SYNERGY INTERNATIONAL SYSTEMS

DEVELOPMENT ASSISTANCE DATABASE FOR UKRAINE

(DAD UKRAINE)

ANALYTICAL INTERFACE

USER MANUAL

Version 1.0

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1. INTRODUCTION

This document describes the *Development Assistance Database for Ukraine (DAD Ukraine)* developed for the Ministry of Economic Development and Trade of the Government of the Ukraine. It provides the necessary instructions to ensure successful work with the application. Use of this document and compliance with the standards specified herein is mandatory for anyone working with the mentioned application.

2. OVERVIEW

The *Development Assistance Database for Ukraine (DAD Ukraine)* is an automated information management system which is designed to support better coordination and management of international assistance/aid to the Ukraine. It is also a powerful tool for tracking and analyzing international aid flows and associated projects. The system serves as the main database and data collection and reporting system as it ensures effective access to development data.

The main objective of *DAD Ukraine* is to serve as a reliable and credible source of information on external aid offered to the Ukraine to support the Government in effectively managing development assistance and promoting the accountable and transparent use of resources. It is also a powerful mechanism for providing and sharing donor-funded project information among the project stakeholders, including government agencies, non-governmental organisations, funding agencies, and other interested groups.

DAD Ukraine is a powerful tool to view project data organised into lists, charts, reports and maps; present the project data in the form of different analytical reports, memorize/save the reports, print them, and export them into PDF, MS Word and MS Excel format files.

DAD Ukraine is designed to provide quick access to the project data (including project financing, implementation, and progress towards results) remotely via Internet. Once you have accessed the application, you can view the project data stored in the database, add new projects, edit existing ones, etc.

In the current design, *DAD Ukraine* consists of the following applications, each dealing with a different dataset:

- **ITA Projects** – this application is designed to view projects that are implemented as part of the international technical assistance to the country. In this application, you can track the project implementation as well present the project data in the forms of different analytical reports in the *List*, *Report, Chart*, and *Map* modules.

- **IFO Projects** - this application is designed to view project details, track the projects implemented in the country and financed by the international financial organisations (IFO), and present the project data in the forms of different analytical reports in the *List*, *Report,* and *Chart* modules.

- **System Projects IFO** - this application is designed to view project details, track the system projects financed by the international financial organisations (IFO), and present the project data in the forms of different analytical reports in the *List* and *Report* modules.

- **Donor Profile** - this application is designed to track the donor profile information, such as organisation's legal address, points of contact, etc. Moreover, you are able to present the donor profile data in the forms of different analytical reports in the *List* and *Report* modules.

- **Requests for ITA attraction** - this application is designed to facilitate placement of requests for international technical assistance. Once you access this application, you can view request details and present the project data in the forms of different analytical reports in the *List* and *Report* modules.

All applications available in *DAD Ukraine* contain a built-in online data entry subsystem, which is designed to allow entering or modifying relevant information remotely via Internet.

DAD Ukraine provides a web-based user interface and requires a web browser pre-installed.

Note: To ensure more flexibility and a more user-friendly environment, *DAD Ukraine* has been implemented as a bilingual system allowing the users to view the data presented in the system in two languages: Ukrainian and English.

3. LOGGING INTO DAD UKRAINE

The starting screen of the *DAD Ukraine* application is the *Login Screen* (Figure 1). To log in, you should validate yourself with the username and password and then click the **Login** button.

Note: The password is case sensitive.

Note: If you have failed to log in several times, the system will be blocked. Contact your system administrator in order to unlock your user access. The number of unsuccessful login attempts is determined by the login policies adopted for the application.

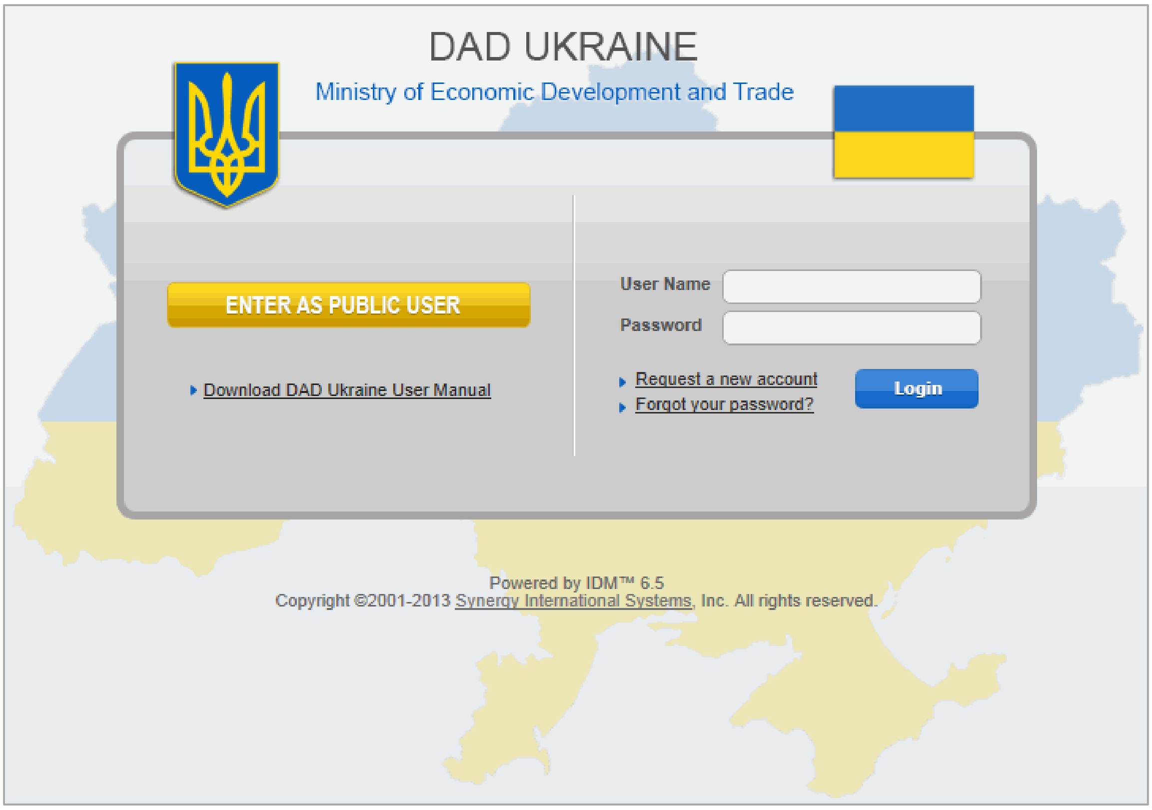


Figure 1: DAD Ukraine Login Screen

A successful login directs you to the *My Portfolio* module.

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

3.1 Registering a New User

If you are new to the system and you need a personal account, sign up for a username and password to start using the system.

In order to register in the system, follow the steps below:

1. Click the **Request a new account** link in the *Login Screen*. A *User Registration Form* (Figure 2) appears.

2. Fill in the information requested.
3. Click the **Submit** button to submit the inserted information.

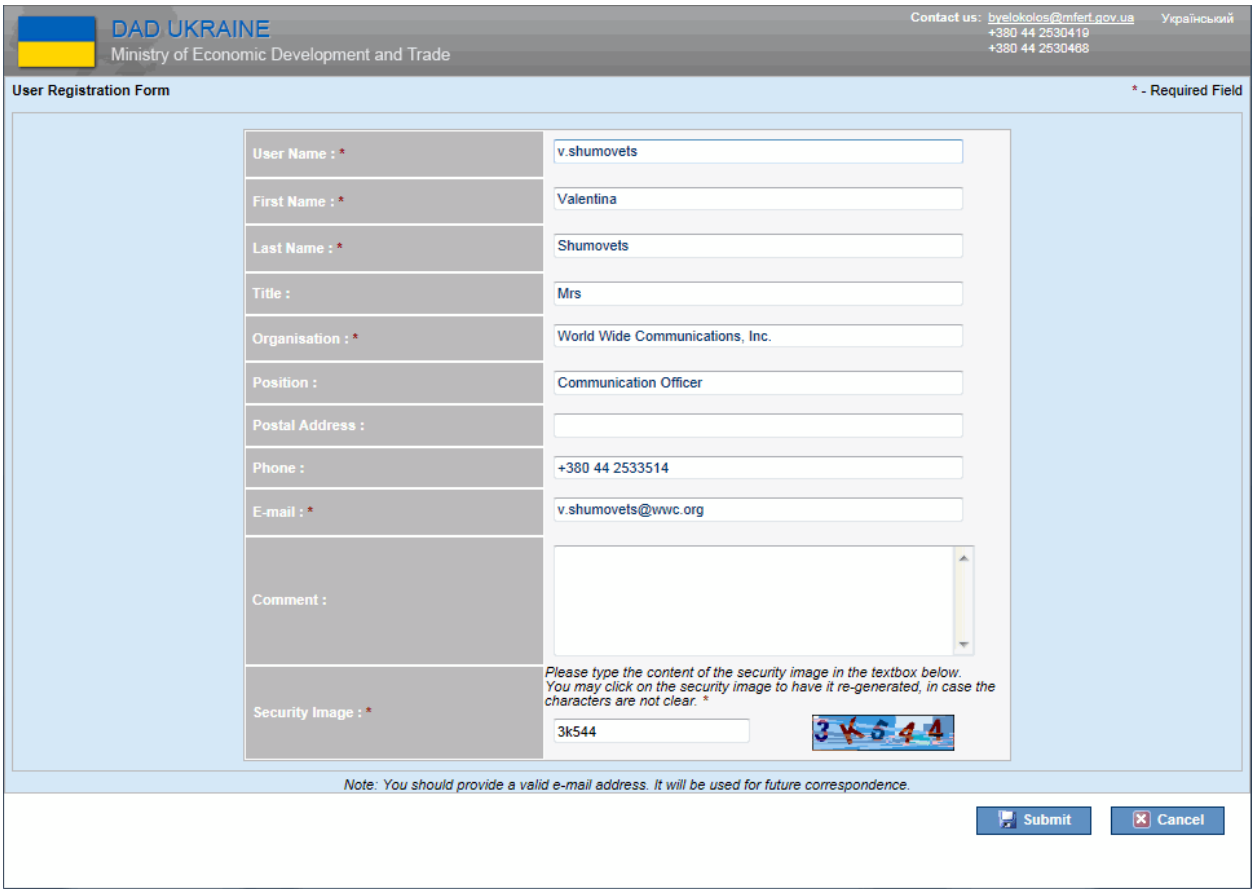


Figure 2: User Registration Form

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

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

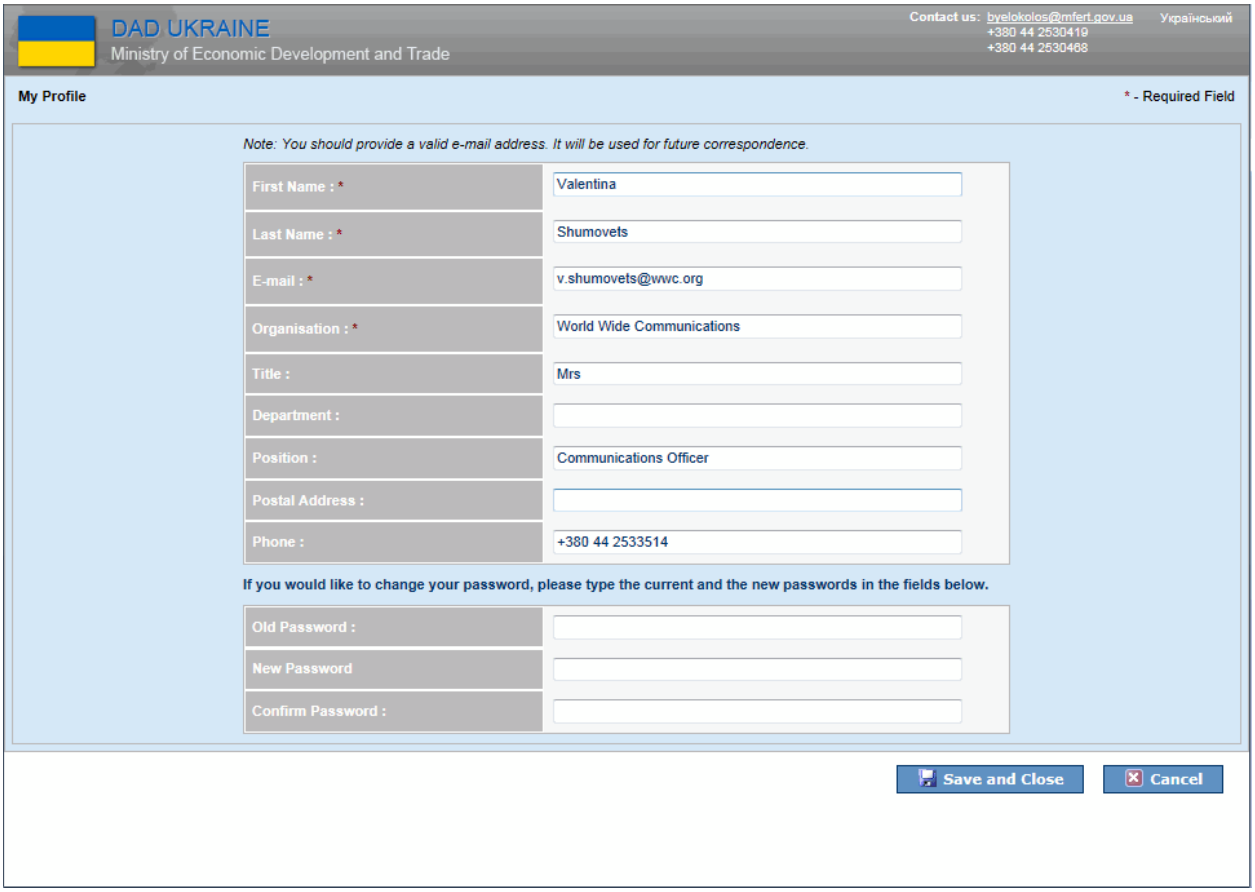


Figure 3: My Profile Section

3.2 Accessing DAD Ukraine without Registration

To ensure more flexibility and to provide access to a wider range of users, the system is designed in such a way that it allows public users to enter it without registration.

Public users wishing to view data should click the **ENTER AS PUBLIC USER** in the *Login Screen* (Figure 1). They will be directed to the *List* module of the application.

4. DAD UKRAINE ANALYTICAL INTERFACE STRUCTURE

DAD Ukraine consists of the following main sections:

- DASHBOARD MODULE - used for quick access to the projects registered in the *DAD Ukraine* system.
- MY PORTFOLIO MODULE – used for quick access to the content (e.g. projects, international agreements, etc.) registered in the *DAD Ukraine* system by the user's group.
- LIST MODULE – used to create and execute ad-hoc queries on the data, and to acquire results in the form of a list.
- REPORT MODULE – used to generate complex reports over one or more criteria and present the output in the printable and user-friendly format.
- CHART MODULE – used to filter and display the data in a chart form.
- MAP MODULE - used to filter and display the data in a map form.

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

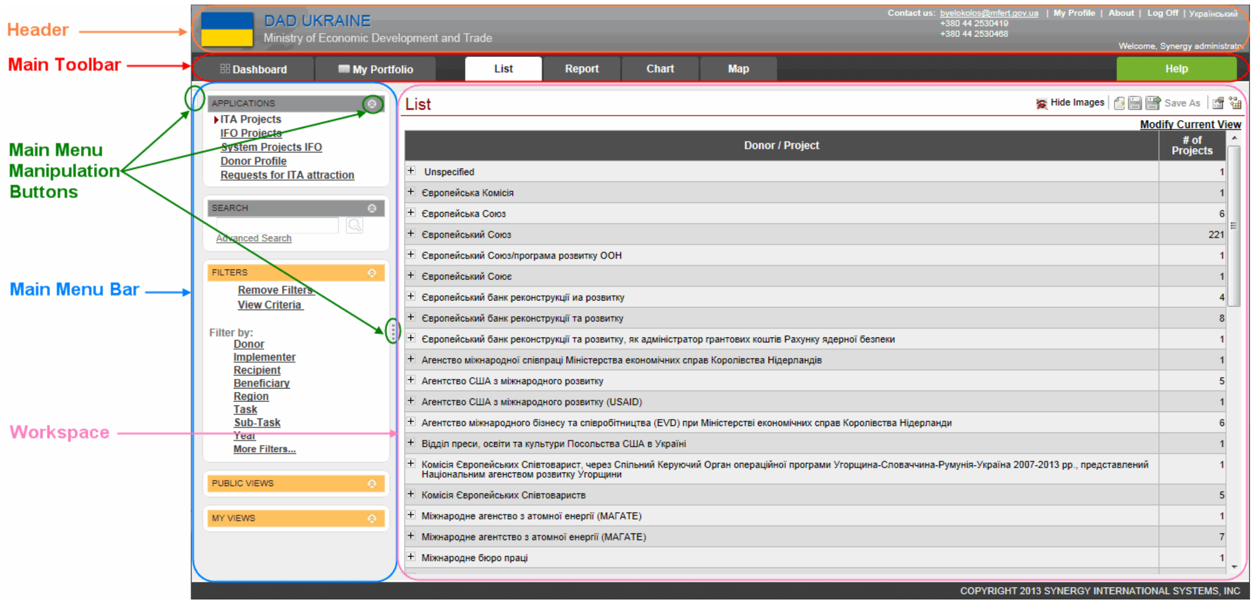


Figure 4: DAD Ukraine Analytical Interface Structure

It contains the following components:

Component Name	Description
Header	This is the application header that contains the application name and the *DAD Ukraine* logo. On the right side, the following functions are available: • **Contact Us** – contact details (e-mail address and phone number) of the *DAD Ukraine* System Administrator. • **My Profile** – this opens your personal settings and details. For details, see Registering a New User. • **About** – opens the *DAD Ukraine* information window. • **Log Off** – this button is used to log off the application.

