New button produces a data entry screen, which enables the addition of new lessons learned.

5. After submission, the lessons index table will appear again, this time with the lesson that has just been added to the specific objective.

5.5.5 Activities

5.5.5.1 What is an Activity?

‘Activities’ define the actions that are required to take place in order for ‘Specific Objectives’ to be achieved, and describe who will do what, with whom, where and when. Activities should be linked to a specific objective and be entered in the chronological order in which they will be carried out. Objectives should be defined prior to activities. Activities should in turn be appropriate for desired results.

5.5.5.2 Guidelines for Writing a Good Activity

Examples of well written Activities -

Example 1. Emergency Contraception Project
   1) Sensitize police, women’s organizations, judges/legal staff and health professionals on emergency contraception (mode of use, common side effects, access) and importance of timely identification and referral for emergency contraception for women experiencing gender-based violence

   2) Offer EC counseling and method to all clients screened for gender-based violence
3) Develop IEC materials in which EC is integrated into SRR and SRH, including GBV, HIV/STI, adolescents, and PAC, Q/C, dual protection.

Example 2. HIV Project
1) Develop HIV prevention counseling checklist with input from recognized HIV experts, counselors, and clinic staff.

2) Conduct three ten-hour training sessions for clinic staff in: HIV transmission and prevention; the special needs of young people; negotiating condom use; and counseling techniques.

Example 3. Abortion Project
1) Form partnerships with women’s groups and other NGOs interested in the issue of unsafe abortion to plan and conduct awareness-raising activities, including an advocacy campaign.

2) Develop an advocacy campaign (including defining the message, setting the goals and objectives of the campaign, and devising strategies for reaching the audience and monitoring the campaign) that includes the development of press releases, factsheets, presentations and other materials.

3) Conduct community forums, media events, and policy discussion groups in collaboration with partners.

5.5.5.3 Adding a New Activity

Moving left to right across the top menu bar, the ‘Activity’ menu is situated between ‘Specific Objectives’ and ‘Assets’.

The activity index page, which is displayed when the ‘Activities’ menu item is selected, has the same layout as the ‘Specific Objectives’ index page.

At the top of the page the title bar consists of the ‘Primary’ and ‘Secondary’ (if selected in the main project definition page) ‘Programme Themes’, and whether the actual and expected results are open or closed in the year selected from the dropdown list on the right. If activities have already been added to the project then they will be listed in table format beneath the title bar.

Figure Error! No text of specified style in document. 14 Activity Table

1. Once the user has activated the ‘Add New’ button a new page is displayed. ‘Activity’ details are required to be entered within this form.
2. The title bar is the same as that on the ‘Activity’ index page. Below the title is a free text field in which the user is required to enter an ‘Activity Title’. This is a mandatory field all activities must have titles.

3. Responsibility – Select person responsible for the activity, including execution plan and results collection from the dropdown list provided or if it cannot be found enter the name in the free text field to the right of the dropdown.

4. Implementation Status – Enables user to select the approximate percentage completed from the dropdown menu provided.

5. Activity Code – The user may enter an activity code that classifies or uniquely identifies the activity in relation to other activities within the project or the eIMS. This is a user-defined field and is optional. The code may correspond to the entity’s own accounting code for the activity. This code may be used later to facilitate integration between the eIMS and the local accounting system.

6. Reporting Period – Relates directly to the programmatic reporting frequency selected on the main project page. If annual has been selected one option will appear in this dropdown, quarterly four options will appear 1st quarter, 2nd quarter, 3rd quarter and 4th quarter etc. This allows activity details to be recorded as per the selected reporting frequency.

7. Relevant Specific Objective – A specific objective should be selected from the dropdown list. The ‘Specific Objectives’ will be those previously entered within ‘Specific Objectives’.

8. Choose Activity Keywords – For each ‘Programme Theme’, ‘Keyword(s)’ are required to be chosen to reflect the activity theme. The list of activity ‘Keywords’ presented depends on the ‘Programme Themes’ selected within the project main page. If only the ‘Primary Programme Theme’ has been selected and not a ‘Secondary Theme’ then only the keywords for this theme will be listed. One or more activity ‘Keywords’ can be selected from either the primary or secondary set of activity ‘Keywords’ and will allow the system to search and classify your project based on the selected values.

Figure Error! No text of specified style in document. - 15 Activities Form
9. Select Activity Month(s) - Beneath the 'Activity Keywords' there is a table listing the months within the year. A tick box is located beneath the month’s name. Indicate in which months the activity will take place. If the timing of the activity is not available at the time of annual plan preparation, then the field may be left blank and updated later during the year as the information is available.

10. Activity Details Planned - The user is required to enter particulars of the 'Planned Activity' within this section. This field is only active if 'expected results' (as described previously in 'Time Line Status' section) is open. Generally, this field is completed at the time of annual plan preparation.

11. Activity Details Completed - The user should explain Details of the activities that have been completed within this free text field. As explained earlier in section 7, if 'actual results' is closed then this field will be inactive. This field is completed at the end of the reporting period.

12. Comments/Observations - Provides an area where the user can enter any special notes or observations specific to the activity.

5.5.6 Financial Aspects and Assets

5.5.6.1 Financial Aspects of a Project

Up until this point all the top menu options have addressed the programmatic requirements of a Project. The top menu options to the right of Project Activities, relate to Project assets, income, expenses, funds and staff allocations. This side of the top menu address the project’s financial budgeting and reporting requirements. Before explaining these sections of the eIMS, it may help to understand the organization of the accounts. A list of the accounts can be obtained from the Menu Options: Reports/Reference/Chart of Accounts.
5.5.6.2 **Organization of Financial Information – Chart of Accounts**

Each eIMS ledger account is classified by ledger type and assigned to a group of accounts. They are numbered according to the group assignment.

The account code of an individual account consists of 6 digits. The first digit indicates whether the account is an asset, fund balance, income, or expense account.

1xxxxx Assets
3xxxxx Fund Balance (Reserves)
4xxxxx Income
5xxxxx Expenses

Within the ledger, the second and third digit identify the *major ledger groups*. For example within the account type, Income, the following ledger groups are available to classify international income:

- 411xxx IPPF Income
- 421xxx International, Foreign Government Income
- 422xxx International, Corporate/Business Donations
- 423xxx International, Private Donations
- 424xxx International, Foundations, Trusts and Int'l. NGO's
- 425xxx International, Cooperating Agencies of USAID
- 426xxx International, UN Organizations & Multinationals Organizations

The last three digits in the account code, identify the specific *account detail* within the ledger group. This may be considered the account sequence number and is associated with a specific account name. For example within the ledger group for national income derived from medical and clinical services, the following detailed accounts are possible:

- 450xxx National Income from Medical/Clinical Services
- 450001 Clinic Client Fees
- 450002 Surgical Services
- 450003 Laboratory Services
- 450004 Contraceptive Sales
- 450005 Sale of Medicines & Medical Products
- 450006 Clinic Counseling Fees
- 450099 Other Clinic Services and Material Sales

Please Note – The eIMS currently accepts negative entries for only two accounts – Income Account – Investment Loss (590004) Expense Account – Indirect Cost Recovery (470005) – to reduce admin by the amount of indirect cost paid by donor funded project.

When an Association Account does Not Exactly Match an eIMS Account.... The eIMS chart of accounts provides a wide variety of accounts to accommodate a diverse set of operational situations. However, it is possible that an organization may have a specific income or expense in its local accounting system that corresponds to an eIMS ledger group, but does not correspond to any of the eIMS account detail within a ledger grouping. In these cases, the detailed eims account code xxx099 may be matched with the association's additional account codes.
For example: if a graphic artist is paid for a drawing to be included in a pamphlet produced by the organization, this production cost may be classified as 520099 Other Media and Advertising expense.

For example: there is a specific office supply item that the organization wants to track in its own local chart of accounts, but the eIMS chart of accounts does not offer that level of expense detail. The organization's expense item should be matched to the eIMS ledger group 540xxx Office Supply and Consumable and its corresponding 540099, Other Office Supply and Consumable.

It is possible to work on your local chart of accounts if you have mapped it with the IMS account codes.

Budgeting using Control or Detail Accounts...
The eIMS recognizes that managers when planning their expenses for the upcoming year, may or may not find it convenient to budget all expense items using the detailed eIMS accounts. The latter allows expense amounts at the time of Annual Program Budget to be entered using the ledger group accounts (XXX000) or the detail accounts, according to the need of the project manager. These are the accounts that are displayed in CAPITAL letters with three zeros at the end of the account code. These accounts permits managers to use aggregated amounts from the prior year's expense reports as their basis for planning. For example, a manager may know that last year's total office supply and consumable expenses were $50,000 for a particular project activity and that they will need to increase it for the cost of inflation by 10%. Using a calculator the adjusted office supply cost for the upcoming year are quickly calculated as $55,000. This budget amount is recorded in the eIMS under the ledger group 540000 OFFICE SUPPLIES AND CONSUMABLES. However at the time of submission of actual expenses, the appropriate detail accounts should be used to reflect the actual composition of the supply expenses.

5.5.6.3 Multi-year Projects and their Budget Allocation within the eIMS

All financial information is recorded in accordance with ‘Time Line Status’ details. The eIMS timeline is a calendar year from January through December. If a project has received funding from a donor agreement that spans more than one calendar year, the organization will need to analyze the proposed budget in order to estimate what income and expenses are applicable to each transaction year of the eIMS. The distribution can be based on an activity implementation schedule or prorate based on the number of months funded in each transaction year. It is important to remember that only the income and expenses that will be received and incurred during the transaction year, should be included in that transaction period. All other assets, income and expenses should be registered in subsequent transaction years.

Assets

5.5.6.4 What is an Asset?

‘Assets’ are defined as an item that you own that has cash or exchange value. This may included both fixed assets, such as buildings, land and furnishings, as well as, inventoried items, such as contraceptives, pharmaceutical products, and other products sold and/or distributed. There cash value must be supported by a receipt, invoice or certificate of donation, documenting the value of the product for auditors. (reference http://moneycentral.msn.com/taxes/glossary/glossary.asp?TermID=28)
Fixed Assets
An item you own for your organization that you expect to last several years, such as a building, a vehicle, donated medical equipment, computer equipment, or office furniture. It can also include a leasehold improvements to clinic and office properties that the organization is leasing.
Purchases such as office supplies, and general clinic supplies used or expended in day-to-day operations are not business assets, and should be classified as project expenses in the year in which they are purchased.

Inventory
Items held for resale or distribution by your organization. If you have a social marketing project, your raw materials (contraceptives), working supplies (packaging materials), and finished goods (assembled contraceptives for distribution) are all inventory. Contraceptives and pharmaceuticals stored in the central warehouse for later distribution to community based and clinic programs are inventory items.

Please Note – It is very important to include acquisitions of new assets only rather than the cost of assets previously purchased and used by an organisation.

The ‘Assets’ menu item is situated on the top menu bar within a specific project and is located between ‘Activities’ and ‘Income’.

The ‘Assets’, ‘Income’ and ‘Expenses’ entry forms are very similar. The asset function is provided in the eIMS in order that the Association may plan the resources required to carryout their projects. Assets are not included in the institutions, income and expense reports. However, their acquisition will affect cash flow and must be planned at the time of budgeting.

5.5.6.5 Adding Assets to a Project

1. The user is required to activate the ‘Assets’ index page by selecting the ‘Assets’ menu item from the top menu bar.

Figure Error! No text of specified style in document.-16 Asset Table

2. The title bar within the ‘Assets’ entry page consists of a dropdown list displaying the transaction year, transaction type and status (open or closed). If ‘Assets’ have already been entered for the project they will be presented in a table under the title bar. To add a new asset the user is required to select the ‘Add New’ button. Remember the asset must be a new acquisition rather than existing asset already utilised by the organisation.
Please Note – Refer to note entitled ‘Important Information regarding Interim Actuals’ section 5.1.2.2 regarding Interim Actuals ledger type and available Asset Financial Periods.

3. Related Activity – The user is required to select the ‘Activity’ the ‘Asset’ is related to from the dropdown list provided. These ‘Activities’ are those, which have been entered within the ‘Activities’ menu for this project.

4. Appropriation Number – If transaction type is ‘Appropriation’ this field (Appropriation Number) will appear between ‘Related Activity’ and ‘Financial Period’. The user is required to identify the ‘Budget Amendment’ the new transactions are apart of by selecting the ‘Appropriation Number’ from the dropdown list provided. For ‘Budget Amendment’ section please refer to 5.9.

5. Activity Code – The code will automatically appear once an ‘Activity’ has been selected from the dropdown list, provided a code has been entered for the ‘Activity’ within the ‘Activity’ data entry screen.

6. Financial Period – Financial period(s) are displayed in the dropdown list. Financial periods are derived from the projects main information page (question ‘Frequency Financial Reporting’) and can be changed if required. If annual was chosen one option will appear, monthly twelve options, quarterly four options and semi annual two options. This allows the acquisition of assets to be planned for and recognized in the appropriate time periods, if necessary.

7. A/C Code – This is a mandatory field. The user is required to select an account code for the ‘Asset’.

8. Account Detail – Additional account details can be entered in the right field. (e.g. Asset tag Number)

9. Amount – This is a mandatory field. A selection of currencies is available from the dropdown list on the left. The default currency is determined by the entity’s
entry in the ‘Time Line Status’ section. This default currency is associated with a specific transaction year, report type, and foreign exchange rate.

If a currency other than the default currency is required, it may be selected from the drop down list of currencies and the appropriate exchange rate entered. If a rate is not specified for the non-default currency, the system will apply a fixed rate available in the Currency table of the system. This rate may or may not be applicable to the transaction, and the entity is advised to manually enter exchange rates for any currency that is not the default currency.

It's not advisable to change the default FX rate, in the middle of a APB or other report unless the rate is wrong for all transactions in that report period. You would need to re-submit or update all previous transactions, since the system won't do this automatically.

10. Amount in USD – This field does not require data entry as it is automatically filled when the amount is entered. This field converts the amount entered from the currency selected to USD (United States Dollars).

11. Funding Type – This is a mandatory field. The user is required to select the funding type (source of funds for the asset). The funding types are Restricted, Unrestricted Core, Unrestricted Earmarked and Unrestricted Core Governance; please refer to previous definitions.

12. Transaction Description – The user is required to enter a description of the ‘Asset’ Transaction.

5.5.7 Income

5.5.7.1 What is Income?

Income in eIMS is always registered on project level. In order to get a comprehensive picture of all your entity income it is important to have all your projects added to the system.

The gross income of a non-profit organization means its recorded income before deduction of any costs or expenses. It will include income from all sources, including any special trusts administered as part of the not for profit institution, as defined in s.97 of the 1993 Act.

Gross income, "is the total recorded income of the charity in all unrestricted and restricted funds but not resources received as capital (endowment) funds. You should calculate income before deduction of any costs and expenses. Therefore, you should include the following in income:

- donations (including covenanted donations), grants, gifts, legacies, covenants and subscriptions (see note below);
- investment income (including interest receivable, dividends and rents);
- gross receipts from the sale of goods or services in furtherance of the non-profit organization's objectives;
- gross proceeds from fundraising;
- other income, including overhead cost recovery from restricted grants and membership fees, and donation of financial instruments or capital assets (i.e. stocks, bonds, and certificates of deposit, etc.) may be included are additional examples.
Note: Other capital donations which should be recognized as assets, but excluded from income include, eg, gifts of land, buildings, and other fixed assets to be retained and used for a particular charitable purpose.

In its simplest form income for a non-profit organization may be defined as the revenue or financial resources generated from the operations of its programs, donations from fundraising, and financial investments. There are four general sources of income: International Donations, National Donations, Program Operations, and Administration of Financial Resources.

Each income source must be identified with a Fund Type. Restricted, Unrestricted Core, Unrestricted Earmarked, and Unrestricted Governance.

It is always recommended that the income be matched against the expenses for an activity. This means that the income generated by a project should relate to the expenses incurred by that project.

5.5.7.2 Income and Mapping Local Chart of Accounts

If the entity intends to automate the export of local accounting information to the eIMS in the future, it should plan for that integration when defining a project. If the local accounting system identifies a cost center and a specific donor with a unique set of income and expense accounts, it may be appropriate to mirror that organization within the eIMS. Under these circumstances it is not advisable to commingle within a single eIMS project the income of several donors, if locally each donors agreement represent a unique cost center in the accounting system. By associating donor income with set of related expenses, it will be easier to balance restricted and unrestricted funds in the eIMS. If the entity choose to implement the eIMS in this manner, it is important to remember that cost and revenue centers with similar goals and approaches, can be linked together in the eIMS to form one single, related “super” or “global” project which responds the strategic objectives of the institution. Alternatively the system will allow you to have different sources of income including restricted and unrestricted. When entering data in this way, please make sure that you do not have the cost of a position (a salary) being funded by two incomes of different fund types. The eIMS staff allocation system will allocate such costs to only one fund type.

For income budgets the average exchange rate will need to be estimated. Within a particular project, if the donation is received in foreign currency other than US dollars the budget rate from the donors agreement should be utilized. If this rate is different from the default financial timeline status, the default rate may be overwritten at the time of data entry and the currency selected from a drop down list.

This also means that for its half-year and annual reports, an association will need to maintain local spreadsheets with each foreign remittance amount received, the date of remittance, the rate of actual conversion at the bank, and local currency amount received after conversion. The total of the amounts of local currency received divided by the dollar equivalent remitted is the average rate of exchange. It is this amount that should be reflected in the financial timeline status for a specific ledger or report type.
The income menu option is situated between ‘Assets’ and ‘Expenses’ and allows the variety of income sources to be recorded.

This financial information is recorded in line with ‘Time Line Status’ details, this is discussed in section 5.1.

5.5.7.3 Adding Income a to Project

1. The user is required to activate the ‘Income’ top menu option within a specific project. This displays the income index page, which lists all income that has been registered for the individual project.

2. The title bar consists of a dropdown list detailing the transaction year, transaction type and status (open or closed). If there have been any income sources entered for the project they will be presented in a table under the title bar. Beneath this there is an ‘Add New’ button, which when clicked activates a dialog page allowing entry of new income details.

Please Note – Refer to note entitled ‘Important Information regarding Interim Actuals’ section 5.1.2.2 regarding Interim Actuals ledger type and available Income Financial Periods.

3. Related Activity – The user may choose associate an ‘Activity’ with an ‘Income’ account selected from the dropdown list of account codes. The ‘Activities’ displayed are those, which have been entered within the ‘Activities’ section for
this project. This is an optional field, but especially helpful for grouping income with a common purpose. For example, a telethon, a major donor luncheon, or Mother’s Day Cancer Prevention promotion are examples of activities that can be defined within the project and associated with specific revenue accounts, such as individual and corporate donations, volunteer membership contributions, or clinic fees. By associating the income with an activity, the manager can match related expenses and more easily determine the financial results of the activities within projects.

4. Activity Code – The code will automatically appear once an ‘Activity’ has been selected from the dropdown list, and provided a code has been entered for the ‘Activity’.

5. Appropriation Number – If transaction type is ‘Appropriation’ this field (Appropriation Number) will appear between ‘Related Activity’ and ‘Financial Period’. The user is required to identify the ‘Budget Amendment’ the new transactions are apart of by selecting the ‘Appropriation Number’ from the dropdown list provided. For ‘Budget Amendment’ section please refer to 5.9.

6. Financial Period – Financial period(s) are displayed in the dropdown list. Financial periods are derived from the projects main information page (question ‘Frequency Financial Reporting’) and can be changed if required. If annual was chosen, one option will appear; if monthly financial periods are selected, twelve options are displayed; quarterly financial periods will present four options; and semi annual, will provide two options for data entry. This allows the income to be grouped into the appropriate time periods if necessary.

7. A/C Code – This is a mandatory field. Selection of the account code for the income source is required. If you cannot identify a detailed income account that matches exactly the entity’s income nomenclature, find the major income group that relates to the entity’s income and use the ‘Other’ detail account within the appropriate group (4XX099). Be sure to describe this ‘other’ type of income in sufficient detail within the account transaction field.

8. Account Detail – If the account code selected is associated with a list of donors, they will be displayed in a dropdown list to allow selection by the user. The drop down list may include international or national donors, depending on the account selected.

International donors are stored by the eIMS in a reference table maintained by the Central Office and Regional eIMS administrators. If an international donor is not included in the drop down list, contract your regional eIMS administrator or send a ‘Message to eIMS’ requesting the addition. Include both the donor’s official acronym as well as their complete, legal name in the request.

The reference table of national donors is maintained by the entity using the System Data/Country/Donor menu options. In this section, the entity should define any national donor that is considered to be a major local donor or a local donor that provides recurring annual support (either restricted or unrestricted) to the organization. This section is not specific to a grant, but the organization making the contribution.

Please Note – eIMS currently accepts negative entries for only one income account, Investment Loss (590004).
9. Amount - A selection of currencies is available from the dropdown list on the left. The default currency is determined by the entity's entry in the 'Time Line Status' section. This default currency is associated with a specific transaction year, report type, and foreign exchange rate.

If a currency other than the default currency is used, it is very important that the entity specify the appropriate average rate of exchange applicable to the project's transaction type and financial period. If a currency is used other than the default and the entity does not specify the exchange rate, the eIMS will apply an exchange rate from a master table of international currencies. This 'master table' rate may or may not be applicable to the specific income record being created by the entity and may lead to inaccuracies in reports. For this reason, a rate should always be specified for any income record that does not use the default Time Line Status rate applicable to the period and transaction type.

When an income or expense data entry screen is displayed, automatically the system reflects the default currency and rate specified in the timeline status screen. If the currency and rate of a particular transaction record is different than the default, this income or expense record's currency and exchange rate may be modified by the user's selection of a different currency from a drop down list and manually typing in a different rate.

Remember to record only the amount of income received during the transaction year. If you are working with a multi-year project, the income amounts may need to be entered in different transaction years if the total grant is not received in the first year of the project and the donor has a payment schedule that crosses or extends beyond one calendar year period.

If your donor happened to submit a larger amount that would cover more than the e.g. annual period, you can appropriate the left over amount to a fund at the end of your period. More about funds in section 5.7.

Please Note - If donors are identified within income transactions, they will appear within the 'Funding Source' dropdown list on the expenses form, thus allowing expenses to be assigned to specific income (or funding) sources.

10. Amount in USD – This field does not require data entry as it is automatically filled when the amount details are entered. This field converts the amount entered from the currency selected to USD (United States Dollars).

11. Funding Type – This is a mandatory field. The user is required to select the funding type (source of funds for the income). The funding types are Restricted, Unrestricted Core, Unrestricted Earmarked and Unrestricted Core Governance, please refer to previous definitions.

12. Transaction Description – The user is required to enter a description of the 'Income' Transaction.
Please Note – Once Income transaction has been submitted deletion and editing of this transaction requires the user to select the A/C for the specific transaction, this acts as a hyperlink. Only once you have done this will edit and delete links appear.

5.5.8 Expenses

5.5.8.1 What is an Expense?

Expenses refers to the cost of goods delivered, or services rendered, which are recorded as charges against the accounts of a project and its activities. [http://accounting.ucdavis.edu/refs/glossary.cfm](http://accounting.ucdavis.edu/refs/glossary.cfm)

Expenses represent financial outlays for project materials, human resources, infrastructure (rent, public utilities) and supporting 3rd party services. They can be incurred through cash expenditures or maybe non cash in nature, as in the case of inventory consumption or asset depreciation.

Expenses should be entered in the currency of the country where the books of account are maintained. Generally, data entry should reflect the national currency utilized in the audited accounts of the organization.

When expenses are entered in local currency they are automatically translated and stored by the eIMS in US dollars. The rate of conversion is determined by the average rate of exchange specified in the financial timeline status for the year and ledger/report type.

The expenses menu item is located within the upper menu bar and is situated after ‘Income’.

This financial information is recorded in line with the Time Line Status details discussed in section 5.1.

5.5.8.2 Adding Expenses to a Project

1. The user is required to activate the Expenses top menu option within a specific project. This displays the Expenses index page, which lists all income registered for the individual project.

2. The title bar consists of a dropdown list detailing the transaction year, transaction type and status (open or closed). Expenses already entered are presented in a table under the title bar. Beneath this there is an ‘Add New’ button, which when clicked displays a dialog page allowing the new expense to be entered.
Please Note – Refer to note entitled ‘Important Information regarding Interim Actuals’ section 5.1.2.2 regarding Interim Actuals ledger type and available Expense Financial Periods.

Figure Error! No text of specified style in document.-21 Expenses Form

3. Related Activity – The user is want to associate an expenses with a specific ‘Activity’, previously defined within the ‘Activities’ section of the project. Examples of activities that warrant the use of this feature are: training, meetings, workshops, evaluation, project management for large integrated projects, clinic administration, and special event fundraising. Each of these activities may be associated with a set of specific expenses (such as travel, professional fees, hospitality, office supplies, etc.), but are not in and of themselves detailed expenses. This is an optional field, but recommended for facilitating the budgeting and monitoring process of project activities.

4. Activity Code – The code will automatically appear once an ‘Activity’ has been selected from the dropdown list, and provided a code has been entered for the ‘Activity’ within the ‘Activity’ menu.

5. Appropriation Number – If transaction type is ‘Appropriation’ this field (Appropriation Number) will appear between ‘Related Activity’ and ‘Financial Period’. The user is required to identify the ‘Budget Amendment’ the new transactions are apart of by selecting the ‘Appropriation Number’ from the dropdown list provided. For ‘Budget Amendment’ section please refer to 5.9.

6. Financial Period – Financial period(s) are displayed in the dropdown list. Financial periods are derived from the projects main information page (question ‘Frequency Financial Reporting’) and can be changed if required. If annual was chosen one option will appear; monthly will twelve options, quarterly presents four options; and semi-annual displays two options. This allows the expenses to be grouped into the appropriate time periods if necessary.

7. A/C Code – This is a mandatory field. Selection of an account code for the expense is required. At the budgeting stage, if a manager has historical expense information for an on-going project, the manager can choose to budget at the more general, control account level (XXX000), rather than work with detailed accounts. If an entity’s own expense account is not exactly the same as the eIMS
account detail, the entity should select the major account group that is most similar to the entity account. However, actual expenses should be entered as detailed expense accounts or matched to the ‘Other’ account within the appropriate account group (for example, Other Office Supplies and Consumables or Other Occupancy Costs).

To view a complete list of eIMS expenses, refer to the Report/Reference/Chart of Accounts menu option.

Please Note – eIMS currently accepts negative entries for only one expense account, Indirect Cost Recovery (470005).

8. Amount – A selection of currencies is available from the dropdown list on the left. The default currency displayed will reflect the currency and rate entered in the Time Line Status for the selected report type, transaction year and financial period.

If the project has expended funds in a currency other than the default currency, the transaction can be associated with another currency and exchange rate. If a currency other than the default is selected from the drop down list, it is important that the user manually enter the applicable rate this particular expense record. If an exchange rate is not specified for the ‘non-default’ currency, the system will utilize a rate from the master table, which may or may not be applicable to the specific project and transaction year and financial report.

When an income or expense data entry screen is displayed, automatically the system reflects the default currency and rate specified in the timeline status screen. If the currency and rate of a particular transaction record is different than the default, this income or expense record's currency and exchange rate may be modified by the user's selection of a different currency from a drop down list and manually typing in a different rate.

9. Amount in USD – This field does not require data entry as it is automatically filled when the amount details are entered. This field converts the amount entered from the currency selected to USD (United States Dollars) using the default exchange rate indicated in the Time Line Status; generally this is the average rate of exchange for the transaction year and financial report.

10. Funding Type – This is a mandatory field. The user is required to select the funding type (source of funds for the expense). The funding types are Restricted, Unrestricted Core, Unrestricted Earmarked and Unrestricted Core Governance, please refer to previous definitions.

11. Funding Source – The source of the funds utilised to pay for the expense can be selected from the dropdown list if within income these funds have been identified as originating from a specific donor.

12. Transaction Description – The user is required to enter a description of the ‘Expense Transaction’.
Please Note – Once Expense transaction has been submitted deletion and editing of this transaction requires the user to select the A/C for the specific transaction, this acts as a hyperlink. Only once you have done this will edit and delete links appear.

Please refer to Appendix 2 APB Submission Checklist

### 5.5.9 Transfers

#### 5.5.9.1 What is a transfer?

‘Transfers’ is functionally associated with ‘Budget Amendments’ and ‘Funds’. This menu option provides a summary of funds that have been transferred into or out of the specific project.

#### 5.5.9.2 How do transfers take place?

Transfers are a direct result of the generation of ‘Project to Fund’ and ‘Fund to Project’ ‘Budget Amendments’. ‘Project to Fund’ ‘Budget Amendment’ transfers are not essential, ie this budget amendment can be generated with no transfers created. Relocating finance from a project can be done via reduction in expenses or transfer of surplus funds. ‘Fund to Project’ ‘Budget Amendments’ transfers are compulsory; a user cannot transfers finance from a fund to a project without assigning this funding to an account code. Read more about ‘Budget Amendments’ in section 5.8.

#### 5.5.9.3 How do these ‘Budget Amendments’ appear within ‘Transfers’?

If the budget amendment transferring funds has not been approved, transfers will appear under the transaction type ‘Appropriation’.

Figure Error! No text of specified style in document. Appropriation Transfers – Before Approval

<table>
<thead>
<tr>
<th>Related Activity</th>
<th>Amount</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Appropriation</td>
</tr>
<tr>
<td></td>
<td>1,266.00</td>
<td></td>
</tr>
<tr>
<td>Total of activity</td>
<td>1,266.00</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>1,266.00</td>
<td></td>
</tr>
</tbody>
</table>

Once the amendments are approved the transfer appear in the transaction type ‘Approved’.
5.5.10 Staff Allocation

5.5.10.1 Ways to Record Personnel and Professional Fees

There are two ways to record personnel and professional fees in an eIMS project:

- The eIMS can automatically calculate the budget figures, if you specify the cost of each post or temporary/sessional staff position, assign the posts to projects and indicate the proportion of time spent on each project. This method enables the system to calculate automatically the human resource cost and numbers per project.
- Alternatively, you have the option of manually entering into the expense section of each project the total amount of personnel expenses and professional temporary/sessional fees. This approach stores only the previously calculated total human resource expenses in the eIMS; individual personnel and consultant numbers, as well as their level of effort in person years would need to be determined outside of the eIMS.

5.5.10.2 What is Staff Allocation?

The ‘Staff Allocation’ option is located adjacent to ‘Expenses’ and is the seventh menu item from the left. This option permits staff to have their efforts distributed amongst various projects. This menu option also allows the project coordinator to identify if the staffing levels are sufficient prior to project initiation and take corrective action prior to the project’s initiation. Often some form of negotiation is required within an entity regarding the division of staff efforts. As more projects are added, an increase in the staff numbers may be necessary or a reallocation of staff responsibilities, if projects are to be maintained and completed in the projected time frame. Conversely, if the number of projects within the unit of an entity decrease over time, the staffing levels may be similarly adjusted or reallocated elsewhere.

Note: The staff allocation matrix is supporting you in your project and programme planning and will thus be only used in ‘proposed budgets’.

It is possible to have a staff member working on two or more projects in different organizational units. This may occur in smaller associations with limited staff numbers. For example, the Medical Director, who may be a physician, may work on
several projects, perhaps in advocacy and clinic administration. In this example, the post of Medical Director within the Medical/Clinical Unit will be assigned X% of the time to clinic administration and Y% of the time to an SRH advocacy effort within the Public and Donor Relations Unit. The total amount of time to be allocated across the units can not exceed 100%. Some organizations may not wish to have staff allocated to projects outside of their unit; this aspect of eIMS administration will be determined by local entity policies.

In order to use the staff allocation feature within a project (through the Top Project Menu) or institutional wide (through the Main Menu on the left side of the screen), the posts and the compensation levels must be defined beforehand in the Human Resource section of the Main Menu. Generally, this is completed during system setup by the Human Resource manager in consultation with the Finance and Payroll managers.

Any staff member that has been allocated to a project through the Staff Allocation main menu option also will be listed in table format when Staff Allocation is selected from the upper project menu.

Please note any changes that are made within ‘Human Resources’ for a particular position require ‘Staff Allocations’ that have been made for that particular position to be resubmitted.

### 5.5.10.3 Allocating Staff to a Project

1. The Staff Allocation index page has a title bar with a dropdown list that displays the transaction year. Beneath this is a table that registers all staff that have been allocated to the specific project to date.

2. To add a new staff member to the project, the user is required to locate the required staff position from the dropdown list in the last row of the index table. The staff positions that are listed in this menu are those, which have been allocated to the specific unit within ‘Human Resources’ ‘Data Entry’. The staff listed will be those that have not yet been assigned to the project.

3. Position type - Once a position has been chosen, it will appear in the table and a number of additional fields will emerge to the right. The first column to the right of the ‘Position Name’ is ‘Position Type’, and indicates whether the position is that of an employee or temporary staff member. Temporary staff status can refer to consultants or sessional fee personnel working on contract in clinics or in the field.

4. Allocation Unit – This is a mandatory field and the default values are those chosen within ‘Human Resources’; the user is able to change this by utilising the dropdown list. For employee positions, the allocation unit or unit of measure will
usually be a percentage of the employees time. For temporary staff and consultants, the allocation unit is customarily the number of hours, days or weeks. The type of allocation and its expression of the level of effort should be taken into account when selecting the ‘Allocation Unit’.

5. Fund Type – This is a mandatory field. It requires the user to select of the type of fund that is financial supporting the position (Restricted, Unrestricted Earmarked, Unrestricted Core, and Governance). Please refer to previous definition.

6. Allocation – This is a mandatory field, if nothing is entered in this field then the position will assume a zero allocation to the project. Allocation of the percentage, number of hours, days or weeks is essential to calculate project expenses.

<table>
<thead>
<tr>
<th>Submit</th>
<th>Saves the ‘Staff Allocation’ and adds the new ‘Staff Allocation’ to the ‘Staff Allocation’ index page which is displayed. A dialog screen will appear and state ....</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1. Update/Add the staff allocation for the projects on this unit</td>
</tr>
<tr>
<td></td>
<td>2. Update/Add Proposed Budget 200X for Staff Cost</td>
</tr>
<tr>
<td></td>
<td>3. Update/Add Proposed Budget 200X for Professional Services/Consultant Cost</td>
</tr>
<tr>
<td>Continue?</td>
<td>Yes  No</td>
</tr>
</tbody>
</table>

If ‘Yes’ is selected, the staff and consultants/part-time workers will be allocated to the project. All prorated salary/benefit costs and professional/sessional fees will be reflected in the eIMS ledger for the project. A ‘Please Wait’ message appears while the update is occurring. Once the processing is complete the Staff Allocation index page is displayed again with the new allocation.

Note:

Salary benefit costs that had been entered into the ledger by the staff allocation system can only be changed with the staff allocation matrix

**5.5.10.4 Staff Allocation Budget Amendments**

Staff allocations can be applied to budget amendments. It is as simple as creating a regular staff allocation and submitting except the transaction type is ‘Proposed Amendments’.

To create a Staff Allocation in a Budget Amendment

1. Within Staff Allocation under Data Entry/Projects and within a specific project select ‘Proposed Amendments’ as the transaction type.
2. Upon selection of ‘Proposed Amendments’ a second dropdown list appears where
the user was required to select the ‘Budget Amendment’ the Staff Allocations are
to be posted.

3. Staff Allocation can then be made as per normal and once submitted will appear
within the selected budget amendment and within the project expense
transactions under the ledger type ‘Proposed Amendments’. The type of
transactions that are posted within the budget amendment and project expenses
depends on the type of budget amendment that is selected within ‘Staff
Allocation’.

Project to Project, Project to Fund and Reductions

As the purpose of all of these budget amendments is to reduce the expenses or
income of the from project and transfer these funds to the to projects or funds. The
transaction posted within the budget amendment for a Staff Allocation budget
amendment will be a negative expense. The reason for this is as all these types of
budget amendments have funds flowing out of them, staff allocation amendments
take the quantity of the staff allocation and write it as a negative expense or income
for the budget amendment.
The staff allocation budget amendments are within the red circle, please note they are negative expenses, income for the budget amendment.

Within the project the expenses are listed as positive, funds flowing out of the project thus increasing expenses.

Please Note - These transactions are in proposed amendments, once the budget amendment is approved they will be transferred to the target ledger.

**Additions**
Addition budget amendments are slightly different. If a staff allocation is submitted to a budget amendment that is an addition it is assumed the staff allocation is an addition to the project and an increase in expenses for the to project.

Within the to project the expense is also positive, an increase in staff allocation expenses.

5.5.11 Project Reports

This ‘Reports’ submenu is situated within the main menu option, ‘Projects’. This report section produces project specific reports.

5.5.11.1 Viewing Project Reports

The user is required to access ‘Reports’ from the Top Menu option of the eIMS Project section by first selecting the particular project, requiring the report.

1. Activate ‘Data Entry’ and then ‘Projects’ within the main menu on the left side of the page.

2. Select the name of the project from the list (index) of entity projects.
3. Upon selection of a specific project, the eIMS will display a top menu. Choose the 'Report' option, situated between 'Staff Allocation' and 'Notes' menu options. The system will display a Report Selector Screen containing a list of basic reports for the project currently in view.
4. The user will need to specify the transaction year and ledger (or transaction type) applicable to the project's report. The report required can be selected by activating the 'View' button adjacent to the description of the report.

<table>
<thead>
<tr>
<th>REPORT NAME</th>
<th>REPORT DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved vs Actual Budget – Detail by Activity</td>
<td>Provides a current review and comparison of the original budget, budget amendments, actual expenses and available balance. Expenses are grouped according to activities.</td>
</tr>
<tr>
<td>Page Orientation - Portrait</td>
<td></td>
</tr>
<tr>
<td>Approved vs Actual Budget – Detail by Expenses</td>
<td>Provides a current review and comparison of the original budget, budget amendments, actual expenses and available balance. All expenses are listed for the specific project.</td>
</tr>
<tr>
<td>Page Orientation - Portrait</td>
<td></td>
</tr>
<tr>
<td>Asset, Income and Expenditure and Balance Transfer - Detailed By Project</td>
<td>This report displays all assets, income and expenses for a specific project grouped according to fund types and then activities.</td>
</tr>
<tr>
<td>Page Orientation-Portrait</td>
<td></td>
</tr>
<tr>
<td>Detailed Programmatic Results</td>
<td>Presents all project data including basic project description and for the selected calendar year the related objectives with indicators, results, and activities, as well as all income and expenses grouped by project activity.</td>
</tr>
<tr>
<td>Page Orientation-Portrait</td>
<td></td>
</tr>
<tr>
<td>Lessons Learned by</td>
<td>Lists details regarding lessons learned for each objective,</td>
</tr>
</tbody>
</table>
### Objective
Page Orientation - Landscape

grouped by objective.

### Project Summary by Objective, Indicator and Activity
Page Orientation - Portrait

Provides a summary of project details with indicators and activities listed for each specific objective within the project.

### Project Activities with Related Monthly Calendar
Page Orientation - Landscape

Creates a list of all activities specifying the months each activity is to take place grouped by project.

### Short Report Summary Including Income and Expenditure
Page Orientation - Portrait

This summary includes an overall description of the project, overall project objective, programme theme, justification, objectives, indicators, activities and income and expense details.

### Project Results Summary and Explanation of Budget Variance
Page Orientation - Portrait

Provides a short summary of key project details combined with detailed budgetary and variance information.

### Project Annual Report including Approved Budget vs Actuals 2002
Page Orientation - Portrait

Generates the annual report for a specific project including project details, specific objectives activities, lessons learned, constraints and budgetary information.

---

6. All reports can be printed from the Crystal Report Viewer and may contain more than one page. Click on the printer icon of the viewer in order to preview the Printer Properties. The default paper orientation is portrait for all reports. Exceptions will be noted in the Report Title column of the Report Table above. If the page orientation is landscape, use the Printer Properties dialogue box to make a change to the page orientation of the printed document.

7. To return to the report index screen after viewing a report or select another report to view, the user is required to select 'Reports' from the top menu bar.

### 5.5.11.3 Detailed Description of Project Reports

**Approved vs Actual Budget – Detail by Activity**

Provides a current review and comparison of the original budget, budget amendments, actual expenses and available balance. Expenses are grouped according to activities.

<table>
<thead>
<tr>
<th>REPORT SECTIONS</th>
<th>REPORT DETAILS</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Description</td>
<td>Entity</td>
</tr>
</tbody>
</table>
### Exchange Rate
Project Title

<table>
<thead>
<tr>
<th>Detailed Budget Description</th>
<th>Original Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Budget Additions (Reductions)</td>
</tr>
<tr>
<td></td>
<td>Revised Programme Budget</td>
</tr>
<tr>
<td></td>
<td>Actuals to Date</td>
</tr>
<tr>
<td></td>
<td>Balance Available</td>
</tr>
<tr>
<td></td>
<td>% Remaining</td>
</tr>
</tbody>
</table>

### Approved vs Actual Budget - Detail by Expense

This report provides a current review and comparison of the original budget, budget amendments, actual expenses and available balance for each project. All expenses are listed for the specific project.

<table>
<thead>
<tr>
<th>REPORT SECTIONS</th>
<th>REPORT DETAILS</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Description</td>
<td>Entity</td>
</tr>
<tr>
<td></td>
<td>Exchange Rate</td>
</tr>
<tr>
<td></td>
<td>Project Title</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Detailed Budget Description</th>
<th>Original Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Budget Additions (Reductions)</td>
</tr>
<tr>
<td></td>
<td>Revised Programme Budget</td>
</tr>
<tr>
<td></td>
<td>Actuals to Date</td>
</tr>
<tr>
<td></td>
<td>Balance Available</td>
</tr>
<tr>
<td></td>
<td>% Remaining</td>
</tr>
</tbody>
</table>

### Asset, Income, Expenditure and Balance Transfer - Detailed By Project

This report displays all assets, income and expenses for a specific project grouped according to fund types and then activities.

<table>
<thead>
<tr>
<th>REPORT SECTIONS</th>
<th>REPORT DETAILS</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>Project Title</td>
</tr>
<tr>
<td></td>
<td>Project Number</td>
</tr>
<tr>
<td></td>
<td>Year</td>
</tr>
<tr>
<td></td>
<td>Transaction Type</td>
</tr>
<tr>
<td></td>
<td>Vision 2000 Programme</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Assets</th>
<th>Account Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Account Title</td>
</tr>
<tr>
<td></td>
<td>Currency</td>
</tr>
<tr>
<td></td>
<td>Amount</td>
</tr>
<tr>
<td></td>
<td>Amount USD</td>
</tr>
<tr>
<td></td>
<td>Transaction Description</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Income</th>
<th>Account Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Account Title</td>
</tr>
<tr>
<td></td>
<td>Currency</td>
</tr>
<tr>
<td></td>
<td>Amount</td>
</tr>
<tr>
<td></td>
<td>Amount USD</td>
</tr>
<tr>
<td></td>
<td>Transaction Description</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th>Account Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Account Title</td>
</tr>
<tr>
<td></td>
<td>Currency</td>
</tr>
<tr>
<td></td>
<td>Amount</td>
</tr>
</tbody>
</table>
**Detailed Programmatic Results**
This report lists all programmatic details about a project. It is a multi-page report and has four major parts: 1. General Description and Classification; 2. Indicators and Results grouped by Objectives; 3. Activities; 4. Income and Expenses.

<table>
<thead>
<tr>
<th>REPORT SECTIONS</th>
<th>REPORT DETAILS</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Description</td>
<td>Vision 2000 Program Area</td>
</tr>
<tr>
<td></td>
<td>Project Goal</td>
</tr>
<tr>
<td></td>
<td>Summary</td>
</tr>
<tr>
<td></td>
<td>Frequency of Financial &amp; Programmatic Reporting</td>
</tr>
<tr>
<td></td>
<td>Dates of Implementation</td>
</tr>
<tr>
<td></td>
<td>Location of Project Mgt and Implementation</td>
</tr>
<tr>
<td></td>
<td>Programmatic Keywords (2)</td>
</tr>
<tr>
<td></td>
<td>Client Age Range and Sex</td>
</tr>
<tr>
<td></td>
<td>Special Client Focus</td>
</tr>
<tr>
<td></td>
<td>Justification and Background</td>
</tr>
<tr>
<td>Indicators and Results grouped by Objectives</td>
<td>Qualitative Indicator, Expected &amp; Actual Result</td>
</tr>
<tr>
<td></td>
<td>Quantitative Indicator, Baseline, Expected &amp; Actual Results</td>
</tr>
<tr>
<td></td>
<td>Monitoring and Evaluation Tools</td>
</tr>
<tr>
<td></td>
<td>Explanation of Variances</td>
</tr>
<tr>
<td>Activities grouped by Objective</td>
<td>Title of Activity</td>
</tr>
<tr>
<td></td>
<td>Activity Details Planned</td>
</tr>
<tr>
<td></td>
<td>Activities Detailed Completed</td>
</tr>
<tr>
<td></td>
<td>Implementation Months [checkbox]</td>
</tr>
<tr>
<td></td>
<td>Activity Keywords</td>
</tr>
<tr>
<td>Income and Expenses</td>
<td>IMS Account Code</td>
</tr>
<tr>
<td></td>
<td>IMS Account Name</td>
</tr>
<tr>
<td></td>
<td>Fund Type</td>
</tr>
<tr>
<td></td>
<td>Amount in Local Currency</td>
</tr>
<tr>
<td></td>
<td>Amount in US Dollars</td>
</tr>
<tr>
<td></td>
<td>Currency</td>
</tr>
<tr>
<td></td>
<td>Notes</td>
</tr>
</tbody>
</table>

**Lessons Learned By Objective**
Creates a report describing all lessons learned for each objective within the project.

<table>
<thead>
<tr>
<th>REPORT SECTIONS</th>
<th>REPORT DETAILS</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Description</td>
<td>Project Title</td>
</tr>
<tr>
<td></td>
<td>Objective</td>
</tr>
<tr>
<td>Lessons Learned Details</td>
<td>Heading</td>
</tr>
<tr>
<td></td>
<td>Description</td>
</tr>
</tbody>
</table>

**Project Summary by Objective, Indicator and Activity**
This report lists all indicators and activities for each specific objective entered for each project and has 3 main sections, general information, specific objective details and personal and operational costs.
### REPORT SECTIONS | REPORT DETAILS
---|---
General Description | Project Number  
| Unit  
| Project Title  
| Vision 2000 Programme  
Specific Objectives Details | Specific Objective  
| Indicators  
| Activities  
Costs | Human Resources  
| Operational  

**Project Activities with Monthly Related Calendar**
Generates report listing all activities within the project and indicates all months the activity is to take place.

---

### REPORT SECTIONS | REPORT DETAILS
---|---
General Description | Vision 2000 Objective  
| Project Title  
Activity Details | Activity description  
| Activity Calendar  

**Short Report Summary Including Income and Expenditure**
This report provides an overview of the project. The basic project report is divided into 3 main sections and information includes project title, related Vision 2000 program area, overall project objective, project summary, specific objectives, list of activities and income and expense information.

---

### REPORT SECTIONS | REPORT DETAILS
---|---
General Description | Unit  
| Vision 2000 Programme  
| Project Title  
| Project Objective  
| Programme Theme  
| Summary  
| Justification/Lessons Learned  
Detailed Description | Specific Objectives  
| Indicators  
| Activities  
Budgetary Information | Income  
| Expenses  

**Project Results Summary and Explanation of Budget Variance**
Provides a short summary of key project details combined with detailed budgetary and variance information.
**Project Annual Report Including Approved Budget vs Actuals, 2002**

Creates a report for each individual project following a suitable layout and providing all necessary information suitable for the annual report.

<table>
<thead>
<tr>
<th>REPORT SECTIONS</th>
<th>REPORT DETAILS</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Description</td>
<td>Vision 2000 Objective</td>
</tr>
<tr>
<td></td>
<td>Project Title</td>
</tr>
<tr>
<td></td>
<td>Programme Theme</td>
</tr>
<tr>
<td></td>
<td>Summary</td>
</tr>
<tr>
<td>Specific Objective Details</td>
<td>Specific Objective</td>
</tr>
<tr>
<td></td>
<td>Indicators</td>
</tr>
<tr>
<td></td>
<td>Activities</td>
</tr>
<tr>
<td>Lessons Learned by Objective</td>
<td>Lessons Learned</td>
</tr>
<tr>
<td>Qualitative Analysis</td>
<td>Most Important Lessons Learned</td>
</tr>
<tr>
<td></td>
<td>Greatest Constraints</td>
</tr>
<tr>
<td></td>
<td>Overcome Constraints</td>
</tr>
<tr>
<td>Budget</td>
<td>Income</td>
</tr>
<tr>
<td></td>
<td>Expenses</td>
</tr>
<tr>
<td></td>
<td>Surplus/Deficit</td>
</tr>
</tbody>
</table>

**5.5.12 Qualitative Analysis**

This section provides users with the ability to enter qualitative information for the specific project for each transaction year the project is active.

Adding Qualitative Analysis Information -

1. Transaction Year – The user is required to select the appropriate transaction year for the project’s qualitative analysis.

2. Reporting Period – This relates directly to the programmatic reporting frequency selected on the main project page and the number of options available in the dropdown depends on this selection. For example, if the reporting frequency selected was annual one option will appear, quarterly four options will appear, 1st quarter, 2nd quarter, 3rd quarter and 4th quarter etc.

3. What were the most remarkable achievements? – The user is required to enter the most remarkable achievements of the project made within the selected transaction year.

4. What were the important lessons learned? – The most important lessons learned for the project within the specified transaction year should be listed in this field.
5. What were the greatest constraints? - Any major project constraints for the project discovered within the transaction year need to be entered within this field.

6. Have you been able to overcome them? - If the user believes the project team overcame the constraints listed in the previous field then ‘yes’ should be selected. If not, then ‘no’ is the answer to the posed question.

7. If yes, how? If not, why not? - The user is required to provide an explanation of their answer to ‘Have you been able to overcome them?’.

Once submitted this information will appear each time the user selects ‘Qualitative Analysis’ and the correct transaction year. Information can be amended or added anytime and is saved once submitted.

5.5.13 Comment Variance

This section is also restricted to members of the budget holder group. This menu option provides budget holders with the ability to justify over and under expenditures.
Adding a Comment Variance

1. Transaction Year - Ensure the year you wish to enter a comment variance is displayed in this dropdown menu.

2. Explanation of Variance - Where the Approved Budget does not equal the Actuals and therefore there is either a positive or negative variance, an explanation of this variance needs to be entered within this field and submitted.

3. This information is saved upon submission and can be added to or changed by selecting ‘Comment Variance’ and submitting the completed amendments.
This page has intentionally been left blank.
5.6 Indirect Costs

5.6.1 What are Indirect Costs?

Indirect Costs are those ongoing costs incurred by an entity (FPA, regional or central office) that cannot be allocated to specific projects and are associated with the overall management and administration of the organization. For example the expenses incurred by the Office of the Executive Director, Accounts Department, Human Resources, Office Services, Headquarter Warehousing, and Information Technology support are considered indirect costs of the organization.

Information and education, resource development, public relations and volunteer activities should not be charged to indirect costs. They should be classified either as projects or associated with existing projects within 13 Vision 2000 program areas. Indirect cost project can not be associated with a vision 2000 objective, because their budgets will be reallocated over all projects and thus be related indirectly.

5.6.2 Functionality of Indirect Costs in the IMS

The eIMS allows the user to define cost centres within the Indirect Cost section of the system. They function in a manner similar to the Project concept in that each indirect cost pool has a Main page for general description as well as access to the following top menu options: objectives, activities, assets, income, expenses, funds and staff allocation. Using these features the entity can establish as many cost centers as appropriate given the size and complexity of the organization.

‘Indirect Costs’ is a submenu option of ‘Data Entry’ and is situated between ‘Projects’ and ‘Staff Allocation’. When this menu item is selected an index page appears, displaying details of the ‘Indirect Costs’ that have already been entered for the entity (if there has been any). The ‘Indirect Costs’ and ‘Projects’ index page have identical formats, with the top menu providing ‘Indirect Cost’ classifications. Please refer to ‘Project’ instructions to make an ‘Indirect Cost’ entry.

5.6.3 Indirect Cost Recovery

Some projects that are funded by donors allow the organization to charge the restricted projects for a portion of Indirect Cost expenses. This expense may be a percentage of total project expenses or a percentage of the project’s personnel expenses. This indirect or overhead expense is always negotiated prior to the project’s approval and is stipulated in the written contract. By allowing the project to charge for overhead, the donor recognizes that the project utilizes some portion of the resources of Indirect Cost centers (such as accounting, personnel, warehousing, and the office of the executive director). Overhead payments by donors are meant to offset the full expenses of the Indirect Cost centers. In a sense, they are “recovering” the cost of Indirect Cost centers through the Indirect Cost charges of restricted projects.

The eIMS allows an organization to reduce the expenses of Indirect Cost centers by the amount of the overhead expenses charged to donors of restricted projects. This is accomplished by submitting a negative expense amount for account 590004.
Indirect cost charges/recoveries in order to offsets the total of indirect expenses entered into the projects.

Example:
A restricted project is funded by Gates Foundation and allows 15% of the project’s total direct labour and materials expenses to be charged to the eIMS expense account 590004 Indirect Cost Charges. In this hypothetical example we will say that the Indirect Cost Charges is $1500.

A second restricted project funded by another donor allows 10% or $1,000 of the project’s total cost to be charged to the eIMS expense account 590004 Indirect Cost Charges.

The total of Indirect Cost charges to restricted project expenses in these examples is $1500 plus $1000 for a total of $2500.
The Indirect Costs of the Institution are reduced or recovered by the $2500 when we enter a negative amount in one of the Indirect Cost centres. This negative amount is associated with the eIMS account 590004, Indirect cost recoveries.
This is the only situation where a negative amount may be entered into the eIMS Expense and Income data entry screens.

Figure Error! No text of specified style in document.-1 Indirect Cost Table
5.7 Staff Allocation (for entire Entity)

5.7.1 Difference Between Staff Allocation for an Entity and Staff Allocation for a Project

‘Staff Allocation’ submenu option is located within the ‘Data Entry’ main menu option and details the allocation of employees and temporary staff amongst units and projects. The ‘Staff Allocation’ index page is almost identical to that within the ‘Project’ ‘Data Entry’ ‘Staff Allocation’, except this page encompasses all units and projects whilst ‘Project’ ‘Data Entry’ ‘Staff Allocation’ includes only the staff that belongs to a particular project. ‘Staff Allocation’ reports are located within the main menu item reports and submenu item ‘Staff Allocation’ and are an excellent reference enabling examination of the distribution of people to projects and projects to people.

5.7.2 Functionality of Staff Allocation for an Entire Entity

In order to utilize this menu option and allocate staff across the entire organization, all the personnel post must FIRST be defined and their costs specified in the Human Resource section of the eIMS.

The title bar is the same as that within the ‘Staff Allocation’, ‘Projects’, ‘Data Entry’ page. Beneath there is a table incorporating staff and their allocations between projects.

5.7.3 What Happens if Human Resource Details Change?

Please note any changes that are made within ‘Human Resources’ for a particular position require the user to resubmit the staff allocations for those positions. Once staff allocations for a particular unit have been submitted in the selected ledger, HR costs are posted in expenses. If however this ledger is changed while working on the selected unit in staff allocation, all HR costs will be deleted for that unit. This avoids duplication of costs.

In the scenario where one project in a unit needs a Target Ledger ‘Proposed’ and rest needs a Target Ledger ‘Proposed Amendment’. Then while doing a staff allocation using a unit Interface (main menu option Staff Allocation) put 0 allocation to the Project for which you want a ‘Proposed Ledger’ as target and do a staff allocation to that project using the staff allocation interface within Data Entry/Project/select project for staff allocation by selecting ‘Proposed Ledger’.
5.7.4 Adding Staff Allocation for an Entire Entity

1. Select Entity Unit – This is a mandatory field. Selection of the Unit will determine which projects appear to the right of the posts and are available to be assigned a portion of staff or professional service time. Ensure the correct transaction type and transaction year have been selected from the dropdown lists at the top of this page prior to entering staff allocations for the selected unit.

2. Select Position – This is a mandatory field. The user is required to select a new position from the dropdown list in the last row within the table. The positions listed will be those, which have not yet been assigned to any projects within the unit and are defined within ‘Human Resources’.

3. Once the position has been selected a new row in the table will be created for the position and will include field boxes for allocation of time among projects.

4. Directly adjacent to the position title is the position status that describes whether the position is permanent employee or temporary consultant.

5. Allocation Unit – The user is required to select an allocation unit from the dropdown list provided. For permanent staff this list will include ‘%’ only, and for
temporary staff the dropdown list will display ‘Hour(s)’, ‘Days(s)’ and ‘Week(s)’, depending on the unit of measure entered in the ‘Prof Svc/Temp Cost’ screen of the ‘Human Resource’ section.

6. The columns that are to the right of the allocation unit list the projects and the matrix allows allocation of human resources between the projects within a particular unit. The user is required to enter the level of effort for each staff position selected from the list.

<table>
<thead>
<tr>
<th>Submit</th>
<th>Saves the ‘Staff Allocation’ and adds the new ‘Staff Allocation’ to the ‘Staff Allocation’ index page which is displayed. A dialog screen will appear and state ....</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1. Update/Add the staff allocation for the projects on this unit</td>
</tr>
<tr>
<td></td>
<td>2. Update/Add Proposed Budget 200X for Staff Cost</td>
</tr>
<tr>
<td></td>
<td>3. Update/Add Proposed Budget 200X for Professional Services/Consultant Cost</td>
</tr>
<tr>
<td></td>
<td>Continue?  Yes  No</td>
</tr>
</tbody>
</table>

If ‘Yes’ is selected, the staff and consultants/part-time workers will be allocated to the project. All prorated salary/benefit costs and professional/sessional fees will be reflected in the eIMS ledger for the project.

A ‘Please Wait’ message appears while the update is occurring. Once the processing is complete the Staff Allocation index page redisplays with the new allocation.

7. To delete a position the user must make all allocations to projects for the position equal to 0 and then submit the changes. This will delete the position from the table and add it back to the dropdown list of unemployed positions. There are no delete or edit links. The user can edit allocations by changing the figures within the table and submitting the changes.

The user is then able to select a different unit and distribute staff amongst the constituent projects.
**Example - Entering Restricted projects into the eIMS when staff allocations are used for Existing and New Positions**

1. Project managers define the restricted project on Main page in the eIMS; they also enter the objectives, indicators and activities.

2. A copy of the donor budget is given to accounting and the classification of income and expenses discussed by the project manager and accountants. The project managers enter all the operational expenses of the project except the personnel costs and percentages. They also enter the income of the project. The project manager lets accounting know that the income and expense pages have been entered and are ready for their review. Accounting will enter the personnel costs of the new project funded by restricted donor funds by following the steps below.

3. If a NEW personnel post has been created by the project, we need to use the eIMS Human Resource menu option to identify the new post, its HR position code, and if known the name of the new employee (exact name can be entered later after recruitment, and left blank during budgeting phase). Then go to the Data Entry/Project/Staff Allocation page, and add the new post and its percentage of time.

4. If an EXISTING personnel post will provide partial support to this project, we need to go to the new project, and add the existing post to the project staff allocation list and enter the percentage of time that the post will dedicate to the new project. Up to 2 decimal places may be used for the allocation percentage in order that the cost of the allocation equals the amount approved by the donor for the post. Use the Data Entry/Project/Staff Allocation menu options for this purpose.

5. Return to the Expense page of the new restricted project and compare the amount of the staff allocation expense with the donor contract. Determine whether the eIMS personnel expense is equal to the personnel cost in the donor agreement. It should be...

6. If this is an EXISTING employee with pre-existing staff allocations in the eIMS (rather than a new employee), we also need to go to the home department and select the unrestricted project where a majority of the staff members time is charged. The percentage time of the existing employee must be adjusted downward by an amount equal to the new restricted project's time allocation.
7. After all the adjustments are made it is a good idea to generate a staff allocation report and verify that the employee's total level of efforts is not more or less than 100%.
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5.8 Funds

5.8.1 Fund Details

5.8.1.1 Definition and Types of Funds

This section tracks Funds that have been donated for projects that extend beyond one year. The idea is to enable users/entities to recognize legally required and prudent funds for their present and future operations. There are at least four basic types of Funds which may be included on the Equity side of the organization's balance sheet:

- Unrestricted, Undesignated Funds
- Unrestricted, Board Designated or Earmarked Funds
- Temporarily Restricted Funds
- Permanently Restricted Funds

Examples of Unrestricted, Earmarked or Board Designated Funds include, Funds for the Construction or Renovation of Buildings, Severance or Redundancy Funds, Retirement or Pension Funds, and Contraceptive Procurement Funds and Sustainability Funds for new project development.

Temporarily Restricted Funds are created when a donor provides a restricted grant for a multi-year project. Any unspent income from the project is transferred to the Donor's Temporarily Restricted Fund. The balance of the fund is reduced in the following by the amount of the restricted project’s expenses. Temporarily Restricted Funds are generally specific to both the donor and a project.

The Permanently Restricted funds are most often associated with endowments to the organization.

5.8.1.1 Funds with Indirect Income

A Fund can have direct income if e.g. a donor contributes directly into the fund or a restricted project is being after the approved budget had been closed. If the latter is the case you will have to create the project fund together with the main project in order to appropriate to the projects. Balance transfers between funds and projects are always based on account codes of the ‘Balance transfer’ range and thus do not show on reports as Income or Expense.

Example for a fund that accompanies a restricted project:

Donor X decides to fund the suggested project Y and donates 3 million US$ for this 3 years project immediately - the entire amount for the whole period. Since you want to show income in the year you received the grant you will have to create Fund Y and to appropriate into at the end of the year. The next year/period you transfer 1 million back into the fund via a new appropriation. All transfers are being made using ‘Balance Transfer’ accounts and thus do not show as income or expense on reports. You will record your expenses as usual directly from the main project. The same procedures apply for the following year.
5.8.1.2 Creating a New Fund

1. A list of funds already created are displayed when the submenu option funds is been activated. The fund details can be viewed by clicking on the name of the fund, which operates as a link to this information.

Figure Error! No text of specified style in document.-1 Funds Index Table

2. Creating a new Fund is similar to setting up a new project, except Add New is not present in the top menu bar but beneath the index table. Details of the new fund need to be entered within this page.

Figure Error! No text of specified style in document.-2 Creating a New Fund

3. Other ID/No – If the entity has a separate identification system to that of IMS they can enter their number for the fund in this field.

4. Entity Unit – The unit the fund is contributing to, is required to be selected from the dropdown list.

5. Title – This should represent the individual fund. If a Fund is accompanying a distinct project it is appropriate to use the same name as the main project.

6. Goal/Overall Project Objective – Some funds are restricted, i.e are for specific use of a project. In this situation the goal or objective of the project should be included in this field.

7. Summary – The user should append a brief summary including purpose and future of the fund.
8. Manager/Co-ordinator – Select the manager/co-ordinator for the fund from the dropdown list or if you cannot find the relevant person enter their name in the field to the right of the dropdown list.

9. Fund Type – The type of funds being held by the fund should be selected from the dropdown list (i.e. whether restricted, unrestricted core, unrestricted earmarked, unrestricted core – governance).

10. Account Code for Transfer – An account code needs to be selected from the dropdown list that will be used when funds are transferred into or out of the fund.

11. Start Date – This is the date the fund was formed.

12. Finish Date – This is the date the fund is to be terminated, this usually occurs when the fund is empty.

13. Extension Date – The date an extension is authorised should be entered here.

14. Actual End Date – The user is required to enter the completion date of the fund within this field.

15. Justification and Background – Purpose, aim and reasons for the fund plus description of associated projects if any can be recorded within this field.

On submission of the fund details the index table will be presented with the new fund. Only once the new fund has been submitted and activated within the index table will the user see the upper menu options.

5.8.2 Main

This upper menu option displays the same page as when the fund was created. The user can view, amend or delete the record displayed.

Figure Error! No text of specified style in document. 3 Main Fund Details
5.8.3 Balance

Presents the balance of the fund and related facts including, Account Code, Funding Type, Currency, Amount, Amount in USD and Transaction Description in a table for viewing only. All transactions from and to this fund made in ‘Budget Amendments’ are recorded here.

5.8.4 Opening Balance

5.8.4.1 What is an Opening Balance

This menu option allows editing of the opening balance. Entry of ‘Opening Balance’ is very similar to entry of assets, income and expenses. The ‘Opening Balance’ appears when viewing ‘Balance’. The ‘Opening Balance’ can be changed via amending the balance within this option.

5.8.4.2 Creating an Opening Balance

1. Financial Period – Usually annual is only available choice for funds, as funds work over an annual period.

2. Account Code – The purpose of the fund can be useful in the selection of an account code from the dropdown list.

3. Amount – The user is required to enter the transaction amount and select the transaction currency.
4. Amount in USD – This is automatically generated once amount has been entered in previous field.

5. Fund Type – The user is required to select the manner the endowment is to be utilised within the entity. Please refer to page section 5.5.1.3 for definitions.

6. Transaction Description – Brief description of the originator, purpose and objectives of the fund can be entered here.
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5.9 Budget Amendments

5.9.1 Aspects of Budget Amendments

5.9.1.1 What is a Budget Amendment?

‘Budget Amendments’ is set out in a similar way to ‘Projects’ and ‘Indirect Costs’. This menu option records all amendments that have been made to approved/closed budgets.

Budget amendments between projects and funds under this menu option must occur within the same entity. If amendments are to be made between projects and funds in two separate entities, then the user must go to the main menu option ‘Linked Projects’ and submenu option ‘Budget Amendments’.

On selection of the ‘Budget Amendments’ sub menu option from the main menu ‘Data Entry’ an index appears listing all budget amendments that have previously been entered.

Figure Error! No text of specified style in document. 1 Budget Amendments Index Table

<table>
<thead>
<tr>
<th>Director General’s Office</th>
<th>By Status</th>
<th>By Units</th>
<th>Add New</th>
</tr>
</thead>
<tbody>
<tr>
<td>World Bank Fund</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Policy Coordination</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vision 2000 Funds Coordination</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IMS Phase B</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

List of Budget Amendments can be grouped By Appropriation Number, By Status or By Units, jump menus will appear to the right. The user defined amendment number will appear next to the amendment title, in the situation where the user has not defined an amendment number the IMS generated number will be displayed.

5.9.1.2 Adding a New Budget Amendment

1. The user is required to select ‘Add New’ from the upper menu, which is located in the top right corner of the screen.

2. Once this option has been selected a screen will appear requiring the user to enter details of the new budget amendment.
3. Appropriation Number – The user is required to enter a unique identification number for the budget amendment.

4. Subject/Title – A title for the change in budget should be entered here.

5. Justification – The reasons, purpose and explanation for the change in budget should be recorded in this field.

6. Amendment Type – Select the type of amendment, whether between projects, funds, or additions.

7. Year – The year the budget that is being amended was created is required to be selected from the dropdown menu.

8. Unit – The unit the budget amendment is going to reside should be selected from the dropdown list.

9. Only from This Unit – If budget amendments are to take place only within the selected unit, this tick box should be activated.

At this point 6 different scenarios need to be examined –
- Project to Project
- Project to Fund
- Fund to Project
- Fund to Fund
- Addition
- Reduction

Please Note – Staff Allocations can be added as part of budget amendments. Please refer to section 5.5.10.4 for instructions. Each of these scenarios have different procedures and outcomes.

**Project to Project**

This involves transferring expenses and income (optional) from one project to another within the same entity. Please note the transfer of expenses is compulsory in this type of budget amendment, income transfer is optional. Once this type of amendment has been selected the ‘From’ and ‘To’ projects need to be chosen.
1. From Project – The user is required to select the project expenses and income (optional) are to be transferred from.

2. To Project – The project the expenses and income (optional) are to be transferred into needs to be identified and selected from the dropdown list provided.

3. The ‘Budget Amendment’ index table will be displayed with the new budget amendment following submission.

5.9.2 Main

1. Selection of the new budget amendment title from the index table will display the most recently visited data entry page.

2. From Transaction – The user is required to access the ‘From’ project via Data Entry/Projects and create a new expense and income (optional) transaction under the ledger type proposed amendments for the appropriate transaction year. To add new expense or income transactions follow the procedure as in section 5.5.7.3 and 5.5.8.2 respectively, except the title of the budget amendment needs to be selected from the dropdown list provided. The ‘From’ transactions appear as negative entries within the project ledgers (both proposed amendments and the target ledger after approval) as these transactions produce
a reduction in income and expenses and in general a flow of funds out of the project. Within budget amendment details these are represented as positive transactions.

3. To Transaction - This type of transaction requires the user to post expense and income (optional) transactions in a similar way to the ‘From’ transaction except they should be posted within the project identified as the receiver of the expense/income. ‘To’ transactions for income and expenses are posted within the project ledgers (both proposed amendments and target ledger) as positive transactions as funds are being received by the project these transactions are also positive within the budget amendment.

4. Once all transactions have been submitted, the user can check they have been successful by accessing the budget amendments approval page. The budget amendment is correct if the ‘Approval Status’ and ‘Target Ledger’ dropdown lists appear, if the message ‘Please Confirm Transactions and Signatures’ is displayed there is an error within the budget amendment. It is important to note that it is a requirement that both the ‘To’ and ‘From’ expense transactions and both the ‘To’ and ‘From’ income transactions need to be of equal amounts. For example if the ‘To’ and ‘From’ amounts of the expense transactions are $1250 and the ‘To’ and ‘From’ amounts of the income transactions are $1500, then approval of this budget amendment will be permitted. If however the ‘To’ income transaction is $1300 and the ‘From’ income transaction is $1500, approval of this budget amendment will not be permitted. In these situations it is better to use ‘Addition’ or ‘Reduction’ budget amendment types which permit off balance one sided transactions, refer to sections 5.9.7.5 and 5.9.7.6 respectively for information regarding ‘Additions’ and ‘Reductions’.

5. Prior to approval both expense transactions appear within their respectful projects under transaction type proposed amendments. Once approved all transactions within the budget amendment are transferred to the target ledger for the specific transaction year.
5.9.3 Details

Provides summary of the budget amendment including transactions and approval status.

5.9.4 Approval Signatures

5.9.4.1 What are Approval Signatures?

Prior to approval all persons who must authorise the budget amendment need to be listed under ‘Signature Names’. These may be different for each budget amendment and therefore ‘Signature Names’ need to be entered for each appropriation.
5.9.4.2  **Adding Approval Signatures**

1. Signature names are simple to enter, the user is required to select ‘Signature Names’ from the upper menu bar. An index table listing any signature names previously entered will appear.

2. To enter a new name the ‘Add New’ tick box should be turned on, this activates all data entry fields.

3. Approval Level (the order signatures need to be obtained, ie 2 should be collected before 3) and Name should be entered and Job Title and eIMS User ID selected from the dropdown lists provided. Any notes and Date Signed (dd/mm/yyyy) can be entered here or within ‘Signature Dates’.

4. Upon submission new signature names will be added to the index table.

5.9.5  **Signature Dates**

Signature Dates provides an interface for the input of the dates once the budget amendment has been signed off by the ‘Approval Signatures’.

5.9.6  **Approval**

5.9.6.1  **What is the Approval of a Budget Amendment?**

Provides an outline of the budget amendment including transactions and approvals. The budget amendment should not be approved until all signatures have been obtained and the ‘From’ and ‘To’ transactions are equal in amounts (except for one sided budget amendments).
5.9.6.2 How are Budget Amendments Approved?

The user is required to select ‘Approval’ from the upper menu, view and agree with the budget amendment summary, select the ‘Approval Status’ and ‘Target Ledger’ from the dropdown lists and then submit. This is will only appear if the user has authorisation to approve the budget amendment. User’s without this permission will see the ‘Approval Status’ dropdown list with ‘Submit to Finance’ the only selection available. The approval status will appear on the ‘Details’ page once submitted.

No amendments are permitted once the budget amendment has been approved or submitted to finance.

5.9.7 Types of Budget Amendments

5.9.7.1 Project to Project

This budget amendment type was discussed in section 5.9.1.2 ‘Adding a New Budget Amendment’ and was used as the case study throughout the explanation of a budget amendment life cycle.

5.9.7.2 Project to Fund

Details of Funds and their creation is available in section 5.8. Funds are generally created when donations are made to projects that cover more than one year of project operation costs. Funds are created via Data Entry/Funds. In the situation where a project has met all expenses and has finance left over, this money should be transferred to a fund.

1. The budget amendment is created in exactly the same way as ‘Project to Project’, except the selected type will be ‘Project to Fund’. 
2. Once this ‘Type’ has been selected the user needs to select the ‘From’ Project, ‘To’ fund, currency and enter the transfer amount. The system will reference the account code and fund type from the information entered for the chosen fund this will appear once the main page for this budget amendment is displayed. Please note the appearance of the screen differs from a ‘Project to Project’ budget amendment.

3. The user is not required to create an expense transaction within the ‘From’ project as per Project to Project budget amendment. The transaction is automatically entered in the ‘Transfer’ section of the specific project, under transaction type ‘Proposed Amendments’ before approval, and after approval the budget amendment is present in Transfers under ‘Approved Budget’. The account code utilised for the ‘From’ transaction will be the same as that identified within fund definition.

4. Within the ‘Fund’ (Data Entry/Funds) the amount being transferred to the fund will appear in transaction type ‘Proposed Amendments’ before and after approval in ‘Approved Budget’.
6. The approval process follows the same procedure as ‘Project to Project’ budget amendment, with the establishment of ‘Approval Signatures’ and ‘Approval’.

5.9.7.3 **Fund to Project**

This is exactly the same and requires the same procedures as Project to Fund except reverse. There are some areas that require explanation.

1. The ‘Budget Amendment’ itself is created in the same way as ‘Project to Project’ and ‘Project to Fund’.

2. ‘From’ Transaction - The amount withdrawn from the fund both before and after approval is listed as a ‘Budget Amendment’ within Data Entry/Funds/*specific fund*. Similar to the ‘Project to Fund’ budget amendment the change in fund is listed within ‘Proposed Amendments’ prior to approval and ‘Approved Budget’ post approval. The account code utilised in this transfer is the one identified within the fund definition, this is displayed on the main page of the budget amendment.

3. ‘To’ Transaction – The transfer of funds is presented under ‘Transfer’, ‘Proposed Amendment’ (transaction type) in the ‘To’ project before approval and within transaction type ‘Approved Budget’ after approval. Once again please note the account code utilised in this transfer is one identified within the fund definition.
4. Unlike ‘Project to Fund’, this type of budget amendment requires the user to dedicate the funds the project is receiving from the fund by adding an expense to the project under the transaction type ‘Proposed Amendments’. A separate account code can be identified within this transaction for the destination of the funds. After approval this transaction will appear in the target ledger under the account code selected in this transaction.

Approval process is the same as in previous examples, both ‘To’ and ‘From’ amounts are required to be of equal amounts.

5.9.7.4  **Fund to Fund**

This is a simple budget amendment. Both ‘From’ and ‘To’ transactions need to be of equal amount. The ‘From’ Fund will show the amount being withdrawn in the balance table as negative, and the ‘To’ Fund will show this amount as positive. Similar to previously explained ‘Budget Amendments’ prior to approval changes to the fund appear in transaction type ‘Proposed Amendments’ and after approval in ‘Approved Budget’.
Please Note – Unlike Project to Fund and Fund to Project Budget Amendments, the user must specify the account codes and fund types of the from and to transactions. This budget amendment may be transferring funds from one account code to another.

5.9.7.5 Addition

Additions are made to projects only. When selected from the ‘Type’ dropdown menu only the ‘To’ Project dropdown list appears (not ‘From’ dropdown list as in previous amendments).

Additions can be used when adding finance in a once off transaction to a project that has not come from a fund or another project.

Since there is only a ‘To’ transaction it makes things fairly simple.
1. Once the 'To' project has been selected and the amendment submitted, the user is required to add income and/or expenses within the selected project.

2. Both income and expenses should be added to the project under the transaction type 'Proposed Amendments'. Within addition and reduction budget amendment types it is not compulsory for both income and expenditure to be added. Circumstances that may lead to a one sided budget amendment include a data entry error made and not identified until the budget is approved or a need to revise income upwards in light of an unexpected increase in donations that may evolve during the course of the year. Please remember that where income and expenses are both part of the addition budget amendment they do not have to be in equal amounts. It is often the case where income and expense amounts are equal the user has dedicated the increase in income to an expense.

Please Note – All income and expense transactions within an addition are posted as positive entries in the proposed amendments and target ledger and within the budget amendment itself.

3. Unlike previous approval pages the addition approval does not prevent the user from approving the budget amendment if the income and expense amounts are not equal. Instead of the usual 'Please Confirm Transactions and Signatures' a warning message is displayed 'Warning: Expense and Income are not equal for this Amendment Reduction' and the normal dropdown lists for the approval process.

Figure Error! No text of specified style in document. -20 One Sided Addition

4. Once approved (finance’s responsibility) all transactions within the budget amendment are transferred to the target ledger for the specific transaction year.

5.9.7.6 Reduction

The easiest way to describe this type of budget amendment is a negative addition to projects only. While an addition is income added to a project reductions can be thought of as a required reduction in income and/or expenditure. For example staff cost reduction of $5,000. While additions require income and expenditures to be increased, reductions entails income and expenditure to be reduced. It is possible to create a one sided reduction with either a decrease in income or expenditure, due to
increases in expenses during the course of the year or a decrease in promised income from a donor.

New Reduction Budget Amendment

1. The user is required to create a new budget amendment and to select the type ‘Reduction’.

   Figure Error! No text of specified style in document. -21 Budget Amendment Type - Reduction

2. Both income and expenses can be reduced for the selected ‘To’ project under the transaction type ‘Proposed Amendments’. Please remember that both the proposed amendment income and expenses are not required to be equal in amount.

Please Note – It is not necessary to post negative amounts in income and expenses as once the transaction is submitted IMS posts these entries as negative automatically within proposed amendments, target ledger and the budget amendment.

Figure Error! No text of specified style in document. -22 Positive Entries made in Income and Expenses
3. A simple way to check the transactions posted is to access the ‘Approval’ page (top right menu option). If transactions are not equal a message informing the user ‘Warning: Expense and Income are not equal for this Amendment Reduction’ (please note this is different from the ‘Please Confirm Transactions and Signatures’ message) will appear. It is not essential for expenses and income to be reduced in equal amounts or for there to be both an income and expense transaction and the budget amendment can still be approved as indicated in figure 5-89.

4. Once approved (finance’s responsibility) all transactions within the budget amendment are transferred to the target ledger for the specific transaction year.
5.10 Ledger

‘Ledger’ is located within the ‘Data Entry’ main menu option and is situated between ‘Entity Details’ and ‘Budget Amendments’. ‘Ledger’ is the submenu option that enables Entity Financial administrators to process various budgets.

When the user activates this submenu option a new page appears with an upper menu customised to ‘Ledger’ functionality.

Figure 5-90 Ledger Upper Menu Bar

<table>
<thead>
<tr>
<th>Copy Ledger by Project</th>
<th>Copy Ledger All Projects</th>
<th>Programmatic Data</th>
<th>Situation Analysis</th>
<th>Import Data</th>
<th>Export Data</th>
</tr>
</thead>
</table>

5.10.1 Copy Ledger by Project

5.10.1.1 Function of Copy Ledger By Project

This menu option ‘copies’ a ledger including expenses, assets and income from one budget report type to another, for example from ‘Proposed Budget’ to ‘Approved Budget’ for the selected project. ‘Copy Ledger’ provides an efficient and effective way to copy a budget from proposed to approved minimising re-entering effort and risk of errors.

a) Preliminary Budget  
b) Proposed Budget  
c) Approved Budget  
d) Interim Actuals  
e) Actuals  
f) Audited Actuals

The ‘Ledger’ types above are listed in the sequence in which they occur during a budgeting cycle. When a user decides to initiate a project he/she prepares a Preliminary Budget for internal discussions and executive consideration. Once he/she receives the entity’s confirmation to proceed with the presentation of income and expenses, the entries in the Preliminary Budget are moved to the Proposed Budget (i.e. Income and expenses the user expects for that financial year). The entries will move from one budget report type to another until Audited Actuals is reached.

5.10.1.2 How to Copy a Ledger by Project

1. Select ‘Ledger’ submenu option from main menu, and ‘Copy Ledger by Project’ option from the upper menu.

Figure 5-91 Copy Ledger Form
2. Select Project – The user is required to select the specific project wherein ledgers are to be copied.