	• **Український** - this button is used to switch the language of the application into Ukrainian.
Main Toolbar	This is the main toolbar of the *DAD Ukraine* application. The following tabs are available here: • **Dashboard** – opens the DASHBOARD MODULE for quick access to the projects registered in the *DAD Ukraine* system. • **My Portfolio** – opens the MY PORTFOLIO MODULE to manage user specific content. • **List** – opens the LIST MODULE. • **Report** - opens the REPORT MODULE. • **Chart** –opens the CHART MODULE. • **Map** –opens the MAP MODULE. • **Help** – opens the *DAD Ukraine* application help.
Main Menu Bar	This menu contains sections with main functions of the *DAD Ukraine* application: • **Applications** – lists all applications present in *DAD Ukraine*. • **Search** – contains a common and advanced search functions among the selected application list. For details, see SEARCH. • **Filters** – contains filtering options. For details, see FILTERING. • **Public Views/Reports/Charts/Maps** – memorized views / report / charts / maps (depending on the opened module) available to all users of the application. • **My Views/Reports/Charts/Maps** – memorized views / reports / charts / maps (depending on the opened module) created by and available to the current user only.
Main Menu Manipulation Buttons	• **Left/Right arrows** ( ) – used to hide/open the Main Menu bar. • **Up/Down arrows** ( ) – used to collapse/expand the section in the Main Menu bar. • **Frame Divider** ( ) – used to adjust the width of the Main Menu bar.
Workspace	In this frame, all applications and modules are managed. Here are filtering and search results displayed.

5. DASHBOARD MODULE

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

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

5.1 Key Features

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

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

5.2 Accessing the Dashboard Module

In order to access the *Dashboard* module of the system, you should click the **Dashboard** tab. This will navigate you to the *Dashboard* module. In this module, you can create dashboards, include reports under them, etc.

5.3 Main Screen and Its Components

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

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

- o ***Cancel* -** discards the modifications made to the dashboard currently displayed on the screen.
- o ***Public* –** makes the dashboard available to other users as well if selected.
- o ***Scroll Mode*** – toggles the scrollbar thus allowing additional space for adding reports to the dashboard.

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

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

- **Add New Item -** adds a new report under the definite dashboard from the list of all pre-defined reports previously created.

- **Dashboard Workspace -** the main screen of the *Dashboard* module where the content of a definite dashboard is viewed.

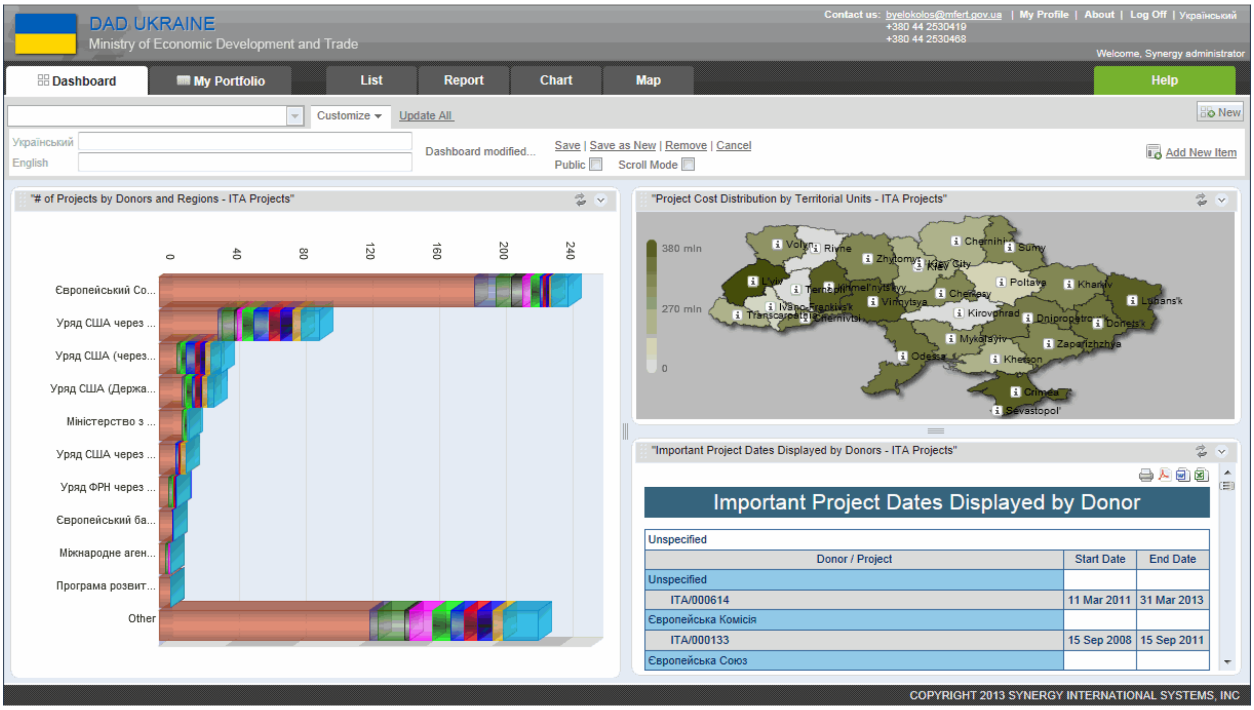


Figure 5: Dashboard Module

5.4 *Dashboard Management*

5.4.1 Create a New Dashboard

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

1. Click the **New** button at the upper right corner of the screen (Figure 6). A new field will appear in the left part of the screen to give a name other than the default one to the dashboard and to save it. Also, the list of all existing pre-defined reports is used to add new items to the dashboard.

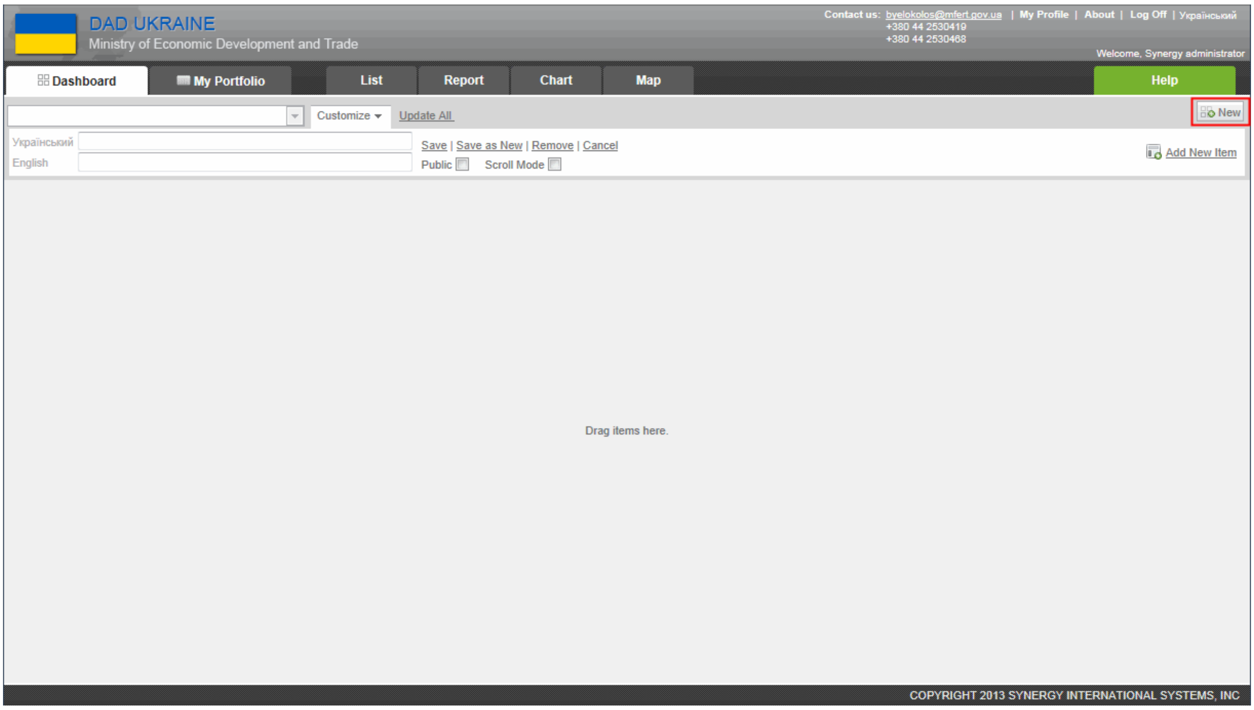


Figure 6: Adding a New Dashboard

2. Give the desired name to the dashboard in the English and Ukrainian languages.
3. Add reports to the dashboard, see Add an Item to a Dashboard.
4. Save it.

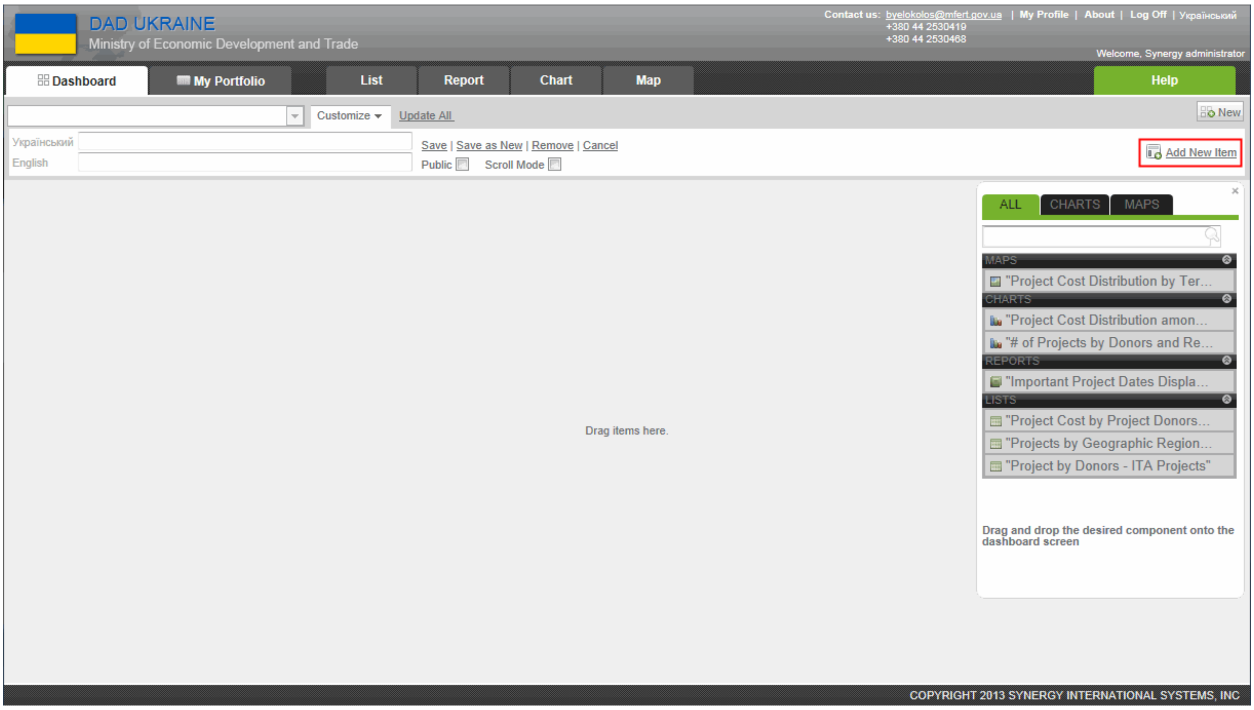


Figure 7: List of Pre-defined Reports

5.4.2 Add an Item to a Dashboard

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

1. Click the **Add New Item** link. The list of all previously saved reports will appear (Figure 7).
2. Select a report to add to a dashboard and drag-and-drop it onto the main screen.

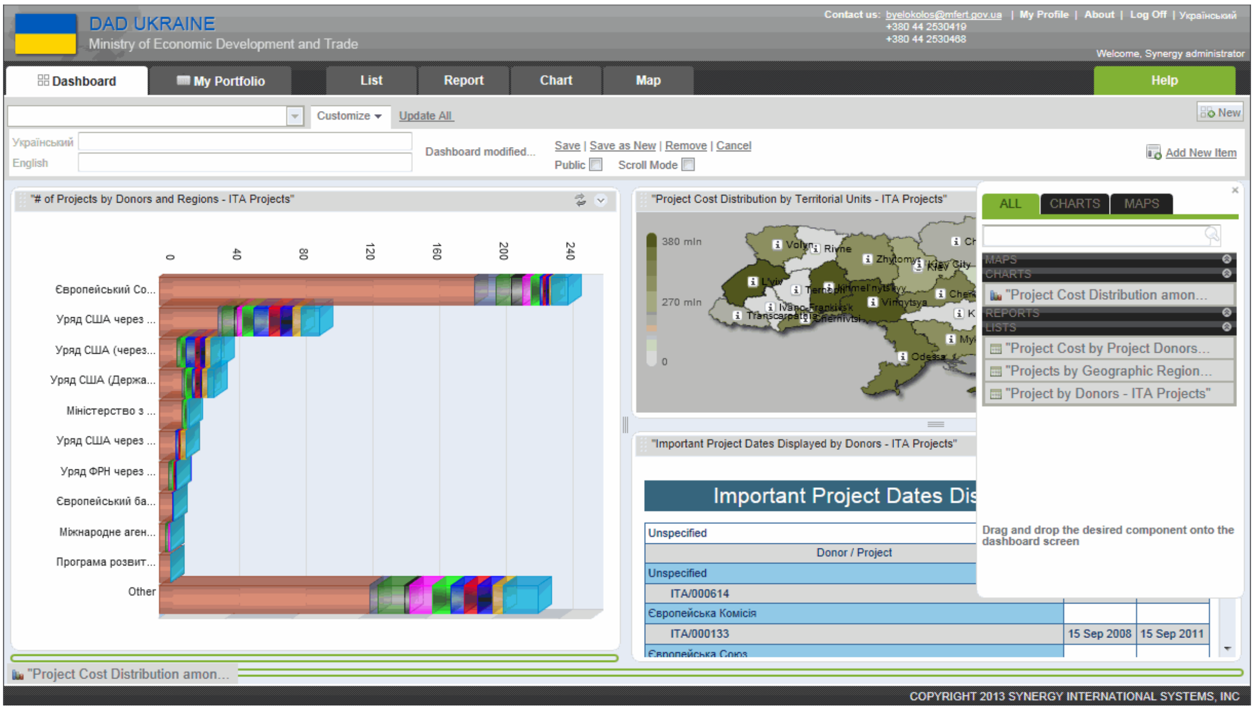


Figure 8: Adding a New Report

3. If you want to add another report to the dashboard, select it in the list, drag it onto the main screen and hold the left mouse button until a green rectangle appears on the screen indicating an area where the new report can be placed. Keep the mouse button pressed until the green rectangle turns blue and release it (Figure 8).
   Note: You may add multiple reports to the dashboard.

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

5.4.3 Customize a Dashboard

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

In order to customize a dashboard, follow the steps below:
1. Click the **Customize** button. A new section will appear displaying all customizable options in the *Dashboard* module (Figure 9).
2. Take the necessary action.
3. Save the changes.