3. From - The user is required to select where the ledger is going to be copied ‘From’ utilising the dropdown list provided.

4. To – The budget the ledger is going to be copied ‘To’ needs to be selected from the dropdown list.

5. Funding Type – It is possible to distinguish between transactions within a ledger by selecting the funding type, therefore the user is able to copy sections of a ledger.

6. Overwrite Existing Entries in Ledger – Activation of this tick box will result in the deletion of all transactions within the ‘To’ ledger, these will be replaced with the transactions in the ‘From’ ledger (if there are any transactions, otherwise the ledger will remain blank). If the user does not want to delete any transactions in the ‘To’ ledger but wishes to add to the transactions, deactivation of this tick box is required (default value of this tick box is activation). This will cause the ‘From’ ledger transactions to be copied and added to the ‘To’ ledger transactions that are already present.

7. Copy Staff Allocation – Unlike ‘Overwrite Existing Entries in Ledger’ the default value for this tick box is null (or not ticked). Activation of this tick box is required if the user wishes to copy Staff Allocation information from one ledger to another. Please note this has no bearing on the staff allocation costs in the expense ledger, as this information will be copied regardless of whether Staff Allocation details are or not.

8. Once this information has been selected a table appears below the fields. This table contains all income (accounts codes that start with a 4), expenses (accounts codes that start with a 5) and assets (accounts codes that start with a 1) within the project, this is situated on the left side of the table and is the ‘copy from’ section.

Figure 5-92 Copy Ledger Form

9. The right side (‘copy to’) of the table is a duplicate of the left minus the activity code, which remains the same for the row, apart from the ‘Amount’ field, which can be changed.

10. Once all information is complete and all amendments have been made the user is required to activate the submit button.
11. A dialog box appears warning that existing information will be overwritten. Acceptance of this executes the copy procedure, cancellation causes the original data input screen to appear.

5.10.1.3 How can the user check the budget has been copied?

It is possible for the user to check this budget has been copied successfully by
- Taking note of the message that appears informing the user ‘Ledger Transactions were Copied Successfully to Year (‘To’ year selected)’.
- Access ‘Select Entity’, and entering the same year and the approved budget (or the budget that the ledger has been copied to), any ledger information that has not been copied will not appear in the ‘to’ budget only in the ‘from’ budget.

5.10.2 Copy Ledger All Projects

5.10.2.1 Function of Copy Ledger All Projects

This menu option is very similar to Copy Ledger as described above, the only difference is there is no need to select a project as all projects are copied at once from one ledger to another.

Figure 5-93 Select Ledger

5.10.2.2 How to Copy a Ledger for All Projects

1. From – Select the budget where the ledger is to be copied from.
2. To – Select the budget where the ledger is to be copied to.
3. Funding Type – If not all transactions within a ledger are required to be copied, fund type selection will limit transactions copied to those of the selected fund type.
4. Activation of the submit button will execute copying and a message will appear informing the user ‘Ledger Transactions were Copied Successfully to Year (‘To’ Year selected)’.
5.10.3 Programmatic Data

5.10.3.1 Function of Programmatic Data Copy

Activities and Indicators for each project can be copied from one year to the next. This eIMS functionality minimises the amount of repetitive input the user has to carry out. This will facilitate creation of annual work plans for multi-year projects. Expected results may be edited after the copy procedure on the Project/Specific Objectives and Project/Activity data entry pages.

Both Activities and Indicators are copied following the same procedure. Please ensure specific objectives for which indicators are to be copied to have been extended to or beyond the ‘Indicators’ ‘To’ transaction year. For example if indicators are to be copied from 2002 to 2003, ensure specific objectives have a ‘To’ year of 2003, further ahead or are ongoing.

5.10.3.2 How to Copy Programmatic Information

1. Upon activation of the ‘Programmatic Data’ upper menu option a new data entry page is displayed.

   Figure 5-94 Copying Programmatic Data

2. The user is required to select the project from which the activities/indicators are to be copied from one year to the next.

3. Select the year ‘From’ which the activities/indicators are to be copied.

4. Select the year ‘To’ which the activities/indicators are to be copied.

5. Finally ‘Select What to Copy’ that is select ‘Activities’ or ‘Indicators’ and click on submit. Both ‘Activities’ and ‘Indicators’ can be copied by repeating this procedure again.

6. A dialog box will appear warning the existing information will be overwritten. Acceptance of this executes the copy procedure and a message appears stating ‘Activities/Indicators copied to year (target ledger)’, cancellation causes the original data input screen to appear.

5.10.4 Situation Analysis

5.10.4.1 Function of Situation Analysis Copy

This feature provides the user with the ability to copy Situation Analysis information from one year to the next, reducing redundant data entry. Individual entries can be amended once copying is finished.
5.10.4.2 **How to Copy Situation Analysis Information**

1. Once the upper menu option ‘Situation Analysis’ is selected a new page is displayed.

![Figure 5-95 Select From and To Year to Copy Situation Analysis](image)

2. The year from which the user wishes to copy the situation analysis information and the year the situation analysis information is to be copied to is required to be chosen from the dropdown lists provided.

3. Activation of the submit button causes a dialog box to appear asking the user if they are sure they want to copy over the situation analysis information that may already be present in the ‘To’ year.

![Figure 5-96 Copy Situation Analysis Warning](image)

4. A message informing the user ‘Situation Analysis Data Copied to Year (selected ‘To’ Year)’ will appear if OK is chosen, cancel will cause the original data input screen to appear.

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5.10.5 **Import Data**

Under Construction

5.10.6 **Export Data**

5.10.6.1 **Why would Data need to be Exported?**

The 'Financial' department of an organization may use software packages that can take advantage of budget data stored in the eIMS. The export data option allows the users to transfer data into other systems for analysis and examination.

5.10.6.2 **How to Export Data**

1. The user is required to activate the ‘Export Data’ menu option from the upper menu bar. The page displayed is identical to that within ‘Select Entity’.
2. Select Country First – The country from which the data is to be exported from is required to be selected from the dropdown list provided.

3. Select Entity – Once the country has been chosen a list of entities will appear within the ‘Select Entity’ dropdown list, the user is required to select the entity data is to be exported from.

4. A new page will appear automatically, the first two fields ‘Select Country First’ and ‘Select Entity’ presenting the values selected within the previous page.

5. Transaction Year|Transaction Type – It is necessary to identify the transaction type and year that contain the information to be exported.

6. Select Project – The user is required to select the project from which data is to be exported.

7. Once all information is complete the submit button should be activated, this will export the data requested. A browse file menu will open asking to select or browse to the location of your computer or network were you want the export file to be saved. The export format is a comma delimited text file (CVS) – a common import/export format.
5.11 Statistics
Statistics enables an entity to provide service details and results/outcomes relating to the services the entity offers.

5.11.1 Services
Provides an overview of each specific service and enables the user to update details relating to each service provided by the entity.

There are three areas within the IMS where services appear and each area has its own requirements regarding service details.

<table>
<thead>
<tr>
<th>Menu Selection</th>
<th>Service Details Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Entry/Statistics/Services</td>
<td>Statistics regarding each of the services offered by the entity is recorded under this menu option. Entity personnel working in outlets or delivery points need to track items and enter data for each reporting period as selected within Data Entry/Entity Details/Services.</td>
</tr>
<tr>
<td>Data Entry/Entity Details/Service</td>
<td>Definition of services made in this section is entity based only, selection of services to be provided, start date, end date and reporting frequency should be carried out by an IMS controller.</td>
</tr>
<tr>
<td>Administration/Services</td>
<td>Provides a list of all services provided by IPPF, requires translation of service description, selection of required details, grouping, report type and CYP (Couples-years of protection) factor for each service. These details should be entered by an administrator and when amended these will change for all entities.</td>
</tr>
</tbody>
</table>

1. To amend or view service information the user is required to select the upper menu option ‘Services’.

Figure 5-99 Select Service Outlet

2. The services delivery point or outlet where the services to be viewed or amended are conducted needs to be selected from the dropdown list. The operational year of the services should also be selected.
3. Once these selections have been made a list of all offered services from the outlet are displayed.

4. To add or edit any information pertaining to these services the user is required to select the service by clicking on the period to the right of the service name.

5. A new dialog box appears displaying:
   - Outlet/Service Delivery Point – Where the delivery is carried out or distributed from.
   - Year – The year the statistics are being collected for the service.
   - Service Description - The title/description of the service.
   - Period - Time period when the service is carried out.

Details to be add or edited
   - Total Visits – Number of people who have visited outlet relating to service provided.
   - Referrals to Other Outlets/Organizations – Number of people who have been referred to the outlet to utilise a specific service.
   - Male Visits – Number of males who have visited the outlet seeking the service provided. This statistic will only appear if the selected point of delivery is a youth facility. Refer to 5.15.6.

The data entry items that appear once the link for a service is activated depends on the tick boxes that have been turned on (each item has a separate tick box and the user can adjust the information collected for each service) and submitted in Administration/Services/Services Details. Refer to 10.3.1.
The user can amend or view service details and submit any changes made.

6. All data collected for the service will appear in the reference table once it has been submitted.

Please Note – If information for a specific service has been entered for years 1999 to 2003 and the start and end date attributes have been changed in Data Entry/Entity Details/Services to 2000 Start Date and 2002 End Date. Information entered in years 1999 and 2003 will be inaccessible as the specific service will not appear when the years 1999 or 2003 are selected.

5.11.2 IEC

5.11.2.1 What is IEC?

Information, Education and Communication
This part of the system allows an entity to record IEC programme details, that is any information, education or communication pertaining to services offered by outlets (i.e. entity).

5.11.2.2 Adding an IEC Record

1. To add an IEC record the user is required to select IEC from the upper menu bar. A new page will appear with an index table and any previously entered IEC records. The ‘Add New’ button should be selected in order to add a new IEC record.

Figure 5-102 IEC Index Table

2. A new dialogue page will appear once the ‘Add New’ button has been activated. All details relating to the new instance of IEC should be entered, if possible, into each field.

Figure 5-103 IEC Form
Brief description of IEC fields –

- **Transaction Year** – The year in which the IEC is to be executed should be entered here.
- **Channel of Communication** – The user is required to select the form of IEC Mass Media, Film/Video, Public Forms/Seminars, Educational Courses or Internet Web Sites, from the dropdown list provided.
- **Programme Theme** – The user needs to select a programme theme that correlates closely to the aim, purpose or objective of the IEC.
- **Number of Activities** – Number of IEC activities, planned or executed.
- **Male, Age 24 or Younger** – Number or percentage of males aged 24 or younger contacted or targeted by IEC.
- **Female, Age 24 or Younger** – Number or percentage of females aged 24 or younger contacted or targeted by IEC.
- **Male, Age 25 or Older** – Number or percentage of males aged 25 or older contacted or targeted by IEC.
- **Females, Age 25 or Older** – Number or percentage of females aged 25 or older contacted or targeted by IEC.

Please note – IEC records once submitted can only be amended or deleted by an administrator.

### 5.11.3 Global Indicators

#### 5.11.3.1 What are Global Indicators?

Global Indicators provide an overview of entity’s activities, priorities and directions relating to the Vision 2000 Objectives and associated global indicators. All entities are obliged to answer questions relating to each global indicator, this ensures the information gathered is highly correlated and can easily be compared across entities.

#### 5.11.3.2 How to Answer a Global Indicator Question

1. To enter information relating to a global indicator the user needs to select the year, Vision 2000 Objective and the specific Global Indicator. Once selected, questions relating to the global indicator will appear in table format. It is common for more than one question to appear for each Global Indicator.

2. Activation of the ‘Answer’ link to the right of the question details opens a new page where the answer should be entered. The interface of the answer page depends on the type of question and answer required.
Answers can be viewed and amended once submitted, but only while programmatic time line is open for that particular year.
This page has intentionally been left blank.
5.12 Commodities (FPA)
This page has intentionally been left blank.
5.13 Human Resources

‘Human Resources’ is a submenu option of the ‘Data Entry’ main menu situated on the left menu bar. ‘Human Resources’ provides essential data for the ‘Staff Allocation’ calculation. The ‘Human Resources’ function is used to define every post in the organization and the associated cost, regardless of whether it is a full time staff member, part-time professional, or volunteer. ‘Staff Allocation’ uses the information in the ‘Human Resource’ section for it calculations and distributions to projects. The ‘Human Resource’ section must be completed before beginning the staff allocation process.

There is more than one section contained within this menu item and once the user has selected ‘Human Resources’ from ‘Data Entry’ on the left menu a blank screen is displayed with a top menu bar customised for ‘Human Resources’ functionality.

Figure 5-106 Human Resources Menu Bar

Please note any changes that are made within ‘Human Resources’ for a particular position require ‘Staff Allocations’ that have been made for that particular position to be resubmitted.

5.13.1 Staff

5.13.1.1 Definition of Staff

Staff – all full time or on-going, part-time employee posts within the organisations which receive salaries and benefits.

5.13.1.2 Adding a Staff Member to Human Resources

1. Staff – The user is required to activate the top left hand menu item, entitled ‘Staff’. A table will appear, listing all previously defined staff positions in each organizational units. The table from left to right includes details regarding the unit, title of position, start date, end date, days per week and current holder. Current holder refers to the person who is in the position. Refer to figure 5-107 below.
2. Jump Menu – To the right of the table there is a menu listing the names of the units within the entity. This menu is referred to as a jump menu, and is used when there are numerous positions, extending beyond the length of a single page. The jump menu can be used to locate a particular unit and group of ‘Staff’ members. Once a unit name is selected the eIMS will will jump to the first post listing in the unit.

Entry fields for the Add New Staff data entry form are explained below –

3. Position Code (optional) – The user is required to enter a code/ID for the position, this coding maybe specific to the entity or unit and assist in searching for positions. You may use in this field the unique identification number assigned by the Human Resource manager to each job description in the organization.

4. Title of Position – This is a mandatory field and requires the title of the permanent staff position to be entered. The position title is the key to the position record, and is essential, especially if no position code has been entered. The position title will be displayed in a list along with other position titles in the ‘Staff Allocation’ sections of the eIMS. Therefore, the position title should be as meaningful and representative of the post’s function, as possible.
5. Select The Unit This Position Allocated To – If the designated unit for the position is known, the unit should be selected from the dropdown list.

Figure 5-109 Staff Form - Completed

6. Start Date (dd/mm/yyyy) – This is a mandatory field and the start date of the permanent position should be entered here. Note that this is not an employment date for a specific employee, but the date that the position was first created.

7. End Date (dd/mm/yyyy) – If the ongoing tick box has been activated, the ‘End Date’ will be deactivated. If the ongoing tick box is not activated, then an end date must be entered. This is not a particular employee’s employment termination date, but the date that the position was eliminated from the organization.

8. Ongoing (tick box) – This tick box requires activation if the permanent staff position has no end date.

9. Days Per Week – The user is required to complete this field and indicate the number of days per week that the post will be working for the organization. Please Note – Days Per Week is for calculating the total staff per unit and is not considered while calculating human resource costs of the project.

10. Current Holder – The current employee assigned to the the position can be selected from the dropdown list of eIMS system users. The list displays all the name of the staff members that have not been assigned to a position. It is not essential that a person is assigned to a position especially if this position is planned to start sometime in the future. There is also text box located beneath this dropdown list that will allow the the names of employees who are not eIMS system users to be manually entered.

11. Notes – Notes field is a free text field where comments, explanations, observation, remarks and other details can be recorded.
5.13.2 Staff Costs

'Staff Costs' relating to the positions referred to in the above section should be entered in this section of 'Human Resources'.

5.13.2.1 Definition of Staff Costs

Staff Cost – the personnel cost of each employee post. This may represent only salaries, or both salaries and benefits, depending on the budgeting and accounting practices of the organization.

5.13.2.2 Adding Staff Costs to a Staff Member

1. ‘Staff Costs’ index page is displayed when the user activates the menu item second from the left. This index page presents the ‘Staff Cost’ information in a table format listing unit, title of position, currency ID, amount, amount in USD and payment basis from left to right.

2. Title of Position – This is a mandatory field, it relates to the cost information to be entered for a particular position. The user is required to select the title of the position from the dropdown list provided; only positions without costs allocated to them are displayed in this list.

3. Amount – Although this is not a mandatory field it is required by the staff allocation system in order to calculate expenses for staff cost on a per project basis. If your entity is using extended eIMS management features like staff allocation, you will have to state an amount. There are three parts to the information regarding amount, the first is the selection of currency from the dropdown list on the left. The second or middle field requires the cost of the staff position to be entered and finally the third field to the far right identifies the payment basis from a dropdown list. The ‘Amount’ in local currency will be multiplied by the selected payment basis to determine the annual compensation. The following factors are used if the unit of measure is: annual (1x), quarterly (4x), monthly (12x) or semi-monthly(24x).
4. **Amount in USD** – This field does not require any data entry. The eIMS will automatically calculate the US Dollar equivalent of the local currency amount entered based on the default exchange rate indicated in the ‘Time Line Status’ section.

5. **Notes** – Notes field is a free text field where comments, explanations, observation, remarks and other details can be recorded.

Figure 5-111 Staff Cost Form - Completed

Delete - It is possible to delete the cost entry of a particular position in a specific transaction year if the position has not been allocated within that year.

### 5.13.3 Prof Svc/Temp

#### 5.13.3.1 Definition of Prof Svc/Temp

Prof Svc/Temp – all individuals contracted for a specified time period to provide a specific set of services or complete a number of tasks. These positions may include consultants, contracted medical/clinical staff working on a sessional basis, and other professionals working under contract.

#### 5.13.3.2 Adding Prof Svc/Temp to Human Resources

1. **Prof Svc/Temp** – Click on the top menu item, third from the left, entitled ‘Prof Svc/Temp’. A table appears, listing all ‘Prof Svc/Temp’ positions for all units. The table from left to right includes details regarding the unit, title of position, start date, end date and current holder. Current holder refers to the person who is in the position.

Figure 5-112 Prof Svc/Temp Table

2. **Jump Menu** – To the right of the table there is a menu listing the names of the units within the entity. This menu is referred to as a jump menu, and is used
when there are numerous positions, extending beyond the length of a single page. The jump menu can be used to locate a particular unit and their group of ‘Prof Svc/Temp’ members. Once a unit name is selected the eIMS will will jump to the first post listing in the unit.

**Entry fields for the Add New Prof Svc/ Temp data entry form are explained below -**

**Figure 5-113 Prof Svc/Temp Form**

![Figure 5-113 Prof Svc/Temp Form](image)

3. **Position Code (optional)** – Enter a code/ID for the position, this coding maybe specific to the entity and assist in searching for positions. It is not essential to have codes or IDs, therefore it is acceptable for this field to be left blank.

4. **Title of Position** – This is a mandatory field and requires the title of the ‘Prof Svc/Temp’ position to be entered. The position title is the key to the position record, and is essential especial when no position code has been entered. The position title is displayed in ‘Staff Allocation’, ‘Data Entry’ and in the project ‘Staff Allocation’, section ; consequently, a meaningful and representative title is crucial.

5. **Select The Unit This Position Allocated To** – If the designated unit for the position is known, then it is should be selected from the dropdown list.

6. **Start Date (dd/mm/yyyy)** – This is a mandatory field and indicates the date that the ‘Prof Svc/Temp’ position was first established by the organization. It is not an employment date.

7. **End Date (dd/mm/yyyy)** – If the ongoing tick box has been activated, the End Date will be deactivated. If the ongoing tick box is not activated and end date must be entered. This is the date of position elimination, not a specific employee’s termination date.

8. **Ongoing (tick box)** – This tickbox should be activated if the ‘Prof Svc/Temp’ staff position has no end date.
9. Current Holder – The current holder of the position can be selected from the dropdown list, which lists all staff in a particular unit that have not been assigned to a position. It is not essential that a person be assigned to a position especially if this position is planned to start sometime in the future. There is a text box located beneath this dropdown list that allows entry of individuals that do not have permission to the IMS.

10. Notes – Notes field is a free text field where comments, explanations, observation, remarks and other details can be recorded.

5.13.4 Prof Svc/Temp Costs

‘Prof Svc/Temp Costs’ relating to the positions entered in the above section should be entered in this section of ‘Human Resources’.

5.13.4.1 Definition of Prof Svc/Temp Costs

Prof Svc/Temp Cost – the professional fees paid to consultants, sessional fees paid to medical and clinic personnel on a session basis, or other fees to individuals contracted to provide professional or temporary services on a monthly, weekly or daily basis.

5.13.4.2 Adding Prof Svc/Temp Costs to a Prof Svc/Temp

1. ‘Prof Svc/Temp Costs’ can be added by clicking on the menu item that is fourth from the left. The ‘Prof Svc/Temp Cost’ index page is displayed and presents the ‘Prof Svc/Temp Cost’ information in a table format listing unit, title of position, currency ID, amount, amount in USD and payment basis from left to right.

2. Title of Position – This is a mandatory field, it relates to the cost information to be entered for a particular position. The user is required to select the title of the position from the dropdown list provided, all positions that have no costs allocated to them are displayed within this list.

3. Amount – Although this is a mandatory field it is required by the staff allocation system in order to calculate expense costs for temps and consultants on a per
project basis. If your entity is using extended eIMS management features like staff allocation, you will have to state an amount. There are three parts to the information regarding amount. The first part selects the currency of the payment from the dropdown list on the left. The middle field identifies the local currency cost of the Prof Svc/Temp position, and finally the right field determines the frequency or payment basis. Note that the Amount is expressed in term of a one hour, one day or one week. In the ‘Staff Allocation’ section, the user will indicate how many hours, days or weeks the individual will work over 12 months in order for the system to calculate the annualized cost.

4. Amount in USD – This field does not require any data entry. The eIMS will automatically calculate the US Dollar equivalent of the local currency amount entered based on the default exchange rate indicated in the ‘Time Line Status’ section. This US dollar amount is relative to the payment basis selected.

5. Notes – Notes field is a free text field where comments, explanations, observation, remarks and other details can be recorded.

Figure 5-115 Prof Svc/Temp Cost Form

Delete – It is possible to delete the cost entry of a particular position in a specific transaction year if the position has not been allocated within that year.

Volunteers – Under Construction.
5.14 Accreditation

5.14.1 Aspects of Accreditation

5.14.1.1 Definition of Accreditation

Accreditation is the procedure by which an association is assessed to be in compliance or lacking compliance with IPPF membership standards. Accreditation reviews are carried out by a number of separate bodies IPPFs membership committee, regional council and the association under review itself.

This section of the IMS is fundamental in guidance through the phases of the accreditation process.

5.14.1.2 Permissions to Accreditation

Access to the accreditation menu options depends on user permissions. There are two levels of access, one ‘Accreditation-Self-Assessment’, those responsible for carrying out the self-assessment for the association will have access to this group which grants permission to the ‘FPA Self-Assessment (F1)’ and ‘Member’s Guide’ menu options. The group ‘Accreditation’ provides access to all upper menu options ‘Review Team Assess.’, ‘RO Assessment (F2)’ and ‘Regional Overview’ as well as those granted by the ‘Accreditation-Self-Assessment’ group. Provides access to review team assessment and regional office assessment forms and information and is limited to those within the assessment team and regional office personnel. (Arabic)

5.14.1.3 Adding Accreditation Details

The ‘Accreditation’ sub menu option is located between ‘Human Resources’ and ‘Time Line Status’ under the ‘Data Entry’ main menu option. Upon activation of ‘Accreditation’ upper menu options appear (directly dependent on the users access).

Figure 5-116 Accreditation Upper Menu

| Self Assessment (F1) | Review Team Assess. | Regional Direct Assess. (F2) | Regional Overview (F3) | Member’s Guide |

In most circumstances access to accreditation will be limited to the ‘Accreditation-Self-Assessment’ group, in this case ‘Self-Assessment (F1)’ and ‘Member’s Guide’ will be the only menu options that appear.

Even though the upper menu options follow the sequence Self-Assessment, Review Team Assess, Regional Direct. Assess, Regional Overview and Member’s Guide. It is best if Member’s Guide is explained first as this is essential reference information.

5.14.2 Member’s Guide

5.14.2.1 Functionality of the Member’s Guide

1. The Member’s Guide menu option is located on the right of the upper menu bar. Upon selection of this option an introductory page is displayed with information pertaining to using the guide.
2. The Member’s Guide is designed to assist IPPF members prepare themselves for an accreditation review. This includes assessing themselves prior to formal accreditation review.

### 5.14.2.2 Using the Member’s Guide

1. Start Using Members Guide – This is a button located at the top of the introductory page and when activated displays the first page of the member’s guide.

2. The layout of this page is consistent across the Member’s Guide with the Standard itself and Issues to Consider being the only changing features. Please refer to the numbers on fig 5-118
   1. Category of the standard
   2. IPPF Membership Number and Standard
   3. Issues to Consider – Tips for the association, ie what is required to meet the IPPF Membership Standards.
   4. Dropdown list of all categories of IPPF Membership Standards enabling the user to jump between categories.
5 – Single arrows on with side of the category selector can be used to jump to the next or previous standards one by one.
6 – Double arrows can be used to jump to the first or last standard.

5.14.3 FPA Self-Assessment (F1)

5.14.3.1 Functionality of FPA Self-Assessment

FPA self-assessment is completed by the FPA under accreditation review. Self-Assessment enables the FPA to identify any areas of non-compliance, provides time to plan and take corrective action prior to the official review and to establish reasons why any non-compliance with membership standards may exist.

5.14.3.2 Adding and Viewing FPA Self-Assessment Details

1. FPA Self-Assessment (F1) is located on the left of the upper menu bar. Upon activation of this option a new page including 5 buttons is displayed.

2. Activation of these buttons depends on the progress of the specific FPAs Self-Assessment.
   a) FPA self-assessment not opened – Only button active is ‘Add New Self-Assessment (Format 1)’.
   b) New Self-Assessment has been added – All buttons active except for ‘Add New Self-Assessment (F1)’ and ‘Print Certificate’.
   c) Self-Assessment Closed – ‘Print Certificate’ and ‘Print Format 1’ are the only active buttons.

3. Adding a New Self-Assessment results in the presentation of a new page with ‘Instructions for completing the FPA Assessment: Format 1’.

Figure 5-119 FPA Self-Assessment Control Buttons

![FPA Self-Assessment Control Buttons](image)

Figure 5-120 FPA Self-Assessment Instructions

![Instructions for completing the FPA Assessment: Format 1](image)
4. ‘Start Working with Format 1’ button produces the first page of the FPAs self-assessment, this is where the FPA must enter evidence of compliance or non-compliance with the FPA membership standards. There are two main sections to this form, the first section is very similar to the Member’s Guide, and the second part requires the FPA to provide details regarding their compliance with each standard.

Figure 5-121 Standards and Navigation

Provides the standard category and standard without the considerations as in the Member’s Guide and the ability to jump between standards and categories by utilising the dropdown list and arrows.

Figure 5-122 Self-Assessment Details

Enables the user to enter evidence to support compliance or non-compliance with the specific standard, assessment date and target date (for ease of selecting and entering a date click on the calendar icon located near these fields), if the FPA is undertaking actions to rectify non-compliance and finally the question whether the FPA itself believes it is complying with the standard.
Please Note – Please be aware if the user is operating under US English configuration, the date format of the calendar will display MM/DD/YYYY, however on the screen the instructions present the date format to be DD/MM/YYYY.

5. One of these forms needs to be completed and submitted for every IPPF membership standard. Once this is done and the FPA is sure no further editing (‘Edit Format 1’) is required the user can close the self-assessment by activating ‘Close Format 1’. It is vital the FPA carefully considers the contents of Format 1 prior to closing as it is not possible to reopen Format 1. ‘Edit Format 1’ and ‘Close Format 1’ are buttons which appear on the first page once the upper menu option ‘FPA Self-Assessment(F1)’ is selected.

**Important Closing Aspects**

a) A new format cannot be opened until the previous one is closed, the order of accreditation is FPA Self-Assessment, Review Team Assessment, RO Assessment and Regional Overview.

b) Once closed format 1 cannot be reedited or open, a new self-assessment can be added 5 years after the previous has been opened when another accreditation cycle begins.

c) Upon selection of the close button IMS performs a validation check and displays necessary results to ensure the FPA is not closing Format 1 prior to completion. The validation check cannot validate information that has been entered only the FPA can do this, but it will confirm –

1. Text has been entered in at least one of the evidence/comment fields for every standard.

2. A date of assessment is specified for every standard.

3. If the association deems it is not in compliance a date has been entered when it believes compliance will be reached.

This allows the association to add missing information identified by the validation check and while it does not guarantee the Self-Assessment is finalised and complete it greatly assists with the achievement of this.

6. ‘Print Format 1’ and ‘Print Certificate’ are the only options available to the organisation once ‘FPA Self-Assessment’ has been closed. ‘Print Format 1’ produces a report of all standards and evidence entered by the FPA for each, this can be viewed and printed prior to closing the FPA self-assessment as well as after. ‘Print Certificate’ creates a certificate that must be printed and sent to RO once the FPA self-assessment has been closed. This certificate is called a validation certificate and confirms format 1 has been completed to the satisfaction of the Association’s Executive Director.

5.14.4 Review Team Assessment

5.14.4.1 Functionality of Review Team Assessment

The Review Team Assessment is conducted by an independent group of assessors with the objective of ensuring the FPA under review adheres to all membership standards. Review Team Members collect documentation from the associations, which provide evidence that standards are being met and where this is not enough interviewing staff and volunteers and other record checks are carried out. The Review Team Assessment predominantly together with Format 1 provide the Regional Office with the assessment details required to make an informed decisions
regarding the association’s compliance. Therefore it is essential the evidence recorded here be as complete and factual as possible.

5.14.4.2 Adding and Viewing Review Team Assessment Details

1. The Review Team Assessment menu option is located to the right of FPA Self-Assessment (F1) and when activated displays a new page including 4 buttons. The Review Team Assessment option will only appear for users who have access to the ‘Accreditation’ group, if not, only two menu options will appear ‘FPA Self-Assessment’ and ‘Member’s Guide’. Refer to figure 5-119.

Figure 5-123 Review Team Assessment Control Buttons

![Review Team Assessment Control Buttons](image)

2. Similar to FPA Self-Assessment, availability of these buttons depends on the progress of the specific FPAs Review Team Assessment.
   a) Review Team Assessment not opened – Only button active is ‘Add New Review Team Assess.’.
   b) New Review Team Assess. has been added – All buttons active except for ‘Add New Review Team Assess.’.
   c) Self-Assessment Closed – ‘Print Certificate’ and ‘Print Format 1’ are the only active buttons. Email sent to Mark about this

3. Upon activation of the ‘Add New Review Team Assess.’ Button a new page is displayed listing instructions for completing the review team assessment. A new Review Team Assessment can only be added once the FPA Self-Assessment is closed.

Figure 5-124 Review Team Assessment Instructions

![Review Team Assessment Instructions](image)

4. To begin working within the Review Team Assessment the user is required to activate the ‘Start Working With Review Team Assessment’ button located at the top of this screen. There are two main sections to this form, the first part identical to the first section in the FPA Self-Assessment providing the standard
and category and the ability to jump between standards and categories utilising the dropdown list and arrows.

Figure 5-125 Standards and Navigation

The next section guides the Review Team through various issues and checks enabling members to assess whether the FPA is in compliance with IPPF standards. This part of Review Team Assessment is divided into three segments, Practical Issues, Checklist and General Assessment.

Figure 5-126 Review Team Assessment Details

Practical Issues identifies potential problems the review team may experience in substantiating the association's compliance with membership standards. Offers advice to members regarding the method of assessment used for each specific standard. The checklist includes a set of suggested checks that should be made by the review team to prove compliance with each standard. In most instances this can be achieved by reviewing the associations documentation. ‘Not Applicable’ should be selected in the case the check is deemed inapplicable, this option is available in the dropdown list adjacent to the checklist item.

Finally a general assessment, the assessor has to decide based on the evidence collected whether the association fulfils the requirements of the standard.

The user is required to enter the date of assessment for each standard, once again please be aware of operating system settings US English will have the date format displaying MM/DD/YYYY even though the screen instructions present DD/MM/YYYY.

5. The review team is required to evaluate the association compliance with every membership standard. Once this has been completed and the Review Team is sure no further editing is required they can close the ‘Review Team Assessment’ by selecting ‘Close Review Team Assessment’ button located on the first page displayed after selecting the ‘Review Team Assessment’ upper menu option.
**Important Closing Aspects**

a) A new format cannot be opened until the previous one is closed, the order of accreditation is FPA Self-Assessment, Review Team Assessment, RO Assessment and Regional Overview.

b) Once closed the review team assessment cannot be reedited or open, a new review team assessment will be opened approx 5 years later, once the next accreditation cycle has begun.

c) Upon selection of the close button IMS performs a validation check and displays necessary results to ensure the Review Team is not closing the Review Team Assessment prior to completion. The validation check cannot validate information that has been entered only the FPA can do this, but it will confirm. The information required in this section does not allow for comprehensive validation checks unlike FPA Self-Assessment, however the IMS can check –

1. The date of assessment has been entered.

This allows the review team to add missing information identified by the validation check and while it does not guarantee the Review Team Assessment is finalised and complete it greatly assists with the achievement of this.

6. Once the Review Team Assessment has been closed the only option available to the Review Team is ‘Print Review Team Assessment’. This creates a report listing practical issues, checklist and general assessment results for each standard based on the associations performance.

**5.14.5 RO Assessment (Format 2)**

**5.14.5.1 Functionality of RO Assessment (Format 2)**

The Regional Office Assessment provides the Regional Office’s judgment of the associations adherence to membership standards. The regional office draws on a number of documentary sources to provide evidence of the association’s compliance or lack of before making their assessment decision concerning each standard. The main sources are FPA Self-Assessment, any documents held by RO but mainly the Accreditation Review Team report (hence the emphasis placed on entering complete and factual information in Review Team Assessment).

**5.14.5.2 Adding and Viewing Regional Office Assessment Details**

1. The ‘RO Assessment (F2)’ upper menu option is located between ‘Review Team Assessment’ and ‘Regional Overview (F3)’. When activated as with the FPA Self Assessment and Review Team Assessment a new page is displayed with this time 5 navigation buttons.

Figure 5-127 RO Assessment Control Buttons
2. Similar to ‘FPA Self-Assessment’ and ‘Review Team Assessment’, availability of these buttons depends on the progress of the specific FPAs RO Assessment (Format 2).
   a) Review Team Assessment not opened - Only button active is 'Add New Review Team Assess.'.
   b) New Review Team Assess. has been added - All buttons active except for 'Add New Review Team Assess.'.
   c) Self-Assessment Closed - 'Print Certificate' and 'Print Format 1' are the only active buttons.

3. A new page displaying instructions for the 'RO Assessment (Format 2)' is displayed when either the 'Add New Format 2' or 'Edit Format' button is selected. The RO Assessment (Format 2) can only be added once the 'Review Team Assessment' for the specific accreditation cycle has been closed.

Figure 5-128 RO Assessment Instructions

4. The user is required to activate the ‘Start Working with Format 2’ button, this presents the interface the RO is required to utilise while completing their assessment of the association. There are two main sections to this form, the first of these identical to the first part in the two previous assessments, displays the standard and category and provides the ability to jump between standards and categories utilising the dropdown list and arrows.

Figure 5-129 Standards and Navigation

The second and final part of this form requires the regional office to enter their assessment, based on FPA Self-Assessment, RTA and other documentary evidence of the FPA’s compliance with each IPPF membership standard. In the situation where the FPA has failed to adhere to a standard and the RO believes there is convincing and acceptable reasons why they cannot comply and
therefore accreditation should not be withheld, those reasons should be stated in the comments box on the left. Where the Regional Office has deemed the FPA to be lacking in compliance but believes compliance can be achieved then a comment should be made relating to this together with a list of required actions by the FPA and entered in the comments box on the right. A target date only needs to be entered if compliance is estimated for the future, please remember the operating system settings and their effect on the date format (MM/DD/YYYY) for US even though instructions are DD/MM/YYYY.

Figure 5-130 RO Assessment Details

5. The RO is required to go through each membership standard and assess the FPAs adherence to each according to documentary evidence gathered and include all particulars within the RO Assessment. When the Accreditation Team Coordinator (responsible for the preparation of the RO assessment) believes the assessment is complete the document is passed over to the Regional Director for final approval prior to closing. Once the Regional Director has reviewed and finalised format 2 and the RO is certain no further changes are required the user can close the RO Assessment by selecting the ‘Close Format 2’ button located on first page displayed after the upper menu option ‘RO Assessment (Format 2)’ is activated. The Accreditation Team Coordinator and Regional Director approve the RO Assessment by signing a copy of ‘Print Format 2’ in the ‘Prepared By’ and ‘Reviewed By’ fields on the last page.

**Important Closing Aspects**

a) A new format cannot be opened until the previous one is closed, the order of accreditation is FPA Self-Assessment, Review Team Assessment, RO Assessment and Regional Overview.

b) Once closed format 2 cannot be reedited or open, a RO Assessment can be added approximately 5 years after the previous ‘FPA Self-Assessment’ has been opened when another accreditation cycle begins.

c) Upon selection of the close button IMS performs a validation check and displays necessary results to ensure the Regional Office is not closing Format 2 prior to completion. The validation check cannot validate information that has been entered only the Regional Office can do this, but it will confirm -

1. Text has been entered in at least one of the evidence/comment fields for every standard where the RO has entered a judgement of non-compliance.

2. A target date is specified where comments on actions currently being undertaken or required have been entered.
This allows the Regional Office to add missing information identified by the validation check and while it does not guarantee the Assessment is finalised and complete it greatly assists with the achievement of this.

6. ‘Print Format 2’ and ‘Print Certificate’ are the only options available to the RO once they have decided to close the Assessment. ‘Print Format 2’ produces a report of the standards and assessment information entered by the RO and as mentioned previously is required to be signed by the Accreditation Team Coordinator and Regional Director. ‘Print Certificate’ creates a certificate that must be signed by the Regional Director and sent to the CO Policy and Governance Unit. This F2 certificate confirms that Format 2 has been completed to the satisfaction of the Regional Director and contains an important summary table in which the details of decisions made by the RD relating to accrediting an FPA that has not met all the standards are presented.
This page has intentionally been left blank.
5.15 Entity Details

‘Entity Details’ records information about the organization and its characteristics; for example it includes contact details, organizational areas of responsibility, and the role in the country. ‘Entity Details’ is located under the ‘Data Entry’ menu on the left and is between ‘Time Line Status’ and ‘Ledger’ submenus.

When ‘Entity Details’ is selected from the ‘Data Entry’ submenu, a top menu appears, which is specific to this main menu option and incorporates the following:
‘Contact Details’ - the physical location and means of communication with the entity,
‘Membership’ - an organization’s membership status in the IPPF,
‘Units’ - the entity’s departments or divisions,
‘Role’ - the organization’s niche and function in the country,
‘Branches’ - the administrative or supervisory units overseeing programs
‘Funds’ – fund balances or equity of the organization, and
‘Chart of Accounts’ – relationship of the entity’s account codes and nomenclature to the eIMS accounts.

5.15.1 Contact Details

5.15.1.1 Definition of Contact Details

Entity details including location, contact details and representatives are registered and stored within this submenu.

Note: Please make sure your entity details are up to date and the user name of the IMS administrator is correct. Contact details, addresses and entity related info will automatically be linked to the country profiles of the IPPF website (www.ippf.org). The selected eIMS administrator will be receiving new eIMS applications and will have to decide access rights of newly signed up users.

5.15.1.2 Adding and Amending Contact Details

1. The user is required to select ‘Data Entry’ from the main menu and ‘Entity Details’ submenu option, and then ‘Contact Details’ from the top menu.

2. A new page will appear that displays information specific to the entity (if entered already)(the entity that was selected via the log in screen or Select Entity menu option).

3. There are six sections of information required -

5.15.1.3 Components of Contact Details

Figure 5-132 Contact Details - Main
Main
1. Entity/FPA Full Name – Enter the complete, legal name of the entity.
2. Region – Select the region where the entity resides from the dropdown list provided.
3. Abbreviation – Enter the initials used to represent the Entity/FPA’s name or its official acronym in the country.
4. Entity Working Language – Enter the language to be used in communications with the entity and utilized in the organization’s publications and official correspondence.
5. Include on World List/Web Site - If this entity should appear on the IPPF world list and web site the tick box should be activated.

Physical Address
1. Street Address Line 1 – Enter the street number and name of the entity’s headquarters.
2. Street Address Line 2 – Enter the name of the suburb where the entity’s headquarters is located.
3. City/Town – Enter the name of the city or town where the entity is situated.
4. Post Code – Enter the post code of the area where the entity resides.
5. Reverse Post Code – If the post code is required to be printed before the city or town, then this tick box should be activated.
6. Country – Enter the name of the country where the entity is located.

Postal Address
1. Street Address Line 1 – Enter the street number and name of the entity’s official postal address.
2. Street Address Line 2 – Enter additional required postal address information, such as suite number, floor number and/or name of the suburb.
3. City/Town – Enter the name of the city or town of the entity’s postal address.
4. Post Code – Enter the post code for the entity’s postal address.
5. Reverse Post Code – If the post code is required to be printed before the city or town, then this tick box should be activated.
6. Country – Enter the name of the country of the entity’s postal address.
Figure 5-133 Contact Details - Physical & Postal Address

<table>
<thead>
<tr>
<th>Physical Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Street Address Line 1</td>
</tr>
<tr>
<td>City/Town</td>
</tr>
</tbody>
</table>

Note: Reverse Zip puts the Zip / PostCode before City / Town.

<table>
<thead>
<tr>
<th>Postal Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Line 1</td>
</tr>
<tr>
<td>City/Town</td>
</tr>
</tbody>
</table>

Communications (International Code Number)

1. Telephone 1 – Enter the entity’s main telephone number, this will be the number the entity wishes to be contacted on.
2. Telephone 2 – Enter an alternative number that can be used to contact the entity.
3. Telephone 3 – If there is another phone number for the entity, enter it in this field.
4. Fax – Enter the main fax number for the entity.
5. Telex – Enter the telex number for the entity. This is optional and may not be applicable in some countries.
6. Cable – Enter the cable number for the entity. This is optional and may not be applicable in some countries.
7. Email Address – Enter the complete email address for the entity.
8. Administrator User ID – Select the name of the eIMS Administrator from the drop down list. The selected name will be receiving new eIMS applications and will have to decide access rights of newly signed up users.
9. Web URL – Enter the organization’s web site address or URL (if the entity has one).
10. Closest International Airport – Enter the name and address of the entity’s closest international airport.
11. Distance – Enter the distance from the entity’s headquarters to the international airport, this is an alphanumeric field km and miles can therefore be entered.
**Executive Director**

1. Job Title – Enter the job title for the post of Executive Director (e.g. Chief Executive Officer, Director Ejecutivo, Regional Director, etc.).
2. Personal Title – Enter the personal title of the Executive Director (e.g. Mr., Mrs., Dr., Lic., etc.).
3. First Name – Enter the first name of the Executive Director.
4. Middle Name – Enter the middle name (if he/she has a middle name) of the Executive Director.
5. Last Name – Enter the last name of the Executive Director.
6. Suffix – Enter the suffix for the Executive Director. (e.g. Jr., Sr.)
7. Direct Phone – Enter the Executive Director’s phone number, including country code and city area code.
8. Mobile Phone – Enter the Executive Director’s mobile number, including country code and city area code.
9. Fax – Enter the Executive Director’s fax number, including country code and city area code.

**President/Chairperson**

1. Job Title – Enter the job title of the President/Chairperson.
2. Personal Title – Enter the personal title of the President/Chairperson.
3. First Name – Enter the first name of the President/Chairperson.
4. Middle Name – Enter the middle name (if he/she has a middle name) of the President/Chairperson.
5. Last Name – Enter the last name of the President/Chairperson.
6. Suffix – Enter the suffix of the President/Chairperson.

Please Note - ‘Contact Details’ can be amended via the ‘Contact Details’ upper menu option and when changes are complete this form should be submitted.

5.15.2 Membership

5.15.2.1 What is Membership?

Membership refers to the entity’s status and membership within IPPF. The information displayed relates to the entity that has been selected and its associated IPPF details.

5.15.2.2 Adding and Amending Membership Details

Membership menu item is located in the top menu bar between ‘Contact Details’ and ‘Units’.

When this menu item is activated the Entity/FPA Full Name is displayed in the title bar located at the top of the screen.

Figure 5-136 Membership Form

1. Foundation Year – The year the Entity or FPA established operations should be entered within this field.

2. Member Status – The user is required to select the membership status of the Entity or FPA from the dropdown list provided.
   - Full – an autonomous, private voluntary organization meeting all accreditation standards and officially recognized as a national family planning affiliate of IPPF with voting rights at regional governing bodies of the Federation.
   - Associate – an autonomous, private voluntary organization which participates in IPPF regional activities, and meets requirements for associate status without membership voting privileges.
   - CFPA – Caribbean Family Planning Affiliation – sub regional “umbrella” organization with full membership in the Federation and representing the smaller island affiliations in the Caribbean.
- Non Member, but Active – Not a member of the IPPF, but participates in IPPF regional activities and is active in family planning and sexual and reproductive health within their country.

A non-member where IPPF is active is an organisation which we give money/technical assistance to but has not yet joined the Federation. Once IPPF considers that the constitution of such an organization is consistent with IPPF standards they may join as an Associate Member. After several years as an associate member they can apply to be a Full Member of IPPF. The main difference between an associate and full is that the former can send only one rep to Regional Councils (rather than two) and members of an associate member cannot be elected to Regional Executives Offices or Governing Council.

3. Affiliated to IPPF Since (year) – Enter the year that the Entity/FPA first became associated with the IPPF prior to full accreditation.

4. Full Member Year – Enter the year the Entity/FPA became 100% fully accredited as a voting member in the IPPF.

5. Notes – Enter any notes regarding the Entity/FPA, transition into the IPPF or any information that may be of use in the future.

Please Note - ‘Membership’ details can be amended via the ‘Membership’ upper menu option and when changes are complete this form should be submitted.

5.15.3 Administrators

This section enables entities to define administrators for each of the systems eIMS, Medical Info, Material Management and Travel Database.

The user should activate submit, once an administrator has been selected for all or some of the systems.

Administrators can be changed by selecting a different person and submitting this new information.

5.15.4 Units

5.15.4.1 What are Units?

‘Units’ are departments or areas of responsibility within organizations. The IMS requires each unit to be defined following the format described in the form below.
### 5.15.4.2 Adding and Amending Unit Details

‘Units’ is located within the top menu between ‘Membership’ and ‘Role’.

When the user activates this menu item a new page is displayed, which contains a table of units that have previously been added to the ‘Entity Details’. The details of the units from left to right are Unit ID, Unit Short Name, Unit Long Name, Unit Administrator, Unit Head and Unit Above This Unit.

---

Once the Add New button has been activated a new input screen appears, and the following information must be entered.

---

1. **Unit ID** – The user is required to enter the Unit ID, it must be unique for each organisational unit. Number should be used for this ID rather than letters or other mnemonic naming conventions. Use of numeric IDs will allow one to change to the name of the unit without affecting its order or definition in the list of units. Units are displayed on the screen or printed on the reports in sequential order according to the assigned Unit ID. If it is necessary that the Board of Directors or the Office of the Executive Director appear first in a financial report, they should be assigned the lowest Unit ID number. It is convenient to set
intervals between the Unit IDs, so that at a later date new Unit IDs can be added “in-between” previously defined organizational units.

If your entity units are subdivided into departments you can code accordingly by setting up departmental head units on the basis of hundreds and units of that department starting with the same first digit (e.g. 100 ‘Director General’s Office’ and 110 ‘Human Resources’) reports will group units then accordingly.

2. Unit Short Name – Enter a short name for the unit, this should be representative of the long name.

3. Unit Long Name – Enter the complete name of the unit, it is logical to have the long and short names similar to each other.

4. Unit Administrator – Select the eIMS unit administrator from the dropdown list, the names listed in the dropdown list will be those people who have been delegated responsibility for eIMS supported in the entity.

5. Unit Head – Select the name of the person in charge of the unit from the dropdown list provided. Only eIMS users who have been assigned to the entity by the eIMS administrator will appear in the dropdown list.

6. Unit Above This Unit – If there is an organizational unit above this unit, select the name of the unit from the dropdown list. Generally this is the department or section to which the Unit reports. The units displayed in the dropdown list will be those that have already been added to the entity.

Please note – Once a project has been assigned to a unit, it cannot be deleted. The deletion process is managed by the eIMS administrator of the entity. All projects associated with a Unit would need to be reassigned to another Unit or deleted from the system, before deletion of an Unit is possible. Because of the long term relationship between Units and Projects, Unit definitions should be carefully planned.

5.15.5 Role

This part of the entity definition allows details of the entity to be placed on the IPPF web site.

Adding or Amending Role
The menu item for entering ‘Role’ details is located in the top menu bar, between ‘Units’ and ‘Branches’.

When this menu item is activated an entry screen appears, the title of this page is ‘FPA Projects – For Web Pages’. The required description for the entity should be inserted in the free text entry field.

Please Note - ‘Role’ details can be amended via the ‘Role’ upper menu option and when changes are complete this form should be submitted.

5.15.6 Delivery Points

Points of delivery for each entity can be defined in this section of ‘Entity Details’.
**Adding Delivery Point**

1. Select ‘Delivery Points’ option from the upper menu. If delivery points have previously been entered they will appear within a table. To add a new ‘Delivery Point’ the user is required to select the ‘Add New’ button.

![Figure 5-140 Delivery Point Form](image1)

1. Upon activation of the ‘Add New’ button a new dialogue page is displayed. All details regarding the new delivery point are required to be entered within these fields. A brief description follows -

   - **Unit/Branch** – The unit or branch the delivery point is to be assigned to.
   - **Point of Delivery** – Name of delivery point.
   - **Opening Year** – Year the delivery point opened.
   - **Closing Year** – Year the delivery point closed, if it has closed.
   - **Distribution Channel** – Type of distribution in operation from the delivery point.
   - **Location** – Type of setting urban, rural, peri-urban.
   - **Owner** – Category of owner Institutional-FPA, Government, Private Physician, Commercial or Other NGO Agency.
   - **Youth Facility** – This tick box should be activated if the Point of Delivery is conducting youth services. All services provided by this youth facility Point of Delivery will be required to provide an additional statistic ‘Male Services’. This will appear when entering information about the service under Statistics/Services and selected delivery point (refer to 5.11.1).

![Figure 5-141 Adding New Delivery Point](image2)

**5.15.7 Services**

This option facilitates definition of services offered by an entity. Further definition of the selected services can be entered under Data Entry/Statistics/Services.

There are three areas within the IMS where services appear and each area has its own requirements regarding service details.
Menu Selection | Service Details Required
--- | ---
Data Entry/Entity Details/Service | Definition of services made in this section is entity based only, selection of services to be provided, start date, end date and reporting frequency should be carried out by an IMS controller.

Data Entry/Statistics/Services | Statistics regarding each of the services offered by the entity is recorded under this menu option. Entity personnel working in outlets or delivery points need to track items and enter data for each reporting period as selected within Data Entry/Entity Details/Services.

Administration/Services | Provides a list of all services provided by IPPF, requires translation of service description, selection of required details, grouping, report type and CYP (Couples-years of protection) factor for each service. These details should be entered by an administrator and when amended these will change for all entities.

1. Upon activation of the ‘Services’ upper menu option an index table appears listing all possible services.

![Figure 5-142 Select Services provided by an Entity](image)

2. The user is required to select the services that the entity will be offering to the community by clicking the tick box ‘Select’.

3. Sort Order – Provides a means of classification for services. The user is required to select one of the major service categories for each service.

4. Start Date – The date the service is due to begin operation from the outlet or delivery point.

5. End Date – The date the service is to cease operation from the outlet or delivery point.

Please Note – If the Start Date is brought forward from 1999 to 2001 or/and the End Date is taken back from 2003 to 2002, please remember any information that has been entered within Data Entry/Statistics/Services in the years that have been removed from service provision will no longer be available. For example service information in 1999, 2000 or 2003 will be inaccessible.
6. Ongoing – If once implemented the service is to remain in operation, this tick box should be checked.

7. Period – This field relates directly to Data Entry/Statistics/Services, as the period selected will determine the frequency of service reporting within Statistics (i.e. monthly will result in 12 reports required for each service, annual one report per year, quarterly 4 and semi-annual 2).

8. Once submitted these services will appear in Data Entry/Statistics/Services and will define the services offered by the entity. Service amendments can be made by accessing this menu option (Data Entry/Entity Details/Services), changing service information and resubmitting these details. If services are added or removed or periods changed in this process, they will be reflected in Data Entry/Statistics/Services.

Please Note – If the service is marked as default in Administration/Services/Services Details it cannot be deselected in Data Entry/Entity Details/Services. If however, it is not marked as default the service can be deselected and new services (not marked as default) selected.

5.15.8 Chart of Accounts

This menu option allows the user to map the entity's chart of accounts to the IMS chart of accounts.

Figure 5-143 Mapping to Local Chart of Accounts

1. To do this the user is required to select the upper menu option ‘Chart of Accounts’ and then select the IMS account code that the local account(s) is to be mapped to.

Figure 5-144 Chart of Accounts Details

2. Local account information including entity account code, entity account name and description should be entered in the data entry fields above the Add New tick box. One local account code mapped to one eIMS account code is called a one to one relationship.
Please Note – If an eIMS account is not going to be used after activating the Local Chart of Accounts (to activate, mapping of any eIMS account code to local chart of accounts needs to take place) ‘not in use’ or ‘blank’ should be entered in the Entity Account Name field of the eIMS account (above Add New tick box).

Figure 5-145 eIMS Account Code Not in Use

3. More than one local account code can be mapped to the eIMS account code, this is called a one to many relationship (one IMS account code to many local account codes). To do this the user needs to tick the ‘Add New’ box and enter the entity account name and description and then activate the submit button. Repeat these steps for each entity account code to be mapped to the one eIMS account code.

Please Note – Number each local account code uniquely.

Figure 5-146 More than 1 Local Account Mapped to eIMS Account

4. Upon submission the data entry screen appears enabling further entries.

Please Note - Mapping local account codes to the eIMS account codes often entails translation into other languages.

Delete – If more than one local account has been mapped to an eIMS account, a delete link will appear next to each entity account code except the first, if the account codes have not been used in transactions. If the user wishes to delete an account code that has been used in transactions they will need to delete the transaction(s) or change the account code for these transactions from the one that is to be deleted to another, then the delete link will appear.

Local Account Codes and Entity Account Codes are terms that have the same meaning and have been used interchangeably within this section.
6. Documentation

‘Documentation’ located within the main menu provides access to documents relevant to the IMS and IPPF.

Once the user activates ‘Documentation’ menu option several sub menus appear these include General, Policies and User Manual.

Figure 6-1 Documentation Submenu Options

| Documentation | General | Policies | IMS Training | System Documents | Accreditation | User Manual |

6.1 General

- The ‘General’ sub menu option when triggered on the left menu bar results in the presentation of a link to ‘eIMS IT Requirements/Specifications’.
- The eIMS IT Requirements/Specifications is a document that lists all PC requirements necessary to run eIMS successfully.

6.2 Policies

- The Policies sub menu option is a direct link to the IPPF policies sub directory within the IPPF web site.

6.3 IMS Training

- Selection of this sub menu option under documentation results in the presentation of a link to ‘IMS Training Materials and Documents’.
- Once this link is activated a new page is displayed which provide links to several IMS training documents.

6.4 System Document

- For use of the eIMS team only, this section of documentation provides a location to download database backups and ASP code.

6.5 Accreditation

- Provides links to the latest accreditation documentation in English, Spanish, French, Arabic and Russian.
- The documentation provided guides the user through the various stages of accreditation.
6.6  **User Manual**

- The ‘User Manual’ sub menu option when triggered on the left menu bar results in the presentation of three links to the ‘eIMS Users Manual’ in English, French and Spanish.
- The ‘eIMS Users Manual’ has been written and presented for eIMS users as reference material for those using the eIMS System.

Please Note – It is quite possible and more than likely the list of documents has since changed, please utilise all documentation presented as these documents will increase eIMS functionality for each user.
7. Search

‘Search’ provides the functionality to identify projects and associated information required as a result of entering limited details.

There are four separate ‘Search’ functions provided in the IMS, ‘Basic’, ‘Advanced’, ‘Free Text’ and ‘By Activities’. Each of these search functions is used according to the information that the user has and wishes to retrieve.

‘Search’ is located on the left menu below ‘Data Entry’ and when activated presents four sub menus ‘Basic’, ‘Advanced’, ‘Free Text’ and ‘By Activity’ searches.

7.1 Basic

7.1.1 What is a Basic Search?

This search utilises dropdown lists to identify Subject, Location and Date.

7.1.2 How to Perform a Basic Search

1. Activate the ‘Search’ option from the left hand menu and select ‘Basic’ from the submenu option. A new page will appear which is divided into three sections Subject, Location and Date.

Figure 7-1 Basic Search Form

2. ‘Subject’ has two dropdown lists that are mutually exclusive, meaning a selection can be made from one of the two fields, but not both of them simultaneously. The first list is Vision2000 Programme and the other is Programme Theme. Select one item from either dropdown lists. If both fields contain values, the first field entered will be omitted. The Subject field is mandatory for the Basic Search function.

3. ‘Location’ also has two optional, dropdown fields. These fields are not exclusive, and both may contain search criteria. The first field is the ‘IPPF Region’. If you wish to limit the search to a specific region, then select it from the dropdown list. According to the IPPF Region selected, the eIMS presents a related set of FPA
within the selected region. The Association does not need to be specified in order to use the regional search criteria.

4. ‘Date’ has two field that work independently of each other. Neither of the fields are mandatory. ‘Start Date Year’ refers to the year the project began, and ‘Finish Date’ indicates the year in which the project ended. When both the start and end years are indicated, the eIMS will locate projects within the range of specified years. Once again it is not necessary to fill all these fields with values, it is possible to enter one field or no fields at all.

5. The ‘Basic Search’ enables the user to find all projects that fit the criteria selected from the dropdown lists, even if only one field has a value. The search process becomes narrower and more restrictive, with each additional selection from the pulldown fields.

6. The search results page is displayed once the submit button has been activated. This page has a title bar that lists the information selected within the search Vision2000 Programme, Programme Theme, IPPF Region, Select FPA, Start Date Year and Finish Date Year. If these items have not been selected then their associated field will appear blank. Below this a table of the resultant projects retrieved by the search is displayed.

7.2 Advanced

7.2.1 What is an Advanced Search?

‘Advanced Search’ is very similar to ‘Basic Search’, however the advanced method allows the user to conduct the search using client profile and other implementation criteria. The purpose of ‘Advanced Search’ is the same as ‘Basic Search’, retrieval of Projects and associated information.

7.2.2 How to Perform an Advanced Search

1. Activate the ‘Search’ option from the left hand menu and select ‘Advanced’ from the submenu option. A new page will appear which is divided into six sections Subject, Location, Date, Location, Client and Other.
2. Please refer to Basic Search for instructions regarding Subject, Location and Date.

3. Location – The user is required to enter the ‘Location’ and/or ‘The Location of Implementation’, if known.

4. Client – If ‘Special Client Focus’ and/or ‘Client Income Classification’ is known, the user can select these specifications from the dropdown lists provided.

5. Other – ‘Sex’ and ‘Age Range’ of the ‘Client Focus’ for the requested project can be selected from the dropdown lists provided by the user.

6. The results page is displayed once the submit button has been activated. This page has a table that lists the information selected within the search Vision2000 Programme, Programme Theme, IPPF Region, Select FPA, Start Date Year, Finish Date Year, Location, Location of Implementation, Special Client Focus, Client Income, Classification, Sex and Age Range. Below this a table of the resultant projects retrieved by the search is displayed.

7.3 Free Text

7.3.1 What is a Free Text Search?

‘Free Text’ allows searching project information utilising keywords that identify the required project(s). More than one keyword can be entered, each word should be separated by a single space.
7.3.2 How to Perform a Free Text Search

1. Activate the Search option from the left hand menu and then select ‘Free Text’ from the submenu options located beneath Search.

2. Enter the keyword(s) in the field entitled ‘Enter Text to Search in Project’. A space is required between each word if more than one keyword is entered.

3. Once all words have been entered activate the Search button, which is located to the right of the field. This search will scan Project Title, Goal/Overall Objective and Project Summary for the specific keywords and display the results.

7.4 By Activities

7.4.1 What is a By Activity Search?

‘By Activities’ search provides a method for finding projects which share common activity keywords in the eIMS database.

7.4.2 How to Perform a By Activity Search

1. Activate the Search option from the left hand menu and then select ‘By Activities’ from the submenu options located beneath Search.

---

<table>
<thead>
<tr>
<th>Advocacy [A00]</th>
<th>Eliminating Unsafe Abortion [B00]</th>
</tr>
</thead>
<tbody>
<tr>
<td>- [A01]</td>
<td>- [B01]</td>
</tr>
<tr>
<td>- [A02]</td>
<td>- [B02]</td>
</tr>
<tr>
<td>- Men as Partners [A03]</td>
<td>- Information Education &amp; Communication [B03]</td>
</tr>
<tr>
<td>- Quality of Care [A04]</td>
<td>- Pre/Post Abortion Care [B04]</td>
</tr>
<tr>
<td>- Reproductive Health Services [A05]</td>
<td>- Research [B05]</td>
</tr>
<tr>
<td>- Reproductive Rights [A06]</td>
<td>- Safe abortion Services [B06]</td>
</tr>
<tr>
<td>- Sustainability [A07]</td>
<td></td>
</tr>
<tr>
<td>- Women’s Rights / Empowerment [A08]</td>
<td></td>
</tr>
<tr>
<td>- Young People’s Rights [A09]</td>
<td></td>
</tr>
<tr>
<td>- Promoting the HPF Charter on Rights [A10]</td>
<td></td>
</tr>
<tr>
<td>- Public Relations/Opinion [A11]</td>
<td></td>
</tr>
<tr>
<td>- Training [A12]</td>
<td></td>
</tr>
<tr>
<td>- Advocacy [B01]</td>
<td></td>
</tr>
<tr>
<td>- Counselling [B02]</td>
<td></td>
</tr>
<tr>
<td>- Information Education &amp; Communication [B03]</td>
<td></td>
</tr>
<tr>
<td>- Pre/Post Abortion Care [B04]</td>
<td></td>
</tr>
<tr>
<td>- Research [B05]</td>
<td></td>
</tr>
<tr>
<td>- Safe abortion Services [B06]</td>
<td></td>
</tr>
</tbody>
</table>
2. To locate projects with activities in common, the user selects the tick box to the left of the activity title. All activities keywords are grouped by Programme Themes.

3. Upon submitting the selected activities, a results page displays every project whose activity keywords matched the selection criteria. The display page lists for each project the Title, Entity, Vision 2000 Objective, Programme Theme, Project Start Year and Project End Year. The eIMS includes a hyperlink to 'View' additional details about the project.

### 7.5 By Donor

#### 7.5.1 What is a By Donor Search?

'By Donor' search enables the user to search for an individual donor added on the country level or an international donor. The search results display all projects the selected donor provides funding for.

#### 7.5.2 How to Perform a By Donor Search

1. To carry out a ‘By Donor’ search the user is required to select the main menu option ‘Search’ and then the ‘By Donor’ submenu option, upon which this data entry screen is displayed.

![Select Donor](image)
2. If the user is searching for an international donor the word ‘International’ should be selected from the ‘Select Country’ dropdown list (this is the default value of this field). The ‘Donor Name’ can then be chosen from the second dropdown list.

3. Upon submission of the search criteria a result table is displayed, providing title, entity and Total USD details for each project the donor is funding. Each of these projects can be viewed in greater detail by activating the ‘View’ link located to the right of the project record. User permissions may not allow the user to view all project details. An ‘Edit’ link will appear adjacent to the projects the user has access to, this allows the user to edit these projects.

Figure 7-6 By Donor Search Results

<table>
<thead>
<tr>
<th>Title</th>
<th>Entity</th>
<th>Total USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>AIDS - Saúde Sexual e Reproductiva entre Adolescentes na Região</td>
<td>Institute of HIV/AIDS Research in Brazil (IHRIBR)</td>
<td>125,250.275</td>
</tr>
<tr>
<td>222 - Erradicação Operacional de Políticas de Gestão de Drogas</td>
<td>Institute of HIV/AIDS Research in Brazil (IHRIBR)</td>
<td>15,399,000</td>
</tr>
<tr>
<td>339 - Atitude às Intervenções: uma análise em 53 para Hipertróficas em VI</td>
<td>Institute of HIV/AIDS Research in Brazil (IHRIBR)</td>
<td>15,161,561</td>
</tr>
<tr>
<td>Neotodas: Disparidade em Renda e Úso de Drogas</td>
<td>Institute of HIV/AIDS Research in Brazil (IHRIBR)</td>
<td>12,413,000</td>
</tr>
<tr>
<td>Brown Bear Prey: In Gear Education for Youth (BGE) Program</td>
<td>Institute of HIV/AIDS Research in Brazil (IHRIBR)</td>
<td>12,390,000</td>
</tr>
<tr>
<td>HIV/AIDS Health (Community on Governmental Sexual &amp; Reproductive Health)</td>
<td>Institute of HIV/AIDS Research in Brazil (IHRIBR)</td>
<td>22,000,000</td>
</tr>
<tr>
<td>Health Promotion To Support Work-Aid Programmes</td>
<td>The Indonesian Planned Parenthood Association (IPPN)</td>
<td>20,280,000</td>
</tr>
<tr>
<td>Multi-Country Regional HIV/AIDS Control</td>
<td>Institute of HIV/AIDS Research in Brazil (IHRIBR)</td>
<td>28,712,280</td>
</tr>
<tr>
<td>Outreach &amp; AIDS and Reproductive Health Education and Services (MAGEC)</td>
<td>Institute of HIV/AIDS Research in Brazil (IHRIBR)</td>
<td>14,419,411</td>
</tr>
<tr>
<td>border the 5th round of the implemented through the Outreach Program</td>
<td>Institute of HIV/AIDS Research in Brazil (IHRIBR)</td>
<td>48,946,335</td>
</tr>
<tr>
<td>V.C. - Vents de Capacitação</td>
<td>Institute of HIV/AIDS Research in Brazil (IHRIBR)</td>
<td>20,349,100</td>
</tr>
</tbody>
</table>

4. If the donor is country based the user is required to select the country from the ‘Select Country’ field and then the ‘Donor Name’ from the dropdown list that is updated once a country has been selected. A results table same as that generated for an international donor search displays projects being funded by the country donor and once again these project details can be viewed or edited (if available) by activating the View or Edit link located adjacent to each project record.
8. Reports

8.1 Types of Institutional Reports

Institutional information may be found on the Main Menu under the Reports option. At this time there are 14 different types of organization or institutional level reports.

For a specific entity, reporting period and year, financial reports provide income and expense information by organizational unit, Vision 2000 program area, and by fund for a specific year or three year period.

Multi-Entity reports focus on programmatic and financial details and groups this information based on the units of an entity, the secretariat itself or linked projects.

Programmatic reports focus on the programmatic side and are a convenient way to review all results and summaries for an institution sorted by Vision 2000 program area, organizational unit or programmatic theme.

Staff Allocation reports list all employees of the organization and the percent of time and cost allocated to all projects within an entity.

Staff Allocation (Sun) report is highly restrictive and reserved only for the use by finance, it provides a cross reference between staff and their allocation across various projects for an entity.

Inventory Status report enables user to query purchase and supply systems. Ensures the correct stock is picked and dispatched to FPAs and enables verification of physical stock to that recorded on the system.

Grant Certificate reports provide a summary of the FPAs financial transactions over the selected period of time.

Reference reports contain tables of data used to classify income, expenses, donors, and keywords. It also provides lists of objectives and indicators used in the system.

Administration provides reports summarising user permissions for a selected unit.

Secretariat Budget reports provides financial information including funding sources, expenditures and staff allocation grouped by ROs and units.

Surveys/Global Indicators – Under Construction
Accreditation provides all reports for the selected entity for the accreditation process as per Data Entry/Accreditation.

Grant Agreement reports are sent out to organisations once APB has been finalised and provides the official agreement between IPPF organisations and the Central Office.

### 8.2 Report Selectors and Filters

When requesting a report the user must verify and adjust as necessary the report selection and sort criteria. Generally the report options contain default values which reflect the Transaction Year and Ledger [a.k.a. Transaction Type] selected after logging into the system. These options can be changed if the required report falls outside of the default year and transaction type.

Please refer to the following definitions when selecting a report:

**Transaction Year:** The year associated with the expected or actual results or financial data.

**Currency:** The currency to be displayed on the report, generally US dollars for Secretariat financial reports. In the case of the Associations it may be their national or local currency. If a currency other than US dollars is selected, you will need to specify the average exchange rate applicable for the report period. The exchange rate needs to be expressed in term of the number of local currency units per one US dollar. The USD currency rate for reports is always 1. For institutional local currency reports, the entity should divide the default timeline status exchange rate for the particular ledger and report period in question into 1. For example, if the default rate in the status for a proposed budget in 2010 is 3 widgets to 1 US dollar. The report rate of exchange for producing the report in local currency is 1/3 or .3333.

**Ledger:** The report type or transaction type: Approved Budget, Proposed Budget, Actual Temporary (Interim Reports, including monthly, quarterly, and half-yearly reports), Actual Final (Annual Report).

**Group By:** Dropdown menu allows the user to select how the information in the report is to be grouped. Options available include Vision 2000 Objective, Unit, Programme Theme and Entity Strategy (grouped by Strategic Goal).

**Country:** Country where organization is located.

**Entity:** Name of organization whose data should be included in the report.
Some financial reports are organized or present sub-totals by Fund Type. There are currently four different fund types:

- **UC** = Unrestricted Core, General Support (a.k.a. IPPF cash grant plus national income)
- **UG** = Unrestricted Governance, IPPF Secretariat funds used to support the activities and training of the volunteer governing bodies
- **UE** = Unrestricted Earmarked, General Support funds that are designated by the entity's board for a specific purpose.
- **R** = Restricted by Donors
- **Total** = Sum of all Fund Types

Financial information contained in the reports include:

- **E** = Expenses
- **I** = Income
- **S** = Surplus (Excess of Income over Expenses)
- **D** = Deficit (Excess of Expenses over Income)

### 8.3 Report Tips and Special Dialog Boxes
The eIMS uses the Crystal Reports Viewer for the Web to display and print financial, programmatic, and other administrative information. This application must be loaded into memory before a report can be displayed. The program is loaded the first time a report is requested during an Internet session.

Before the Viewer loads, dialogue box with Security Warning asks to install the Crystal Reports. Respond by selecting the Yes button. In order to avoid this box to appear again, you can alternatively check the box: ‘Always trust content from Seagate Software’. Next time you want to see a report you will not be challenged again.

If no is accidentally selected follow this procedure -
1. Open Internet Explorer (blue ‘E’)
2. Select the Tools Tab from the menu at the top of the screen, followed by Options found within the dropdown menu.
3. Under the Temporary Internet File section there is a ‘Delete Cookies’ button – Click this, then ‘OK’

Note: This will not affect any of your personal settings. You should now have the option to Accept the Reports Viewer when Viewing Reports in Future.

The system will also display a Security Alert when the ‘View’ report option is selected from a table of reports. Click on Yes to display both secure and non-secure report items.
Figure 8-4 Crystal Report Final Security Warning

The Crystal Reports screen uses a standard set of icons to view and print the displayed document. At the bottom of the screen the system displays a tool tip with name of the icon. The following is a brief explanation of each function.

Figure 8-5 Crystal Report Menu Bar

<table>
<thead>
<tr>
<th>Icon</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>X</td>
<td>Close sub-report view (not applicable to preview)</td>
</tr>
<tr>
<td>Printer</td>
<td>Print document displayed</td>
</tr>
<tr>
<td>Envelope</td>
<td>Export report to a file (formats include Crystal .rpt, Excel .xls, Word .doc, Adobe .pdf, and Microsoft .rtf) These files can be sent as attachments with E-mails.</td>
</tr>
<tr>
<td>Tree Diagram</td>
<td>Show/Hide report elements or subsets</td>
</tr>
<tr>
<td>Zoom %</td>
<td>Enlarge or Reduce displayed report</td>
</tr>
<tr>
<td>&lt;</td>
<td>Go to First Page of Report</td>
</tr>
<tr>
<td>&lt;</td>
<td>Go to Previous Page</td>
</tr>
<tr>
<td>&gt;</td>
<td>Go to Next Page</td>
</tr>
<tr>
<td>&gt;</td>
<td>Go to Last Page</td>
</tr>
</tbody>
</table>

A report may have several row headings and related subtotals. The report row headings are displayed in the left pane of the Preview screen. By selecting the + or - next to a row heading, the Viewer will display or hide related row headings or report subsections. You can quickly jump to a report subsection by double clicking on the subsection name. The viewer will outline the selected subsection in red.
Figure 8-6 Financial Report

If the report contains sub reports, the sub report will appear by name as a tab to the right of the report Preview tab. All hyperlinks are recognized in the reports as a shadow box. (Ex: Expense link to the Expense Crosstab.rpt)

8.4 Printing Reports

Please note - Before saying it’s okay to print, the Printer Properties need to be adjusted to landscape if the report orientation is not portrait orientated. The default for all eIMS reports is Portrait. On very wide reports, the user needs to manually set the properties to landscape; IMS doesn’t automatically adjust the paper orientation.

To change the orientation of the paper, select Properties from the Print screen.

Figure 8-7 Printing Crystal Reports

Within the Printer Properties Dialogue box locate Paper/Output section. Select Landscape Orientation and OK to accept the change to the printer properties.

Printing a range of pages within an institutional report maybe required at certain times. While page ranges cannot be requested using the Crystal Reports module within IMS, it is possible to Export the report to an Adobe Acrobat .pdf file format, using the Export icon located to the right of the Crystal Report Printer icon. Then use Adobe Acrobat to open the .pdf file. Using Adobe Acrobat’s extensive print features, the user can specify the exact page to be printed or a range of pages within a lengthy report.
Also, it is recommended that you check the correct paper size is selected. Letter size (8.5" x 11") is utilized in the United States, while the longer A4 paper size is more common in elsewhere. Depending on the Printer, this may be found in the Advanced settings or displayed as a Dialogue box tab.

Figure 8-9 Paper Options for Printing Crystal Reports

8.5 Exporting Reports

The Report Viewer Export icon will save the displayed report as a file. This file can be sent as an email attachment and opened by the recipient provided they have installed a program that recognizes the file format.

After selecting the export icon, the viewer will ask for the user to identify the type of export file format required and the location where the export file should be saved.
By default, Crystal Reports saves a file in Crystal Report format with a .rpt file extension. However, if the intended recipient of the report does not have the Crystal Report program, you may select another common file format.