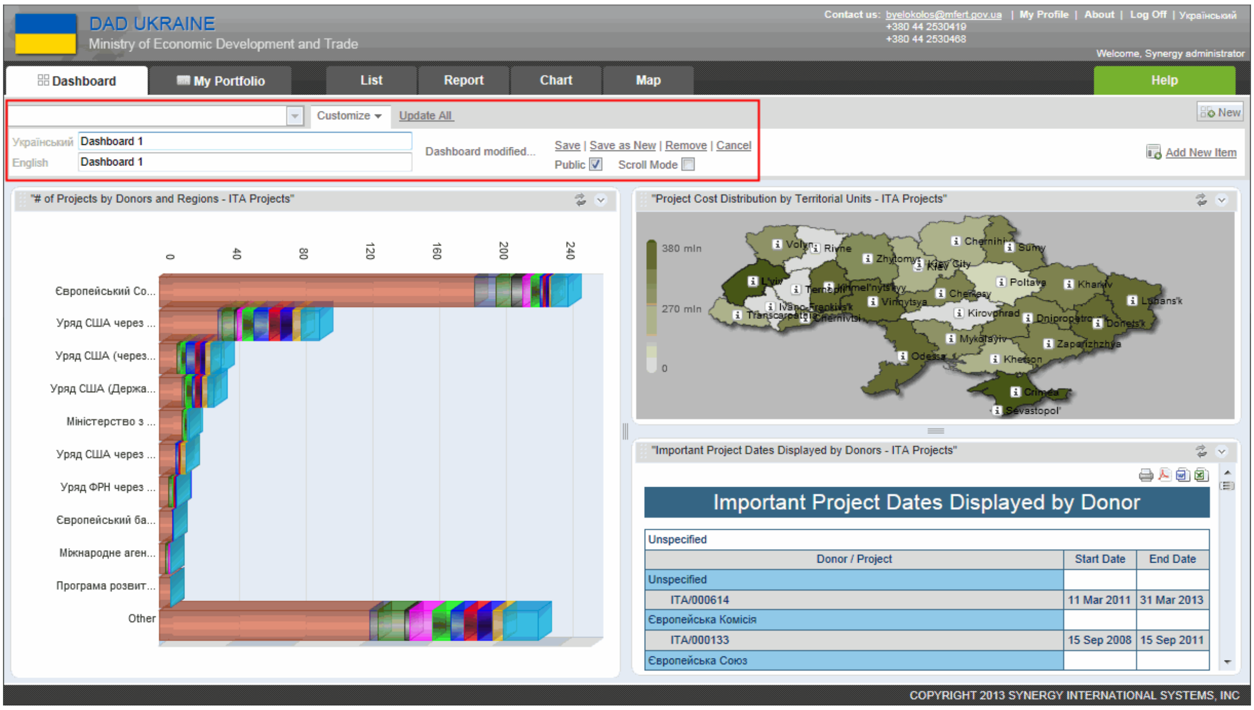


Figure 9: Customizing a Dashboard

5.4.4 Save a Dashboard

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

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

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

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

5.4.5 Delete a Dashboard

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

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

5.4.6 Discard the Changes

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

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

5.4.7 Update Data

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

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

6. MY PORTFOLIO MODULE

The *My Portfolio* module of the *DAD Ukraine* application provides quick access to the projects implemented as part of the international technical assistance to the country as well as international agreements and implementer accreditation information.

In order to access the *My Portfolio* module, click the **My Portfolio** tab in the *Main Menu* of the *DAD Ukraine* application. Editing permissions for records in *My Portfolio* can be based on the user (whether the user has created the record) or user's group (whether someone from the group the user belongs to has created the record).

The My Portfolio module consists of the following sections (Figure 10):

- **Project** – this section lists the projects implemented as part of the international technical assistance to the country. See Managing Projects.
- **Implementer Accreditation** - this section lists the implementer organisations that have passed the accreditation process. See Managing Implementer Accreditations.
- **International Agreement** – this section lists the international agreements that are signed within the framework of the implementation of the international technical assistance (ITA) projects. See Managing International Agreements.

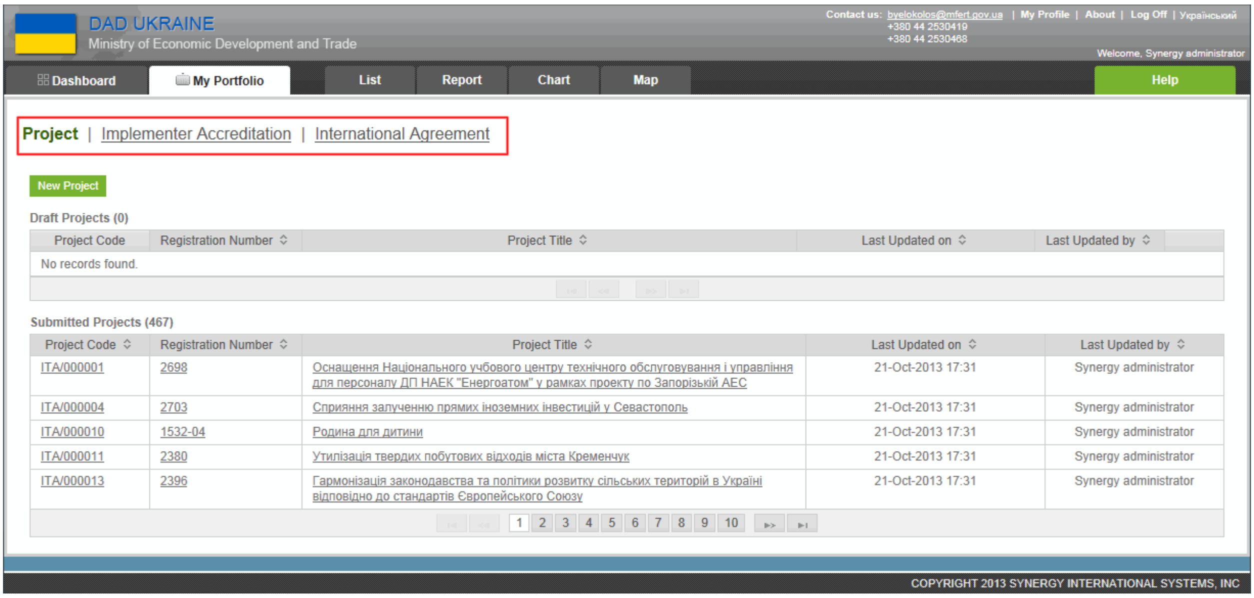


Figure 10: Viewing Sections in the My Portfolio Module

6.1 *Managing Projects*

In the *Project* section of the *My Portfolio* module (Figure 11), you may see a list of draft and submitted ITA projects.

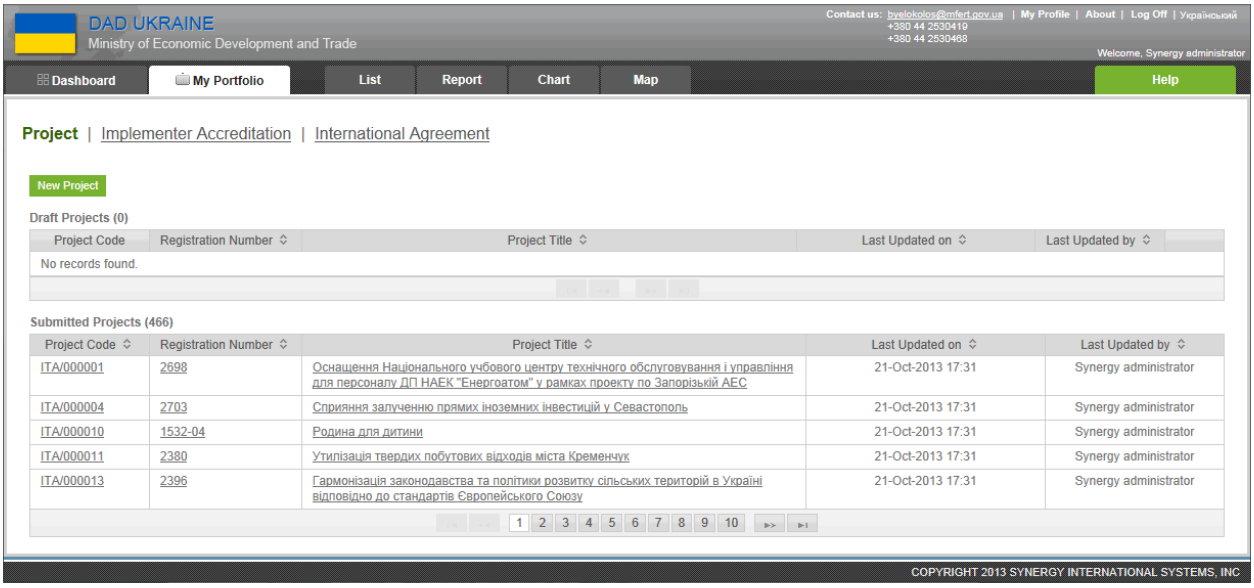


Figure 11: Project Section in the My Portfolio Module

Each project created in *DAD Ukraine* either from the *Project* section of the *My Portfolio* module or *ITA Projects* application should get submitted first in order to become public and official. Below is the procedure of project submission:

- A user adds a project. It is saved as a draft in the user's portfolio, in the *Draft Projects* section (Figure 11). Drafts may also be viewed and edited by other users that have the corresponding permissions. Further, drafts should be revised by the user or by the corresponding project manager.
- If all mandatory fields are filled in the project form, then drafts may be submitted. To submit the draft, press the **Submit** button in the *Draft Projects* table.

Note: Only submitted drafts are displayed in the *List* table (see LIST MODULE) and available for analytics and reporting in the *DAD Ukraine* application.

The information displayed in the *Project* section of the *My Portfolio* module for each project includes the following:

- **Project Code** – this is a unique code assigned to the project for identification and future reference;
- **Registration Number –** this is the number that has been assigned to the project upon registration;
- **Project Title** – this is the title of the project;
- **Last Updated By** – this is the name of the user who last updated the project;
- **Last Updated On** – this is the date when the project was last updated.

In this module, a project may be created; details of the existing projects can be viewed. Moreover, it is possible to browse projects and sort the projects in ascending or descending order according to definite criteria.

6.1.1 Adding an ITA Project

In order to add a new ITA project from the *Project* section in the *My Portfolio* module, follow the steps below:

1. Go to the **My Portfolio** module.
2. Click the **Project** tab.
3. Click the **New Project** button (Figure 12). This will open an **ITA Project** form which is described in the *DAD Ukraine International Technical Assistance Projects Application User Manual*, see REFERENCES.

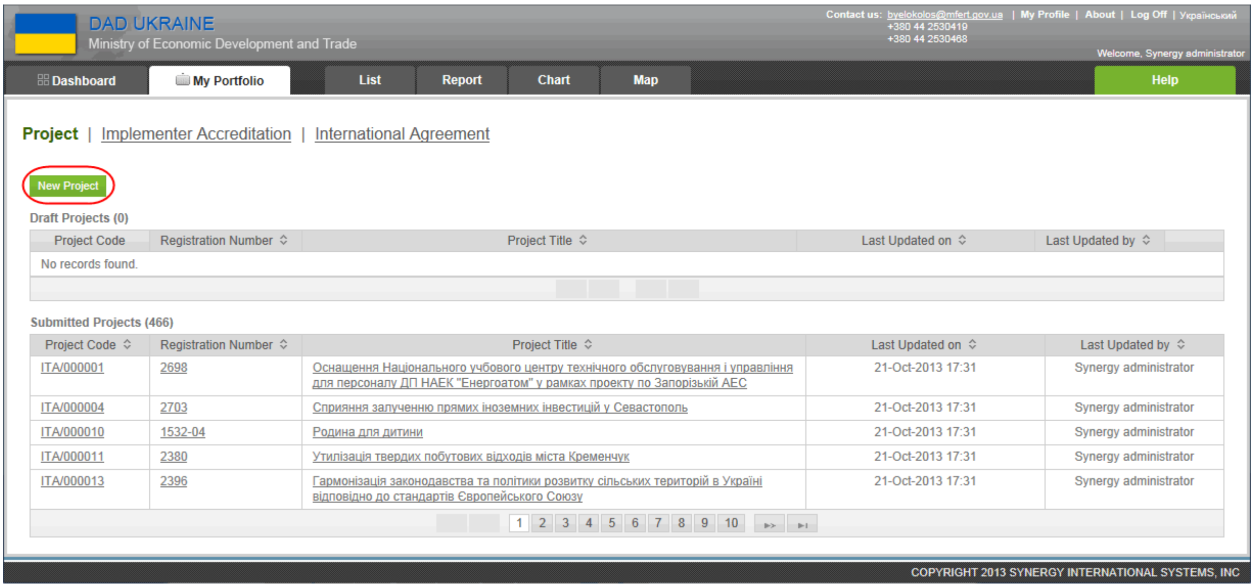


Figure 12: Adding a New ITA Project

6.1.2 Viewing ITA Project Details

In order to view the details of ITA projects in the *Project* section of the *My Portfolio* module, follow the steps below:

1. Go to the **My Portfolio** module.
2. Click the **Project** tab.
3. Click the project that you want to see the details for. You will be directed to the *Details* section where the project data will be displayed. For more information, see DETAILS SECTION.

6.1.3 Sorting ITA Projects

The ITA projects displayed in the *Project* section of the *My Portfolio* module can be sorted in ascending or descending order according to one of the following criteria:

- **Project Code** – the ITA projects will be sorted in numerical order according to the code that they have been assigned.
- **Registration Number** - the ITA projects will be sorted in numerical order according to the registration number that they have been assigned.
- **Project Title** – the ITA projects will be sorted in alphabetical order according to the project title.
- **Last Updated By** – the ITA projects will be sorted in alphabetical order according to the user who last updated the project.
- **Last Updated On** – the ITA projects will be sorted in chronological order according to the date when they were last updated.

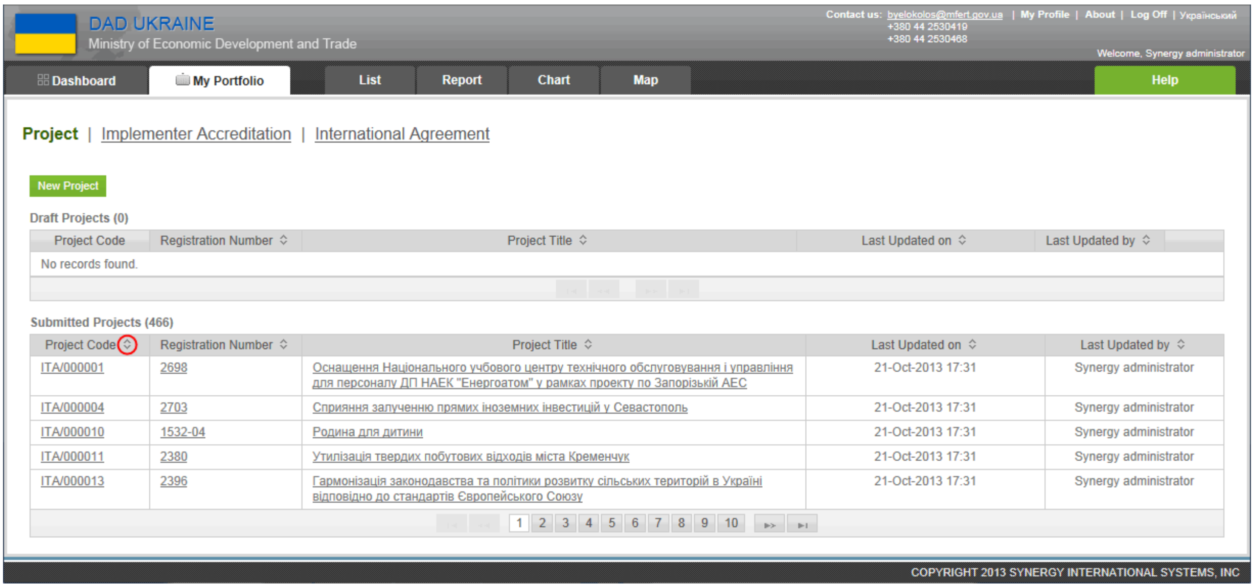


Figure 13: Sorting the ITA Projects

In order to sort the ITA projects according to one of the criteria described above, follow the steps below:

1. Go to the **My Portfolio** module.
2. Click the **Project** tab.
3. Click the arrow icon in the header of the column that you want to sort the ITA projects by (Figure 13).
4. Click the arrow icon once again to sort the ITA projects in reverse order.

6.2 *Managing Implementer Accreditations*

In the *Implementer Accreditation* section of the *My Portfolio* module (Figure 14), you may see the list of implementer organisations that have passed the accreditation process.

The information displayed in the *Implementer Accreditation* section of the *My Portfolio* module for each implementer organisation includes the following:

- **Implementer** – this is the name of the organisation that acts as an implementer for an ITA project;
- **Accreditation Number –** this is the number that has been assigned to the implementer upon accreditation;
- **Last Accreditation Date** – this is the date when the organisation was last accredited;
- **Expiry Date –** this is the date by which the organisation's accreditation should expire.
- **Assigned Deadline** – this is the date by which the organisation should be re-accredited.