It is a good idea to test the exported file using an application that will recognize and open the file format. The format of the report may need some refinement if a file extension other than Crystal Reports was selected.
<table>
<thead>
<tr>
<th>Type of Information</th>
<th>Main Menu Options</th>
<th>Report Title</th>
<th>Report Contents</th>
<th>Report Columns</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Report</td>
<td>Main: Reports/Financial</td>
<td>Functional Expense by Restricted / Unrestricted</td>
<td>This is a multi-year report comparing either elMS functional expense or income categories for the proposed plan year, the current year’s approved budget and the prior year’s annual report. Within each transaction period the expenses or income are summarized as either Restricted or Unrestricted funds.</td>
<td>Annual Report: Restricted, Unrestricted, Total</td>
</tr>
<tr>
<td></td>
<td>Sub-Menu: 3 Year Comparison</td>
<td>Page Orientation-Landscape</td>
<td></td>
<td>Approved Budget: Restricted, Unrestricted, Total</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Income Source by Restricted / Unrestricted</td>
<td></td>
<td>Proposed Budget: Restricted, Unrestricted, Total</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Page Orientation-Landscape</td>
<td></td>
<td>% Variation – Proposed vs. Annual Report</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Functional Expense by Unrestricted Core / Earmarked and Restricted</td>
<td></td>
<td>% Variation – Proposed vs. Approved Budget</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Page Orientation-Landscape</td>
<td></td>
<td>Total</td>
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<tr>
<td></td>
<td></td>
<td>Income Source by Unrestricted Core / Earmarked and Restricted</td>
<td></td>
<td>% Variation – Proposed vs. Annual Report</td>
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<tr>
<td></td>
<td></td>
<td>Page Orientation-Landscape</td>
<td></td>
<td>% Variation – Proposed vs. Approved Budget</td>
</tr>
</tbody>
</table>

The three year analysis compares either expenses or income over time according to fund type.
<table>
<thead>
<tr>
<th>Financial Report</th>
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</thead>
<tbody>
<tr>
<td><strong>Main: Reports / Financial</strong></td>
<td><strong>Sub-Menu: 3 Year Comparison</strong></td>
<td>**Yearly Expense Comparison for (UC</td>
<td>UG</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Report encompassing three years of approved budget expenses (HR Expenses and Other Costs (OC+OH C/R+Grants)) and calculates variances between the expenses over the three years. Each project displays type of funding and is classified according to V2K, Unit or Programme Theme.</strong></td>
<td><strong>Proposed Budget for 2000, 2001 and 2002 column heading further subdivided into the following:</strong></td>
</tr>
<tr>
<td></td>
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<td></td>
<td><strong>HR Expenses, Other Costs (OC+OH C/R+Grants) and Total Expenses</strong></td>
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<td></td>
<td></td>
<td></td>
<td><strong>Variation %’ is subdivided into 2002 vs 2000 and 2002 vs 2001</strong></td>
</tr>
<tr>
<td></td>
<td>**Project Expense 3 Yr. Comparison (UC</td>
<td>UG</td>
<td>UE</td>
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<tr>
<td></td>
<td><strong>Proposed Budget for 2000, 2001 and 2002 column heading further subdivided into the following:</strong></td>
<td></td>
<td><strong>UC, UG, UE, R and Total</strong></td>
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<td></td>
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<td></td>
<td><strong>Variation %’ is subdivided into 2002 vs 2000 and 2002 vs 2001</strong></td>
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<tr>
<td></td>
<td>**Project Income 3 Yr. Comparison (UC</td>
<td>UG</td>
<td>UE</td>
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</tbody>
</table>
### Financial Report

<table>
<thead>
<tr>
<th>Type of Information</th>
<th>Main Menu Options</th>
<th>Report Title</th>
<th>Report Contents</th>
<th>Report Columns</th>
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<tbody>
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<td></td>
<td>Financial Report</td>
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<td></td>
<td>Main: Reports /</td>
<td>3 Year</td>
<td>This report</td>
<td>Each ledger</td>
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<td></td>
<td>Financial</td>
<td>Comparison</td>
<td>provides a</td>
<td>(Annual 2000,</td>
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<tr>
<td></td>
<td>Sub-Menu: 3 Year</td>
<td></td>
<td>summary of</td>
<td>Approved PB</td>
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<td></td>
<td>Comparison</td>
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<td>actual, approved</td>
<td>2001 and</td>
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<td></td>
<td></td>
<td>and proposed</td>
<td>Proposed PB)</td>
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<td></td>
<td>Actual/Approved/Proposed</td>
<td>subdivided</td>
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<td></td>
<td></td>
<td>[U/R]</td>
<td>into –</td>
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<td>Page Orientation -</td>
<td>Unrestricted</td>
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<td>Landscape</td>
<td>Restricted</td>
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<td>Total</td>
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<td>3 Year</td>
<td>The Variation</td>
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<td>Comparison –</td>
<td>‘%’ column is</td>
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<td></td>
<td>Actual/Approved/Proposed</td>
<td>subdivided</td>
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<td>[U/R]</td>
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<td>Detailed by</td>
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<td>Project Report</td>
<td>Annual</td>
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<td>Page Orientation -</td>
<td>Proposed vs</td>
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<td>Landscape</td>
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<td>3 Year</td>
<td>Provides a</td>
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<td></td>
<td>Comparison –</td>
<td>comparison of</td>
<td></td>
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<td>Expenses</td>
<td>expenses,</td>
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<td></td>
<td>Actual</td>
<td>indirect cost</td>
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<td>Allocation</td>
<td>allocation,</td>
<td></td>
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<td></td>
<td></td>
<td>[U/R]</td>
<td>income, surplus/</td>
<td></td>
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<td></td>
<td></td>
<td>Detailed by</td>
<td>deficit over a</td>
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<td></td>
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<td>Project</td>
<td>three year</td>
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<td>Page</td>
<td>period for each</td>
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<td>Vision 2000</td>
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</table>

*Each ledger (Annual 2000, Approved PB2001 and Proposed PB) is subdivided into – Unrestricted, Restricted, Total.*

*The Variation ‘%’ column is subdivided into – Proposed vs Annual, Proposed vs Approved.*

<table>
<thead>
<tr>
<th>Type of Information</th>
<th>Main Menu Options</th>
<th>Report Title</th>
<th>Report Contents</th>
<th>Report Columns</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Report</td>
<td>Main: Reports / Financial</td>
<td>Projects by Expenditure, Income, Surplus/(Deficit) Page Orientation- Landscape</td>
<td>This report calculates for each project grouped by vision 2000 objectives and indirect (administrative) cost centers the total Expense, Income, and Surplus/Deficit and within each concept further subdivides the information by Fund Type.</td>
<td>For each budget concept (Expenses, Income and Surplus/Deficit) the following 5 Fund Type columns are displayed: UC = Unrestricted Core or Genrl. Support UG = Unrestricted, Governance UE = Unrestricted Earmarked or Designated R = Restricted Total = Sum of all Fund Types</td>
</tr>
<tr>
<td></td>
<td>Sub-Menu: By Year and Ledger</td>
<td>Projects by UC</td>
<td>For a specific transaction year and ledger type, the report summarizes project (grouped by vision 2000 objectives) expenses and Indirect (administrative) expenses by Fund Type.</td>
<td>IMS Project Number Project Title UC = Unrestricted Core or General. Support UG = Unrestricted, Governance UE = Unrestricted Earmarked or Designated R = Restricted Total = Sum of all Fund Types</td>
</tr>
<tr>
<td>Type of Information</td>
<td>Main Menu Options</td>
<td>Report Title</td>
<td>Report Contents</td>
<td>Report Columns</td>
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<td>---------------------</td>
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<td>----------------</td>
</tr>
<tr>
<td><strong>Financial Report</strong></td>
<td>Main: Reports / Financial Sub-Menu: By Year and Ledger</td>
<td>Projects by [UC-E][I][S/D] [UG-E][I][S/D] [UE-E][I][S/D] Page Orientation- Landscape</td>
<td>For a specific transaction year and ledger type, project and indirect (administrative) expenses are presented by Fund Type with additional details provided relating to Expenses, Income and Surplus/Deficit within each Fund Type.</td>
<td>For each Fund Type heading (Unrestricted Core, Unrestricted Governance and Unrestricted Earmarked, and Restricted) the following 3 columns are displayed: Expenses, Income, Surplus/Deficit</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Project Results Summary and Explanation of Budget Variance Page Orientation - Portrait</td>
<td>Provides a short summary of key project details combined with detailed budgetary and variance information.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Type of Information</th>
<th>Main Menu Options</th>
<th>Report Title</th>
<th>Report Contents</th>
<th>Report Columns</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Financial Report</strong></td>
<td>Main: Reports / Financial Sub-Menu: By Year, Ledger and Fundtype</td>
<td>Projects (Direct + Indirect Expense Summary) Page Orientation- Portrait</td>
<td>This expense report lists projects individually and groups them by V2K Objective, unit and programme theme. Institutional administrative or indirect costs are allocated to the unrestricted projects in order to HR (Personnel) Other Costs = (Operational Expenses + Overhead Cost Recovery from Restricted Projects + Sub-Grant Expenses) Sub-Total of HR and Other Costs</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Projects Including Proposed Amendments Report - Generates the same report including proposed amendments in project budget calculations.</th>
<th>Indirect (Administrative) Expenses</th>
<th>Total Expenses (Direct plus Indirect)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expenses &amp; Funding Sources Excluding Overheads Report - Generates the same report minus overheads.</td>
<td>Expense Columns</td>
<td>Human Resources</td>
</tr>
<tr>
<td>Expenses &amp; Funding Sources Including Proposed Amendments Report - Generates the same report including proposed amendments in expense and funding calculations.</td>
<td>Operational Costs</td>
<td>Grants</td>
</tr>
<tr>
<td>Expenses &amp; Funding Sources Excluding Overheads Report - Generates the same report minus overheads.</td>
<td>Sub-Total Direct Expenses</td>
<td>Overhead Recovery from Restricted Projects</td>
</tr>
<tr>
<td>Expenses &amp; Funding Sources Including Proposed Amendments Report - Generates the same report including proposed amendments in expense and funding calculations.</td>
<td>Expenses with Overhead Recovery</td>
<td>Indirect (Administrative) Cost Allocation</td>
</tr>
<tr>
<td>Expenses &amp; Funding Sources Excluding Overheads Report - Generates the same report minus overheads.</td>
<td>Total Expenses</td>
<td>Income Columns</td>
</tr>
<tr>
<td>Expenses &amp; Funding Sources Including Proposed Amendments Report - Generates the same report including proposed amendments in expense and funding calculations.</td>
<td>IPPF</td>
<td>National Sales/Services</td>
</tr>
<tr>
<td>Expenses &amp; Funding Sources Excluding Overheads Report - Generates the same report minus overheads.</td>
<td>International</td>
<td>Local Donations</td>
</tr>
<tr>
<td>Expenses &amp; Funding Sources Including Proposed Amendments Report - Generates the same report including proposed amendments in expense and funding calculations.</td>
<td>Fund Transfers</td>
<td>Total Income</td>
</tr>
<tr>
<td>Expenses &amp; Funding Sources Excluding Overheads Report - Generates the same report minus overheads.</td>
<td>Surplus/Deficit</td>
<td>% of Local Self Sufficiency</td>
</tr>
<tr>
<td>Type of Information</td>
<td>Main Menu Options</td>
<td>Report Title</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------</td>
<td>--------------</td>
</tr>
<tr>
<td><strong>Financial Report</strong></td>
<td>Main: Reports / Financial Sub-Menu: By Year, Ledger and Fundtype</td>
<td>HR/Other/Total Expenses by Project Orientation-Portrait</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Projects by Expenditure Summary - Central Office Only Page Orientation - Portrait</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Projects - IPPF Allocation Page Orientation - Portrait</td>
</tr>
<tr>
<td><strong>Financial Report</strong></td>
<td>Main: Reports / Financial Sub-Menu: By Year, Ledger and Fundtype</td>
<td>Approved vs. Actual Budget Page Orientation - Portrait</td>
</tr>
</tbody>
</table>
| **Approved vs. Proposed Budget for the year**  
| **Page Orientation - Portrait** | Lists approved budget expenses classified by activities for each project, displays proposed budget and difference between each budget for the particular activity. |
| **Is Your Budget in Balance?**  
<p>| <strong>Page Orientation- Portrait</strong> | Generates a list of projects for the specific entity. Displays Total Expenses and Total Income, integrating balances and totals. The report is divided into those projects with a surplus, deficit and those whose budgets are balanced. Within each of these sectors the projects are grouped in accordance with their funding types, and finally units. Provides an overview of the entity budget status and project details, which may allow budgets to be manipulated into balance. |</p>
<table>
<thead>
<tr>
<th>Type of Information</th>
<th>Main Menu Options</th>
<th>Report Title</th>
<th>Report Contents</th>
<th>Report Columns</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Page Orientation - Landscape</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Projects by Expenditure, Income, Surplus/Deficit Including Assets</td>
<td>Generates a financial summary for each project grouped by Vision 2000 Objective, incorporating Expenditure, Income and Surplus/Deficit which are categorized by fund type.</td>
<td>Vision 2000 Objective divided into Projects - Assets Expenditure, Income and Surplus deficit divided into fund types UC, UG, UE and R.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Page Orientation - Landscape</td>
<td></td>
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</tr>
<tr>
<td></td>
<td></td>
<td>Approved vs. Actual Budget Including Assets</td>
<td>Provides an up-to-date summary of budget status for each for every activity grouped by projects and Vision 2000 Objective.</td>
<td>Activity expenses grouped by project and projects grouped by Vision 2000 Objective. Activity expenses subdivided into - Original Budget Budget Additions (Reductions) Revised Programme Budget Actuals to Date Assets, Actual Budget Balance Available % Remaining</td>
</tr>
<tr>
<td>Type of Information</td>
<td>Main Menu Options</td>
<td>Report Title</td>
<td>Report Contents</td>
<td>Report Columns</td>
</tr>
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</tr>
<tr>
<td></td>
<td></td>
<td>Donations from Local Donors Page Orientation-Landscape</td>
<td>Generates a list of all local donors for a specific entity. Displays sub and grand totals of donations.</td>
<td>Donor and ID Annual for 2000 (UC, UG, UE, R and Total) Approved for 2001 (UC, UG, UE, R and Total) Proposed for 2002 (UC, UG, UE, R and Total)</td>
</tr>
<tr>
<td>Type of Information</td>
<td>Main Menu Options</td>
<td>Report Title</td>
<td>Report Contents</td>
<td>Report Columns</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------</td>
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</tr>
<tr>
<td><strong>Financial Report</strong></td>
<td>Main: Reports / Financial Sub-Menu: Administration</td>
<td>Staff Breakdown Relative to Activities by Unit Page Orientation - Portrait</td>
<td>Provides a list of activities within a specific unit assigned to particular positions.</td>
<td>Type of Staff Position classified by unit Activity Code Activity Title Project Number</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Staff Breakdown Relative to Activities by Expenses Page Orientation - Landscape</td>
<td>Generates a list of activities and associated HR and other expenses grouped by unit.</td>
<td>Unit and Project Activity Code Activity Expense Description Expense USD</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Estimated Overhead Restricted Projects Page Orientation - Landscape</td>
<td>Creates a list of all overhead estimates for each project funded by restricted finance grouped by Vision 2000 Objective.</td>
<td>Project Overheads listed under headings – Human Resources Operational Costs Grants Sub Total Direct Expenses Overhead Recoveries Transfer Expenses After Overhead Recoveries Indirect Cost Allocation Total Cost Indirect Cst Allocation to Total Cost</td>
</tr>
<tr>
<td>Type of Information</td>
<td>Main Menu Options</td>
<td>Report Title</td>
<td>Report Contents</td>
<td>Report Columns</td>
</tr>
<tr>
<td>---------------------</td>
<td>------------------</td>
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<td>-----------------</td>
<td>----------------</td>
</tr>
<tr>
<td><strong>Financial Report</strong></td>
<td>Main: Reports / Financial Sub-Menu: Units</td>
<td>Expenses and Funding Sources By Unit Page Orientation- Landscape</td>
<td>Generates a summary of project income and expenses sources for every project within a unit.</td>
<td>Project Description Expenses subdivided into Human Resources Operational Costs Grants Sub-Total Direct Expenses Overhead Recoveries Transfer Total Cost Income subdivided into IPPF International National Income – Sales/Svc Local Donations Fund Transfer Total Income Surplus/Deficit %</td>
</tr>
<tr>
<td></td>
<td>Approved vs. Actual Budget Including Assets by Unit Page Orientation- Landscape</td>
<td>Provides an up-to-date summary of budget status for each activity grouped by projects and Units.</td>
<td>Activity expenses grouped by project and projects grouped by Units. Activity expenses subdivided into – Original Budget Budget Additions (Reductions) Revised Programme Budget Actuals to Date Assets, Actual Budget Balance Available % Remaining</td>
<td></td>
</tr>
<tr>
<td>Type of Information</td>
<td>Main Menu Options</td>
<td>Report Title</td>
<td>Report Contents</td>
<td>Report Columns</td>
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<td>---------------------</td>
<td>-------------------</td>
<td>--------------</td>
<td>-----------------</td>
<td>----------------</td>
</tr>
<tr>
<td><strong>Financial Report</strong></td>
<td>Main: Reports / Financial Sub-Menu: Units</td>
<td>Projects by Expenditure, Income, Surplus/(Deficit) By Unit Page Orientation - Landscape</td>
<td>Generates a detailed report displaying expenditure, income and surplus/deficit for each project grouped according to units and classifies each of these according to fund type UC, UG, UE, R and Tot.</td>
<td>Unit and Project listed - Expenditure Income Surplus/Deficit Further subdivided into - UC UG UE</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3 Yr. Comparison - Actual/Approved/Proposed [U/R] Detailed by Project Page Orientation-Landscape</td>
<td>Provides a summary of project income and expenses grouped by Vision 2000 Objectives (unrestricted/restricted/total) across three years enabling comparison. Calculates variation between proposed and annual and proposed and approved.</td>
<td>Project details Actual 2001 Approved PB2002 Proposed PB 2003 Further divided into - Unrestricted Restricted Total Variation (in line with Actual 2001 etc.) Further subdivided into - Proposed vs Annual Proposed vs Approved</td>
</tr>
<tr>
<td>Type of Information</td>
<td>Main Menu Options</td>
<td>Report Title</td>
<td>Report Contents</td>
<td>Report Columns</td>
</tr>
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</tr>
<tr>
<td>Financial Report</td>
<td></td>
<td>Project Results Summary and Explanation of Budget Variance by Unit Page Orientation - Portrait</td>
<td>Provides a short summary of key project details combined with detailed budgetary and variance information grouped by units.</td>
<td>Unit Project Title Objective Justification Comments on Variance Expenditure Details Including Assets (Budget, Actuals to Date, Variance, % v Remaining)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Project Annual Report Including Approved Budget vs Actuals by Unit Page Orientation - Portrait</td>
<td>Generates the annual report including project details, specific objectives activities, lessons learned, constraints and budgetary information. Projects grouped by units.</td>
<td>Vision 2000 Objective Project Title Overall Project Objective Programme Theme Summary Specific Objectives Indicators Activities Lessons Learned Qualitative Analysis Income Expenses Surplus/Deficit</td>
</tr>
</tbody>
</table>

**Main:** Reports / Financial Sub-Menu: Units
### eIMS User Manual

#### Multi-Entity/Project Report

<table>
<thead>
<tr>
<th>Type of Information</th>
<th>Main Menu Options</th>
<th>Report Title</th>
<th>Report Contents</th>
<th>Report Columns</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Multi-Entity/Project Report</strong></td>
<td>Main Menu: Reports / Multi-Entity Sub-Menu: By Unit</td>
<td>Short Report Summary by Unit Page Orientation - Portrait</td>
<td>Provides a summary of project information including objective, summary, justification, activities and costs. Projects are grouped according to units. Project Summary Including Income and Expenditure by Unit - Generates the same report except costs are replaced by income and expenditure.</td>
<td>Project Title, Objective, Programme Theme, Summary, Specific Objectives, Justification/Lessons Learned, Activity, Costs, Project Summary Including Income and Expenditure by Unit - Replaces costs with income and expenditure.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Project Summary Including Income and Expenditure by Unit Page Orientation - Portrait</td>
<td>Short Programmatic Summary by Units Page Orientation - Portrait</td>
<td>Program Title, Strategic Goal, Project Goal, Frequency Financial Reporting, Frequency Programmatic Reporting, Programme Theme, Special Client Focus, Justification, Specific Objectives</td>
</tr>
</tbody>
</table>

#### Expenses

<table>
<thead>
<tr>
<th>Human Resources</th>
<th>Operational Costs</th>
<th>Grants</th>
<th>Sub Total - Direct Expenses</th>
<th>Overhead Revenues Transfer</th>
<th>Expenses After Overhead Recoveries</th>
<th>Indirect Cost Allocation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Σ1</td>
<td>Σ2</td>
<td>Σ3</td>
<td>Σ4</td>
<td>Σ5</td>
<td>Σ6</td>
<td>Σ7</td>
</tr>
</tbody>
</table>

#### Income

<table>
<thead>
<tr>
<th>IPPF</th>
<th>International</th>
<th>Nat Income-Sales/Svc</th>
<th>Local Donations</th>
<th>Fund Transfers</th>
</tr>
</thead>
<tbody>
<tr>
<td>I1</td>
<td>I2</td>
<td>I3</td>
<td>I4</td>
<td>I5</td>
</tr>
<tr>
<td>Type of Information</td>
<td>Main Menu Options</td>
<td>Report Title</td>
<td>Report Contents</td>
<td>Report Columns</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------</td>
<td>--------------</td>
<td>-----------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Multi-Entity/Projects Report</td>
<td>Main Menu: Reports / Multi-Entity Sub-Menu: Secretariat</td>
<td>Total Secretariat Page Orientation-Landscape</td>
<td>This report presents the expenses and income for the Central Office and Regional Offices of IPPF. The first version of the report sub-totals the expenses and income by fund type for each V2K program area of the Central or Regional Office. The second version of the report groups the expenses and income by fund type and lists each organizational unit of the Central. Regional Office information is not detailed by organizational unit, but presented in summary form.</td>
<td>Expenses: Human Resources Operational Expenses Sub-grants Total Gross Expenses Overhead Recoveries Transfers Expenses after Overhead Recovery Income: Non IPPF IPPF Total Income Surplus/ Deficit</td>
</tr>
</tbody>
</table>
### Summary of Total Secretariat Page Orientation-Landscape

This report summarizes the total Secretariat expenditures and income by Vision 2000 Program area within each Fund Type.

### Total Secretariat, Expenses and Funding Sources Page Orientation-Landscape

Provides secretariat expense and income details for each unit within a specific entity. Units are listed for each entity and secretariat sectors are listed within each unit.

### Type of Information | Main Menu Options | Report Title | Report Contents | Report Columns
--- | --- | --- | --- | ---
Multi-Entity/Project Report | Main Menu: Reports / Multi-Entity Sub-Menu: Linked Projects | Linked Project By Entity Page Orientation-Portrait | Provides a summary of all linked projects within a specific entity incorporating goals, objectives, summary, justification and budgetary details. | Global Project Name Global Home Entity Goal/Overall Objective Summary Justification Project Vision 2000 Programme Unit Project Summary Project Goal Reporting Frequency Dates Location Justification and Background Specific Objectives Income Expenses
<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
<th>Vision 2000 Objective Project Number and Title Specific Objectives Indicators Activities Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Summary by Objective, Indicator and Activity Page Orientation - Portrait</td>
<td>Provides a summary of project details with indicators and activities listed for each specific objective within the project.</td>
<td></td>
</tr>
<tr>
<td>Short Report Summary Page Orientation-Portrait</td>
<td>This is the first page of the Detailed Programmatic Results report and provides and overview of the project. The report selector groups this information by V2K program area, organizational units or 1st Programmatic Theme according to the report filter selected. Fast method for finding and printing a group of project summaries.</td>
<td>Project Title and Number Project Objective Programme Theme Project Summary Specific Objectives Justification/Lessons Learned Activity Cost</td>
</tr>
<tr>
<td>Project Summary Including Income and Expenditure Page Orientation-Portrait</td>
<td>This report is similar to the previous report, but adds to the basic project summary, information relating to income and expenses, which is grouped by activities and then by fund type. Fast method for finding and printing a group of project summaries that include activity information.</td>
<td>Same data as that presented in the previous report PLUS Activity Title Income and Expenses subdivided into - Account Code Activity Code Amount USD Transaction Description</td>
</tr>
<tr>
<td>Type of Information</td>
<td>Main Menu Options</td>
<td>Report Title</td>
</tr>
<tr>
<td>---------------------</td>
<td>------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>Programmatic Report</td>
<td>Main Menu: Reports / Programmatic</td>
<td>Direct and Indirect Staffing by Project Page Orientation - Portrait</td>
</tr>
<tr>
<td></td>
<td>Sub-Menu: NA</td>
<td>Calendar of Activities Page Orientation - Portrait</td>
</tr>
<tr>
<td>Type of Information</td>
<td>Main Menu Options</td>
<td>Report Title</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>Staff Allocation Report</td>
<td>Main: Reports / Staff Allocation Sub-Menu: Staff Allocation Without Costs</td>
<td>HR Allocation per Unit and Project w/o Cost Page Orientation - Portrait</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Project Allocation per Person w/o Cost Page Orientation - Portrait</td>
</tr>
<tr>
<td>Type of Information</td>
<td>Main Menu Options</td>
<td>Report Title</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------</td>
<td>--------------</td>
</tr>
<tr>
<td><strong>Staff Allocation Report</strong></td>
<td>Main: Reports / Staff Allocation Sub-Menu: Staff Allocation With Costs</td>
<td>Project Allocation per Person w/cost Page Orientation - Portrait</td>
</tr>
<tr>
<td></td>
<td></td>
<td>HR Allocation per Unit and Project w/cost Page Orientation - Portrait</td>
</tr>
<tr>
<td></td>
<td></td>
<td>HR Allocation per Project w/costs Page Orientation - Portrait</td>
</tr>
<tr>
<td>Type of Information</td>
<td>Main Menu Options</td>
<td>Report Title</td>
</tr>
<tr>
<td>---------------------</td>
<td>--------------------</td>
<td>--------------</td>
</tr>
<tr>
<td><strong>Staff Allocation (Sun) Report</strong></td>
<td>Main: Reports/Staff Allocation (Sun)</td>
<td>Staff Allocation by Project (for Sun) Page Orientation - Landscape</td>
</tr>
<tr>
<td>Type of Information</td>
<td>Main Menu Options</td>
<td>Report Title</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------</td>
<td>--------------------</td>
</tr>
<tr>
<td><strong>Cubes Report</strong></td>
<td>Under Construction</td>
<td>Under Construction</td>
</tr>
<tr>
<td>Type of Information</td>
<td>Main Menu Options</td>
<td>Report Title</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------</td>
<td>--------------</td>
</tr>
<tr>
<td><strong>Inventory Status Report</strong></td>
<td>Main: Reports/Inventory Status</td>
<td>Inventory Status Reports Page Orientation - Portrait</td>
</tr>
<tr>
<td>Type of Information</td>
<td>Main Menu Options</td>
<td>Report Title</td>
</tr>
<tr>
<td>-----------------------</td>
<td>------------------------------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td><strong>Grant Certificate Report</strong></td>
<td>Main: Reports / Grant Certificate Sub-Menu: N/A</td>
<td>Commodity Grant Certificate</td>
</tr>
<tr>
<td>Type of Information</td>
<td>Main Menu Options</td>
<td>Report Title</td>
</tr>
<tr>
<td>---------------------</td>
<td>------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>IMS Keywords</td>
<td></td>
<td>For each major Programme Theme, the report lists the related Activity Theme words.</td>
</tr>
<tr>
<td>IMS Chart of Accounts</td>
<td></td>
<td>The report lists the IMS account codes and descriptions for assets, income, expenses, and fund transfers.</td>
</tr>
<tr>
<td>Indicators</td>
<td></td>
<td>This analysis report lists all the indicators defined by users and groups these indicators under objectives within V2K program areas.</td>
</tr>
<tr>
<td>Donor List</td>
<td></td>
<td>List of Donors, their donor codes and related IMS chart of account classifications. Central Office provides international donor codes. If an organization defines national donors, it will appear under that country's heading.</td>
</tr>
<tr>
<td>Objectives and Indicators by V2K Programs</td>
<td></td>
<td>For each V2K area and related objectives, the report lists in separate columns the quantitative and qualitative indicators.</td>
</tr>
<tr>
<td>Type of Information</td>
<td>Main Menu Options</td>
<td>Report Title</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------</td>
<td>--------------</td>
</tr>
<tr>
<td><strong>Administration</strong></td>
<td><strong>Report</strong></td>
<td>User Permissions By Unit and Groups Page Orientation-Landscape</td>
</tr>
<tr>
<td></td>
<td></td>
<td>IMS Tables and Their Descriptions Page Orientation - Portrait</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Entity Abbreviation and Country Name Reference Page Orientation - Portrait</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Number of Reports Generated to Date Page Orientation - Portrait</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Number of FPA's per Region and Projects within each Entity Page Orientation - Portrait</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Report Licenses Currently Available Page Orientation - NA</td>
</tr>
<tr>
<td>Type of Information</td>
<td>Main Menu Options</td>
<td>Report Title</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>Secretariat Budget</td>
<td>Main: Reports / Secretariat Budget</td>
<td>CO Division - Units and Total For ROs Detailed by Project</td>
</tr>
<tr>
<td></td>
<td>Sub-Menu: N/A</td>
<td>Orientation - Portrait</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summary by CO Divisions - Units and Total For ROs By Funding Sources</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Orientation - Portrait</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Type of Information</th>
<th>Main Menu Options</th>
<th>Report Title</th>
<th>Report Contents</th>
<th>Report Columns</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secretariat Budget</td>
<td>Main: Reports / Secretariat Budget</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Sub-Menu: N/A</td>
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<td>Type of Information</td>
<td>Main Menu Options</td>
<td>Report Title</td>
<td>Report Contents</td>
<td>Report Columns</td>
</tr>
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<td>---------------------</td>
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<td>-----------------</td>
<td>----------------</td>
</tr>
<tr>
<td><strong>Secretariat Budget</strong></td>
<td><strong>Main: Reports / Secretariat Budget Sub-Menu: N/A</strong></td>
<td>Confidential – Divisions and Units Staff Allocation Page Orientation - Portrait</td>
<td>Provides a detailed report of staff positions and allocations dedicated to specific projects, grouped according to unit, division and office.</td>
<td>Position Information, Project Number and Title, Allocation Percentage, Cost of Allocation (USD)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Project Summary Including Income and Expenditure by Unit Page Orientation -</td>
<td>Generates a summary of project information, including programmatic, income and expense information. Projects are grouped by units then divisions.</td>
<td>Project Title, Objective, Programme Theme Summary, Specific Objectives, Justification/Lessons Learned, Activity, Income, Expenses</td>
</tr>
<tr>
<td>Type of Information</td>
<td>Main Menu Options</td>
<td>Report Title</td>
<td>Report Contents</td>
<td>Report Columns</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------</td>
<td>--------------</td>
<td>-----------------</td>
<td>----------------</td>
</tr>
<tr>
<td><strong>Statistics Reports</strong></td>
<td>Main: Reports / Statistics Sub-Menu: N/A</td>
<td>Number of Services Provided By Type Page Orientation - Portrait</td>
<td>Generates a summary of services provided by each outlet in accordance with the selected reporting frequency.</td>
<td>Entity, Unit and Outlet listed. Services divided into - Period CYP Factor Items Provided New Acceptors Visits Referrals</td>
</tr>
<tr>
<td></td>
<td></td>
<td>IEC Statistics Page Orientation - Portrait</td>
<td>Provides a report listing all IEC activity details grouped by programme theme and channel of communication.</td>
<td>Channel of Communication Programme Theme Number of Activities People Reached Male Female Under 25 Over 25 Total</td>
</tr>
<tr>
<td>Type of Information</td>
<td>Main Menu Options</td>
<td>Report Title</td>
<td>Report Contents</td>
<td>Report Columns</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------</td>
<td>--------------</td>
<td>-----------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Accreditation Report</td>
<td>Reports/Accreditation</td>
<td>Format 1 Page Orientation -</td>
<td>Sent out to organisations once APB has been finalised this report provides an outline of the official agreement between IPPF and Central Office.</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Member’s Guide Page Orientation -</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>RD Certificate Page Orientation -</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Validation Certificate Page Orientation -</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Type of Information</td>
<td>Main Menu Options</td>
<td>Report Title</td>
<td>Report Contents</td>
<td>Report Columns</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------</td>
<td>--------------</td>
<td>-----------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Grant Agreement Report</td>
<td>Main: Reports/Grant Agreement</td>
<td>Grant Agreement Conditions Page Orientation - Portrait</td>
<td>Sent out to organisations once APB has been finalised this report provides an outline of the official agreement between IPPF and Central Office.</td>
<td>NA</td>
</tr>
</tbody>
</table>
9. System Data

This menu item refers to data stored within the system regarding Countries, Currencies, Attributes and Chart of Accounts. This menu option manages data tables shared or utilized by several areas of the eIMS. For example, the currency information is utilized to translate one currency into another in the ledger. System Data as well as Administration are also used when translating eIMS menus into another language. System Data is located on the left menu and the submenu options Reference Data (ATT), Countries, Currencies and Chart of Accounts are located beneath this menu item.

9.1 Reference Data (ATT)

This table provides the ability to add Reference data to the system like e.g. a new Vision2000 Programme for the dropdown list on the main project page.

Adding or Amending Reference Data (Att)

1. Activate ‘System Data’ on the left menu bar, and then click on the ‘Reference Data’ submenu item. Once ‘Reference Data’ has been activated a new data entry page is displayed.

2. Select Table – This is a mandatory field. The user is required to select the table containing the attribute to be amended.

3. Description – The user is not required to enter any information, as once the table has been selected the description is automatically displayed.

4. Select Attribute – The attribute needs to be selected from the dropdown list. Not all attributes within the table will be displayed, only those which have an associated dropdown list.

5. Once the attribute has been selected, allow the system to process the selection for a few seconds. Once processing is complete a record of all values in the dropdown list for this field is displayed.

6. Add New Attribute – If a new attribute is to be added to the dropdown list the user is required to activate this tick box.

7. Code - A code should be entered for the new attribute. Coding: Some sections depend on proper reference data coding like e.g. the programme theme and the activities:
Each programme theme can have many activities. A programme theme starts with an alpha, followed by 2 zeros. E.g. A00 Advocacy. The activities for advocacy would subsequently be A01, A02 A03 etc.

Even more complex is the vision 2000 programmes, the specific objectives and the related indicators. A vision 2000 programme is coded in accordance to its official number, like 01 SRR. The corresponding objectives of table BBLA00 are coded by this Vision 2000 programme number followed by 5 alphas, e.g. 01aware for ‘To increase awareness of the incidence of harmful practices and of the serious health and human rights implications of harmful practices’ that can get suggested for projects with field A01 (V2K programme 01). The specific objectives can have many indicators in table BBLAA0 (one level down from BBLA00). Indicator attributes/references are subsequently coded as 01aware001 (# of people reached by IEC activities). This indicator is now distinctively linked to a specific objective and a V2K programme.

8. English – Enter the English that is to be displayed within the dropdown list.

9. When all appropriate information has been added to the table click the submit button to save the changes that have been made and/or to add a new attribute.

9.2 Countries

This section stores details of your country. Some of them are directly displayed on the IMS Website. ‘Countries’ is located on the left menu bar below ‘Reference Data’ and is a submenu item of ‘System Data’. The information that is collected here pertains to country contact, address and donor details. As long as a user has access to Entity Details within a country it is possible for them to view this country information.

Once ‘Countries’ menu has been selected from the left menu bar a new page appears with a dropdown list and an associated message ‘To view a profile, please select a country from the dropdown list’. The countries that are displayed for a particular user will depend on the individual’s permissions. Once the country has been selected from the dropdown list a blank screen will appear with Extension, Details and Donor(s) listed as the top menu options.

Figure 9-2 Country Selection
9.2.1 Details - Country Identification

Adding or Amending Country Details

1. Click on Details menu item, which is located on the left of the top menu bar. When this menu item has been activated a dialog box will appear entitled My Country with several fields listed. Information can be added or amended for the chosen country.

2. ISO Code (3 letters) – Enter the ISO (International Standards Organization) code for the specific country.

3. International Dialling Code – Enter the country’s dialling prefix, that is the number required to be dialled from another country in order to access the telephone system and contact people within that particular country.

4. Country Name English – Enter the name of the country in English.

5. Country Name French – Enter the name of the country in French.

6. Country Name Spanish – Enter the name of the country in Spanish.

7. Country Name Arabic – Enter the name of the country in Arabic.

8. Country Name 05 – Enter the name of the country in 05.

9. Country Name 06 – Enter the name of the country in 06.

10. Country Name 07 – Enter the name of the country in 07.

11. Country Name 08 – Enter the name of the country in 08.

12. Country Name 09 – Enter the name of the country in 09.

13. Country Name 10 – Enter the name of the country in 10.

14. Continent – Select the continent the country is situated in from the dropdown list provided.

15. Sub Continent – Select the sub continent the country is located in from the dropdown list provided.
16. Once as many details as possible have been completed the **submit** button should be activated. This will save all changes and new information that has been added to the country details. A new screen will appear stating that the ‘Record is Updated Successfully’. The **Reset** button to the right of the submit button reverts information to the saved values (as submitted previously). The Back button should return you to the previous screen.

### 9.2.2 Extension – Additional Country Details

#### Adding or Amending Country Extension

1. Extension is located between Details and Donor(s) on the top menu. The contents of extension is similar to Details, except it provides extra details about a particular country. When this menu item is activated a new data entry screen appears which allows existing information to be changed and/or new information to be entered.
2. UNFPA Priority – Select the UNFPA Priority for the specific country from the dropdown list provided. This United Nation’s priority reflects the country’s need in terms of development, population, reproductive health and family planning.

3. IPPF Priority – Select the IPPF Priority for the specific country from the dropdown list provided. This priority reflects the economic, developmental and reproductive health status of the country relative to others. This rating is considered when planning resource allocation.

4. GNP – Enter the Gross National Product for the specific country. The Gross National Product (GNP) is the total dollar value of all final goods and services
produced for consumption in society during a particular time period. The rise or fall in GNP measures economic activity based on production output within a country.

5. Area in Square Kilometres – Enter the total area of the particular country in square kilometres.

6. Ethnics - Enter details of all ethnic and indigenous groups of the country. This is a free text field. As much information as needed can be entered here.

7. Religions – Enter details of all religions that are practised within the specific country. This is a free text field, allowing and as much information as necessary to be entered.

8. Languages Spoken – Enter the name(s) of all the languages spoken within the country. This is also a free text field.

9. Description of Country – This field is a free text field and requires a description of the country incorporating location, geography, industries, standards of living and public utilities to be entered.

10. Family Planning Environment – Enter details regarding the family planning environment, which includes services provided, the availability of services, how and if these services are utilised and whether or not the citizens of the country are aware of the existence of the Family Planning facilities. This field is free text and its content being displayed on the IPPF website under the country profiles (e.g. www.ippf.org/countries)

11. Family Planning Constraints – Enter any constraints that the Family Planning Association confronts in this particular country of operation. This may include funding, government regulation, religious restrictions to Family Planning policies and demographic factors. This field is free text and its content being displayed on the IPPF website under the country profiles (e.g. www.ippf.org/countries)

12. Public Holidays – Enter all public holidays including dates and descriptions.

13. When all details have been entered the Submit button should be activated to save the record and amendments that have been made. Once submitted the data entry page is displayed.

**9.2.3 Donors**

**Adding or Amending Donor(s)**

1. Donor menu item provides the ability to add and amend the donor listing for a country. The donor list incorporates donors from the particular country that are contributing to the IPPF cause within the specific country.

2. Donor(s) is located in the top menu bar to the right of Extension.

3. When the Donor(s) menu option is activated the Donors index page is displayed, all donors that have been already entered are listed within this table. From left
to right the details listed for each donor record is Donor ID, Name, Account Code and Notes.

4. A new donor can be added by activating the **Add** button which is located under the index table. Activation of this menu item will display a data entry page in which the details of the new donor can be entered.

5. Donor ID – Enter the ID of the donor, this can be numeric, alphabetic or a combination.

6. Name – Enter the name of the donor.

7. Account Code – Select the account code from the dropdown list that applies to the specific donor.

8. Notes – This is a free text field, any notes about the donor can be entered in this section.

9. Once all details have been entered regarding the donor **submit** can be triggered which will save the donor record and display the details on the index page.

10. International Donors - Given that the list of international donors is maintained by RO and CO, in order to update or add international donors please send an email to [IMS@IPPF.ORG](mailto:IMS@IPPF.ORG), indicating the changes or additions required.

### 9.3 Currencies

This is a reference table that defines all the currencies available in the system. If a currency other than the default is selected in the data entry screen and the operator does NOT specify the exchange rate for the record, the system will insert the currency table’s exchange rate for the transaction year in question. The exchange rate in this table is entered by central office finance, and should be updated yearly with the following criteria in mind: best regional estimate of that currencies projected annual average based on historical trends. If the currency is subject volatile devaluation, more frequent adjustment of the exchange rate will be made by central office finance.

‘Currencies’ is a submenu option of ‘System Data’ and is located between ‘Countries’ and ‘Chart of Accounts’ on the left menu bar.

**Adding or Amending Currencies**

1. Once the main menu option ‘System Data’ and the submenu option ‘Currencies’ have been activated a table is displayed detailing currencies and associated exchange rates with the United States Dollar.
2. To add a new currency the user is required to activate the ‘Add New’ button below the table. This displays a dialog box which requires information regarding the new currency to be entered.

3. Currency ID – This is a mandatory field, the ID of the currency should be entered within this field, for example Great Britian Pounds GBP, United States Dollars USD, Indian Rupees INR. This information can be found in exchange rate page in the financial sections of the paper or on the internet.

4. Countries ISO Code – This is usually a 2 or 3 alpha character code for a specific country, these codes can be found in the ‘Countries’ section of ‘System Data’ under ‘Details’.

5. Currency Name – The user is required to enter the name of the currency the information is being entered concerning.

6. Xchange Rate – The exchange rate of the currency for one United State dollar should be entered within this field.

7. Currency and exchange rate details can be amended by activating the edit link located to the right of currency details within the currency table.
Figure 9-6 Editing Currency Form

<table>
<thead>
<tr>
<th>Currency ID</th>
<th>MXN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Currency ISO Code</td>
<td>MX</td>
</tr>
<tr>
<td>Currency Name</td>
<td>Mexico Pesos</td>
</tr>
<tr>
<td>Exchange Rate</td>
<td>0.5</td>
</tr>
</tbody>
</table>
This page has intentionally been left blank.
10. Administration

Only a few individuals will have access to the administration section of the IMS. These are usually administrators and systems managers of the eIMS. The Administration section has control over many aspects of eIMS functionality, including user permissions, validation messages, menus, tables, and tips.

Please avoid using special characters within the eIMS administration section apostrophes, ampersands, slashes and dashes or hyphens.

10.1 Users

This menu item allows creation and amendment of user permissions and security, including storage of User Details, Group Permissions (that is the information the user is permitted to view), Entity (the entities that the user can view) and Unit data the user has access to add or modify.

eIMS administrator establishes a user profile once the user applies for a User Id and Password using the ‘eIMS Log On’ the link from the IPPF home page.

10.1.1 User Details

10.1.1.1 Viewing, Adding and Amending User Details

1. To locate a user that has been registered in the system, a dialog box is displayed once the User menu has been activated. Any or all of the fields within this box can be filled in. Upon selecting ‘Submit’, eIMS users meeting all the specified criteria will be listed in a table. Each user ID in the table is an active link to a user profile page.

Figure 10-1 Find User

2. User ID – Enter the user ID; this will apply to one person only. The user ID should follow the format of the first name initial plus the complete last name(s) of the person. The entire ID should be typed in lower case. To obtain the details of the person, select the submit button from the dialog page. Tip – if the
exact spelling of the last name is unknown, type the first initial followed by the first few letters of the last name. The eIMS will list every user id that begins with that letter combination. Or: Just type the first 2 letters of the userid and the system will try to locate the person

3. User Created On – Select the time frame when the desired user was created, the selections available include Today, This Week, Last Week and Last Month. Once one of these times has been selected and submitted a list of all the users created in that period will be displayed.

4. Last Name – Enter the full last name of the user and submit, this will display a list of users with the last name that has been entered.

5. First Name – Enter the first name of the user and submit, this will display a list of users with the first name that has been entered.

6. Select Country – Select a country from the dropdown list, the countries that are displayed will only be the ones that the user has permission to view. Once a country has been selected submit can be activated which will display all the users within that country who have access to the IMS.

7. Select FPA – Select a FPA from the dropdown list, the FPAs that are displayed will only be the FPAs that are within the field labelled ‘Select Country’. Therefore, users are unable to select a FPA without selecting a country first. The selection of the FPA will narrow the results list to those users who have access to IMS within the country selected and within a specific FPA.

8. The user ID acts as a link, and activating this link will display a new top menu and the message ‘Select your task from the above menu’ and ‘To assign the access and edit rights to Entities and Units’.

Figure 10-2 User Details Upper Menu

<table>
<thead>
<tr>
<th>User Details</th>
<th>Groups</th>
<th>Entity</th>
<th>Units</th>
</tr>
</thead>
</table>

10.1.1.2 User Details Profile Page

1. This is located left of the top menu bar, and when activated displays the personal details of the specific user. Any of these details can be changed or amended.

2. User ID – This is the first initial of the user and the last name, no spaces between. This information should be entered by user at the time of initial registration and log in.

3. Password – This is the password that has been entered by the user and is displayed by * for each character. This should not be amended unless requested by the user. The user can change the password by selecting the link, ‘change password’ which is on the bottom of the screen. When selected a new page will appear with a new dialog box and as long as the fields are entered with the correct values the password for the user will be changed.
4. Gender - Select/edit the appropriate gender from the list by clicking within the circle provided.