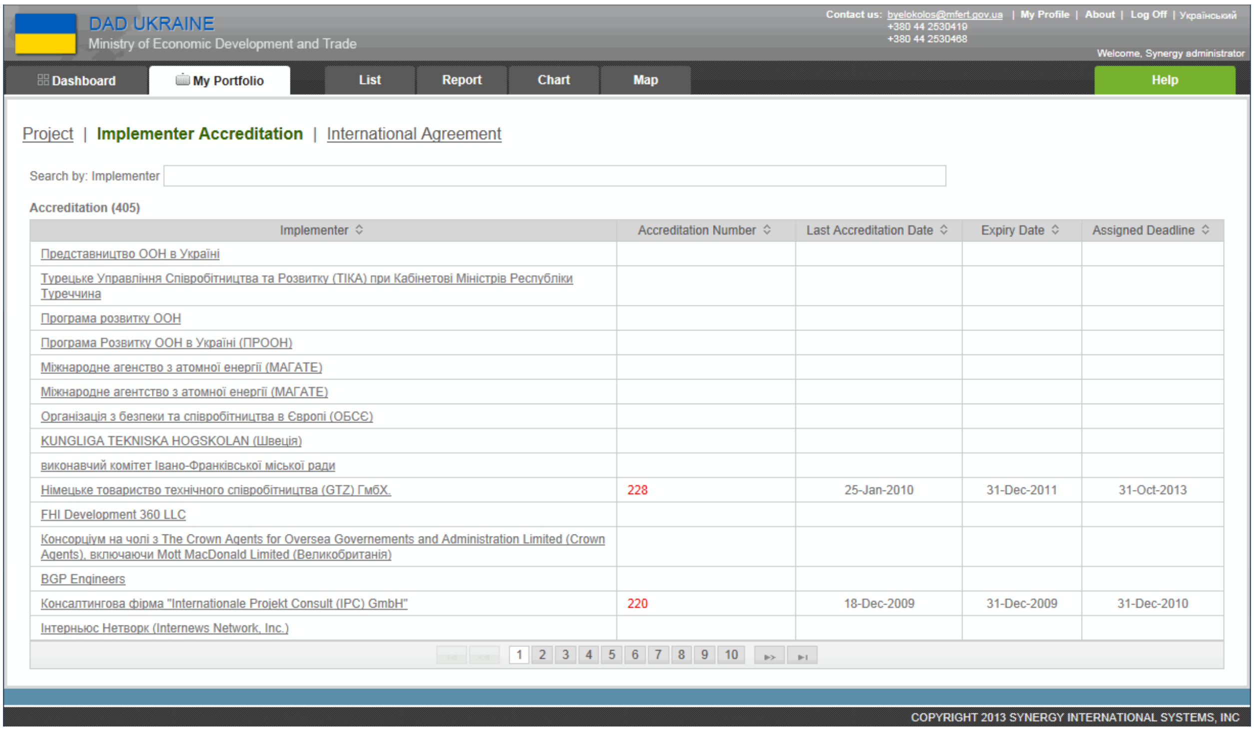


Figure 14: Implementer Accreditation Section in the My Portfolio Module

In this module, an implementer may be accredited/re-accredited; accreditation details can be viewed. Moreover, it is possible to browse implementers, search for them, and sort the organisations in ascending or descending order according to definite criteria.

6.2.1 Accrediting/Re-accrediting an Organisation

In order to accredit/re-accredit an implementer organisation, follow the steps below:

1. Go to the **My Portfolio** module.
2. Click the **Implementer Accreditation** tab.
3. Click the implementer organisation that you want to accredit/re-accredit. This will open an **Accreditation/Re-accreditation** form which is described in the *DAD Ukraine Implementer Accreditation Application User Manual*, see REFERENCES.

6.2.2 Viewing Accreditation/Re-accreditation Details

In order to view the details of an organisation accreditation/re-accreditation in the *Implementer Accreditation* section of the *My Portfolio* module, follow the steps below:

1. Go to the **My Portfolio** module.
2. Click the **Implementer Accreditation** tab.
3. Click the organisation that you want to see the details for. You will be directed to the *Details* section where the organisation accreditation/re-accreditation data will be displayed. For more information, see DETAILS SECTION.

6.2.3 Sorting Implementer Organisations

The Implementer organisations displayed in the *Implementer Accreditation* section of the *My Portfolio* module can be sorted in ascending or descending order according to one of the following criteria:

- **Implementer** – the organisations will be sorted in alphabetical order according to the organisation name.
- **Accreditation Number** - the organisations will be sorted in numerical order according to the accreditation number that they have been assigned.
- **Last Accreditation Date** – the organisations will be sorted in chronological order according to the last accreditation date.
- **Expiry Date** – the organisations will be sorted in chronological order according to the accreditation expiry date.
- **Assigned Deadline** – the organisations will be sorted in chronological order according to the re-accreditation deadline date.

In order to sort the implementers according to one of the criteria described above, follow the steps below:

1. Go to the **My Portfolio** module.
2. Click the **Implementer Accreditation** tab.
3. Click the arrow icon in the header of the column that you want to sort the implementer organisations by (Figure 15).
4. Click the arrow icon once again to sort the implementer organisations in reverse order.

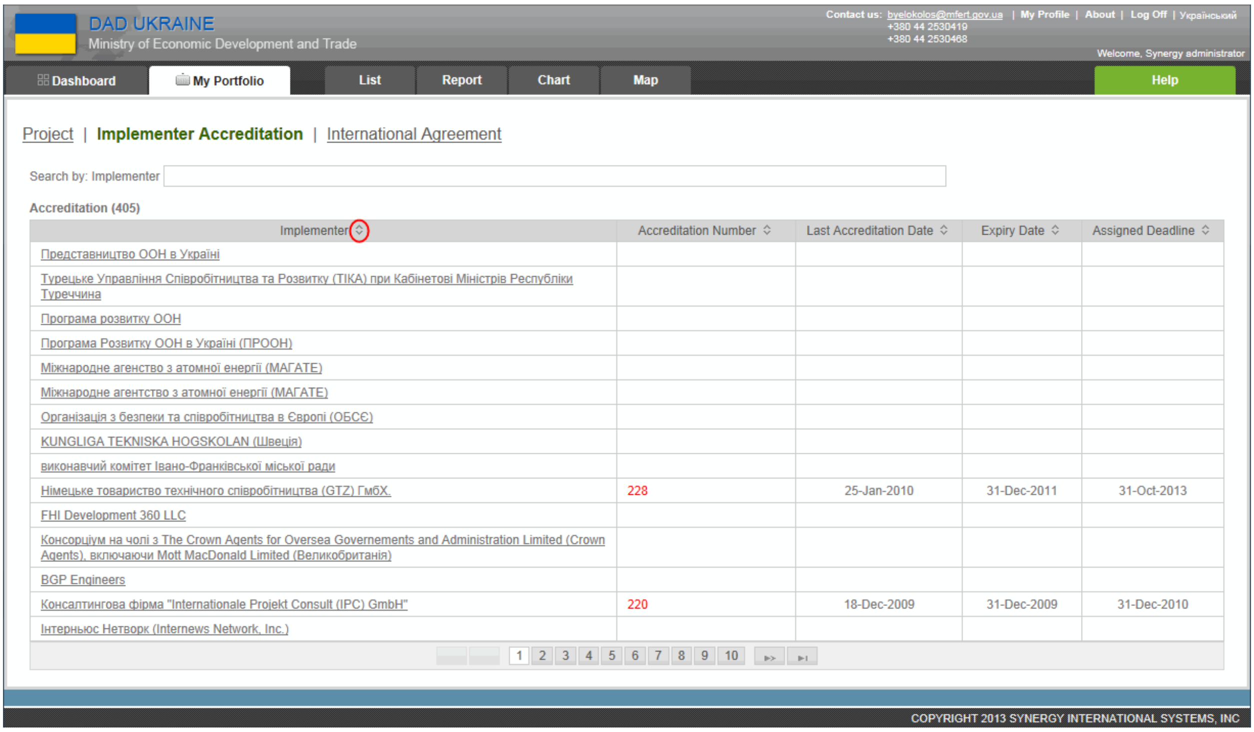


Figure 15: Sorting the List of Implementers

6.2.4 Searching for an Implementer Organisation

Because the list of implementer organisations displayed in the *Implementer Accreditation* section of the *My Portfolio* module can be long and hard to browse in, you are offered to use a search feature to filter the list of organisations by keyword.

In order to locate a definite organisation, follow the steps below:

1. Go to the **My Portfolio** module.

2. Click the **Implementer Accreditation** tab.
3. Enter the keyword in the search box above the screen. This will filter the list of organisations and display only those instances that match the search criteria (Figure 16).

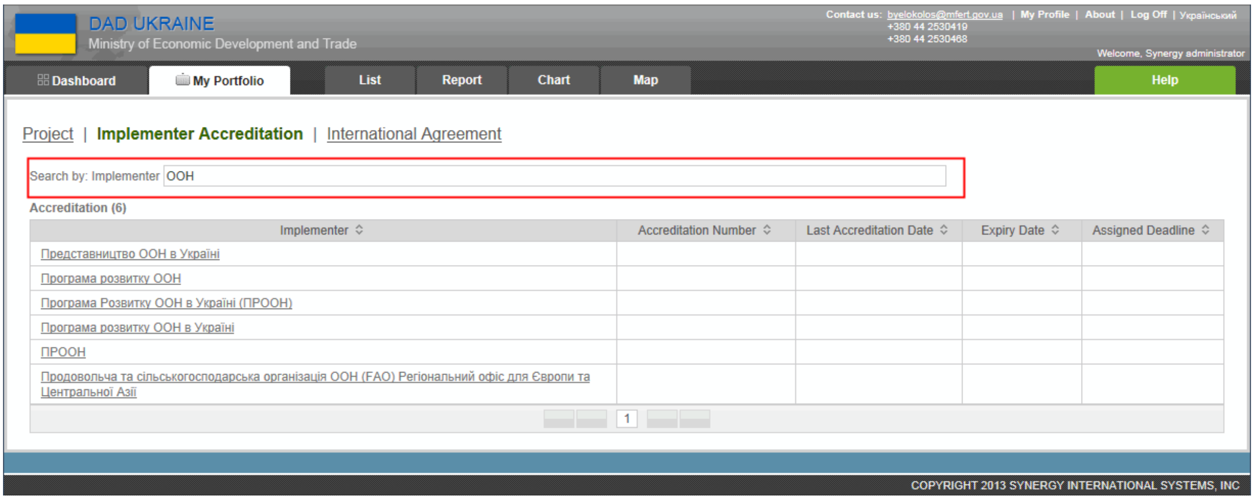


Figure 16: Searching for an Implementer Organisation

6.3 *Managing International Agreements*

In the *International Agreement* section of the *My Portfolio* module (Figure 17), you may see the list of international agreements that have been signed within the scope of implementing ITA projects.

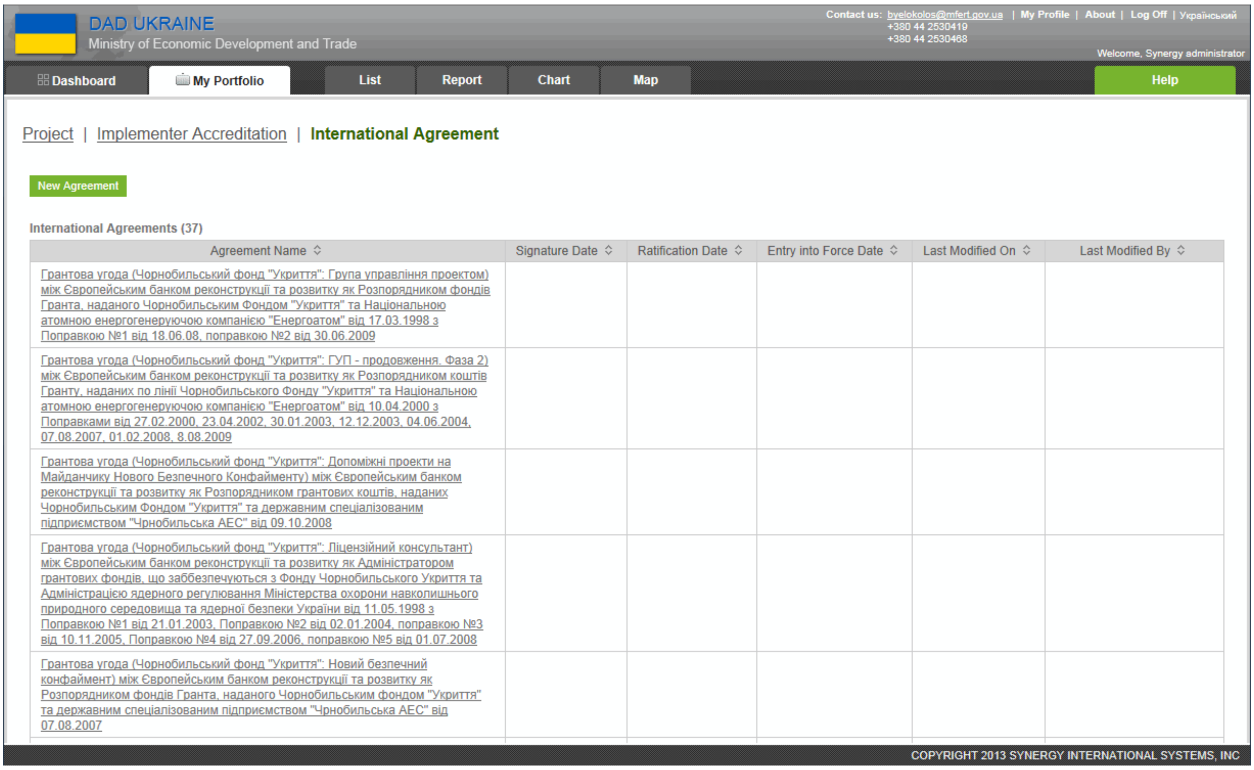


Figure 17: International Agreement Section in the My Portfolio Module

The information displayed in the *International Agreement* section of the *My Portfolio* module for each agreement includes the following:

- **Agreement Name** – this is the name of the international agreement;
- **Signature Date –** this is the date when the agreement was signed;
- **Ratification Date** – this is the date when the agreement was ratified;
- **Entry into Force Date –** this is the date when the agreement is supposed to enter into force;
- **Last Modified On** – this is the date when the agreement was last updated;
- **Last Modified By** - this is the name of the user who last updated the agreement.

In this module, an international agreement may be created; agreement details can be viewed. Moreover, it is possible to browse agreements and sort them in ascending or descending order according to definite criteria.

6.3.1 Adding an International Agreement

In order to add a new agreement from the *International Agreement* section in the *My Portfolio* module, follow the steps below:

1. Go to the **My Portfolio** module.
2. Click the **International Agreement** tab.
3. Click the **New Agreement** button (Figure 18). This will open an **International Agreement** form which is described in the *DAD Ukraine International Agreement Application User Manual*, see REFERENCES.

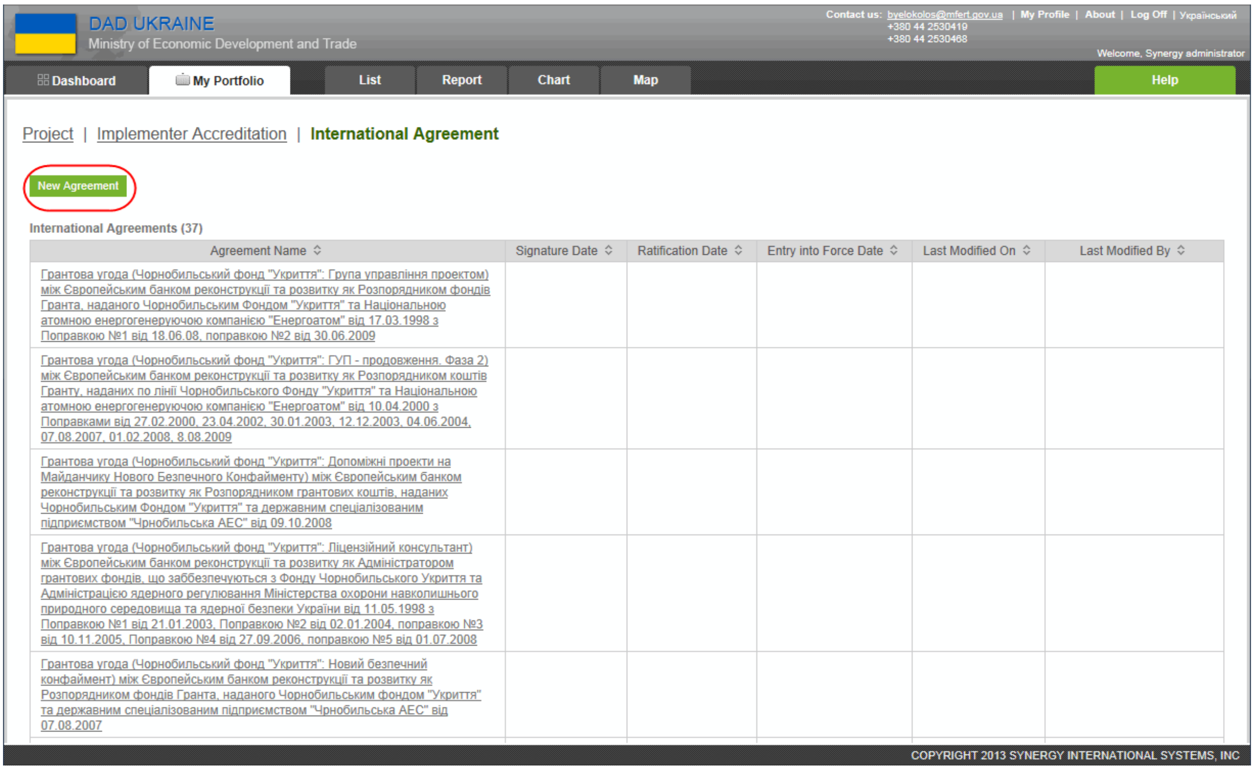


Figure 18: Adding a New International Agreement

6.3.2 Viewing Agreement Details

In order to view the details of agreements in the *International Agreement* section of the *My Portfolio* module, follow the steps below:

1. Go to the **My Portfolio** module.

2. Click the **International Agreement** tab.
3. Click the agreement that you want to see the details for. You will be directed to the *Details* section where the agreement data will be displayed. For more information, see DETAILS SECTION.