5. Personal Title - Enter/edit the personal title of the user it could be, Miss, Mrs, Mr or Ms. This may require changing if a user marries or gets divorced.

6. First Name - Enter/edit the user's first name, it is not necessary to enter any middle names.

7. Last Name - Enter/edit the user's full last name.

8. Email - Enter/edit the email address of the user, this is UserID@ippf.org.

9. Job Title - Enter/edit the user's job title held within the FPA.

10. Role - Select/edit the user's role from the dropdown list provided, select the most appropriate role for the user. Please refer to the table definition in section 2.1.3.

12. Employee Number - Enter/edit the employee number, if the user is a consultant their employee number will be 0 as the individual is not an employee of IPPF organisation.

13. Preferred Language - Enter/edit the language the user prefers to utilise whilst communicating.

14. User Created On - Enter/edit the date the user was created (DD/MM/YYYY).

15. User Expires On - Enter/edit the date the user's IMS access is due to expire, (DD/MM/YYYY). This can be entered when the user no longer works for IPPF or is on extended leave.

16. Home Entity - Select/edit the user's home entity from the dropdown list. This is where the user is working and will be displayed as the default entity when the user logs in. This can be changed by the user, please note that once changed and submitted the user is required to activate the 'eIMS Home' menu option to execute this change.
17. Block this User- When ticked the user is unable to log on to the eIMS. This feature may be used when an user is on leave for an extended period of time and does not need to work on the eIMS. This feature should be used when an eIMS user is no longer employed by an organization, but cannot be deleted because at sometime in the past their userid was utilized in the staff allocation or human resource sections of the eIMS.

18. Delete this User- The user id and profile are deleted from the eIMS database. This is only possible, if the user id has not been entered or reference by the system at any time in the past, with respect to annual staff allocations or human resource definitions.

19. When all appropriate information has been entered or amended the submit button should be activated, a blank screen with a message box will appear stating that the update has been completed.

### 10.1.2 Groups

#### 10.1.2.1 What are Group Permissions?

The segment Groups gives user’s permission to various IMS sections and is located in the top menu between ‘User Details’ and ‘Entity’.

#### 10.1.2.2 Granting Group Permissions

1. Each part of the IMS is listed, a tick box is located adjacent to each area.

2. The menu and submenus for a ‘Group’ will not be displayed for the areas that are not activated for a specific user.

#### 10.1.2.3 Group Definitions

Please refer to the ‘Group’ definitions below -

*Budget Holders* - permits those officials who hold budgets for areas in IPPF to access and extensive range of IMS information, including Project Specifics, Linked Projects, Situation Analysis, Strategic Planning, Entity Summary, Projects, Indirect Costs, Budget Amendments, Search, Documentation and Reports incorporating Financial, Multi-Entity, Programmatic, Cubes and Reference.

*IMS Training Group* - provides access to main areas in IMS for training purposes including, Situation Analysis, Projects, Indirect Costs, Staff Allocation, Statistics, Human Resources, Time Line Status, Entity Details, Select Entity, Documentation, System Data and Administration.

*Performance* - permits users to access entity results based menu options, including Situation Analysis, Qualitative Analysis within Entity Summary, Statistics and Delivery Points. The users of this group will be those responsible for collecting and researching statistics and maintaining results based entity information.
**Country/Entity Editing Group** - allows entry and editing of country and entity specifics, incorporating Situation Analysis, Strategic Plan, Entity Details and Countries and Currencies under System Data. The users permitted to use this group will be those in charge of updating country and entity based details.

**Membership Group** - provides access to the Membership upper menu option located under Data Entry and Entity Details. This group allows users to enter membership details for their entity and are likely to be the same type of users as those who use Country/Entity Editing group.

**Budget Amendments [MNU] Group** - permits entry and editing of Budget Amendments and users of this group will generally be restricted to financial personnel. Menu options available to this group include Project, expenses, transfers and main details, Budget Amendments main and approval details, Multi Entity Transfers, Funds and the Basic Search function.

**Time Sheet Users Group** - permits users to enter information relating to each working day, time spent at work and tasks involved, generate a report based on data entered (Time Sheet Report) and post tasks in Internal Messages. The users of this group will be anyone accessing the IMS and required to time write.

**Reports Financial Group** - provides access to all Financial Reports, Multi Entity Secretariat and Linked Projects, Programmatic and Reference Reports. Access to this information is restricted to those authorised financial personnel.

**Reports Programmatic Group** - permits access to programmatic and reference reports. Restricted to users working within programs and users requiring programmatic information.

**Medical Info Group** - allows users to access the extensive hormonal contraceptive database located in the IMS as a main menu option.

**Policy Group** - permits access to the Policies submenu option located under the main menu option Documentation. Policies provides a direct link to the IPPF policies sub directory within the IPPF web site.

**Material Mgmt Group** - provides access to the Inventory Status report located under main menu item Reports. Access to this report is restricted to those personnel dealing with IPPF's inventory levels.

**Amendments Admin [Sec] Group** - no items chosen.

**Secretariat Budget Group** - no items chosen.

**Accreditation Group** - permits access to Accreditation submenu option under Data Entry and the Accreditation Report. What is the purpose of accreditation? Which personnel will enter information into accreditation?
Accreditation-Self-Assess - no items chosen.

Grant Agreement Group - allows users to access the Grant Agreement report. What is the purpose of the grant agreement report and who will use it?

Basic IMS Access Group - gives users the right to Login, Search for information, obtain Documentation, post Internal Messages and Log Off menu functions. Data cannot be added or modified in the system.

Project Editing Group - allows users to access the menu options for Linked Projects, Data Entry, Indirect Costs and Entity Selection. The editing of existing data is only possible for those organizational units the user has been authorized to access. Without Unit authorization, data can only be viewed.

HR Staff Group (Human Resources) - permits entry and editing of all staff positions and associated salary data, plus the viewing of Staff Allocation reports with and without costs. Generally, these menu functions are restricted to a few users in the organization responsible for personnel, payroll and institutional finances.

HR Consultant Group (Human Resources) - permits entry and editing of all consultant positions and associated salary data. Generally, this menu function is restricted to a few users in the organization responsible for personnel and office management.

IMS Controller Group - maintains financial, programmatic, and work related (labour) parameters grouped under the submenu option Time Line Status (under main menu option Data Entry). The other menu options accessible to this group include, Linked Projects, under Data Entry main menu Strategic Plan, Funds, Budget Amendments, Ledger and Entity Details, Multi-Entity and Staff Allocation Reports, Donors and Currencies under System Data and Services and Internal Messages under Administration. The users for this group include the Director of Finance or Chief Accountant of the organization, and any other responsible for maintaining the eIMS financial ledgers and national donor codes.

Staff Allocator Group - allows users to assign personnel positions and consultants to projects and indirect cost centers. This allocation can be on a percentage or numeric basis. Permits viewing of the Staff Allocation without Costs report and project details. Access to these menu options is usually reserved for users who are unit directors responsible for supervising a group of projects or cost centers. Compensation costs cannot be viewed by this group.

User Administration Group - responsible for eIMS security and assigns the data access rights for each user according to management’s instructions. Permits users to view Administration reports. This user is generally the same person who serves as eIMS administrator.
**Translator Group** - enables authorized users at the regional and central levels of IPPF to translate the screen labels, menus, tips, and attribute value lists to French, Spanish or Arabic. Menu options available to this group are under the System Data and Administration main menu options.

**Grant Certificate Group** - allows those in IPPF responsible for producing the annual cash grant certificates for each Association to manage the required information. Permits access to the Grant Certificate Report. Generally limited to users in the Central Office.

**Staff Allocators (Finance)** - permits access to the Staff Allocation (Sun) report. Restrictive use only.

**FPA Commodities** - provides access to the commodity menu option under Data Entry for those responsible for maintaining FPA commodity details.

**RO Commodities** - provides access to the commodity menu option under Linked Projects for those responsible for approving and analysing the commodity requests of FPAs.

**COMM** - Central Office Materials Managements receives regional recommendations, consolidates all regional data for commodities, negotiates with big vendors and arranges shipment. Permits access to the COMM menu options available under Linked Projects.

Figure 10-4 Group Options

3. When submit is initiated the message ‘Data saved select your next task from Top Menu’ is displayed with the title bar ‘User profile : UserID’.

10.1.3 **Entity**

10.1.3.1 **What are Entity Permissions?**

This part of user administration allocates user permissions to entities and is located in the top menu between ‘Groups’ and ‘Units’.

10.1.3.2 **Granting Entity Permissions**
1. A list of entities for each user is displayed within the boxes ‘Entities You are Authorised To’ and ‘Assigned Entities’.

2. Entities within ‘Entities You are Authorised To’ will give the user read-only permission, ‘Assigned To’ entities allows the user to add and amend entity details.

3. Only IMS administrators can change the entities a user has access to.

4. Changes can be made within the Entity permissions and submitted as per normal.

**Figure 10-5 Entities**

![Entities You are Authorised To]

**10.1.4 Units**

**10.1.4.1 What are Unit Permissions?**

User permissions to various units depend directly on the entities the user has access to. Units is located on the top menu between ‘Entity’ and ‘.’.

**10.1.4.2 Granting Unit Permissions**

1. When the user clicks on ‘Units’, a new page is displayed detailing ‘User profile : User ID’, underneath this there is a dropdown list which displays all the entities the user has access to.

2. Only one entity can be selected at a time and once an entity has been selected a list of units within the entity is presented. The layout of these units is similar to the layout of ‘Groups’.
3. Tick boxes are located next to each unit, activation of a tick box will give the user permission to the particular unit within the entity.

4. Submit will save the changes and new information.

**Figure 10-6 Units**

![Units Figure]

### 10.2 Chart of Accounts

This menu option provides multilingual functionality to Chart of Accounts (i.e. allows all account codes descriptions to be translated into various languages).

**Figure 10-7 Chart of Accounts Translation**

![Chart of Accounts Translation Figure]

Prior to translation the user needs to select the appropriate language from the dropdown list.

Translated account codes appear within the system once access is granted in the translated language.

### 10.3 Services

This menu option enables the definition of services made available by entities. There are three areas within the IMS where services appear and each area has its own requirements regarding service details.
Figure 10-8 Services Upper Menu

<table>
<thead>
<tr>
<th>Menu Selection</th>
<th>Service Details Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration/Services</td>
<td>Provides a list of all services provided by IPPF, requires translation of service description, selection of required details, grouping, report type and CYP (Couples-years of protection) factor for each service. These details should be entered by an administrator and when amended these will change for all entities.</td>
</tr>
<tr>
<td>Data Entry/Entity Details/Service</td>
<td>Definition of services made in this section is entity based only, selection of services to be provided, start date, end date and reporting frequency should be carried out by an IMS controller.</td>
</tr>
<tr>
<td>Data Entry/Statistics/Services</td>
<td>Statistics regarding each of the services offered by the entity is recorded under this menu option. Entity personnel working in outlets or delivery points need to track items and enter data for each reporting period as selected within Data Entry/Entity Details/Services.</td>
</tr>
</tbody>
</table>

10.3.1 Service Details

10.3.1.1 Function of Service Details

Unlike other service options this section allows the addition of services not already included in available services list, translation and enables changes to service reporting requirements. Service details are measured in the Data Entry/Service Statistic section. Depending on the items selected here the service can be measured by Items Provided, New Acceptor and Referrals.

10.3.1.2 Adding/Editing a Service

1. A page listing all services appears once the user has selected the upper menu item ‘Services Add/Edit’.

Figure 10-9 Service Translation and Details

2. Data Entry fields for the new service are located at the end of this page.
3. Add New - This tick box must be turned on as all fields are deactivated until this box is ticked.

4. The user is required to complete all information relating to the new service on this page.
   - Service Title - Name of service should be entered here.
   - Default Service (Y/N) - This Service will always be available as a service even if the FPA did not specify to provide this service under Data Entry/Entity Details.
     Please Note - If the service is marked as default it cannot be deselected in Data Entry/Entity Details/Services where service-reporting attributes are set. If however, it is not marked as default it can be deselected in this menu option and new services (not marked as default) can be selected.
   - Items Provided (Y/N) - Should the number of items provided for the service be tracked?
   - New Acceptor (Y/N) - Number of new people accepting the service, is this to be tracked?
   - Referrals (Y/N) - Should the entity track the number of people referred to outlet for a particular service?

5. Once submitted the new service will appear within the list, Default Service, Items Provided, New Acceptor and Referrals can be amended, however the title of the service cannot be changed. Translation of service title can only occur once the new service has been submitted, this is initiated by selecting the language from the ‘Select Language’ dropdown list. Translation of services already submitted can occur by selecting the language and then submitting the translation. Only new services need to be submitted before translating.

Please Note - Service description can be amended once the service has been submitted by selecting English from the language dropdown list, making the changes and submitting the service again.

10.3.2 Service Types

10.3.2.1 What are Service Types?

This menu option enables the grouping of available services. It is not essential for all services to be grouped. A Service Type may have many Service Details for example other male surgeries may have penis surgery, prostate surgery, testicle surgery etc.

10.3.2.2 Adding a New Service Type –

1. The ‘Service Types’ menu needs to be selected from the upper menu bar. A new page will appear with all groups and their constituent services.
2. A new group can be added by scrolling to the end of the page and entering the new group details.

3. The ‘Add New’ tick box should be ticked (as in Services Add/Edit) in order for the service types fields to become active.

4. The name of the group and the service need to be selected from the dropdown lists provided.

5. Once submitted the group and the service will be added to the list, or if the group has previously been added the service will be added to the group. Once committed the service will no longer be available in the service dropdown list. Service Types cannot be amended only deleted.

10.3.3 Service Type Report Groups

10.3.3.1 What are Service Type Report Groups?

Service Type Report Groups group service types as used by specific IMS reports for example Type Group Report field VSC can have service type male and female. Service Type Report Groups can have many service types.

10.3.3.2 Adding a New Service Type Report Group

1. Service Type Report Groups can be added by scrolling to the end of the page, which appears after the Service Type Report Groups upper menu option has been selected.

2. Add New tick box needs to be activate to allow entry of a new service type report group.
3. The user is required to select the report name and type group and click on the submit button to add the new Service Type Report Group. If this is a new report and group the record will be added to the list, if this report has previously been added the group will be appended to the report. Once entered Service Type Report Groups cannot be amended only deleted.

10.3.4 Report Groups

10.3.4.1 What are Report Groups?

Report Groups may have many Service Type Groups. Service Type Report Groups can be assigned to a sub family report as well as a whole family report.

Clicking on the upper menu option ‘Report Groups’ automatically displays an index table with all Report Groups previously entered.

10.3.4.2 Adding a New Report Group

1. The user must tick the ‘Add New’ box to add a new report group.

2. Service Family Report - Sexual Reproductive Health or Non Sexual Reproductive Health as pertaining to the report group needs to be selected from the dropdown list.

3. Service Sub-Family Report - Most appropriate for the report group is required to be selected from the dropdown list, options include SRH Contraceptive, SRH Non-Contraceptive, Diversified Medical Services or Diversified Non-Medical Services.

4. Service Type Report Group - Many Service Type Reports can be assigned to a Sub-Family or a Whole Family report group.
5. Family Number – This provides a sorting order.

6. The record will be added to the index table upon submission.

10.3.5 CYP

10.3.5.1 What is CYP?

Couple-Years of Protection
Presents estimation of protection provided by family planning services over a one year period. This is based upon the volume of contraceptives sold or distributed. Please Note – CYP information is recorded for service types only.

10.3.5.2 Adding CYP information

1. CYP information like other sections within Services requires the user to scroll to the end of the page and tick the add new box.

Figure 10-15 Adding CYP Factors

2. The service type for which CYP data it to be recorded needs to be selected from the dropdown list, transaction year and CYP information entered. CYP values can vary depending on the organisational study used as the basis for the calculation of CYP. Different studies will use different assumptions or averages for coital frequency or contraceptive efficacy. Generally the first CYP factor is that of IPPF, second USAID and the third the FPA’s own value.

3. Once submitted this record can be deleted but not amended.

10.4 Global Indicators

This IMS section provides the basis of the Data Entry/Statistics/Global Indicators menu option.
10.4.1 Indicators

10.4.1.1 What are Indicators?

Global Indicators provide an overview of entity’s activities, priorities and directions relating to the Vision 2000 Objectives and associated global indicators. Details relating to global indicators are entered and can be amended under this upper menu option.

10.4.1.2 Adding/Amending Global Indicators

1. The user is required to select the Vision 2000 Objective most appropriate for the new Global Indicator.

Figure 10-16 Selecting Vision 2000 Objective

2. Once selected a list of global indicators previously entered for the Vision 2000 Objective appear. Global indicators can be deleted or edited here utilising the delete and edit links to the right of global indicator information.

Figure 10-17 Global Indicators Index Page

3. To add a new Global Indicator the user is required to click on the ‘Add New’ button at the end of the table, this displays a new page.
4. The user is required to enter details relating to the new global indicator.
   - **Indicator Name** – Global Indicator Title
   - **Purpose** – What is assessed, illustrated or measured by the global indicator.
   - **Definition** – Explanation of the name, purpose and constituent parts, exactly what and who the global indicator is targeting.
   - **Programme Theme** – Related theme to Global Indicator.
   - **Data Source** – Where information regarding global indicator is located with entities.
   - **Data Collection** – How this information is to be collected from entities.

5. Global Indicator details will be listed under the selected Vision 2000 Objective once submitted.

### 10.4.2 Questions

#### 10.4.2.1 What are Questions?

These questions provide the ‘Data Collection’ for the Global Indicators. Grouped according to Vision 2000 Objective and Global Indicators entities are obliged to answer these questions to the best of their knowledge. This is where the questions are entered, users answer questions from menu option Data Entry/Statistics/Global Indicators.

#### 10.4.2.2 Adding/Amending Global Indicator Questions

1. Two dropdown lists appear when the upper menu ‘Questions’ is selected.

Figure 10-19 Selecting Global Indicator to Add Questions
2. The user is required to select the appropriate Vision 2000 Objective and Global Indicator. All questions previously entered for this Global Indicator appear below the dropdown lists. Questions can be edited or deleted via the links to the right of the questions.

3. A new question can be added by selecting the ‘Add New’ button. A new page then appears requesting information about the question.

Figure 10-20 Question Index Page

4. Question and Comments – The user is required to enter the question and any comments relating to the question. Both these fields will appear when the question is asked.

Figure 10-21 Adding a New Question

5. Answer and Answer Comment – Tick these boxes if an answer or answer comment section is required. These will appear when the question is asked in Data Entry/Statistics/Global Indicators.

6. No of Sub Answers (0-5), No of Yes/No Answers (0-5) and No of Numeric Data (0-5) – If sub, yes/no or numeric data is needed in answer to questions posed, the number of each type of these answers required should be entered in these fields and submitted. This will result in answer fields appearing when the questions in Data Entry/Statistics/Global Indicators are accessed.

7. Once submitted the questions will appear in Data Entry/Statistics/Global Indicators according to the parameters set under Administration/Global Indicators.

**10.5 Group Access**

‘Group Access’ assists the eIMS administrators in defining which menu options the new IMS user will have permissions to if they are part of the particular group. It is quite possible for a user to have permissions set for more than one group. ‘Group Access’ is situated on the left menu bar, is a submenu item of ‘Administration’, is located between ‘User’ and ‘Group Definitions’ and available only for authorised staff.
Adding and Amending Group Access

1. Activate the ‘Group Access’ menu by selecting the ‘Administration’ menu item from the left menu bar and then the ‘Group Access’ submenu item.

2. A new page is displayed with a title bar requesting the user to ‘Select Group to assign menu items’. There is a dropdown list located next to this request and the menu lists all groups within IMS.

3. Once a group has been selected a chart is displayed indicating the menu items the user who has permissions to the group will view (indicated by a tick present in the box next to the menu item).

4. These can be changed and submitted, it is possible to increase or decrease the menu items that can be viewed.

10.6 Group Definition

This menu item provides the functionality for the translation and adding of group names into the various required languages and the addition groups if necessary. ‘Group Definition’ is a submenu of ‘Administration’ and is located between ‘Group Access’ and ‘Tables’.
Adding and Amending Group Definitions

1. Once the ‘Group Definition’ menu item has been activated a new page is displayed. All group names are listed vertically on the left of the page under the title ‘Name 1’. Next to ‘Name 1’ there is ‘Name 2’, ‘Name 3’, ‘Name 4’…. Each name represents a different language, for example ‘Name 3’ is Spanish.

Figure 10-24 Group Definition

<table>
<thead>
<tr>
<th>Name 1</th>
<th>Name 2</th>
<th>Name 3</th>
<th>Name 4</th>
<th>Name 5</th>
<th>Name 6</th>
<th>Name 7</th>
<th>Name 8</th>
<th>Name 9</th>
<th>Name 10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Developer</td>
<td>bry</td>
<td>Fisch</td>
<td>Lamb</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Live</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staff Allocators</td>
<td>Allocated Personnel</td>
<td>Asignación de Personal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>JMS Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Adjacent to each group title, there is an Edit link located on the far right side. Activating this link results in a page being displayed with the translations of the Group name listed and it is possible to change and add to the translations.

3. Once complete **Submit** should be selected this will result in the amendments or additions being saved and the initial ‘Group Definition’ page displayed.

Figure 10-25 Edit Group Definition

<table>
<thead>
<tr>
<th>Name 1</th>
<th>Name 2</th>
<th>Name 3</th>
<th>Name 4</th>
<th>Name 5</th>
<th>Name 6</th>
<th>Name 7</th>
<th>Name 8</th>
<th>Name 9</th>
<th>Name 10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff Allocators</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4. At the bottom of the page beneath the group names, there is an **Add New** button. This button should be clicked if a new group needs to be added. A page will be displayed with ‘Name 1’ to ‘Name 10’ and should be filled in according to the name of the new Group and it’s Definition. Submitting this new group will add it to the bottom of the Group Definition and to all appropriate sections in the IMS such as Group Access.
10.7 Tables

This menu option records details relating to tables and also allows new tables or virtual tables to be managed via the eIMS user interface. 'Tables' submenu option is located within 'Administration' on the left menu bar and is situated between 'Group Definition' and 'Menus'. Once a table is listed here it becomes visible in the labels and reference data section. Labels can thus be added, translated and marked as attributes in order to allow reference data to be added to dropdowns etc.

Amending and Adding Tables

1. Activation of the ‘Tables’ submenu option displays a new data entry page, a title bar with the message ‘Select table to Edit’, a dropdown list along side this message with a listing of all tables and to the right of this an Add New button.

2. When a table is selected from the dropdown list the details of the table are displayed, this information can be amended or viewed. Once the details are complete, if being amended they can be saved by activating the submit button. This will display the initial table selection page.

3. The Add New button displays a new page in which the details of the new table can be entered.

4. Table – The identity of the table should be entered here, this can begin with IMS or another ID that will identify the table to other administrators in the IMS team.

5. Real Table on the System? – If this is a real table on the system meaning that the fields are used in a database format and appear within the IMS collecting information, then this tick box should be activated. If this is a table where information is stored for the efficient operation of the system then this box should not be activated. What is a real table? A table in the database. What is a virtual table? A table that does not exists but is added to the attributes table of the database and allows menu items to be added which act as labels, these attributes are the foundation of the translation process permitting several languages to be entered naming a single field label. If labels were used instead of attributes only one identification (language) would be permitted per field label.

6. Table Name – Enter a meaningful name for the table, one that will identify the contents to other administrators within IMS.

7. Table Description – Enter a comprehensive description of the table within this free text field.
8. Activate the **submit** button once all table details have been entered, this will save the new table and display the original page within the table menu ('select table to edit').

### 10.8 Menus

This menu option is utilised in the development and maintenance of the top menu items for each of the left main menu items that require top menu options.

‘Menus’ is located beneath ‘Administration’ and is between ‘Tables’ and ‘Menu Tips’.

**Adding and Amending Menus**

1. Once the ‘Menus’ option has been selected a new page is displayed with ‘Menu Edit Screen’ presented in the title bar. Below this title bar there is a dropdown list and instructions ‘Select Menu’.

2. Select the main menu that requires amendments or additions from the dropdown list. Once a selection is made the page describing the menu options will be presented underneath the title bar and dropdown selection. It is possible to use the dropdown list if the incorrect menu was initially selected or if movement from one menu to another is required.

3. If a new menu option is to be added the tick box next to the ‘Add New Menu Item’ should be activated. This is located just before the last line of the page that is the data entry line for the new menu item. This box has to be activated in order to enter the new details for the new menu option below.

4. **Menu Code** - How is a new menu code allocated? Like units, the code has a meaning. If starting with 1 the next digit would open as a 2nd level main menu.

5. **English** – Enter the name of the top menu item in English.

6. **Link** –

7. **Target** –
8. When all these details have been entered they can be saved and the new top menu option will be appended to the main menu option. What does reset do? It resets the values you typed in.

9. The top menu options that have already been entered, between ‘English’ and ‘Link’ have a dropdown list entitled ‘Select Language’. This is for translation purposes and when a new menu option is added it should be translated into the languages listed in the dropdown list, this can only be done when the menu option has been submitted and is within the main list.

10.9 Menu Tips

This is where the messages are entered which appear when the mouse is moved over a menu item. The messages that appear are commonly known as tips and give a general outline of the functionality of the menu item.

The ‘Menu Tips’ submenu appears beneath the ‘Administration’ main menu in the left menu bar and is located in between ‘Menus’ and ‘Help’.

Adding and Amending a Menu Tip

1. Activation of the ‘Menu Tips’ submenu results in a new page appearing in much the same layout as the ‘Menus’ initial page. ‘Menu Tip Edit Page’ is presented in the title bar. There is a dropdown list beneath the title bar with the instruction ‘Select Menu’.

2. Select a menu from the dropdown list, when this selection is complete new information will appear. A list of the menu items will be presented, the tip in English and the tip in the selected language from the dropdown list.

3. Changing the text within the English and other language free text field and submitting this information can amend any menu tip that has previously been appended.

Figure 10-29 Menu Tip Edit
4. Adding new menu tips is almost the same as changing existing tips. The user is required to enter the tip adjacent to the name of the top menu option, in English beneath the column heading English and in the other specific language which when selected should be entered adjacent to the top menu option and in the column of selected language.

5. Activation of the **submit** button will save the tips, this will display the tip entry page and the tips will be displayed when the mouse moves over the top menu options.

## 10.10 Help

This menu option provides the functionality to enter comprehensive explanations and help relating to each field. These explanations provide a greater definition of the fields and related terminology.

‘Help’ is one of the submenus of ‘Administration’ located in the main menu on the left and is situated between the submenus ‘Menu Tips’ and ‘Labels (DATDIC)’.

**Adding and Amending Help**

1. Activation of the ‘Help’ submenu results in a new page being displayed with a title bar Administration/Help and within the main screen two fields. The first labelled ‘Table’, there is a dropdown list associated with this field.

   ![Figure 10-30 Help Form](image)

2. Once a table has been selected from the list a description will be displayed in the field ‘Table Description’.

3. Two new fields will appear one ‘Field Name’, it requires a field within the chosen table to be selected. The language that the help is to be used written in should be selected from the ‘Language’ dropdown list.
4. Once ‘Field’ and ‘Language’ have been selected two more fields are added, the first is the ‘Image Path’. The directory of the image should be entered here if an image is to be added to the help message for that particular field. ‘Help Text’ should be entered in the last field, this is a free text field and as much text as necessary can be inserted.

5. **Submit** will save the entered or amended help for the field and will display the information when requested by the user.

### 10.11 Labels (DATDIC)

This menu item facilitates the input of field labels. All labels within the IMS are fields (this assists the language translations), a field is a variable and will change according to the language that is selected.

‘Labels (DATDIC)’ menu item is located beneath the ‘Administration’ main menu and is located between the submenus ‘Help’ and ‘Tips for Pages’.

#### Adding and Amending Labels
1. Once the ‘Labels (DATDIC)’ submenu item has been selected from the left menu bar a new page is displayed. There is a title bar ‘Data Dictionary Edit Screen’ and two fields below this ‘Table’ and ‘Table Description’. There is also a button
entitled ‘List the Fields’, this button can only be activated once a table has been chosen.

2. The user is required to select a table from the dropdown list provided. In order to add labels to the fields, it is necessary for the user to know which tables the fields belong to so the correct table can be selected.

![Figure 10-33 Select Table](image)

3. Once the table is selected the ‘Table Description’ is automatically entered within the field.

4. Activate the ‘List the Fields’ button once the table has been selected. This will result in a chart appearing below the existing information on the page listing all fields within the table.

![Figure 10-34 Edit Labels](image)

5. Amendments and additions can be made to the field labels within the table, activation of the submit button will save this information. Please note that not all fields within the table require labels.

10.12 **Tips for Pages**

This menu option provides the functionality to enter tips for fields, which are activated when the mouse moves over a field label. These tips offer basic information regarding the required input within the data entry field.
‘Tip for Pages’ is located beneath the ‘Administration’ main menu situated within the left menu bar and is between ‘Labels (DATDIC)’ and ‘Error Messages’.

Amending and Adding Tips for Pages

1. Activation of the ‘Tips for Pages’ menu option results in the presentation of a new page. The title bar located at the top of the page is entitled ‘Data Tips Edit Screen’ and there are two fields ‘Table’ and ‘Table Description’. Below this as within the ‘Labels (DATDIC)’ initial page there is the button ‘List the Fields’.

2. Select a table from the dropdown list, again this will require the user to have some knowledge regarding the location of the fields.

3. Once the table has been selected, the ‘Table Description’ will automatically appear.

4. Activate the ‘List the Fields’ button, this will list all fields within the table and will result in a chart appearing below the existing information on the page. The chart lists all fields within the table.

Figure 10-35 Tips for Pages

Amendments and additions can be made to the field tips within the table, activation of the submit button will save this information. Please note that not all fields within the table require labels.

10.13 User Manual

This section of the IMS is dedicated to the user manual and provides a storage area for its contents and translations. The ‘User Manual’ sub menu option is structured in three levels much like the user manual.

Adding User Manual Information

The user is required to select the ‘User Manual’ sub menu option from ‘Administration’ main menu. This will display a new screen with three upper menus for the user to choose from.
10.13.1 Header Section

The user is required to enter the titles for the main chapters in this section. To add a new chapter title the user is required to activate the Add New Header tick box, and enter the title within the text box below.

10.13.2 Subheader Section Level 1

Once the user has selected this option from the upper menu, the following screen will be displayed.

1. The user is required to select a main header that the sub header will come under from the dropdown menu provided. Once selected the user should activate the ‘Add New’ button.
2. Details of the subsection should be entered within the fields provided.

### 10.13.3 Subheader Section Level 2

In a similar way to subheader section level 1, sub-subsections can be added. The user is required to select the subheader that will be broken down further into sub-subheadings from the drop down menu provided, to activate the ‘Add New’ button and enter the details of the new sub-subheading.

![Figure 10-40 Adding New Sub-Subheader Details](image)

### 10.14 Error Messages

This menu option assists the user to provide accurate information on the correct format data should be entered into the system. These ‘ErrorMessages’ will only appear when incorrect information has been entered or information that is mandatory has not been entered.

‘Error Messages’ is located beneath the ‘Administration’ main menu situated within the left menu bar and is situated between ‘Tips for Pages’ and ‘Messaged to elMS’.

**Amending and Adding Error Messages**

1. Activation of the ‘Error Messages’ menu option results in the presentation of a new page. The title bar located at the top of the page is entitled ‘Error Messages Edit Screen’ and there are two fields ‘Table’ and ‘Table Description’. Below this there is a button ‘List the Fields’.

2. Select a table from the dropdown list, again this will require the user to have some knowledge regarding the location of the fields.

3. Once the table has been selected, the ‘Table Description’ will automatically appear.
4. Activate the ‘List the Fields’ button, this will result in a chart appearing below the existing information on the page, which lists all fields within the table.

5. Amendments and additions can be made to the error messages within the table, activation of the submit button will save this information. Please note that not all fields within the table require error messages.

Figure 10-41 Error Messages

<table>
<thead>
<tr>
<th>Field Name</th>
<th>English</th>
<th>TableLanguage</th>
</tr>
</thead>
<tbody>
<tr>
<td>BUGID</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Year</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Entry</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dept</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unit</td>
<td>Please Select Unit Its a Mandatory</td>
<td></td>
</tr>
<tr>
<td>Overhead</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

10.15  Internal Messages

10.15.1 Managing Internal Messages

10.15.1.1 What are Internal Messages?

All users can enter Bugs, Suggestions and Questions into this section. This is an excellent communications media between the eIMS team and users. Bugs, Suggestions and Questions are checked for new additions at least once a day.

‘Internal Messages’ is located beneath the ‘Administration’ situated within the main menu on the left and is between ‘Error Messages’ and ‘Time Sheet’.

10.15.1.2 Adding and Amending Internal Messages

1. Bug, Suggestion and Question follow a similar methodology.

2. Once the ‘Internal Messages’ submenu item has been activated a new top menu is displayed. The top menu incorporates from left to right, Bug, Suggestion, Question and depending on permissions may include Task and News.

3. When the Bug, Suggestion or Question menu option is activated a new page appears with a dropdown list and a table listing the details of the Bug, Suggestion or Question. The last row of the table incorporates a ‘Post A Message’ button.

Figure 10-42 Bugs and Dropdown List
4. The dropdown list allows the user to change the messages that are displayed within the table. The choices in the dropdown list are My Messages, which will display all the messages that have been posted by the user, All Messages, which now displays pending messages (those not started, under consideration or in progress) less than three months old, Posted Today, which display all messages that have been posted today, Posted Last Week, display all messages which have been posted in the last week, All Pending which display all messages that do not have the status done and have been assigned to the user and Archives which lists all messages that have been posted.

5. The table lists, from left to right -
   - **Message ID** - This is a number that the IMS assigns to each message that is posted. Whether bug, suggestion or question, each number is unique.
   - **Logged By** - This will be the user ID and name of the person who has logged the bug, question or suggestion, for example Dave Smith will have the ID dsmith.
   - **Reported On** - This is the date that the bug, question or suggestion was logged in the eIMS.
   - **Subject** - Short line describing the topic of the message.
   - **Description** - Details of the bug, suggestion or question.
   - **Reply** - Details of the fix if a bug, answer if a question and acknowledgement if a suggestion.
   - **Status** - The status is either Done, Not Started, Under Consideration or In Progress.

**10.15.1.3 Posting a Message**

1. Activate the Post a Message button from the appropriate display (bug, suggestion or question), this results in the presentation of a new entry page.

2. **Subject** - The user should enter a short description of the bug, suggestion or question.
3. Description - The details of the bug, suggestion or question should be appended in this free text field. In order to better identify any particular issues with the eIMS, please follow these guidelines to submit your requests.

- The name and number of the project where the problem occurred.
- The transaction year
- The transaction ledger or full report name
- The menu options selected (e.g.: Data Entry/Projects/Expense)
- The userid of the person who experienced the error
- Full text of SQL error, if applicable
- Attached a screen shot displaying the error message
- Brief statement describing the error.
- Brief statement describing what they expect the system to do

Figure 10-44 Enter Message Details

4. Once all the details regarding the bug, suggestion or question have been entered, **Submit** should be activated. This will save the message and then display the new message in the table as described above.

5. In index table format that is displayed when bug, suggestion or question is triggered on the top menu, the message ID can be activated and this acts as a link which then presents the complete message details in an easy to view format.

**10.15.1.4 Replying to Internal Messages**

1. The eIMS messaging system acts as a communications medium between the users and administrators of the IMS. Therefore it is necessary to have a method of replying to the messages that have been posted.

2. To the right of each bug, suggestion and question listed in their appropriate index tables there is the word 'reply'. This word acts as a link and when activated presents a screen the user can use to reply to the message.

3. The Message ID, Logged By, Reported On, Subject and Description is read-only text.
4. Reply - The user can use this free text field to enter the details of the reply to the bug, suggestion or question.

5. Status - The status can then be selected from the dropdown list according to the reply that was written, this can be either Done, Not Started, Under Consideration or In Progress.

6. Due Date - If Under Consideration or In Progress the user may wish to enter a due date. Format DD/MM/YYYY.

7. Date Completed - Once the bug has been fixed, question answered and suggestion acknowledged the task is completed and the date should be entered here. Format DD/MM/YYYY.

8. Activation of the submit button will save the reply and display the information that has been entered when next the message is viewed and return the user to the index table.

9. It is possible to amend or update the reply once it has been made, the same process is required to be followed. An email is automatically sent from the IMS to the originator of the message once a reply has been posted.

10.15.2 Tasks

10.15.2.1 Adding and Amending Tasks

1. Task is used by the eIMS administrators and those working on elements of the system. Task operates in a similar way to bug, suggestion and question.

2. A task may be allocated for work to be carried out on the system or one of the eIMS administrators to reply to a bug, suggestion or question.
3. From the top menu the task menu should be activated. The page layout is quite similar to the messages described above. Message ID and Logged By are the same. Task Assigned to lists the ID of the person who is to carry out the task. Reported on, Subject and Reply are the same as described previously. Assigned priority is the precedence the assignee should give the task and status is the same as above.

4. A new task can be posted by activating the post message button. This will display a data entry page in which the task details are to be entered.

5. Task Assigned To – Select the person the task is to be assigned to from the dropdown list provided.

6. Subject – Enter a brief description of the task.

7. Description – Enter the details of the task in this free text field.

8. Assigned Priority – Select a priority for the task Low, High or Urgent.

9. **Submit** will save the task and present the index table of tasks as well as send a message to the Assignee informing them that they have a task to perform and the details of that task.

10. The details of the task can be viewed by activating the message ID from the index table.

**10.15.2.2 Replying to a Task**

1. The reply to a task is managed in exactly the same way as a reply to a bug, suggestion or question.

2. Activate the reply link, which is located to the right of the task record within the task index table.

Figure 10-47 Replying to a Task
3. Message ID, Logged By, Reported On, Subject and Description fields will be in read-only format.

4. Reply – A reply to the assigned task should be entered here.

5. Status – The status of Done, Not Started, Under Consideration or In Progress can be selected from the dropdown list.

6. Due Date – If the status is Under Construction or Under Development a due date can be entered in this field (DD/MM/YYYY).

7. Done Date – Once completed the date of completion should be entered in this field (DD/MM/YYYY).

8. **Submit** will save the reply and present the index table.

**10.15.3 News**

**10.15.3.1 What is News?**

‘News’ is viewed on the eIMS welcome page (select main menu option eIMS Home) and comprises of a selection of the latest reports concerning the eIMS developments.

‘News’ is located on the right of the top menu of the eIMS Messages.

**10.15.3.2 Adding News**

1. Activation of this menu item displays a listing of the news items that have been entered in an index table with the following details from left to right, News Title, News Text, Publish On and Publish (Y/N).

Figure 10-48 News Form
2. The ‘News Title’ acts as a link to the news details, only the user (and administrators) that entered the news article can change the details. The other users that access the news article will view this in read-only and will not be able to change any information.

3. Another news article can be added by activating the Add New button, this will result in the presentation of a data entry page in which the details of the article can be entered.

4. **News Title** – Brief description of the contents and subject of news article.

5. **News Text** – Written article.

6. **Publish (Y/N)** – Tick box that should be activated if the article is to be published.

7. **Publish On** – Enter the date in DD/MM/YYYY format that the article is required to be published.

8. Once all details are completed the submit button should be activated, this saves the details of the article and display them in the index table.

9. The saved news article will be displayed on the IMS HomePage.

10. To translate the news article the user is required to select the ‘News Title’ from the index table. This will display details of the news article within the form plus a new dropdown list that requires the user to select the language the news article is to be translated.

Figure 10-49 Select Language for News Translation
11. Two new fields appear upon selection of a language. This enables the title and text of the news article to be entered in the chosen language.

Figure 10-50 Translate News Article

12. Upon submission the news article will be saved in the translated language and when the user logs in and selects for example Spanish the news article will appear in Spanish on the IMS HomePage provided it has been translated.

10.16 Time Sheet

This menu item provides the functionality that allows users to enter information relating to the time they spend working and the work they perform within this time.

‘Time Sheet’ is located beneath the ‘Administration’ main menu situated on the left and is below the ‘Internal Messages’ and above ‘Log Off’.


10.16.1 Time Sheet Entry

1. There are only two items in the top menu, clicking on the left item ‘Time Sheet Entry’ will result in a new page being presented.

2. At the top of the page the eIMS requests the user the month and year corresponding to the work hours to be registered. Two fields with dropdown lists are presented ‘Select Year’ and ‘Select Month’.
3. There is an index table of all entries that have been made in the selected month, the details of these entries from left to right include Start Date, End Date, Location, Project, Task Associated and Details.

4. To add a new entry the user is required to supply the following information.

**Figure 10-51 Time Sheet Entry**

5. Start Date Time – Enter the start date and time of the task, dd:mm:yyyy hh:mm.

6. End Date Time – Enter the end date and time of the task, dd:mm:yyyy hh:mm.

7. Location – Enter the location this task took place.

8. Project – Enter the title of the project this task is associated with.

9. Details - Enter the details of the task.

10. Select submit when all details have been entered and if editing a task, the edit field on the left should be activated.

### 10.16.2 Time Sheet Report


2. The new page displayed has ‘Select Year’ and ‘Select Month From’ a dropdown list in the title bar and a viewing option to view the report titled ‘IPPF IMS/Time Sheet System Module’.

**Figure 10-52 Time Sheet Report**

3. The month the report is required should be selected from the dropdown list and then the view button should be activated adjacent to the title ‘IPPF IMS/Time Sheet System Module’.

4. This will produce a report, which can be saved by clicking on the envelope with an arrow going into it, and/or printed by selecting the printer from the top menu bar in the crystal report viewer.
11. Appendix 1

Checklist for eIMS Configuration in Preparation for Project Definition

This check list is designed to assist organizations with the initial set up of the eIMS, prior to definition of projects and indirect cost centers. The steps should be completed in the sequence presented by a team senior level managers and system personnel designated by the organization's Executive Director. Please read the document through in its entirety before beginning the process. The steps outlined in this document include:

1. Identification of eIMS Administrator
2. Identification of personnel responsible for maintaining reference data
3. Creation of User ID’s
4. Establish Organizational Units
5. Define Group, Entity, and Unit Access for each User
6. Establish Timeline Status for Program, Financial, and Entity Work
7. Identify Human Resources
8. Specify the Cost per person

- Decide who will be eIMS Administrator with access to all database information, including user profiles, logical framework for projects and financial data. This may be someone with formal training in computer systems, or a “power” PC user who can assist with training, and be responsible for defining user access. This person may also be asked to help diagnose and communicate technical problems to regional eIMS administrator. The eIMS administrator person will be entrusted to maintain confidentiality of institutional and user profile data.

- Decide who will be responsible for maintaining the relatively static, reference data about the Association.
  - Situation Analysis, from the Data Entry menu option, maintains demographic statistics for the country. In addition to international sources, the Association may also enter the comparable results from national demographic health surveys available locally.
  - The Country profile (located within the System Data menu option) list in Details the country name in multiple languages, describes in Extension the country socio-geographic environment, lists the public holidays when the Association is closed, provides an overview of the national family planning environment, and identifies the national Donors.
  - Entity Details, accessible from the Data Entry menu option, include Contact Details; identification of the organization’s major Units, Branches, and Delivery Points; a free text description of the association’s Role in the country; a locally adapted version of the eIMS Chart of Accounts; and a default list of national Services.
Create a UserId spreadsheet that can be used facilitate organization of the 'Sign-In' (user registration) process. The name of this spreadsheet should be USR000.

- UserId (It is recommended that a standard naming convention be used for each individual. To make it easier to locate user profiles, it is convenient to use the first initial of the first name followed by the full last name, no spaces in between the letters. Each User Id must be unique and cannot be changed once posted to the eIMS.)
- Password (This must be at least 8 characters long; do not use any special characters in the password.)
- Sex (male or female)
- Date of Birth
- Title (Mr, Ms, Mrs...)
- First Name
- Last Name
- Email address
- Job Title
- Role (FPA Volunteer, FPA Director, Executive, FPA Manager, and FPA Officer)
- Preferred Language (affects the display of menus and data entry; options include English, French, Spanish and Arabic)
- Employee Number (This is optional. If an ID number is used, it should be same as the local identification number or code used by the Association's timesheet, accounting or personnel system)
- Home Entity (number assigned by Central Office to the Association; this indicates to the eIMS which organization's data should be displayed by default when a user logs into the system.)

If there are only a few users of the eIMS within the Association, this information can be entered manually one user at a time using the “New User? Sign up Now!” hyperlink on the eIMS login web page. However, if there are many users (more than 30) it may be more efficient to send the USR000 spreadsheet to the regional eIMS administrator and request that it be imported into the system.

The user can change the password anytime. The option is available at the bottom of almost all eIMS screens.

If the staff enters each individual user id using the web based eIMS login screen, the database will automatically send the regional eIMS administrator and the user confirmation of the user ID’s creation. The regional eIMS administrator will inform the Association eIMS administrator when this occurs so that user access to Units and menu option groups can be granted locally.

As soon as an employee leaves the organization or is no longer required to use the eIMS, the eIMS administrator needs to deactivate the user account by entering the date (DD/MM/YYYY) of account expiration. Use the filed labeled “User [ID] expires on”. Activate with a tick the check box for ‘Block User’.
Define the organizational units, using the Data Entry main menu option to access *Entity Details*.

- **Unit ID**
- **Unit Abbreviation**
- **Unit Full Name**
- **Unit Manager**
- **Unit subordinate to (To which Unit on the organizational chart does the section or department belong)**

The Unit ID must be unique for each organizational unit identified in the system. Numbers should be used for the ID, rather than letters or other mnemonic naming conventions. In planning for this ID, consider if it is convenient to use existing local accounting codes that are familiar to the staff. Intervals should be set between Unit IDs to allow future additions (ex: 100, 200, 300, 400, etc.)

Although it is possible to change a unit's name and abbreviation, the Unit ID cannot be modified or deleted once it created. Deletions require special assistance from the Central Office eIMS administrator. Unit ID's should be considered permanent in nature, and changed only when there is a major reorganization.

Unit information is listed sequentially in reports and on screens from lowest ID to highest ID value. Therefore, consider assigning the lowest value, such as 000 to an unit at the top of the organizational chart (ex: the Executive Committee of the Board). The next Unit ID value is assigned to the subordinate organizational unit. (ex: 100 = Office of the Executive Director).

Unit Abbreviations should be short, meaningful names that enable one to distinguish at a glance the section or department to which projects or indirect/administrative centers are assigned. They often appear on reports or on the screen. Unit abbreviations and full names can be modified, although Unit IDs cannot be modified.

Establish User Security using the main menu option, *Administration, Users*.

- **Assign Users to Entity**
- **Assign Users to Units**
- **Assign Users to Groups of Main Menu options**

A User Id must exist in the eIMS before the user access can be established by the association’s own eIMS administrator. If a UserId does not appear in the User Maintenance section's list of user, then it has not been posted or recognized to the eIMS database.

There are three basic steps to the configuration of user security. The purpose of this security is to indicate which system menu options are
available to the user and what data can be entered, modified or viewed by the user – and in which Entity data the user is authorized to access.

- First, the eIMS administrator must indicate which Entity or Entities can be accessed by the user. Assignment of rights is on a need to know basis.

  The Central Office eIMS administrator provides the regional eIMS administrator with access to all entities in their region. The regional eIMS administrator in turn gives access to association or entity level eIMS administrators. Associations can only see their own data. Only authorized regional and central office personnel can view Association data.

- Second, the administrator gives the user rights to add or modify data by organizational Unit. If no organizational unit is selected, the user may view, but will not be able to add new projects or amend existing data within an organizational unit.

- Third, the administrator will specify which menu functions may be viewed and accessed by the user. This last step assigns the user to functional Groups. User Groups are briefly explained below:

  Basic Access Group - gives users the right to Login, Search for information, view all institutional Reports, obtain Documentation, and Log Off menu functions. Data cannot be added or modified in the system.

  Project Group - allows users to access the menu options for Global Projects along with Data Entry for Projects, Indirect/administrative costs and Entity Selection. Entry of new projects or edit of existing data is only possible for those organizational units that have been marked as authorized under the Units. Without Unit authorization, the data can only be viewed. The menu options for reports, search, and documentation are not accessible.

  HR Staff Group (Human Resources) - permits entry and edit of all staff posts and their salary data. Generally, this menu function is restricted to a few users in the organization responsible for personnel, payroll and institutional finances.

  HR Consultant Group (Human Resources) - permits entry and edit of all consultant posts and their salary data. Generally, this menu function is restricted to a few users in the organization responsible for personnel and office management.

  IMS Controller Group - maintains the financial, programmatic, and labor (work related) parameters grouped under the TimeLine menu option. The main menu options accessible to this group include Time Line Status, Global Projects, and System Data. The users for this group include the Director of Finance or Chief Accountant of the organization, and any other responsible for maintaining the eIMS financial ledgers and national donor codes.
**Staff Allocator Group** - allows users to assign personnel posts and consultants to projects and indirect cost centers. This allocation can be on a percentage or numeric basis. Access to this menu option is usually reserved for users who are unit directors responsible for supervising a group of projects or cost centers. Compensation costs cannot be viewed by this group.

**User Administration Group** - responsible for eIMS security and assigns the data access rights for each user according to management's instructions. This user is generally the same person who serves as eIMS administrator.

**Translator Group** - enables authorized users at the regional and central levels of IPPF to translate the screen labels, menus, tips, and attribute value lists to French, Spanish or Arabic. Menu options available to this group are under the System Data and Administration main menu option.

**Grant Certificate Group** - allows those in IPPF responsible for producing the annual cash grant certificates for each Association to manage the required information. Generally limited to users in the Central Office.

**Report Group** - enables authorized users to view institutional financial reports. Access should be given to Financial Director, Executive Director and those Senior Staff Members involved in overall institutional management and budgeting.

Note: Sometimes when a user submits data to the eIMS database, they receive an error message stating that a page is unavailable. This error may be due to insufficient rights to certain menu groups or data sets. Before reporting this error as a “Bug” to the eIMS, verify that the use of the system is consistent with the profile in the user administration section of the eIMS.

Define Timelines Status using the Data Entry the main menu option.

- **Programmatic** - This parameter controls the transaction periods open or closed for programmatic data entry. For each calendar year the Association will need to define the Transaction Types (expected and actual), their related Transaction Year, and Status (open or closed)
  - **Transaction Types** include Expected Results (applicable to Annual Program Budgets), Actual Results (applicable to Annual Reports, and Interim Results (relevant for Half Year Reports)
  - The Status should be set to Open until the Association is absolutely sure that all the data for the specified program year has been entered correctly and completely. Once closed by an association, only the Central Office eIMS administrator can change the status.

- **Financial** - This parameter controls the asset, expense and income transactions entered into the eIMS database ledger. For each
calendar period and report type the Association will need to define the appropriate Report (transaction)Types, Report Year, Currency, Exchange Rate, Financial Status, and Inflation rate.

- The report types to be specified include: Proposed Budget (applicable to the Annual Program Budget), Approved Budget, Interim Actual (for use at the time of the Half Year Report), Annual Actual (Annual Report), and Audited Actual (reflecting the annual auditor's report). Each one of these report types represents a separate ledger within the eIMS.

- Currency Id, select the national currency used by the Association for its accounting records. This will be the default currency used during entry of assets, income, and expenses.

- The Exchange Rate is the average exchange rate applicable to the report period (year) and report (transaction) type. For example, when used in conjunction with the Annual Program Budget, this represents the proposed institutional exchange rate for the calendar year.

- Status should be set to Open, until the Association has entered all the data for the report period and type. Once the financial time line status is closed, it cannot be opened again without assistance from the Central Office eIMS administrator.

- Inflation represents in whole number the average increase in cost of living for a specified report type and period. This rate should reflect only increases that directly affect the budget of the organization.

- Entity Works - This parameter controls the labor cost and distribution calculations. The parameter must be created annually in the system. These parameters are not automatically transferred from one year to the next.
  - Entity Code (assigned to the Association by IPPF Central Office)
  - Transaction Year (a calendar year represented by 4 digits)
  - # Working Hours per Week
  - # Working Days per Week
  - # Working Days per Year (exclude vacation, holidays, weekends, sick leave allocation, and other standard leaves)
  - Calculate HR (staff) costs based on Staff Allocation Matrix (This parameter when check marked will allow the eIMS to automatically calculate personnel expenses using the compensation costs entered by post and the percentage or numeric allocation of staff associated with cost centers. [We recommend that you check mark this option and utilize the system to track the budget allocation of staffing. If this is not checked, the Association will have to manually keep track of staffing numbers outside of the eIMS].
  - Calculate Professional Services costs based on Staff Allocation Matrix (This parameter when check marked will allow the eIMS to automatically calculate consultant, contractor, and sessional fees entered by post, taking into consideration the proportionate allocation of consultants to cost centers. [This option should be check marked
only if the Association has contract employees that occupy posts on
the Association organizational chart.]
  - Remove Staff accounts from expenses. (This parameter controls
    whether Salary and Benefit expense accounts can be viewed in the
    dropdown list of accounts options within the Project Expense data
    entry screen. The intent is to avoid duplicate, manual entries of
    personnel expenses. Because there are some personnel expenses
    (such as allowances) that are unrelated to salary, it is not
    recommended that Associations utilize/check this option).
  - Remove Professional Services accounts from expenses. This is similar
    to the option above in terms of controlling the list of eIMS accounts
    options, however this affects all consultant, temporary and part time
    posts expenses. Because there are some consultant/professional
    service expenses (such as legal, audit, translation) that are unrelated
    to posts, it is not recommended that Associations utilize/check this
    option).
  - Account code for staff. This is the eIMS account code that will be
    used to identify personnel staff salaries (ex: 500001, Basic Salaries).
  - Account code for Consultant/Temp. This is the eIMS account code
    that will be used to identify the consultant/part time professional fee
    account (ex: 505004, sessional fees or 505002 consultants)
  - Global Staff Entry. Check mark this field in order to summarize and
    display all staff allocations for a specific project as a single amount in
    the eIMS ledger.
  - Global Consultant Entry. Check mark this field to summarize and
    display the allocation of all professional fees allocated related to a
    specific project as a total in the eIMS ledger.

Note: These parameters should be defined for each year that an annual
work plan is submitted to IPPF. Once defined, the Entity Works
parameters should not be modified after project and indirect
cost/administrative personnel have been entered into the system. Please
consult with the eIMS regional administrator, prior to making changes to
the parameter – after data entry has occurred.

- Human Resources [HR] - This main menu option identifies each post in
  the organization and its compensation. It manages personnel post or job
  titles, rather than the names of people. If the organization has more than
  a few personnel posts, the post and salary data should be organized in
  separate spreadsheets before beginning the data entry exercise.

The first HR spreadsheet identifies the posts and is called ENTPOS. The
second HR spreadsheet associates the costs with each post and is called
POSCST.

- ENTPOS – Identification of Human Resource Posts
  - Position Code (equivalent to job description code)
  - Title of Position
  - Unit Code (Unit ID associated with the post)
  - Start Date of Post (in DD/MM/YYYY format)
In order to take advantage of the staff allocation features of the system, each post in the organization should be defined in the eIMS. All salaried and part-time, consultant or contract positions can be identified using the HR menu option. By associating each post with a supervisor and organizational unit, the system is able to create a list of posts by organizational area, calculate and distribute the costs across several projects, and build a simple organizational chart.

The post code must be unique. If you have an existing human resource computer system, consider whether these codes are appropriate for use in the eIMS.

If the organization does not currently use post codes on its job descriptions or human resource computer system, the following naming convention serves as an illustrative example:

XXX – N – XXX

XXX – First three letter of the department or organizational unit name. Alternatively, an accounting code for the section can be used.

N or E – Use a letter to indicate whether the post is Exempt or NonExempt from overtime payments and compensatory leave eligibility.

XXX – The last three digits represent a sequence number that uniquely identifies the post within a department. Note that two employees with the same generic title (ex: bilingual administrative assistant or program advisor) actually have unique job descriptions based on their specific department responsibilities.

POSCST – Identification of Human Resource Costs

The second spreadsheet associates the previously defined posts with their costs. This cost represents the total of salaries plus benefits for salaried staff. For consultants and other part time posts, this represents the total fees to be paid for the specified transaction year.
o Currency ID
o Amount (gross amount to be expensed including salaries, and social benefits in relation to unit of measure)
o Payment Basis (For Staff the multiplier is either Annual (x1), Quarterly (x4), Monthly (x12), or Semi-monthly (x24). For Consultants and Professional Fee contractors, the multiplier is Weekly, Daily, or Hourly according to the parameters set in the Entity Work section of Time Line status)

☐ Create Projects, Objectives, Results Oriented Indicators, and Activities

After entering the above User Administration, Time Line Status, Human Resource and Entity Details, the Association is ready to begin defining projects and indirect/administrative cost centers from the Data Entry main menu option.
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12. Appendix 2

**APB Submission Checklist**

A. SITUATION ANALYSIS
Associations enter in the eIMS table provided the international and national Economic and Socio Demographic statistics that are relevant to their operating environment.

B. STRATEGY
FPAs enter a list of their institutional strategic objectives with title and description, in both national language and English. FPAs enter their mission statement and if it exists, their vision statement. The statement should be entered in English and national language.

C. ENTITY DETAILS
FPA information in the CONTACT DETAIL section is up to date with respect to the following contact information: postal, telecommunication, physical location of headquarters, names and titles of Executive Director and President.
All local DONORS [that do not appear in the international donor list] have been defined. These donors will appear in the income section. All organizational UNITS assigned to manage eIMS projects are defined with the name of the administrator and supervisory unit above The ROLE of the entity is reviewed and up dated to reflect the current year’s status.

D. TIMELINE STATUS
The Association has set the EXCHANGE RATE and INFLATION RATE to reflect the average rates for the specified APB period.

E. PROJECTS
1. Every on going project of the FPA and all new projects for the proposed budget period are defined in the eIMS
2. Each project has the following pages complete: MAIN, SPECIFIC OBJECTIVE, ACTIVITIES, INCOME, EXPENSES
2a Projects are consistently classified by Vision 2000 program areas using the guidelines issued by IPPF
2b. Multi-year projects funded by donors reflect proportionately the results and associated indicators, activities, income and expenses for the proposed APB period.
3. On the MAIN page the following information must be included;
   Accounting code number for project, Other Local Project ID
   Applicable FPA Strategy
   Full Title
   Overall Goal
   Summary - the content should include all items listed in manual, such as sources of funding, beginning date and duration, who is responsible for the project in the Association, who are the beneficiaries/audience of the project, overall implementation approach and key objectives and expected results.
   Selection of a Default Fund Classification that is consistent with most of the project funding.
Justification - This should explain the relevance of the project - what need is unmet or what gap in knowledge will be filled. Reference to lessons learned from a previous project may be mentioned.

Programmatic Themes - at least one must be selected

Location of Project in Country

Client age range, if applicable

Urban, Rural, PeriUrban, not applicable

Accounting code number for project, Other Local Project ID

Applicable FPA Strategy

4. SPECIFIC OBJECTIVE page should contain all the project objectives and each objective should be stated as a SMART objective. A "small" project requires at least 1 objective; a large integrated project will require at least one objective per thematic area. If it is a donor funded project, they should reflect the objectives agreed to in the funding agreement.

5. There must be at least 1 INDICATOR per Specific Objective. Indicators should be practical in terms of the effort and cost. They should reflect the main intent of the specific objective.

6. ACTIVITIES - each activity should have a title, at least one key word and a detailed description. Avoid repetition of the title in the detailed description. Major activity groupings, rather than routine daily activities should be described. Months when activity are implemented should be checked off.

7. INCOME and EXPENSES -
7a. All the income and expenses of the project are correctly classified by fund type [UC/UG, UE, R].
7b. All project income and expenses entered for ongoing projects accurately reflect the classifications used in prior years with regard to type or nature of income and expense.
7c. For restricted projects, the amount of restricted income and the amount of restricted expenses balance within the Restricted Fund Type.
7d. Only income and expenses directly generated or incurred by a project maybe associated with the project.
7e. The OTHER expense category should not be a significant portion of expenses.

F. INDIRECT COSTS -
1. The Association has appropriately defined the Indirect Cost centers or Indirect projects to include only: the office of the executive director, human resources, accounting/finance/budget/treasury, systems support to headquarters, headquarters maintenance and occupancy related to administration, central warehouse management. All program support cost centres and activities are not included in the Indirect Costs, but incorporated in projects, including IEC, supply logistics administered by affiliates branches, evaluation, public relations, fundraising.
2. All indirect income and expenses are correctly classified by fund type [UC/UG, UE, R].
3. All indirect income and expenses entered for for the proposed budget year accurately reflect the classifications used in prior years, with regard to type or nature of income and expense.
4. The OTHER expense category should not be a significant portion of expenses.
5. For every restricted project with an overhead expense charge there should be a negative, but equivalent adjusting entry to and Indirect Cost center.

G. FINANCIAL REPORTS
When generating the reports from the BY YEAR & LEDGER tab using the option for a
Expenditure, Income, Surplus/Deficit presentation by fund, the institutional result for the year must balance within funds. That means that when you compare all the organization’s income and expenses within a single fund type (such as Restricted), the Association has neither a deficit or a surplus.

### Annual Program Budget Checklist

<table>
<thead>
<tr>
<th><strong>EIMS FUNCTION</strong></th>
<th><strong>YES</strong></th>
<th><strong>CHECK LIST ITEM</strong></th>
<th><strong>NOTES</strong></th>
<th><strong>AREA</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Situation Analysis</td>
<td>SOMA</td>
<td>Socio-Demographic Statistics</td>
<td>International Sources&lt;br&gt;National Sources Optional</td>
<td>Evaluation</td>
</tr>
<tr>
<td>Strategies</td>
<td></td>
<td>Mission Statement</td>
<td>Mission Statement Required&lt;br&gt;Vision Statement Optional</td>
<td>Program</td>
</tr>
<tr>
<td></td>
<td></td>
<td>FPA Strategic Objective</td>
<td>Strategy Title &amp; Full Text</td>
<td>Program</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>In both FPA Language &amp; English</td>
<td></td>
</tr>
<tr>
<td>Entity Details</td>
<td></td>
<td>Contact Details</td>
<td>Up to date Info on Hdqtr. location, postal address, telecom/Internet contact, names and title of Executive Director and President</td>
<td>Program</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Units</td>
<td>Organizational Units responsible for supervising projects; preferably with numeric Unit ID</td>
<td>Program</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Donor</td>
<td>Identification of national donors</td>
<td>Program</td>
</tr>
<tr>
<td>Programmatic Status</td>
<td></td>
<td></td>
<td>Status set to Open for Expected Results in 2003</td>
<td>MIS</td>
</tr>
<tr>
<td>Financial</td>
<td></td>
<td>Status set to Open for Proposed Budget 2003&lt;br&gt;Local Currency should be specified with Average Exchange Rate</td>
<td></td>
<td>MIS</td>
</tr>
<tr>
<td>Entity Work</td>
<td></td>
<td>Entity rules set for 2003, including account code to be used when posting calculated personnel costs, along with other rules for calculation of level of effort (days per week, hours per day, work days in a year).</td>
<td></td>
<td>MIS</td>
</tr>
<tr>
<td>Projects</td>
<td></td>
<td>Index List of Projects by V2K</td>
<td>Appropriate and consistent classification of projects within V2K Program Areas</td>
<td>Program</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Main Project Page</td>
<td>Includes all of the following project data items:&lt;br&gt;Applicable FPA Strategy&lt;br&gt;Complete Project Title&lt;br&gt;Overall Objective/Goal&lt;br&gt;Summary (1)&lt;br&gt;Correct selection of Preferred Fund Type&lt;br&gt;Justification(2)&lt;br&gt;Appropriate Programmatic Theme Keyword(s)&lt;br&gt;Location of Project in Country&lt;br&gt;Client Age Range and Sex&lt;br&gt;Urban/Rural/Peri-Urban classification</td>
<td>Program</td>
</tr>
<tr>
<td><strong>eIMS Function</strong></td>
<td><strong>Yes</strong></td>
<td><strong>CHECK LIST ITEM</strong></td>
<td><strong>NOTES</strong></td>
<td><strong>AREA</strong></td>
</tr>
<tr>
<td>-------------------</td>
<td>---------</td>
<td>---------------------</td>
<td>-----------</td>
<td>----------</td>
</tr>
<tr>
<td><strong>Specific Objective</strong></td>
<td></td>
<td>All objectives must be SMART, results oriented with verb indicating change and specific with respect to beneficiary or audience. At least 1 objective per project. Integrated projects need a minimum of 1 objective per theme area Must relate to statement of overall objective</td>
<td></td>
<td>Program</td>
</tr>
<tr>
<td><strong>Indicators</strong></td>
<td></td>
<td>At least one output or results indicator per objective At least one process indicator per objective</td>
<td></td>
<td>Program</td>
</tr>
<tr>
<td><strong>Activities</strong></td>
<td></td>
<td>Short Activity Title Detailed description of activity planned (avoid lists of routine task)</td>
<td></td>
<td>Program</td>
</tr>
<tr>
<td><strong>Assets Income Expenses Staff Allocation</strong></td>
<td></td>
<td>Correct Identification of Project’s Fund Type as Restricted, Unrestricted Core or Unrestricted Earmarked Restricted Project, Restricted Income should equals Restricted Expenses If Unrestricted Project, includes prorated IPPF grant &amp;/or local income generated by that project. Restricted Projects should include overhead expenses Staff Cost calculated using Staff Allocation feature</td>
<td></td>
<td>Finance</td>
</tr>
<tr>
<td><strong>Main</strong></td>
<td></td>
<td>Includes only the following cost centers: Office of Executive Director, Acctg/Finance/Budget/Treasury, Human Resources, Office Services, IT, Central Warehouse IEC, Evaluation, Public Relations, Fund Raising, and Program Coordination activities should not be included within Indirect Cost centers.</td>
<td></td>
<td>Finance</td>
</tr>
<tr>
<td><strong>Assets Income Expenses Staff Allocation</strong></td>
<td></td>
<td>Correct Identification of Indirect Cost Fund Type Overhead Cost Recovery adjustment (U/R negative amount equal to overhead expense charge to projects) ‘Other Expense’ sub category should not be significant Staff Costs calculated using Staff Allocation feature</td>
<td></td>
<td>Finance</td>
</tr>
<tr>
<td><strong>Financial By Year &amp; Ledger</strong></td>
<td></td>
<td>Generate the IMS Report – ‘Expenditure, Income, Surplus/Deficit’ Institutional Fund Balances should be Balanced (with neither surplus or deficit)</td>
<td></td>
<td>Finance</td>
</tr>
</tbody>
</table>

(1) Project Summary should include all the following elements - Statement of overall approach and purpose Who is responsible for project coordination and management?
Beginning date and duration
Project beneficiaries or audience
Major sources of income

(2) Project Justification should include all the following elements –
Explain relevance of project
What unmet need or gap in knowledge is addressed?
Reference to supporting socio-demographic statistic
This page has intentionally been left blank.
13. Appendix 3

**Half Year Report Preparation, Data Entry and Reports using the eIMS**

1. **Approved Budget**

   It is assumed that the organization has already copied the Proposed Budget to the Approved Budget ledger for both financial and programmatic information, before beginning the Half Year Report process.

2. **TimeLine Status (Required)**

   “Actual Results” in the Programmatic TimeLine Status must be created with an Open status flag for the transaction year of the Half Year Report.

<table>
<thead>
<tr>
<th>Entity</th>
<th>408</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Type*</td>
<td>Actual Results</td>
</tr>
<tr>
<td>Transaction Year*</td>
<td>2002</td>
</tr>
<tr>
<td>Status*</td>
<td>Open</td>
</tr>
</tbody>
</table>

   Within the Financial TimeLine Status, the Transaction Type should be defined as “Interim Actuals” and the Status should be set to “Open”. Enter in this screen the currency, average actual exchange rate to be applied to the first six months of income and expense and the real inflation rate from January through June.

<table>
<thead>
<tr>
<th>Entity/FPA</th>
<th>400</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Type</td>
<td>Interim Actuals</td>
</tr>
<tr>
<td>Transaction Year</td>
<td>2000</td>
</tr>
<tr>
<td>Currency</td>
<td>Brazil Real</td>
</tr>
<tr>
<td>Exchange Rate (to US$)</td>
<td>3.5</td>
</tr>
<tr>
<td>Status</td>
<td>Open</td>
</tr>
<tr>
<td>Inflation</td>
<td>5.0</td>
</tr>
<tr>
<td>Suppress Control Account</td>
<td></td>
</tr>
<tr>
<td>Note for FX and inflation rates</td>
<td></td>
</tr>
</tbody>
</table>

   The comment box in the Financial TimeLine status should be used to explain any significant differences between the budget and actual exchange and inflation rates.

   For purposes of the Half Year Report, the accountant should select and check the box to suppress display of control budget accounts. All actual expenses and income should be entered at the detailed account level.
3. Default Settings

After the TimeLine Status has been opened for the Half Year period and, users should be advised to select and “Submit” the Half Year Report Year and the Interim Actuals Ledger when logging onto the eIMS. This default setting will facilitate the Half Year Report data entry process.

4. Projects:

If the programmatic reporting frequency on the main project page has been set to Half Year, the Association should enter results achieved between January and June and the activities completed during that period.

However, if the programmatic reporting frequency is Annual, the Association is not required to submit the results until the end of the year.

The IPPF Half Year Report requires submission of 1) project income and expenses and 2) commodity consumption and inventory movement. As a general rule, it does not require submission of programmatic information, unless the Association has received special instructions from their regional office or it is required by an IPPF restricted project.

Having said this, there are several advantages to entering programmatic findings, lessons learned, and activities completed as they occur or periodically through the year, instead of waiting until the annual report submission.

1) it may be easier for staff to document workshops and activities as they are completed while the details are fresh, rather than recall them months later.
2) the report workload may be more evenly distributed throughout the year rather than compressed into several weeks of at the end of the year.
3) for those associations using the eIMS as an internal management tool, their supervisor can review on line the progress of their projects as supervision and follow-up is required.

4.1 Indicators (As Required)

Before proceeding to the Indicator section, please review the Specific Objectives of each Project. Be sure that there is a starting and ending year specified for each
objective. Without the year range, some reports may not correctly print the specific objectives.

All projects of limited duration require an ending or “To Year” to be selected.

<table>
<thead>
<tr>
<th>Summary Main</th>
<th>Specific</th>
<th>Objectives</th>
<th>Activities</th>
<th>Assets</th>
<th>Income</th>
<th>Expenditures</th>
<th>Transfers</th>
<th>Staff</th>
<th>Allocation</th>
<th>Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specific Objective</td>
<td>To increase awareness of gender-based violence as a public health problem on</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Suggested Objective</td>
<td>To reduce barriers to the provision of FV services caused by laws and policies</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>From Year 2000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To Year 2003</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If the project is classified as an “ongoing” project in the Main project page, and the objective is designed to continue through the life of the project, please check the “Ongoing” box and leave empty the “To Year”.

If the programmatic reporting frequency on the main project page has been set to Half Year, the Association should revisit each indicator.

Enter both the qualitative findings and the quantitative results for the January through June period. Explain significant difference between planed and actual in the appropriate comment field.

If your screen resolution is set to 800 x 600 the Comment on Variance field may not be immediately in view on the screen. Please use the horizontal scroll bar to shift the screen to the right and complete the data entry.

Results for Semi-Annual quantitative indicators:
4.2 Project Lessons Learned (Where Applicable)

Where applicable, one can also describe the lessons learned in relation to the achievement of a each specific objective. The information in this section may include guidance on replicating the project achievement, results of evaluation studies, or obstacles encountered and related tips for working around and through challenges. Not every specific objective requires a Lesson Learned, however it is likely that a project will have a few each year.
4.3 Project Activities (As Required)

Those project’s and indirect cost centers whose programmatic report frequency is set to Half Year, should be revisited. Also if the eIMS is used for internal management of ongoing work, the activities completed should be updated to reflect work completed through June 30th. Any explanation of significant differences between plan and actual or other information may be entered in the comments and observations field.

4.4 Project Income and Expenses (Required)

The actual income and expenses generated and incurred respectively by the project is entered. Organizations should record Actuals using the Account Detail level (ex: Airfare, Per diem, Hospitality). The actual average exchange rate entered in the TimeLine status section is automatically applied to each transaction, unless the organization specifies a different rate.

5. Indirect Costs (Required)

The process for recording information about Indirect (Administrative) Cost centers is similar to the report process for Projects, both in terms of reporting semi-annual income earned and expenses incurred. Activities completed between January and June, should be recorded for each indirect cost center.

6. Additional Data Entry (Required):

The commodity section of the web based IMS is currently under construction and cannot be used to enter commodity data for the 2003 Half Year Report. Consequently, the Association is requested to submit via email or fax the following information using formats recommended in the past by the Regional Office:

- Format 11b (Consumption of Contraceptives and Other Supplies)

Associations will be able to enter this information on line for the 2003 Annual Report following training later this year.

7 eIMS Reports
The organization may wish to print an Annual Report document for its archives and discussion with managers and volunteers. The following report formats are suggested for this purpose:

7.1 Project Level Reports:

<table>
<thead>
<tr>
<th>Report Title</th>
<th>Content and Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved vs. Actual Budget – Detailed by Activity</td>
<td>A comparison of approved budget and actual expenditures grouped by activity.</td>
</tr>
<tr>
<td>Approved vs. Actual Budget – Detailed by Expense</td>
<td>A comparison of approved budget and actual expenditures grouped by eIMS expense accounts.</td>
</tr>
</tbody>
</table>

7.2 Institutional Level Reports:

Be sure that transaction type on the report filter is set to Interim Actuals in order to view information relevant to the Half Year Report period. To facilitate printing, consider exporting the report to a Adobe Acrobat (.pdf) file format.

To examine the budget results for the entire organization in terms Approved Budget, Amendments, Actuals and Variances of every project, use the Reports/Financial/By Year, Ledger & Fund Type menu options to select:

Approved vs. Actual Budget Report

To review budget results by organization unit, use the reports listed within the menu options Report/Financial/Unit. This will print the budget versus actual reports in batch for each individual projects within a Unit.
14. Appendix 4

**Annual Report Preparation, Data Entry and Reports using the eIMS**

1. **TimeLine Status (Required)**

“Actual Results” in the Programmatic TimeLine Status must be created with an Open status flag for the transaction year of the Annual Report.

If required the expected results can be closed at this stage in order to avoid modifications to that section at this time. This option applies if you want to make sure that only actual results can be entered.

Within the Financial TimeLine Status the Transaction Type “Actuals” will have to be set to “Open” together with the currency, average actual exchange rate to be applied to the income and expense reports, and the real inflation rate.

The comment box in the Financial TimeLine status should be used to explain any significant differences between the budget and actual exchange and inflation rates.
For purposes of the Annual Report, the accountant may or may not choose to check the box controlling display of control budget accounts.

Note: It is assumed that the organization has closed the Approved Budget ledgers for both financial and programmatic information, before beginning the Annual Report process.

After the TimeLine Status has been opened for the Annual Report period, users should be advised to select and “Submit” the Annual Report Year and the Actuals Ledger when logging onto the IMS. This will default setting will facilitate the Annual Report data entry process.

Please select your default YEAR and LEDGER for this session:

Select Year: 2002
Select Ledger: Actuals

Select Your Preferred Colour Pattern

2. Projects:

There are several places in the Project section where information should be entered to complete the Annual Report. Some are required and others are optional, to be used on as needed basis.

Before proceeding to the Indicator section, please review the Specific Objectives of each Project. Be sure that there is a starting and ending year specified for each objective. Without the year range, some reports may not correctly print the specific objectives.

All projects of limited duration require an ending or “To Year” to be selected.
If the project is classified as an “ongoing” project in the Main project page, and the objective is designed to continue through the life of the project, please check the “Ongoing” box and leave empty the “To Year”.

2.1. Indicators (Required)

Both the qualitative and the quantitative indicators should be revisited in order to enter the Actual Results and explain significant difference between planed and actual in the appropriate comment field.

Results for quantitative indicators:

Results data entry for qualitative indicator:

2.2. Project Lessons Learned (Where Applicable)

Where applicable, one can also describe the lessons learned in relation to the achievement of a each specific objective. The information in this section may include guidance on replicating the project achievement, results of evaluation studies, or obstacles encountered and related tips for working around and through challenges.
Not every specific objective requires a Lesson Learned, however it is likely that a project will have a few each year.

### 2.3 Project Activities (Required)

Each activity associated with either a project or an indirect cost center should be revisited. The organization should enter the actual activities completed. Any explanation of significant differences between plan and actual or other information should be entered in the comments and observations field.

#### Activity Details Planned

- Develop the following documents:
  - Self-assessment tools and questionnaires for service providers at SDP levels

#### Activity Details Completed

- All the tools and protocols were developed in consultation with the London/Central Office team and Regional QOC Advisors. The tools and protocols were pre-tested at the first phase of the program and were

### 2.4 Project Income and Expenses (Required)

The actual income and expenses generated and incurred respectively by the project is entered. Organizations should record Actuals using the Account Detail level (ex: Airfare, Per diem, Hospitality). The actual average exchange rate entered in the Timeline status section is automatically applied to each transaction, unless the organization specifies a different rate.
2.5 Qualitative Analysis and Comment Variance (Required)

These sections require one to describe the overall project results in programmatic and financial terms. The most significant project results be described by the organization on the “Qualitative Analysis” page. An explanation of financial results focuses on significant differences between budget and actuals, using the top menu option “Comments on Variances”.

Qualitative Analysis - Programmatic Project Summary (Required):

A programmatic summary for the year will briefly state the project’s most important achievements. This would include key findings in the case of a study, and major outcomes that advance the association toward resolving the problem and addressing the overall goal of the project. In addition, this summary page should summarize the most important lessons learned during the year. List those lessons that affect next year’s program planning, the replication and design of the project or are significant in explaining the project’s outcome. The major obstacles encountered and efforts to overcome them should also be included to complete the project information.

Comment Variance – Financial Project Expense Summary (Required):
The financial summary requires an explanation when there is a significant under or over expenditures and differences between budgeted income and expenses. It is generally accepted that a variance of 10% from budget requires a clear explanation to be recorded. If no significant difference between budget and actual for both expenses and income, please enter, “No significant variance exists”.

Note: You must have entered data in the Approved Budget as well as Actuals transaction types (ledgers) in order to see these fields in this financial information.

3. Indirect Costs (Required)

The process for recording information about Indirect (Administrative) Cost centers is similar to the annual report process for Projects.

4. Executive Entity Summary by Programme Area (Required)

This data entry section, located just below the Strategic Plan menu option, is qualitative in nature and should be completed after the project and indirect cost information has been entered in the Annual Report. Depending on the selected programme one will find project titles listed above four strategic questions, that aim to guide users through the qualitative programme analysis. The Entity Executive Summary is a brief synthesis of achievements and challenges during the year at an institutional level. For each Programme Area, the organization should answer 4 basic question about it should include highlights of the most important institutional achievements significant results, lessons learned and problems encountered by strategic program area. The narrative is not specific to a single project, but summarizes it should summarize the achievements of all projects within a specific programme area.

Upon selection of a calendar year and IPPF Programme Area, a list of related projects are displayed followed by a series of questions and related Strategic Objective of the Association.
Use your mouse to click on a question and display the data entry page (shown below). You can type the response directly into the page or, if the narrative is lengthy, copy the text from another Word document into this page. Be sure to select the Submit button after completing your response to the question.
5. Additional Data Entry (Required):

Three sections of the web based IMS are currently under construction and cannot be used to enter commodity and service data on-line for the 2002 Annual Report. Consequently, the Associations are requested to submit via email or fax the following information using formats recommended in the past by the Regional Office:

- Format 11b (Consumption of Contraceptives and Other Supplies)
- Service Statistic Formats:
  - S1: Contraceptive Services Provide through FPA clinics and Associated Clinics
  - S2: Other Services Provided through FPA clinics
  - S3: Number FPA Service Outlets and Other Agencies Supplied with Contraceptives by the FPA
  - S4: Calculation of CYP using Data on FPA Contraceptive Issues to Acceptor
- Changes in Reserves and Fund Balances

Associations will be able to enter this information on line for the 2003 Annual Report following training later this year.