6.3.3 Sorting International Agreements

The agreements displayed in the *International Agreement* section of the *My Portfolio* module can be sorted in ascending or descending order according to one of the following criteria:

- **Agreement Name** – the agreements will be sorted in alphabetical order according to the agreement name.
- **Signature Date** - the agreements will be sorted in chronological order according to the date when they were signed.
- **Ratification Date** – the agreements will be sorted in chronological order according to the date when they were ratified.
- **Entry into Force Date -** the agreements will be sorted in chronological order according to the date when they are supposed to enter into force.
- **Last Updated On** – the agreements will be sorted in chronological order according to the date when they were last updated.
- **Last Updated By** – the agreements will be sorted in alphabetical order according to the user who last updated the project.

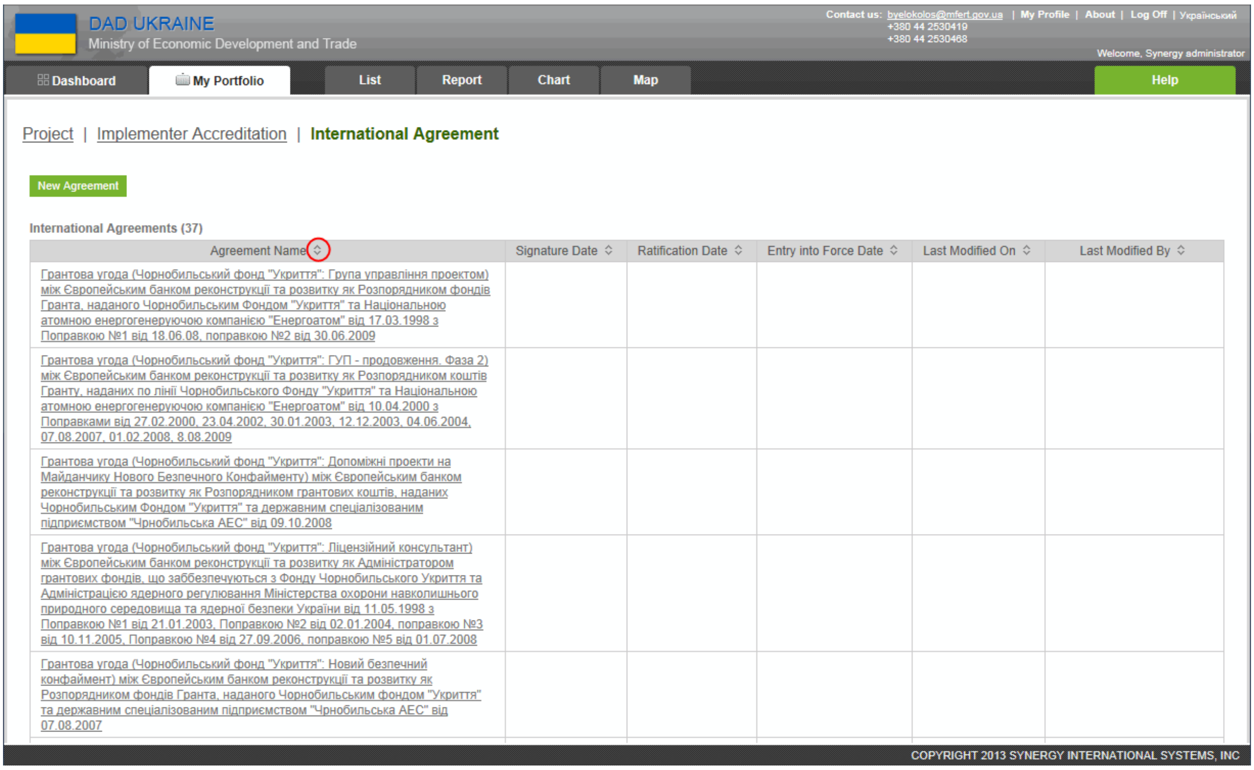


Figure 19: Sorting International Agreements

In order to sort the agreements according to one of the criteria described above, follow the steps below:

1. Go to the **My Portfolio** module.
2. Click the **International Agreement** tab.

3. Click the arrow icon in the header of the column that you want to sort the agreements by (Figure 19).
4. Click the arrow icon once again to sort the agreements in reverse order.

7. LIST MODULE

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

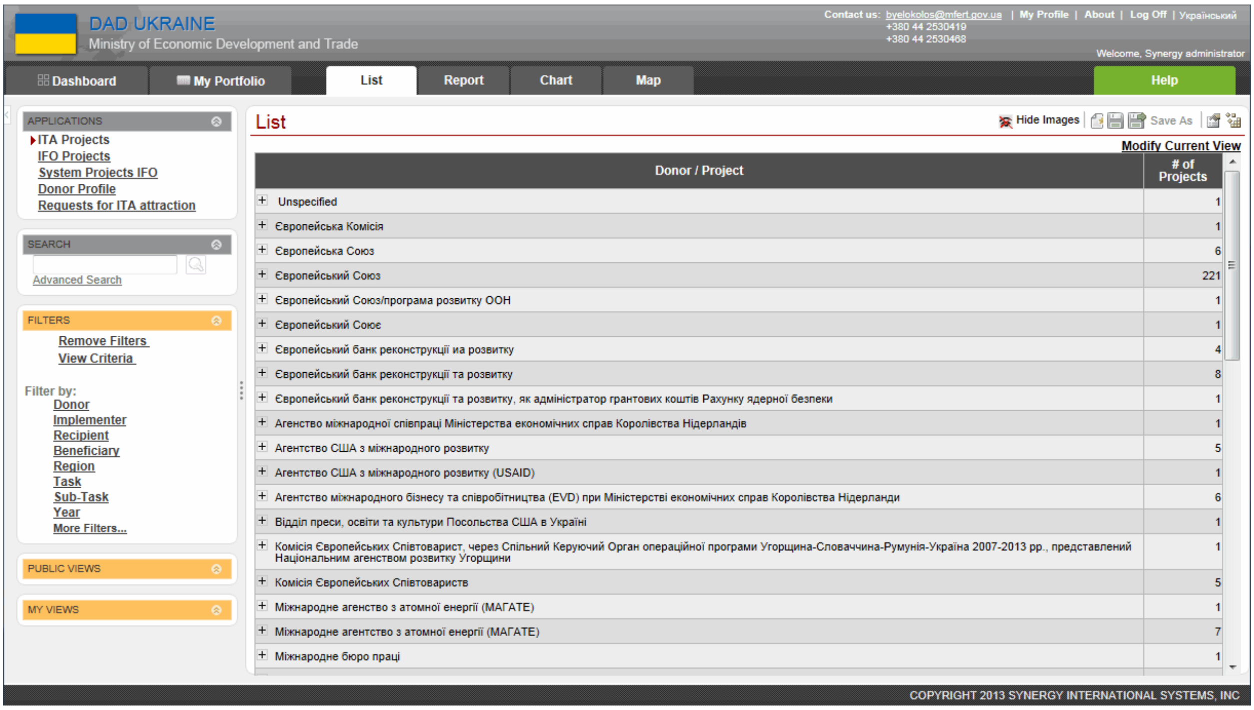


Figure 20: List Module

7.1 Accessing the List Module

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

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

7.2 Expanding the List Item

It is possible to expand the list item level to view the information of the sub-level(s). In order to expand the list item level, click the '+' sign next to the name of the list item. This will expand the list item group level displaying the first sub-level (Figure 21). This can further be expanded unless there are no more sub-levels to be displayed.

Note: You can expand only one group level at a time. If you expand the group level of another list item, the previously expanded group level will get collapsed.

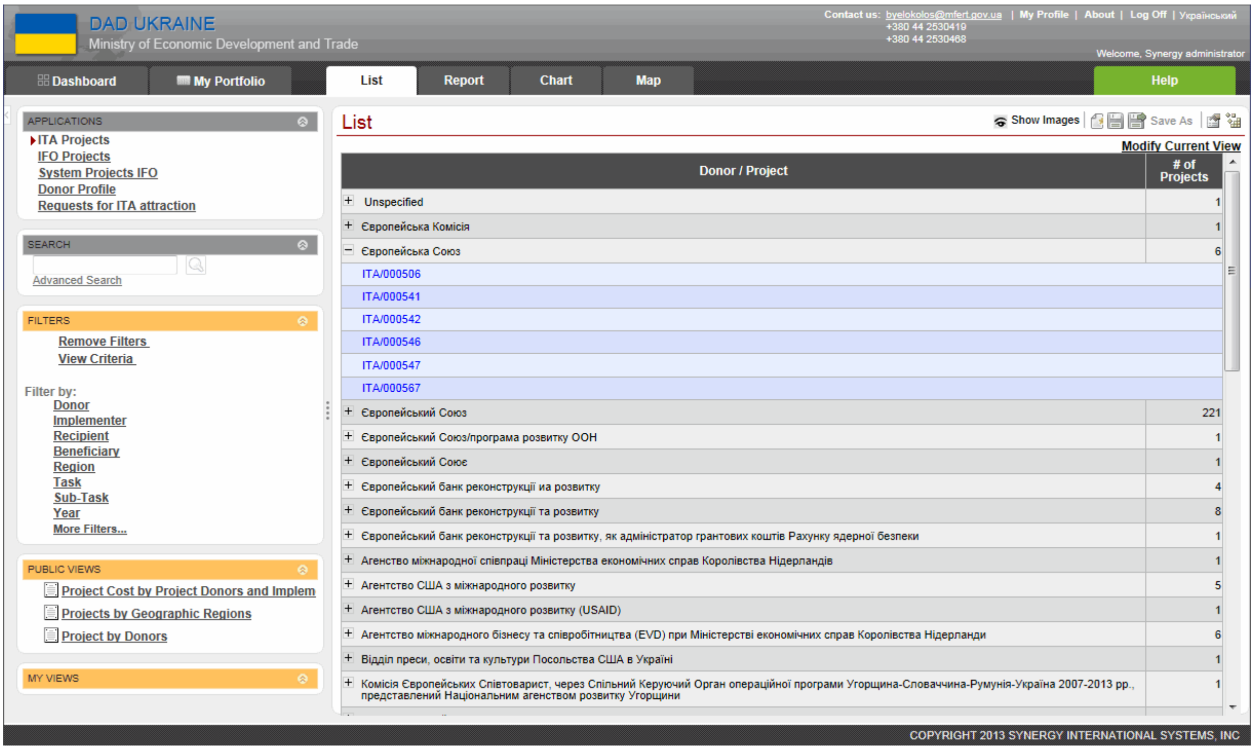


Figure 21: Expanding the List Item Level

7.3 Sorting List Items

You can sort the list view by column by clicking on the name of the column. This will sort the list alphabetically or numerically depending on the type of data entered into that column. The arrow that appears on the column can reverse the order of the list.

7.4 Browsing among List Items

You can browse among the list items by clicking on the number link of the page to navigate to. The **Previous** and **Next** buttons can be used to move to the required page.

7.5 Hiding / Showing Images in the List

In order to make the list load quicker, you can choose to hide the images which are displayed in the list. These images can be donor flags, sector icons, etc.

To show the images in the list, click the Show Images button located at the top of the screen. All the images in the screen will display.

Note: Clicking the Hide Images button will not show the images.

7.6 Modifying the Current View

It is possible to modify the list that is currently displayed in the *List* module. You can add new groupings to it or remove the selected ones, (un-) select columns, re-order them, etc. The steps described below provide for the necessary instructions for modifying the current view.

1. Click the **Modify Current View** link at the top right corner of the *List* screen. A *Modify Current View* window (Figure 22) will appear presenting the administrator with the groupings/columns selected and available for the list view.
2. In the *Groupings* section, add / re-order / remove groups.
3. In the *Columns* section, add / re-order / remove columns.
4. In the *Cross Tab Groupings* section, define add / re-order / remove column groupings for the view.
5. Set the view as default, if necessary. Please, note that the view can appear as default for a current user or for unregistered public users.
6. After finishing making changes in the view, click the **OK** button for the changes to take effect. Or, click the **Cancel** button to discard the changes made.

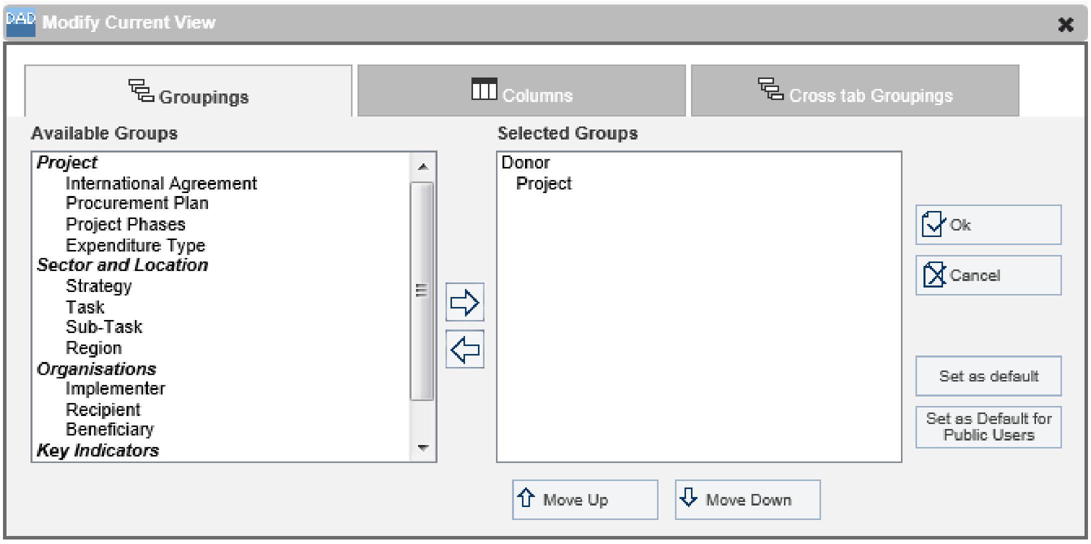


Figure 22: Modifying the Current View

7.6.1 Adding List Groups / Columns / Column Groupings

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

1. In the *Available Groups / Columns* panel, select the group / column / column grouping to be added to the list.
   Note: It is possible to select several groups / columns by means of the **Shift** or **Ctrl** keyboard buttons.
2. Click the  **(Select)** button. The selected group(s) / column(s) will appear in the *Selected Groups / Columns* panel.

7.6.2 Re-ordering Groups / Columns / Column Groupings

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

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

7.6.3 Removing Groups / Columns / Column Groupings

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

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

7.6.4 Setting a View as Default

After making changes in the view currently displayed in the *List* module, you can set the newly-created view as default. This means that the new view will appear when you will next time access the *List* module.

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

1. Make the necessary changes in the current view as described in the sections above.
2. After finishing, click the **Set as Default** button in the *Modify Current View* window. Please note that the view will be set as default only for the current user.

Note: The **Set as Default for Public Users** button is only available for administrators and will save the current view as a default for all unregistered/public users.

8. REPORT MODULE

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

8.1 Accessing the Report Module

As it has been stated above, the system provides for the opportunity to create different sorts of list reports. In order to access the *Report* module of the system, click the **Report** tab. You will be navigated to the *Report* module of the application where the *Report Designer* (Figure 23) will open.

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

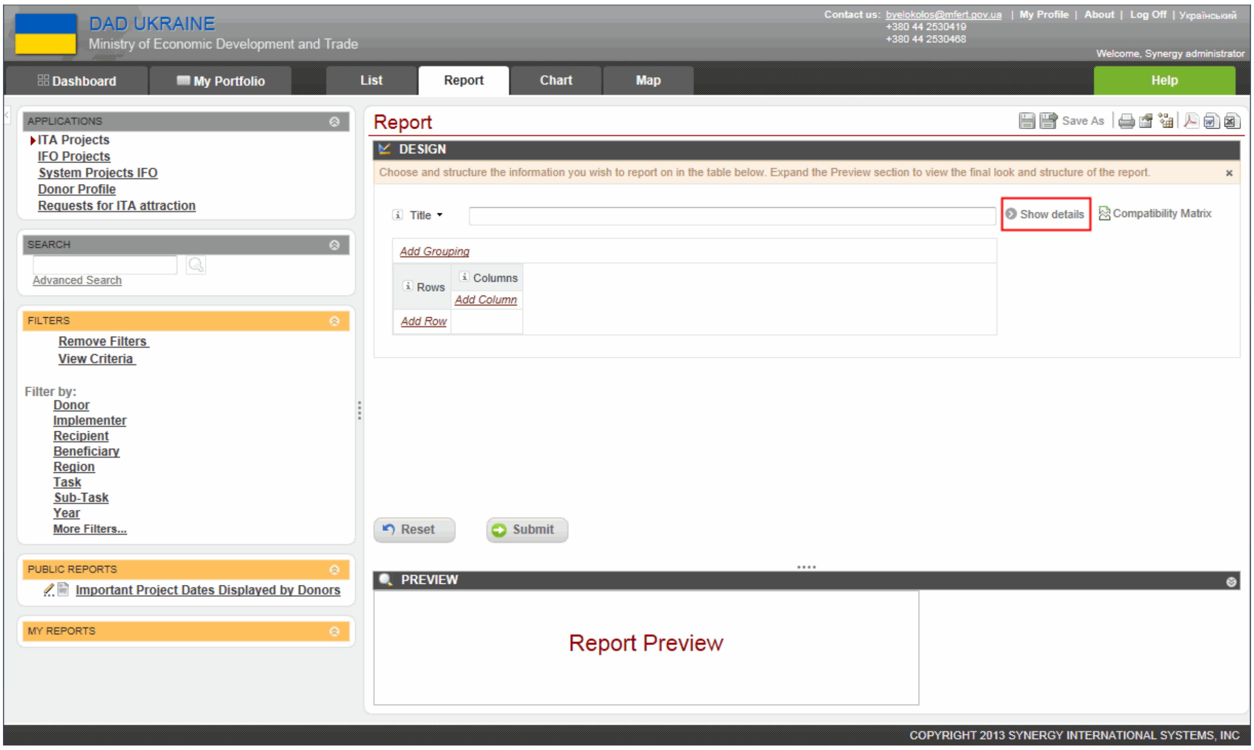


Figure 23: Report Module

8.2 Creating a Report

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

- **Text entries** – title, subtitle, header, and footer. For these fields, the expected input is a free text.
  Note: By default, the *Report Designer* gives you the possibility of adding report titles. However, you can change the default view to make adjustments for other text entry components (sub-title, header and footer) as well. To be able to provide additional textual information to the report, you will have to click the **Show Details** link (Figure 23) and provide the appropriate information the fields that emerge.

Clicking the **Hide Details** link will collapse the text entry fields displaying only the **Title**.

- **Report grouping** - allows grouping data according to a specific category. Grouped data appear in different tables. Each table contains data that fall under one group of the category specified.
- **Rows** - group data within the report table.
- **Columns** - show details specific to each table row.
- **Sub-columns** - divide the row details displayed under each column.

In order to add report components, follow the steps below: They provide instructions on how to compose and submit queries.

1. Type the text that should appear as the report title in the **Title** text box.
2. Enter a **Subtitle**, **Header**, and **Footer** if needed.
3. In the *Group Report by* section, specify the category, which will be used to group data into different tables. To add a report grouping, click the **Add Grouping** link in the *Group Report by* section and select the appropriate category from the menu that appears (Figure 24).
   Note: The report will be divided into as many tables as there are table groupings selected.

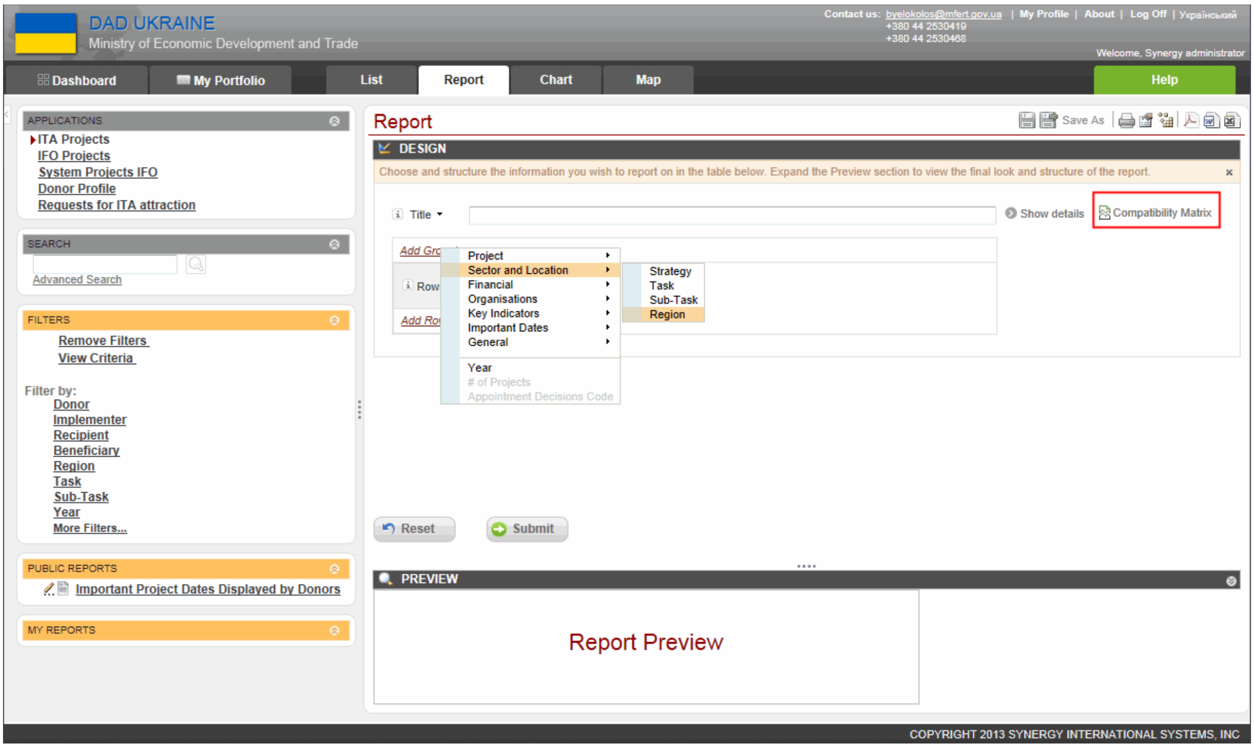


Figure 24: Selecting a Grouping for a Report

4. Select table rows by clicking the **Add Row** link and selecting the appropriate item from the menu that appears. Please note that it is possible to select one row at a time from the list of available rows.
5. Select table columns by clicking the **Add Column** link and selecting the appropriate item from the menu that appears. Please note that it is possible to select one column at a time from the list of available columns.

> **Note:** Once you have selected a report column, an **Add Sub-column** link becomes available under the selected column. It allows indicating how the row details displayed under each column will be divided.

Note: At any point it is possible to remove all components selected for the report and design a new report from scratch by clicking the Reset **(Reset)** button.

Note: If you have defined a report which has incompatible columns (columns over which reports cannot be generated), they will be marked in red and an error message will occur. To make your reports productive, use the link (as marked in red, Figure 24) to open the *Compatibility Matrix* table (Figure 25). This is a table that displays the compatibility between all categories and measures in the database to display them in the report.

Compatibility Matrix

• - indicates compatibility between Category and Measure

Rows(Categories) / Columns(Measures)	# of Projects	Appointment Decisions Code	Appointment Decisions Date	Commitment(UAH)	Commitment(USD)	Created By	Disbursement(UAH)	Disbursement(USD)	Duration	End Date	Expenditure(UAH)	Expenditure(USD)	Modified By	Progress	Project Cost(UAH)	Project Cost(USD)	Project Phase Cost(UAH)	Project Phase Cost(USD)	Project State Registration Number	Project Title	Signature Date	Start Date	Target
Beneficiary	•			•	•		•	•			•	•			•	•	•	•					
Donor	•			•	•		•	•			•	•			•	•	•	•					
Expenditure Type	•			•	•		•	•			•	•			•	•	•	•					
Implementer	•			•	•		•	•			•	•			•	•	•	•					
International Agreement	•			•	•		•	•			•	•			•	•	•	•					
KPI	•			•	•		•	•			•	•		•	•	•	•	•					•
Procurement Plan	•			•	•		•	•			•	•			•	•	•	•					
Project		•	•	•	•	•	•	•	•	•	•	•	•		•	•	•	•	•	•	•	•	
Project Phases	•			•	•		•	•	•	•	•	•			•	•	•	•				•	
Recipient	•			•	•		•	•			•	•			•	•	•	•					
Region	•			•	•		•	•			•	•			•	•	•	•					
Strategy	•			•	•		•	•			•	•			•	•	•	•					
Sub-Task	•			•	•		•	•			•	•			•	•	•	•					
Task	•			•	•		•	•			•	•			•	•	•	•					
Year	•			•	•		•	•			•	•			•	•	•	•					

Figure 25: Compatibility Matrix

8.3 Previewing a Report

At any time during the process of creating a report, look in the *Preview* section at the bottom of the page, in order to view the final structure of the report (Figure 26). The *Preview* will not be ready for viewing unless the user has at least one table row defined.

All your added report components and structuring results will be displayed in the *Preview* section which helps you to check whether the report matches the required output or not. This section can be expanded in order to display whole of the information.

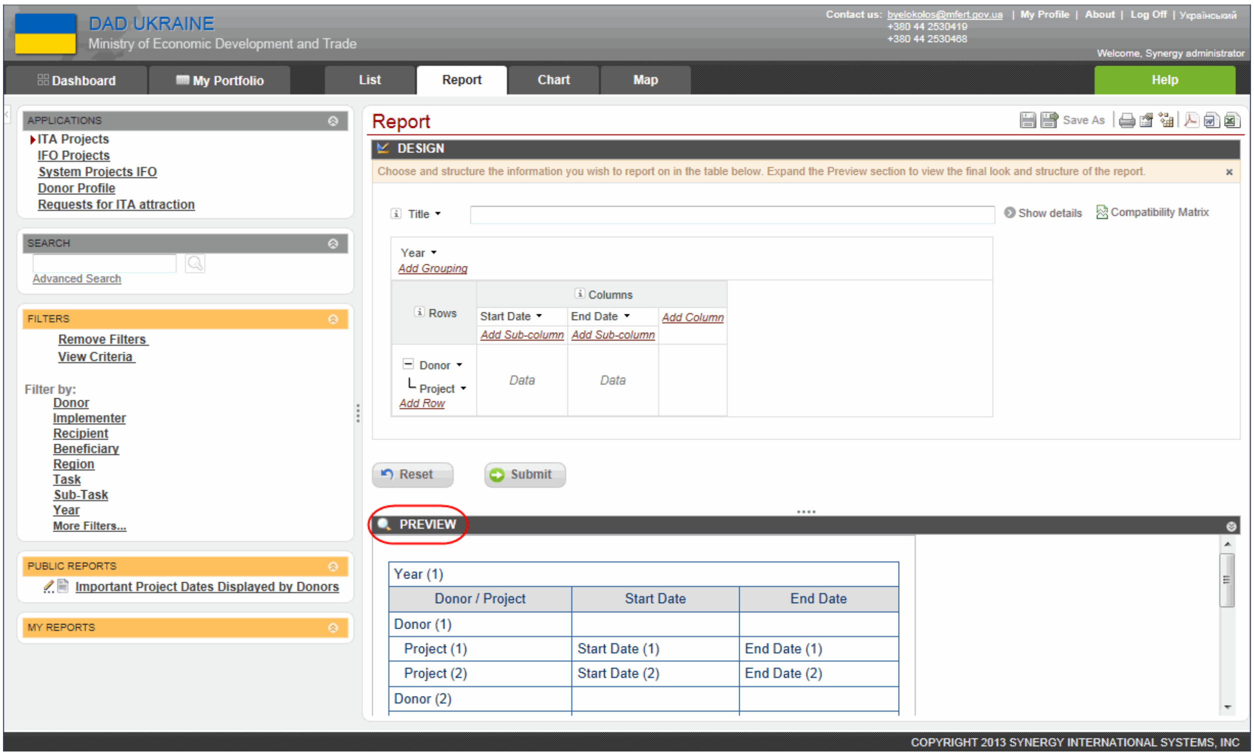


Figure 26: Previewing the Report

8.4 Generating a Report

The final step in the process of creating a report is report generation. By clicking the 

(Submit) button, a request to the Reporting Engine is submitted in order to access the database, gather the required data and present it in the manner required. The report containing all the real data appears in a new window.

8.5 Customizing Reports

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

8.5.1 Formatting/Styling Report Components

You may format/style the text entries as well as main report table captions and values by assigning to them value characteristics such as font, font size, font color, background color, alignment (i.e. left, center, or right), etc.

In order to format/style a report component, follow the steps below:

1. Click the report component that needs to be formatted / styled.
2. Select the **Properties** option from the actions list that appears (Figure 27).

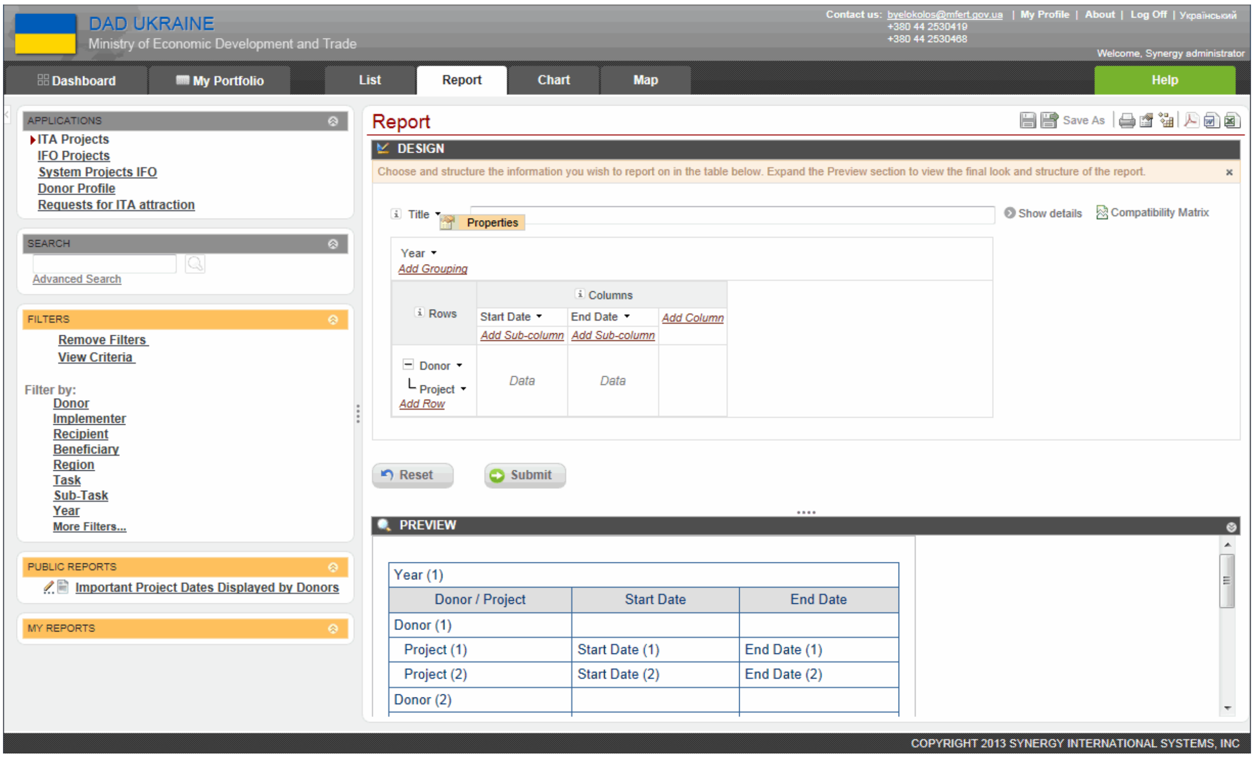


Figure 27: Reports Window with Properties Focus on the Title Field

The *Properties* window will appear. Please note that for text entries the *Properties* window includes text formatting buttons and a text area (Figure 28). For other report components, like rows, columns, etc., the *Properties* window also allows assigning additional characteristics (Figure 30), e.g. sorting order, reference text, etc.