6. eIMS Reports

The organization may wish to print an Annual Report document for its archives and discussion with managers and volunteers. The following report formats are suggested for this purpose:

6.1 Project Level Reports:

<table>
<thead>
<tr>
<th>Report Title</th>
<th>Content and Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Annual Report including Approved vs Actual Budget [Recommended]</td>
<td>Base Line, Expected Results and Actual Results for each Indicator. Completed Activities and Lessons Learned for Objective. Budget vs Actual comparison of Expenses and Income. A summary of the project’s most remarkable achievements, most important lessons learned, and greatest constraints. An explanation of significant variance over 10%</td>
</tr>
<tr>
<td>Lessons Learned by Objective</td>
<td>A detailed list of lessons learned for each specific objective of the project.</td>
</tr>
<tr>
<td>Project Results Summary and Explanation of Variance</td>
<td>A short narrative summary limited to the project’s most notable achievements, lessons learned, and greatest constraints. An explanation of significant project variances.</td>
</tr>
</tbody>
</table>

6.2 Institutional Level Reports:

Be sure that transaction type on the report filter is set to Actuals in order to view information relevant to the Annual Report period. To facilitate printing, consider exporting the report to a Adobe Acrobat (.pdf) file format.

---

1 Servicios anticonceptivos provistos a través de las clínicas en la APF y clínicas asociadas
2 S2: Los otros servicios provistos a través de las clínicas de la APF
3 S3: Número de centros de servicios de APF y otras agencias que reciben anticonceptivos de la Asociación
4 S4: Calculo de los Años – Pareja protección usando los métodos anticonceptivos de la APF
If you wish to print out project programmatic and budget information in batch, Unit by Unit [rather than project by project], please use the Reports/Financial/Unit menu options. The recommended reports are:

*Project Annual Report, including Approved vs. Actual Budget*
*Project Results Summary and Explanation Variance*

The Entity Summary of each Program Area can be printed using the Report/Programmatic menu options. The information in these reports is qualitative in nature. The first is a synthesis by Program Area Outcomes, Achievements, Lessons Learned and Obstacles. The second report includes the Program Area synthesis and adds the related project qualitative summaries. The two reports are:

*Entity Summary*
*Entity Summary Including Aggregated Project Summary*

To examine the budget results for the entire organization in terms Approved Budget, Amendments, Actuals and Variances of every project, use the Reports/Financial/By Year, Ledger & Fund Type menu options to select:

*Approved vs. Actual Budget Report*

If the organization has entered several years of actual expense data, then you may wish to use a multi-year report designed to view the total expenditures for each project over a three year period. Use the Reports/Financial/3 Year Comparison menu options and select:

*Yearly Expense Comparison for UC/UG/UE/R/Tot*

You will need to adjust three report filters in order to produce the 3 Year Comparison Report. ‘Final/Last Comparison Year’ of the 3 year comparison should equal the annual report year currently being entered into the IMS. ‘Transaction Type’ should be set to ‘Actual’. ‘Currency’ should specify either local currency or USD and the corresponding average exchange rate for the current year’s annual report.

To view trends in income, use the Reports/Financial/3 Year Comparison menu options and adjust the report filters to reflect the last year of AR income comparison, set transaction type to equal ‘Actual’, and specify the currency.

*Project Income 3 Yr. Comparison (UC/UG/UE/R/Tot)*
This page has intentionally been left blank.
## 15. Appendix 5

**EI MS Cycle**

<table>
<thead>
<tr>
<th>Process</th>
<th>Timing</th>
<th>Data Entry Sub-Menu</th>
<th>Operation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategic Planning</td>
<td>Every 3 to 5 Years</td>
<td>Situation Analysis</td>
<td>Enter and edit socio-demographic data collected prior to strategic planning</td>
</tr>
<tr>
<td></td>
<td>As Required</td>
<td>Strategic Plan, Mission</td>
<td>Add or edit Mission of Organization; enter and label Vision, if it is also available</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Strategic Plan, Strategic Goals</td>
<td>Add or edit Goals of Organization</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Strategic Plan, Strategic Objectives</td>
<td>Add or edit Strategic Objectives of Organization.</td>
</tr>
<tr>
<td>Annual Program and Budget</td>
<td>Due October 15th</td>
<td>Log In</td>
<td>Use Proposed Budget ledger and specify Year of Annual Program and Budget</td>
</tr>
<tr>
<td></td>
<td>Annual</td>
<td>TimeLine Status, Programmatic</td>
<td>Open Expected Results for APB Year</td>
</tr>
<tr>
<td></td>
<td></td>
<td>TimeLine Status, Financial</td>
<td>Open Proposed Budget &amp; Set Exchange Rate / Inflation for APB Year</td>
</tr>
<tr>
<td></td>
<td></td>
<td>TimeLine Status, Entity Work</td>
<td>Open Parameters for Calculation of Personnel Costs for APB Year</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Entity Details, Units</td>
<td>Add New Units not previously defined in the eIMS</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Entity Details, Donors</td>
<td>Add New National Donors not previously defined in the eIMS</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Ledger, Situation Analysis</td>
<td>Copy Situation Analysis data from previous year to APB year and Update</td>
</tr>
<tr>
<td>Process</td>
<td>Timing</td>
<td>Data Entry Sub-Menu Option</td>
<td>Operation</td>
</tr>
<tr>
<td>--------------------------</td>
<td>--------</td>
<td>-----------------------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Situation Analysis</td>
<td></td>
<td></td>
<td>Edit Situation Analysis copy to reflect most recent data for APB proposed year.</td>
</tr>
<tr>
<td>Ledger, Programmatic</td>
<td></td>
<td></td>
<td>Copy Activities &amp; Indicators for each project from previous APB to next APB</td>
</tr>
<tr>
<td>Human Resources, Staff / Professional-Temp</td>
<td></td>
<td></td>
<td>If eIMS Staff Allocation module will be used, update list of staff by adding new posts</td>
</tr>
<tr>
<td>Human Resources, Staff Costs / Professional-Temp Costs</td>
<td></td>
<td></td>
<td>If eIMS Staff Allocation module will be used, update annual cost of each employee and consultant.</td>
</tr>
<tr>
<td>Project, Main</td>
<td></td>
<td></td>
<td>Add New Projects and Update Main Project Definition of On-going Projects</td>
</tr>
<tr>
<td>Project Specific Objectives</td>
<td></td>
<td></td>
<td>Add New Objectives</td>
</tr>
<tr>
<td>Project, Indicators</td>
<td></td>
<td></td>
<td>Add New Quantitative and Qualitative Indicators</td>
</tr>
<tr>
<td>Project, Activities</td>
<td></td>
<td></td>
<td>Add New Activities</td>
</tr>
<tr>
<td>Project, Assets</td>
<td></td>
<td></td>
<td>Add New Fixed Assets and Inventory Assets to be acquired during APB year</td>
</tr>
<tr>
<td>Project, Income</td>
<td></td>
<td></td>
<td>Add Income for each Project</td>
</tr>
<tr>
<td>Project, Expense</td>
<td></td>
<td></td>
<td>Add Expenses for each Project</td>
</tr>
<tr>
<td>Project, Staff Allocation</td>
<td></td>
<td></td>
<td>Add Staff and Consultant/Temp Allocations</td>
</tr>
<tr>
<td>Reports, Financial</td>
<td></td>
<td></td>
<td>Print Institutional Budget Summaries (for Association use; do not send to IPPF)</td>
</tr>
<tr>
<td>Reports, Programmatic</td>
<td></td>
<td></td>
<td>Print Project Objectives, Indicators and Activities for Entire Institution (for Association use; do not send to IPPF)</td>
</tr>
<tr>
<td>Commodities (under construction - Formats 11a and 12)</td>
<td></td>
<td></td>
<td>Add Commodity Requests for Proposed Budget Year</td>
</tr>
<tr>
<td>Entity Summary, General Info</td>
<td></td>
<td></td>
<td>Executive Overview of Significant Issues affecting implementation of APB</td>
</tr>
<tr>
<td>TimeLine Status, Financial</td>
<td></td>
<td></td>
<td>Close Proposed Budget, upon submission of APB to IPPF/WHR Regional Office</td>
</tr>
<tr>
<td>Process</td>
<td>Timing</td>
<td>Data Entry Sub-Menu Option</td>
<td>Operation</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>---------------------------------</td>
<td>--------------------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Reserves/Fund Balances</td>
<td>Due October 15th</td>
<td>Funds, Add New</td>
<td>Add any new Reserves or Fund Balances</td>
</tr>
<tr>
<td></td>
<td>Annual</td>
<td>Funds, Opening Balance</td>
<td>Submit Opening Balance for Estimated Reserves ./ Fund Balances for Proposed Budget year</td>
</tr>
<tr>
<td>Balancing Proposed Budget</td>
<td>Due October 15th</td>
<td>Budget Amendments / Transfers, Add New</td>
<td>Add New' Proposed Budget Amendments to apply balance From a Reserve To Project Deficit</td>
</tr>
<tr>
<td></td>
<td>Annual</td>
<td></td>
<td>Add New' Proposed Budget Amendment to apply a surplus From a Project To a Reserve</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Budget Amendments, Signatures</td>
<td>IMS Controller reviews Proposed Amendments and specifies signatures required for Authorization</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Budget Amendments, Approval</td>
<td>IMS Controller verifies that Proposed Amendments balance and posts to Proposed Budget ledger</td>
</tr>
<tr>
<td>Approved Budget</td>
<td>January 31st</td>
<td>TimeLine Status, Financial</td>
<td>Open Approved Budget &amp; Set Exchange/Inflation Rate</td>
</tr>
<tr>
<td></td>
<td>Upon Receipt of Annual</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>IPPF Funding Agreement</td>
<td>Ledger, Copy Projects</td>
<td>Copy Projects from Proposed Budget to Approved Budget ledger</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Copy one project at a time, verifying budget figures for each project before posting</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>If approved budget is different than proposed, enter adjustment in Ledger Copy before posting</td>
</tr>
<tr>
<td>Process</td>
<td>Timing</td>
<td>Data Entry Sub-Menu Option</td>
<td>Operation</td>
</tr>
<tr>
<td>-------------------------</td>
<td>----------------------------------</td>
<td>---------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Budget Modifications</td>
<td>As Required during Year</td>
<td>Budget Amendments</td>
<td>Add New Amendments to Increase Income &amp; Expenses Budget when Restricted Projects Approved</td>
</tr>
<tr>
<td></td>
<td>When Donor Approves New</td>
<td>Budget Amendments, Signatures</td>
<td>Add New Amendment to Reduce Income and Expense Budget, in cases of Anticipated Deficit</td>
</tr>
<tr>
<td></td>
<td>Restricted Project, or</td>
<td>Budget Amendments, Approval</td>
<td>IMS Controller reviews Proposed Amendments and specifies signatures required for Authorization</td>
</tr>
<tr>
<td></td>
<td>If Anticipated Deficit requires</td>
<td></td>
<td>IMS Controller verifies that Proposed Amendments balance and posts to Proposed Budget ledger</td>
</tr>
<tr>
<td></td>
<td>Significant Budget Changes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Half Year Report</td>
<td>July 31st Annual</td>
<td>TimeLine Status, Programmatic</td>
<td>Open Actual Results</td>
</tr>
<tr>
<td></td>
<td></td>
<td>TimeLine Status, Financial</td>
<td>Open Interim Actuals &amp; Set Exchange/Inflation Rate</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Log In</td>
<td>Use Interim Ledger and Specify Year of Half Year Report</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Projects, Specific Objectives (Indicators)</td>
<td>Enter Interim Results for any Indicator with a 6 Month, Quarterly or Monthly Frequency</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Projects, Activities</td>
<td>Enter Activities Completed To Date from Jan-June</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Projects, Income</td>
<td>Enter Interim Jan-June, 1st 6 Month Project Income</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Projects, Expenses</td>
<td>Enter Interim Jan-June, 1st 6 Month Project Expenses</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Reports, Financial</td>
<td>Print Budget vs Actual Report for Entire Organization (for Association use; do not send to IPPF)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Commodity (under construction - Format 11b)</td>
<td>Enter Inventory Movement for Consumables and Contraceptives, 1st 6 Months of Year</td>
</tr>
<tr>
<td></td>
<td></td>
<td>TimeLine Status, Financial</td>
<td>Close Interim Actuals for Half Year Report period</td>
</tr>
<tr>
<td>Process</td>
<td>Timing</td>
<td>Data Entry Sub-Menu</td>
<td>Operation</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------------------</td>
<td>----------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Annual Report</td>
<td>February 28th Annual</td>
<td>TimeLine Status, Financial</td>
<td>Close Approved Budget for Annual Report year</td>
</tr>
<tr>
<td></td>
<td></td>
<td>TimeLine Status, Financial</td>
<td>Close Proposed Amendment for Annual Report period</td>
</tr>
<tr>
<td></td>
<td></td>
<td>TimeLine Status, Financial</td>
<td>Open Actuals (Final) &amp; Set Exchange/Inflation Rate</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Log In</td>
<td>Use Actual Ledger and Specify Year of Annual Report</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Projects, Specific Objectives (Indicators)</td>
<td>Enter Actual Results for each Project Indicator</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Projects, Specific Objectives (Lessons Learned)</td>
<td>Enter Lessons Learned for each Project Objective</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Projects, Activities</td>
<td>Enter Activities Completed</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Projects, Income</td>
<td>Enter Actual Project Income</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Projects, Expenses</td>
<td>Enter Actual Project Expenses</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Projects, Notes / Project Result Summary</td>
<td>Enter Summary of Project Achievements and Obstacles</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Projects, Comments/Variances</td>
<td>Enter Explanation of Budget Variances</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Data Entry, Entity Summary, Qualitative Data Analysis</td>
<td>By Program Area, describe key outcomes, lessons learned, obstacles</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Reports, Financial</td>
<td>Print Institutional Budget vs. Actual Report (for Association use; do not send to IPPF)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Reports, Programmatic</td>
<td>Print Summary of Project and Program Results for entire Institution (for Association use; do not send to IPPF)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Changes in Reserves (under construction - Format 5)</td>
<td>Enter Actual Increases and Decreases to Reserves/Fund Balances</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Commodities (under construction - Format 11b)</td>
<td>Enter Inventory Movement for Consumables and Contraceptives for Annual Report year</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Service Statistics (under construction - Format S1-S4)</td>
<td>Enter Service Statistics for Annual Report year.</td>
</tr>
<tr>
<td>Process</td>
<td>Timing</td>
<td>Data Entry Sub-Menu Option</td>
<td>Operation</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-------------------------</td>
<td>------------------------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Update Institutional</td>
<td>Whenever Changes Occur</td>
<td>Entity Details, Contact Info</td>
<td>Update Association Address, Phone Numbers, Executive Dir and President Names</td>
</tr>
<tr>
<td>Reference Data</td>
<td>in the Organization's</td>
<td>Entity Details, Administrators</td>
<td>Update Contact Information for those in responsible for managing IMS, Commodities, etc</td>
</tr>
<tr>
<td></td>
<td>Operations or Personnel</td>
<td>Entity Details, Services</td>
<td>Update List of Services currently offered by Association</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Entity Details, Outlets</td>
<td>Update List of Outlets where services and products are provided to clients</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Entity Details, Chart of Accounts</td>
<td>Create and Update the list of Local Accounts that match or map to the eIMS Chart of Accounts</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>(Only IF the Local Chart of Accounts feature is activated by the Association, are updates required.)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>***** MAIN MENU OPTIONS *****</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Create or Update User Profiles</th>
<th>Whenever the Employment Status of User Changes</th>
<th>IMS New User Registration (<a href="http://www.ippf.net">www.ippf.net</a>)</th>
<th>To Add Users to the IMS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Main Menu Option, Administration, User Basic Info</td>
<td>To Block User from Accessing IMS (use if staff allocation and human resource data exists)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>To Delete User from IMS User list (use if staff allocation or human resource data does NOT exist)</td>
</tr>
<tr>
<td>Process</td>
<td>Timing</td>
<td>Data Entry Sub-Menu Option</td>
<td>Operation</td>
</tr>
<tr>
<td>-------------------------</td>
<td>----------------------------</td>
<td>---------------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Main Menu Option, Administration,</td>
<td>To allow access to menu options</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Groups</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Main Menu Option, Administration,</td>
<td>To allow data entry and modification to projects or indirect costs centers within Unit</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Units</td>
<td></td>
</tr>
<tr>
<td>Reporting System</td>
<td>As Problems Occur</td>
<td>Main Menu Option, Administration,</td>
<td>To report a system error or report problem</td>
</tr>
<tr>
<td>Problems</td>
<td></td>
<td>Bugs</td>
<td></td>
</tr>
<tr>
<td>Recommending Improvements</td>
<td></td>
<td>Main Menu Option, Administration,</td>
<td>To suggest improvements to IMS and requesting additional features</td>
</tr>
<tr>
<td>Asking 'How To'</td>
<td></td>
<td>Suggestions</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Main Menu Option, Administration,</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Information</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Main Menu Option, Documentation,</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Manual</td>
<td></td>
</tr>
<tr>
<td>Accreditation</td>
<td>When Organization's</td>
<td>Main Menu Option, Accreditation,</td>
<td>Association answers questions about its compliance with IPPF standards, as listed in Membership Guidelines</td>
</tr>
<tr>
<td></td>
<td>Accreditation is</td>
<td>Self-Assessment (Format 1)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Reviewed by IPPF</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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16. Appendix 6

**Indirect Cost Charge/ Recoveries**
EIMS account 590004

If an organization collects from a donor funded project an amount for overhead expenses, eIMS requires both of the following transactions: (1) an increase of project expenses and (2) a decrease of indirect (administrative) expenses equal to the overhead expense.

To recognize the overhead within a project, use Account 590004 and create an expense transaction. The funding type is usually Restricted [R]. In the transaction description it is advisable to include: the Name of the Donor and the Percent of overhead or other information that explains the basis of overhead expense calculation.

<table>
<thead>
<tr>
<th>Account Code</th>
<th>Activity Code</th>
<th>Currency</th>
<th>Amount</th>
<th>Recipient Code</th>
<th>Transaction Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>590004</td>
<td>PERSONNEL</td>
<td>USD</td>
<td>17,993.60</td>
<td>[590004]</td>
<td>Staff Cost allocation</td>
</tr>
<tr>
<td>590004</td>
<td></td>
<td>USD</td>
<td>4,574.00</td>
<td>[590004]</td>
<td>Indirect cost charges (recoveries)</td>
</tr>
</tbody>
</table>

To balance these expense transactions, Donor Income equal to the total of direct project expenses and the overhead charge by the project should be entered in the Project Income section. In the example above, the restricted Donor Income transaction would equal $22,567.60 ($17,993.60 personnel + $4,574.00 indirect cost charges).

The adjustment of administrative indirect costs requires that the organization establish an indirect cost (administrative) cost center entitled “Overhead Cost Recovery Pool”.

For each project that records an overhead expense, the organization should create a separate negative expense transaction within the Overhead Cost Recovery Pool. The negative amount should be exactly equal to the overhead expense entered in the Project. Negative expense transactions are only permitted in relation to Account 590004, Indirect Cost Recoveries.
Note that the Funding type associated with this adjustment is Unrestricted Core and will therefore reduce the total institutional indirect costs supported by IPPF and local income.

To facilitate future maintenance of this indirect cost recovery pool, it is important that the Transaction Description specify all of the following: the Donor Name, the Project Title, and Project Number.

It is recognized that a double entry accounting system with Debits and Credits may handle the transactions with slightly different journal entries, however for purposes of preparing the Annual Program Budget or Annual Report within the eIMS, these single entries to the eIMS ledger are required to reflect the net effect of overhead expense recovery on institutional indirect costs.

| [59999+] Indirect cost charges (recovery) | UC | USD | (4,574.00) | (4,574.00) | 6/17 Cost recovery from Gates Gender Violence, Projects 400-1929-003 | Delete | Edit |

If the organization wants to associate the IPPF cash grant with the Accounting and Financial Management indirect Cost Center, only $45,426.00 of income is required to offset the net expenses of the indirect cost center.

<table>
<thead>
<tr>
<th>Project Income:</th>
<th>Project Expense:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donor – Gates</td>
<td>Personnel</td>
</tr>
<tr>
<td>International Foundation Income</td>
<td>22,567.60</td>
</tr>
<tr>
<td>Total Project Income [R]</td>
<td>22,567.60</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Indirect Cost Center Income:</th>
<th>Indirect Cost Centers Expenses:</th>
</tr>
</thead>
<tbody>
<tr>
<td>IPPF Grant</td>
<td>45,426.00</td>
</tr>
<tr>
<td>Total Indirect Cost Center Income [UC]</td>
<td>45,426.00</td>
</tr>
</tbody>
</table>

Net Indirect Cost Center Expense [UC] = IPPF Grant - Overhead Expense - Indirect Cost Recovery Pool

Net Indirect Cost Center Expense [UC] = 45,426.00 - 4,574.00 - (-4574.00) = 45,426.00
17. Appendix 7
Fund Balances, Budget Amendments, Transfers and Reserves

Fund Balances and Reserves

The results of operation each year are distributed to Fund Balances and Reserves of the Association. Positive results or surpluses will increase the Fund Balances and Reserves, while negative results or deficits will decrease them. The results are determined by comparing the income against the expenses of the organization. Fund Balances and Reserves are presented on the Balance Sheet of the organization, and the Schedule of Changes in Reserves and Fund Balances are also subject to audit each year.

Fund Balances and Reserves can be of many types but generally fall within a few broad categories. Those that may be used without any restriction by the association for their general operations are known as **UnRestricted and UnDesignated**. Other Reserves and Fund Balances that are authorized by the Board for a specific purpose are considered **UnRestricted Earmarked or Designated** and are often used to expand the organization or address special legal and customary obligations of the employer. The Fund Balances and Reserves that represent the annual, unused portion of a donor’s restricted grant are known as **Restricted** Reserves or Fund Balances. In some countries, the auditors refer to these as ‘Temporarily’ Restricted Reserves or Fund Balances. Endowments that are maintained into perpetuity are also considered **Restricted** in nature. They may be referred to as ‘Permanently’ Restricted Fund Balances or Reserves by some auditors.

The establishment of Reserves in the eIMS is a two step process. First, the Fund or Reserve account must be defined by name. Second, an opening balance is specified, generally based on the most recent audit. Use the Reserve/Fund Balance option located within the Data Entry submenu to add a new Fund to the eIMS.
When defining a Reserve or Fund Balance, you will need to complete the following fields of information:

- The organizational Unit responsible for managing the Reserve/Fund Balance.
- The overall or general objective of the Reserve/Fund Balance.
- A summary statement should include the overall purpose of the Reserve/Fund Balance, the utilization criteria, investment considerations, as well as any other information that the organization considers relevant to understanding the Fund’s use, maintenance or management.
- The name of the employee in charge of managing the Fund.
- Date of Fund Balance Creation
- Expected Date of Fund’s Termination, or Ongoing status
The next step requires the organization to specify an opening balance. If this Reserve or Fund Balance already exists in the audited Financial Statements of the organization, then the association should use the most recent audit figures for the Opening Balance. If the Reserve or Fund Balance is new, this step may be skipped. The system will assume a zero opening balance unless another is specified.

When a fund is created using restricted funds, use the “Name” field to indicate the donor associated with the reserve. This is useful for identifying project funds that are carried over from one year to the next in order to complete multi-year projects.

The opening balance and each additional transfer to or from the Reserve or Fund Balance can be viewed from the “Ending Balance” top menu option. This is a historical view of all transactions increasing or decreasing the Reserve or Fund Balance.
Budget Amendments and Transfers

The organization may want to use surplus income from local operations in a specific program year for contraceptive procurement or sustainability activities in following years. In the proposed budget of the organization, local income will exceed the operational expenses and appear as a project surplus, and contribute to an institutional surplus.

In other instance, a project may receive more donor income than it can spend within a single year. The unused portion of the grant will need to be carried forward to the following contract year, if this is a multi-year project.

All amendments and transfers are recorded in a “Proposed Amendment” ledger and upon approval are posted by the eIMS to either the “Proposed Budget” or “Approved Budget” ledgers as required by the organization. The “Proposed Amendment” ledger must be “Open” in order to receive amendment transactions. Refer to Timeline Status/Financial Budget to verify the status of this ledger for the Transaction Year of the Proposed or Approved Budget to be amended.

When the Amendment/Transfer option is used correctly, the organization can produce reports that track financial results against the original approved budget and an adjusted budget that includes all changes to the budget. It also incorporates a systematic process into the Proposed Budget preparation for managing planned surplus or deficit situations.

Use the Menu option, Budget “Amendments” and Transfers to increase and decrease Reserves or Fund Balances. The steps are the following:

1) Select “Add New” from the Amendment top menu options, complete the Amendment description data entry page and specify the Amendment Type.

2) Use the “Approval Signatures” menu option to specify the name of the staff members who will approve and serve as signatories for the budget transfer or amendment.
3) Depending on the type of Amendment, you may be required to enter expenses or income line items into the Project’s Proposed Amendment ledger.

4) Select the “Approval” top menu option to complete the amendment information and post it to the ledger.

There are six Amendment Types to choose from in the Amendment description page. In the first four options, the Amendment transactions are “balanced” and two sided, allowing increases to be offset by decreases between Projects and Reserves. In the last two options, Additions and Reductions, only one Project is affected within the ledger.

**From a Project to another Project:**
This option will increase a project's expenses, while decreasing another project's expenses in equal amounts for a specific transaction year. It can also be utilized to adjust income between projects up and down in equal amounts. Generally this option is used in conjunction with the Approved Budget ledger to document adjustments among projects during the current operational year.

**From a Project to a Reserve or Fund Balance:**
An organization will use this option to increase a Reserve or Fund Balance by the amount of a project's surplus. This occurs when operational income exceeds project expenses and is set aside for future program use (ex: Clinic Renovation/Construction or Contraceptive Procurement Reserve). It also occurs when a restricted project carries forward from one year to the next the positive difference between income received from the donor and annual expenses.

Under GAAP rules, all income is recognized in the year that it is received and eIMS complies with this guideline. Therefore, the Amendment type for “Project to a Reserve or Fund Balance” does not reduce the amount of income reported. However, in order to aide the interpretation of budget reports, upon approval of an amendment, the system will record the transfer adjustment and present it as a separate column on selected eIMS financial reports.

**From a Reserve or Fund Balance to a Project:**
This option will utilize a Reserve or Fund Balance to support the expenses of a project or indirect (administrative) cost center. It will decrease the Reserve and offset the project's deficit budget in a Proposed Budget.

**Between Reserves or Fund Balances:**
Occasionally it is necessary to make transfers between Reserves/Fund Balances. This amendment option will increase one reserve and decrease the other in amounts. For example, an organization may decrease its working capital reserve in order to increase its building renovation reserve or severance reserve level.

**Additions:**
Use “Additions” to increase the Approved Budget of project or indirect (administrative) cost centers. Generally used when a donor of a restricted project provides additional support to a project during a calendar year.
**Reductions:**
This option is utilized to decrease the income and/or expenses of an Approve Budget due to changes in funding by a donor or significant changes in local income generation.

Some amendment types require the operator to return to the Project Expense or Income sections of the eIMS in order to create expense and/or income entries in the “Proposed Amendment” ledger.

<table>
<thead>
<tr>
<th>Amendment Type</th>
<th>One or Two Sided Amendment</th>
<th>Create Income or Expense Entries in Proposed Amendment Ledger of Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>From a Project to a Project</td>
<td>Two Sided</td>
<td>Yes, Project entries to Proposed Amendment Ledger are required for both the “From” project and the “To” project.</td>
</tr>
<tr>
<td>From a Project to a Reserve</td>
<td>Two Sided</td>
<td>No, data entry in the Proposed Amendment Ledger of the Project / Expenses section is not required.</td>
</tr>
<tr>
<td>From a Reserve to a Project</td>
<td>Two Sided</td>
<td>Yes, data entry in the Proposed Amendment Ledger of the Project / Expenses section is required.</td>
</tr>
<tr>
<td>Between Reserves or Fund Balances</td>
<td>Two Sided</td>
<td>No additional entry at the Project level is required.</td>
</tr>
<tr>
<td>Additions</td>
<td>One Sided</td>
<td>Yes, data entry in the Proposed Amendment Ledger of a Project’s Expense or Income section is required. Warning message if Addition of expenses and income are not equal.</td>
</tr>
<tr>
<td>Reductions</td>
<td>One Sided</td>
<td>Yes, data entry in the Proposed Amendment Ledger of a Project’s Expenses section is required. Enter only positive amounts; upon approval the system will treat the entries as negative adjustments to the budget. Warning message if Reduction of expenses and income are not equal.</td>
</tr>
</tbody>
</table>
If manual entries to the Proposed Amendment Leger of a Project are required, the data entry screen will be similar to the one shown below. Note that the Transaction Type is identified as the “Proposed Amendment” Ledger. Also each entry must be associated with a Proposed Amendment Number.

Step 1: Identify the Amendment or Transfer

Select “Add New” from the Budget Amendment top menu. The system will display a page to create an Amendment description or record header.

- Assign a unique Amendment number in order to track the Amendment transactions over time. This can be a number created by the organization or one assigned by IPPF to its appropriations. Enter a brief label or title for the Amendment and briefly describe the amendment’s purpose and justification.
- In the field labeled Type of Amendment, select the type of amendment or transfer from the dropdown list in the field. For the purpose of increasing or establishing funds using project surpluses, where project income exceeds expenses in a specific year of operation, select the option “From a Project to a Reserve or Fund Balance”.
- Next, specify which year of the Budget ledger will be affected by the Amendment, the organizational unit responsible affected by this budget change, and the title of the Project or Indirect Cost Center whose surplus will be applied to the Reserve or Fund Balance.
- When the Amendment Type is defined as “From a Project to a Reserve or Fund Balance”, select the Project Title from the dropdown list of projects. On the project side, the Account Code should be: 300000 Fund Transfers/Balances. This is the control account for all budget transfers and reserve adjustments. Also confirm the Fund Type of this project.
Select the title of the Reserve or Fund Balance from the drop down list of “Funds” and identify its corresponding Account Code and Fund Type. Be sure that the Fund type of the Reserve specified in the Amendment section is the same as the Fund type originally identified when the Fund was first created.

Enter the Amount of the Amendment affecting both the Project and the Reserve, and specify the currency. Submit the Amendment transaction.

**Step 2: Identify the Signatories**

After submission of the Amendment description is submitted, it will appear in the list of on the Main Amendment page. Select the Amendment from the list by clicking on the Title. The system will display a new top menu for this amendment. Next, select “Approval Signatories”.

Those authorized to approve the amendment should be selected from the Job Title field, in the order that their approval is required by the organization. The numbering of approval levels will determine the sequence of signatories printed on the amendment format; a blank space is provided next to each post and name for signatures. Generally the Approval Level is numbered from lowest to highest.
Step 3: Creating manual entries to the “Proposed Amendment” ledger

This step is required for all Amendment type except “From a Project to a Reserve” and “From a Reserve to a Reserve”.

If this is a transfer “From a Project to a Reserve or Fund Balance” or if this is an amendment that will transfer funds “From a Reserve to another Reserve”, the process of Amendment Approval in Step #4 will automatically post the transfer amount from the Proposed Amendment ledger to the specified target ledger (either the Proposed Budget or the Approved Budget ledger). No additional manual entries to the Proposed Amendment ledger on the Project side are required. Proceed to Step #4.

Upon submission of the Amendment Approval, the system will automatically record the Proposed Amendment as a transfer. This entry is visible on the Project / Transfer menu tab.

If this is a transfer “From a Reserve or Fund Balance to a Project”, an “Addition” to a Project or a “Reduction” to a Project, the Proposed Amendment ledger will be used to adjust the expense details of the Project. Go to the project section and select the Project Expense option from the top menu tab. Specify the “Proposed Amendment” ledger, transaction year of amendment and amendment number. Create and submit to the Proposed Amendment ledger each expense that will be paid from the Reserve or Fund Balance.
It is also possible to amend the staff allocations percentages. First select Staff Allocations option from the Project Top Menu. On the data entry page, select the year of the budget to be affected, and the “Proposed Amendment” ledger. Next select the appropriate budget amendment title from the dropdown field. Locate from the list the posts that are subject to change or select the posts that are being added, and enter the new allocation amount for the post. Submit the amendment to post the information to the Proposed Amendment ledger. Note that this new allocation replaces the existing allocation rate with a new allocation rate.

Step 4: Approval of the Amendment

In the last step, return to the Budget Amendment main menu option, select the transaction year and title of the amendment to be approved from the list of amendments displayed. Use the “Approval” top menu option to display and verify that the transaction is correct and in the case of From/To transaction, that increases are fully offset by decreases to the ledger.
A budget amendment can be several different status or approval levels, depending on the size of the organization and its internal procedures. In order for the amendment to be posted to either the Proposed Budget or Approved Budget, it must be submitted with the status of “Approved”. All other status do not affect the Proposed Budget or Approved Budget ledger.

The target ledger field will display only those ledger that are open for the specified transaction year. Amendment during a budget year that affect that budget period should be posted to the Approved Budget ledger. Amendments that affect future budget periods (such as the estimated transfer of project surpluses or deficits to/from reserves) should be posted to the Proposed Budget ledger.
Upon submission of the “Approval” page, the system will post the Proposed Amendment to the ledger. Any transfers to or from Reserves will be recognized in the Project or Indirect Cost sections under the “Transfer” top menu option.

The system will not permit the submission of amendments that are not in balance according to the rules set for each Amendment Type.
Amendment Example of a “Project to a Project” Amendment Type:

Step #1: Define the Amendment in the Budget Amendment section and identify the approval signatures required.

The “From Project” needs its expenses decreased, while the “To” project requires its expenses increased. Use the Project or Indirect Cost sections of the system for these Proposed Amendment entries.

Step#2: For the “From: Project/Indirect Cost Center”, create the adjusting expenses in the Project or Indirect Cost/Administrative section of eIMS. Indicate the amount of the reduction and submit each expense adjustment individually. Use only positive numbers, do not enter negative amounts.
Step #3: For the “To: Project/Indirect Cost Center” side of the transaction, create the expense entries that will increase the cost center’s budget.

Step #4: Return to the Amendment Approval section of the system and verify that the transactions are in balance.

These steps apply also to adjustments to project or indirect cost center income, when one cost center’s increase is offset by another cost center’s decrease in income.
Amendment Example of a “Project to a Reserve” Amendment Type:

Step #1: Define the Amendment in the Budget Amendment section and identify the approval signatures required.

Step #2: Submit the Amendment Approval page.
Amendment Example of a “Reserve to a Project” Amendment Type:

Step #1 : Define the Amendment in the Budget Amendment section and identify the approval signatures required.

<table>
<thead>
<tr>
<th>Amendment No</th>
<th>7835</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject/ Title</td>
<td>Funds for eIMS</td>
</tr>
<tr>
<td>Justification</td>
<td></td>
</tr>
<tr>
<td>Year</td>
<td>2003</td>
</tr>
</tbody>
</table>

From Fund : Fish Fund [999 2002031]

<table>
<thead>
<tr>
<th>A/C Code</th>
<th>Funding Type</th>
<th>Currency</th>
<th>Amount</th>
<th>Amount USD</th>
<th>Transaction Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>9992002031</td>
<td>R. USD</td>
<td>120.00</td>
<td>120.000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total USD Transfer</td>
<td></td>
<td></td>
<td>120.000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To Project : eIMS [999 20021424]

<table>
<thead>
<tr>
<th>A/C Code</th>
<th>Funding Type</th>
<th>Currency</th>
<th>Amount</th>
<th>Amount USD</th>
<th>Transaction Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>9992002031</td>
<td>R. USD</td>
<td>120.00</td>
<td>120.000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total USD Transfer</td>
<td></td>
<td></td>
<td>120.000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Expenses (Add/Edit Expenses using Project expenditures section.)

Total USD Expenses | 0.000 |

Please Confirm Transactions and Signatures

Step #2 : The amendment transaction will appear out of balance on the Approval screen.

<table>
<thead>
<tr>
<th>Amendment No</th>
<th>7835</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject/ Title</td>
<td>Funds for eIMS</td>
</tr>
<tr>
<td>Justification</td>
<td></td>
</tr>
<tr>
<td>Year</td>
<td>2003</td>
</tr>
<tr>
<td>Unit</td>
<td>test</td>
</tr>
<tr>
<td>Amendment Type</td>
<td>Fund To Project</td>
</tr>
</tbody>
</table>

From Fund

| Title | [2002999 031]Fish Fund |
| A/C Code | 9992002031 |
| Funding Type | Restricted |

To Project : eIMS [2002999 424]eIMS

| Title | [2002999 424]eIMS |
| A/C Code | 9992002031 |
| Funding Type | Restricted |

Amount

| Amount | USD | 120 |
| Amount In USD | 120 (1 USD = | USD ) |
Return to the Project Expense section and enter into the Proposed Amendment ledger each expense required to offset the transfer from the reserve.

Step #3: Use the Amendment Approval menu option and verify that the Transfer transaction and the Proposed Amendment Expense are equal before submitting it for approval.

Upon submission the system will post the amendments to the specified ledger and reduce the Ending Balance of the Fund.
Amendment Example for an Addition or Reduction to a Project:

Step #1: Define the Amendment in the Budget Amendment section and identify the approval signatures required.

Step #2: Go to the Project and create in the Proposed Amendment ledger the adjustment to Income.

The income adjustment will appear in the list of income transactions with a posting note associating it with the Budget Amendment ledger.
Next go to the Project Expense data entry screen and submit the additional expenses one at a time to the Proposed Amendment ledger.

The additional expenses will appear in the list of expenses with the number and title of the appropriation in the Transaction Description field.

Step # 3: Return to the Budget Amendment Section and submit the Proposed Amendment addition or reduction to the Income and Expenses of the Project.
If this is a Reduction Amendment Type, the system will automatically post negative amounts to the ledger upon submission of the Amendment.

It is possible in the Reduction and Addition Amendment Type to reduce or add only income and to reduce or add only expenses. This entry to the Proposed Amendment ledger is known as an “unbalanced” entry because income and expenses are not equal. Occasionally this is required to correct typographical errors made during data entry and posted to the Approved Budget. The system will display a warning message on the approval page, indicating that income entries do not equal expense entries to Proposed Amendment ledger. The warning message does not stop the approval of the unbalanced entry. It is up to the Association if it wishes to continue the amendment approval process or go back and make changes to the proposed income and expense amendments.
18. Appendix 8

Frequently Asked Questions

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>What do you do when add/delete/edit options disappear or do not appear on the data entry screens.</td>
<td>These steps presume that the person's security level does permit use of these options (according to their previous use history).&lt;br&gt;1) Reconfirm that user has access to Unit and Project/Edit group rights.&lt;br&gt;2) Determine if the problem occurs throughout the entity or is limited to one project or indirect cost center. If limited, but not entity wide, then recheck security levels.&lt;br&gt;3) If that doesn't work, go to Default Settings and reset the year and ledger.&lt;br&gt;4) If that doesn't work, switch to training entity, enter new ledger and year, then switch back to home entity and specify the ledger and year where add/edit/delete options are expected to be displayed.&lt;br&gt;5) If that doesn't work, Exit eIMS and within Internet Explorer select Tools/Internet Options from top menu options. Under the General tab of the Internet Options dialogue box, select the &quot;Delete File&quot; button of the section titled &quot;Temporary Internet Files&quot;. Close and reopen browser, then relogn.&lt;br&gt;6) If that doesn't work, request IPPF eIMS support assistance. Be sure to indicate the ledger, year, project/indirect cost center number and entity where problem with add/edit/delete option was first noted.</td>
</tr>
<tr>
<td>What do you do if the internet connection is slow and there is a problem viewing data saved to the database.</td>
<td>1) Resynchronize their access to the IMS by selecting the Inicio SGI or Extranet home option on the main menu and specifying again the ledger and year for the transactions.&lt;br&gt;2) Another possibility is to use the Internet Explorer option to clear the temporary files so that the browser present only the most recent and correct information from the database rather than a screen stored on the disk (Tools, Internet Options, Temporary Internet Files, Delete Files). If they have never done this</td>
</tr>
<tr>
<td></td>
<td>before, it may take a couple of minutes for the system to clear all the old temporary web pages in the directory.</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>3)</td>
<td>They should also check the security level of the user to be sure that the user has been given access to the Unit in which the project is assigned. Without unit access, income and expense data entry is not possible.</td>
</tr>
<tr>
<td>4)</td>
<td>If they submit the information, but cannot see the income or expense in the table list view, they should check the transaction year. The transaction year in the table view must be the same as the transaction year of the data entry screen. Unless a year is specified, the system will not display any data.</td>
</tr>
</tbody>
</table>