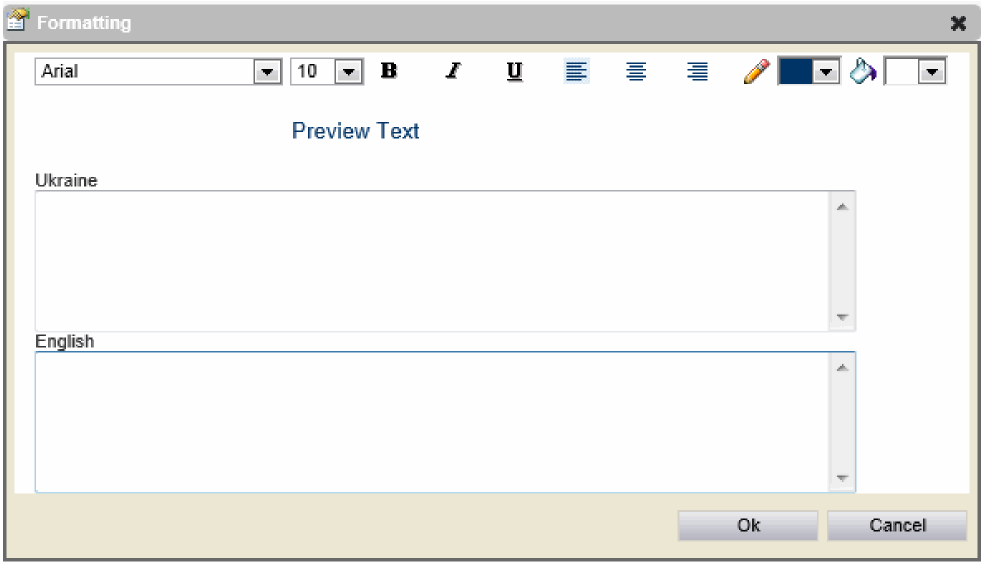


Figure 28: Formatting / Styling Text Entries

3. Change the properties as needed.
   Note: To prevent you navigating away from the section every time when modifying the properties of a different report table component, the *Properties* window allows selecting the next item to be modified. To do that, you need to select the appropriate instance from the *Items* drop-down list in the *Properties* window. The list contains the previously selected report table components.

4. Click the **Apply** button for the changes to take effect. Clicking the **OK** button will close the window and navigate you to the *Report* module.

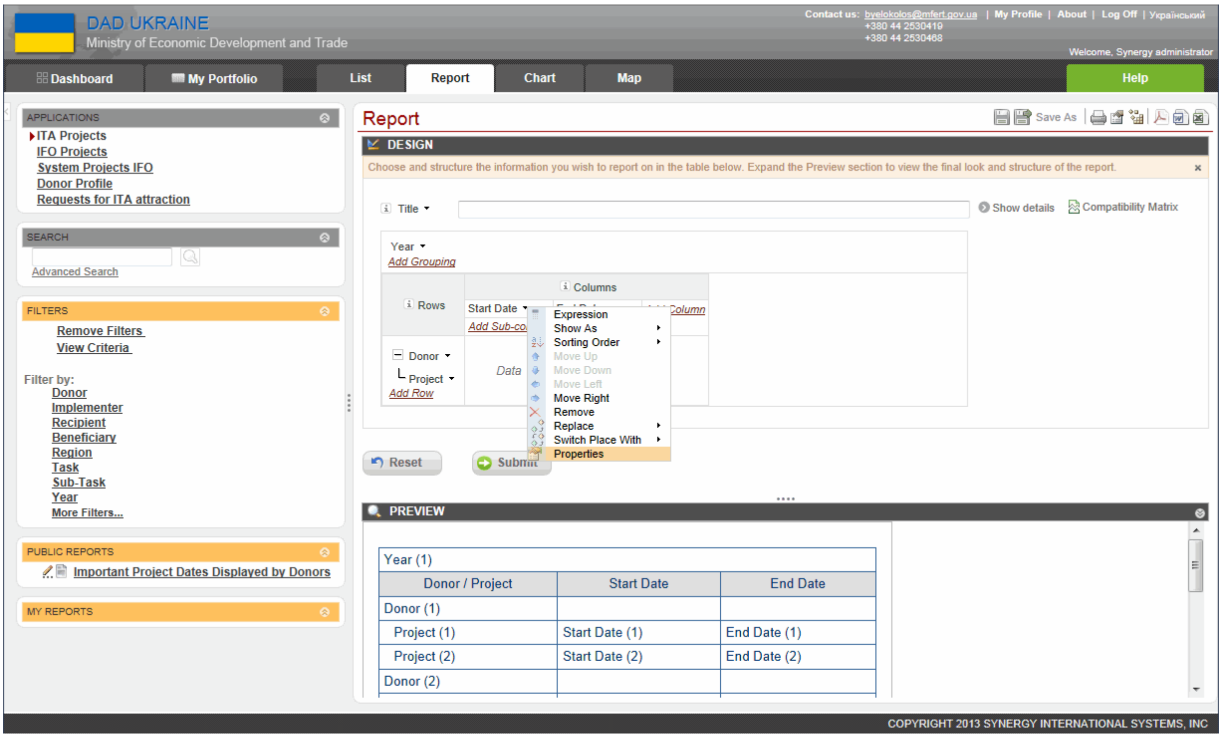


Figure 29: Reports Window with Properties Focus on the Column

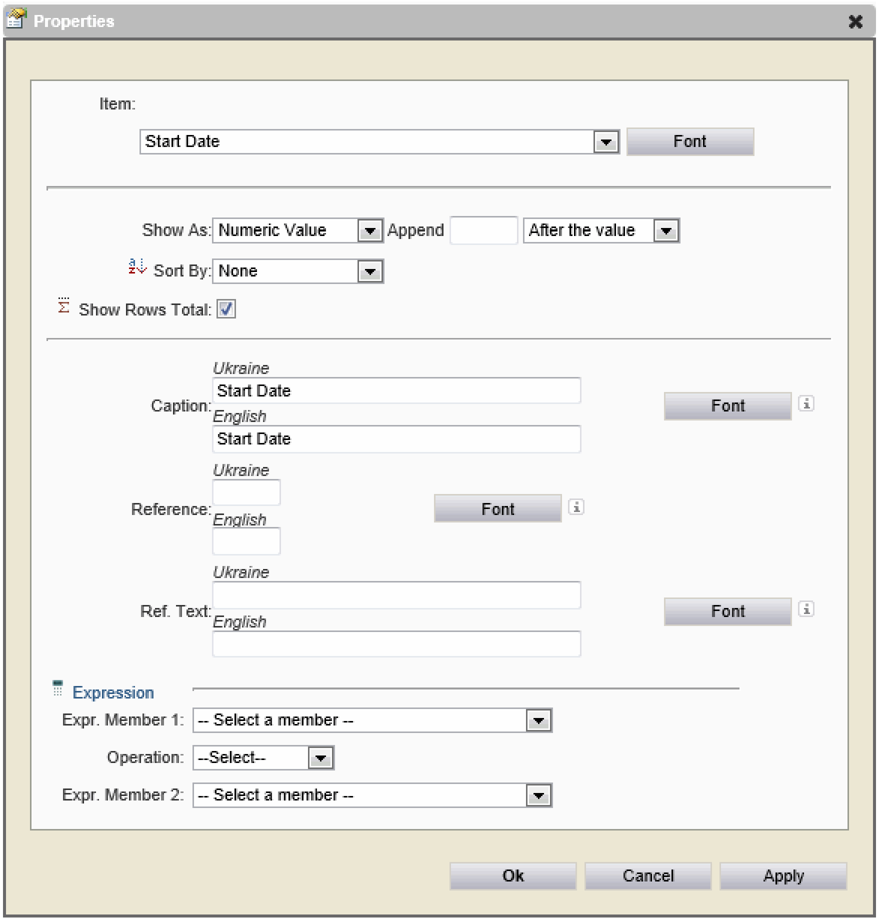


Figure 30: Assigning Properties to Report Table Components

8.5.2 Re-ordering Report Table Components

This option enables the user to establish and modify the order of the report table components, like rows, columns, etc.

In order to re-order report table components, the user should follow the steps described below.

1. Click the component item that needs to be reordered in the report.
2. Select the respective **Move Up / Move Down / Move Right / Move Left** option from the menu that appears. The report generated will maintain the order of the items that was displayed in the *Report Designer* (Figure 31).

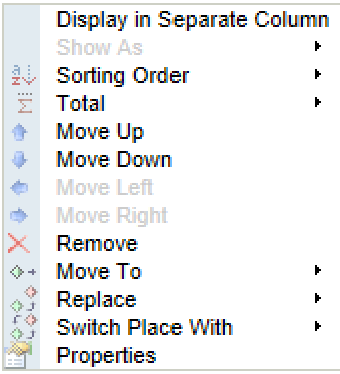


Figure 31: Re-ordering Report Table Components

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

8.5.3 Sorting Report Table Components

You may change the order in which the table components will appear in the final report. The report table components can be sorted either in an *Ascending* (A-Z) or a *Descending (Z-A)* order.

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

1. Click the component item for which the sorting order needs to be changed.
2. Select the **Sorting Order** option from the actions list (Figure 32).

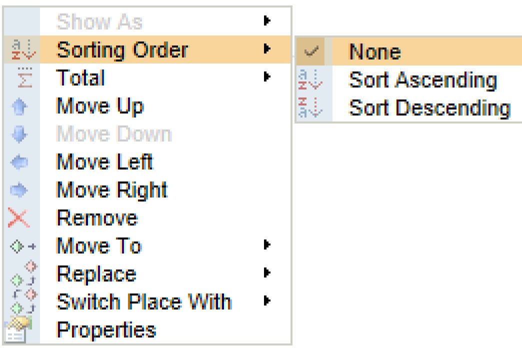


Figure 32: Defining the Sorting Order

3. Define whether the report item values should be sorted in the ascending or descending order. Please note that selecting the **None** option from the list removes the sorting criteria.

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

8.5.4 Removing a Report Table Component

It is possible to remove a report table component from being included in the report, if this is necessary.
In order to remove a report table component, follow the steps below:

1. Click the component item that needs to be removed.
2. Select the **Remove** option from the menu that appears. The selected grouping value will be removed.

8.5.5 Switching Report Table Components

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

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

1. Click the component item that needs to be switched.
2. Select the **Switch Place with** option from the menu that appears (Figure 33).

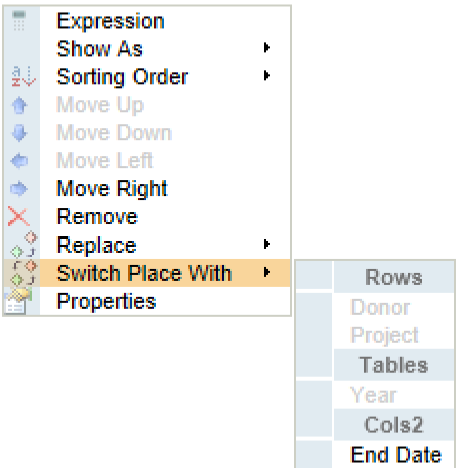


Figure 33: Switching Report Table Components

Define what component item the selected instance needs to switch place with. The selected component item will be removed from its current position and added as an item to the specified component. For instance, if it is selected to switch between table grouping and row, the selected table grouping item will be removed from table grouping and added as the row item, while the row item will 'trade' places with the table grouping item.

9. CHART MODULE

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

9.1 Chart Module Key Features

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

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

9.2 Accessing the Chart Module

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

9.3 Main Screen and Its Components

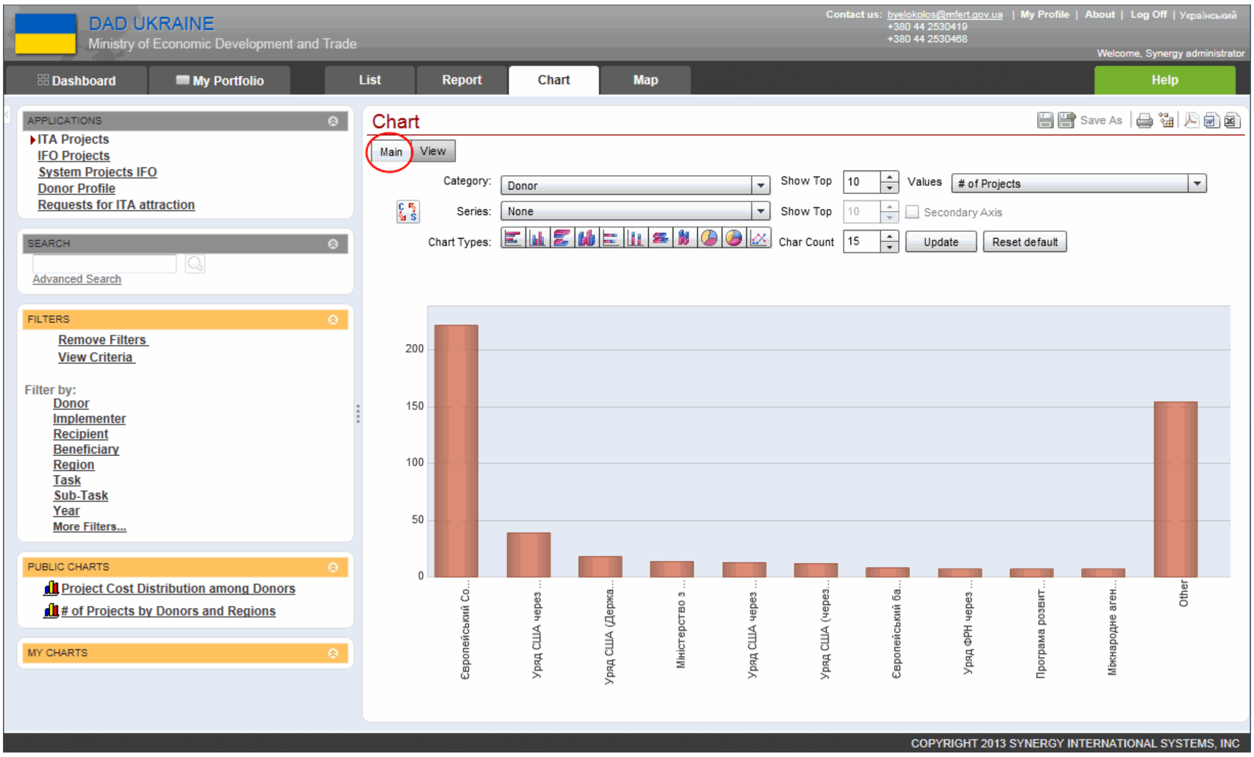


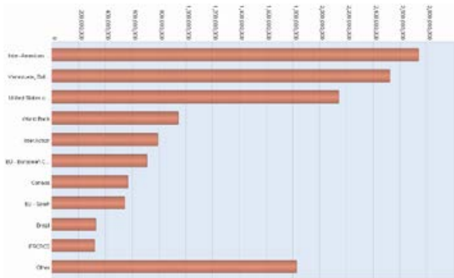
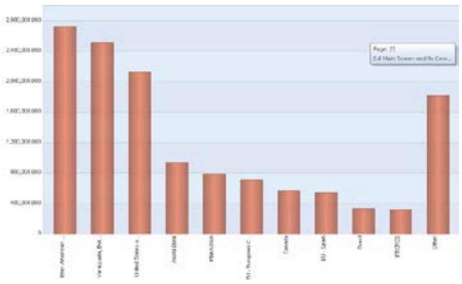
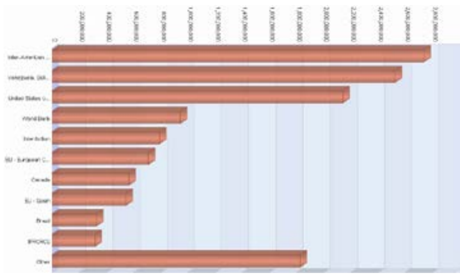
Figure 34: Main Screen of the Chart Module

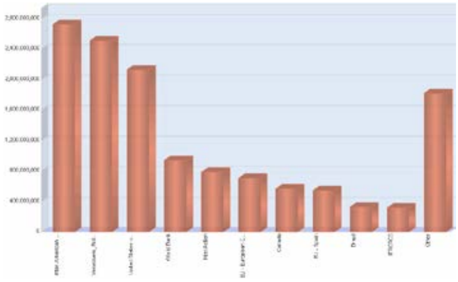
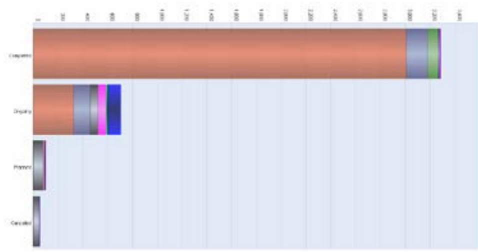
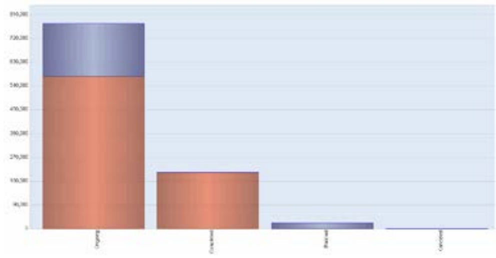
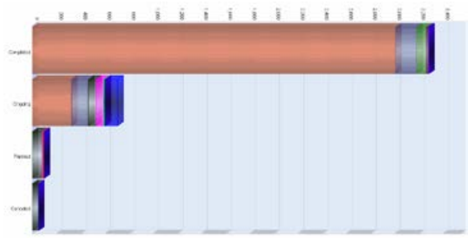
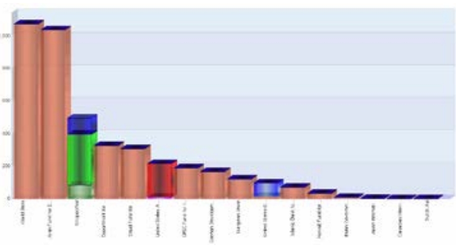
1. **Category** - allows selecting one of the options provided in the **Category** drop-down menu located at the top of the *Chart* window. The selected category will define one of the chart axes. Selection of a category for the chart report is required.

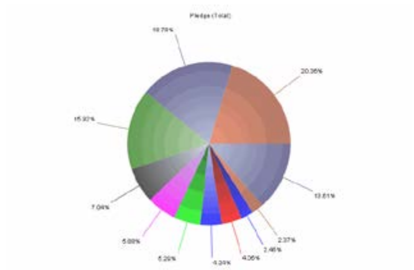
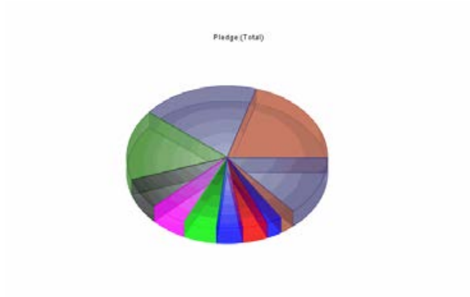
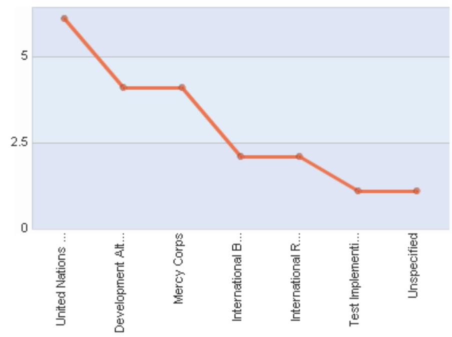
2. **Series** - allows selecting one of the options provided in the **Series** drop-down menu located at the top of the *Chart* window. The selected series will define the chart legend. Selection of a series for the chart report is optional.

   Note: Clicking the **(Swap)** button allows switching places of category and series selections.

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

Chart Type	Example
1. Bar	
2. Column	
3. 3D Bar	

4. 3D Column	
5. Stacked Bar	
6. Stacked Column	
7. Stacked 3D Bar	
8. Stacked 3D Column	

<table>
<tr><td>9. Pie</td><td></td></tr>
<tr><td>10. 3D Pie</td><td>
</td></tr>
<tr><td>11. Line</td><td>
</td></tr>
</table>

4. **Show Top <Number>** - indicates the maximal number of category items to be displayed in the chart.

5. **Show Top <Number> on Secondary Axis** - indicates the maximal number of series items that should be displayed on the secondary axis in the chart. Becomes available only if a Series is selected. This option is disabled if you have selected the pie or line chart types.

6. **Char Count** - limits the number of characters to be used to display the category item names to the value set in this field.

7. **Values** - allows selecting a value from the list that will define the main chart criteria.

8. **Update** - loads the latest data from the database and displays them on the chart.

9. **Reset Default** - loads the default chart built according to the default chart category and chart type.

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

9.4 View Screen and Its Components

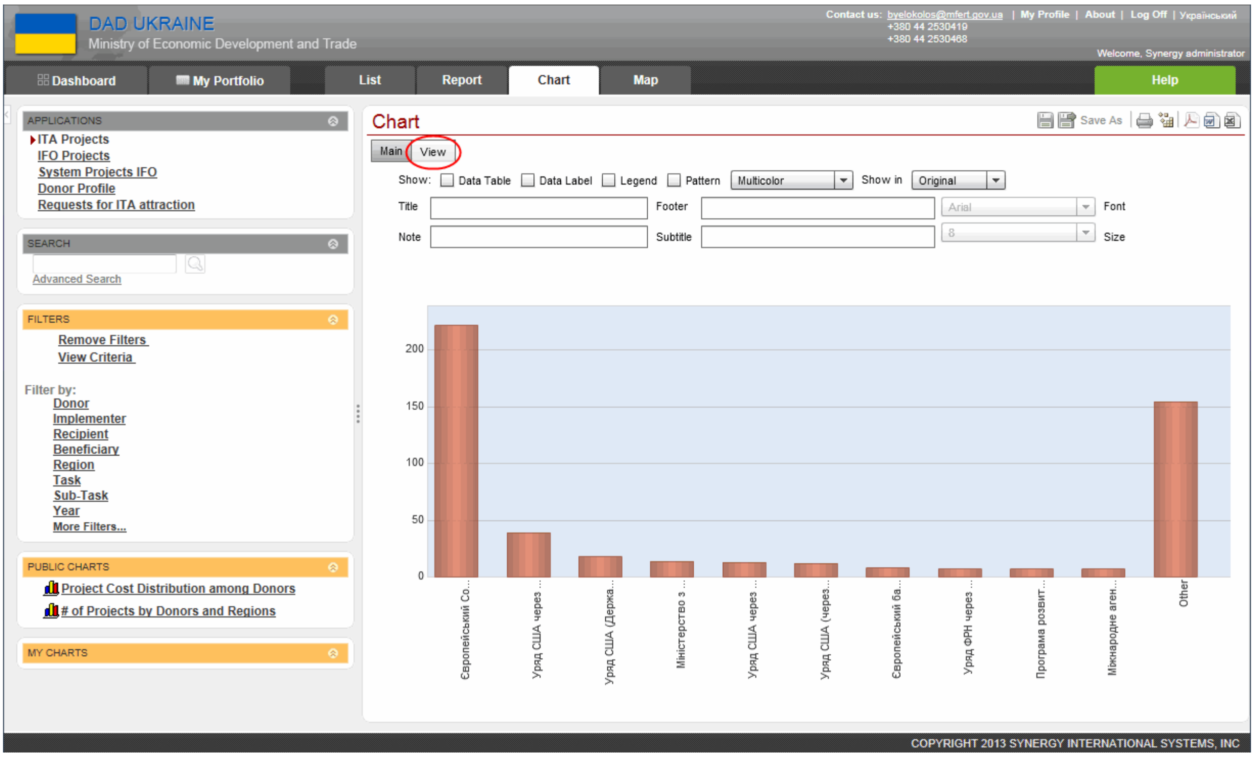


Figure 35: View Screen of the Chart Module

1. **Show -** allows selecting one or several of the following options:
   - ***Data Table -*** presents the information contained in the chart in a grid or matrix.
   - ***Data Label -*** shows the actual values of each chart cell. This option is disabled if you have selected the pie or line chart types.
   - ***Legend -*** explains the categories and data series displayed on the chart.
   - ***Pattern -*** allows choosing a pattern-filled chart for black and white printing.
   - ***Coloring Option -*** allows defining whether the chart should be displayed in multiple colors or in one of the colors available.
   - ***Show In -*** allows defining how the numeric values will be displayed on the chart. To avoid large number occupying too much space, you can choose to view the numbers in thousands / millions / billions.

2. **Title** – a text box to enter the chart report title.

3. **Note -** a text box to enter additional information about the chart report.

4. **Footer -** a text box to insert a portion of text that will appear in the bottom area of the chart report.

5. **Subtitle -** a text box to enter a subtitle for the chart report.

6. **Font -** allows selecting the font the chart report title/subtitle/footer/note will appear in.

7. **Size -** allows selecting the font size the chart report title/subtitle/footer/note will appear in.

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

10. MAP MODULE

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

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

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

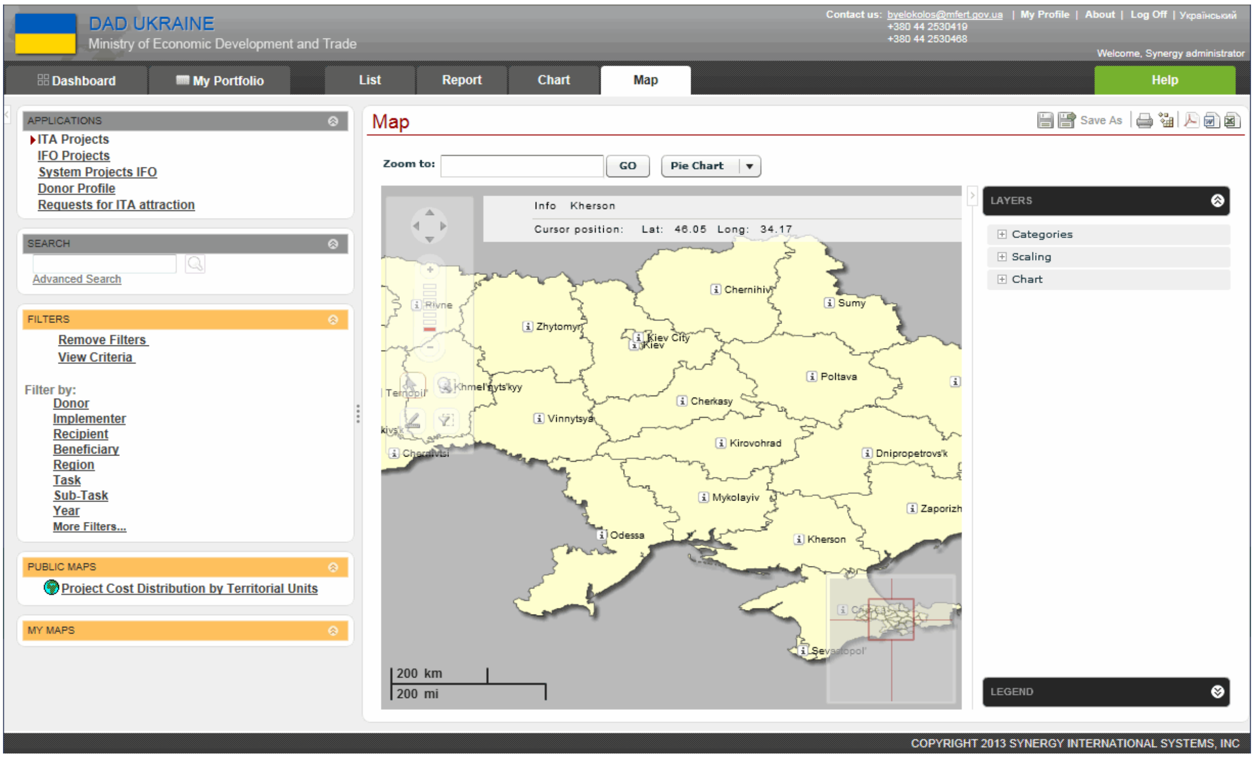


Figure 36: Map Module

10.1 Key Features of the GIS Tool

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

- Vector-based platform
- Multi-layer mapping
    - Dynamic number of administrative territorial units
    - Category or Indicator data
    - Static Data (Borders, Cities, Rivers, Roads, Construction Sites, etc.)
    - Names and Labels
    - Any other type of layer

- Data visualization features

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

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

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

- GIS specific features
  - Distance Measurement
  - Buffered Zone Querying
  - Geocoding

- Internationalization features
  - User interface multi-lingual capability
  - Map multi-lingual capability

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

- Interoperability
  - Map retrieval via web services

10.2 Accessing the Map Module

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

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

10.3 Map Module Screen Components

The following figure describes some of the features available in the main screen of the *Map* module (Figure 36):

1. **Zoom to panel -** allows free zooming to the desired administrative unit.
2. **Chart type selector -** allows defining whether the data should be presented in form of a pie chart or a bar chart when plotting graphs on the map.
3. **Navigation controls -** a set of tools that provide common navigation functions, such as panning and zooming.
4. **Map -** the map of the country.
5. **Scale Bar -** allows you to work out the distances on the map. The distances are expressed both in the metric and English units of measure.
6. **Mini Map -** an overview map of the entire country displayed in a small window allowing quick navigation to a desired location with one click without having to zoom out, find the new location and zoom in again.
7. **Layers Panel -** provides a variety of data to choose to display on the map.
8. **Legend Panel -** explains the categories and data series displayed on the map.
9. **Location information section -** displays the name of the administrative unit when it is pointed on the map.
10. **Cursor position section -** displays the geographic coordinates (expressed as latitude and longitude) for any point on the map.

10.4 Working in the Map Module

10.4.1 Zooming in / Zooming out

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

Free zoom in / zoom out

This option allows you to easily explore the data through Intelligent Searching. You can enter any combination of letters in the *Zoom to* panel and select the administrative territory to navigate to from the list containing the search results (Figure 37). The selected item will be magnified and displayed in the main screen.

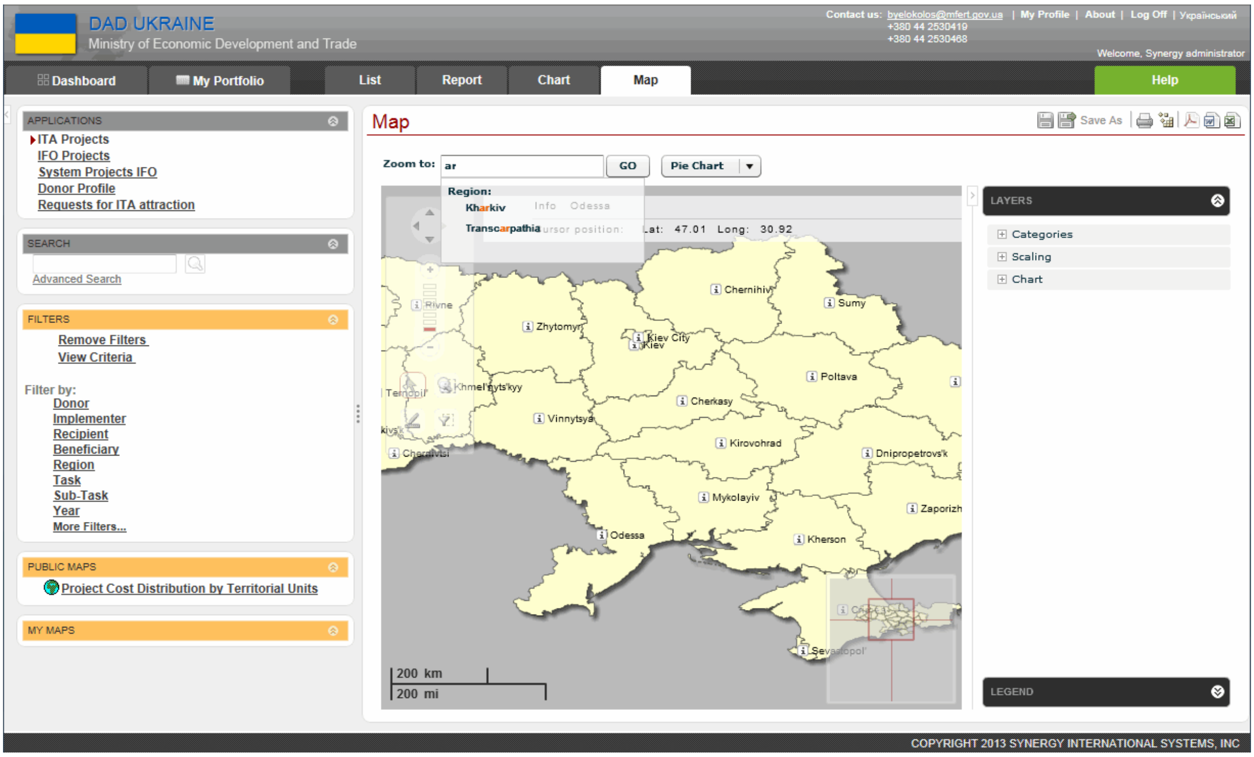


Figure 37: Intelligent Searching

<u>Scaled zoom in / zoom out</u>

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

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

<u>Mouse wheel-based zoom-in/zoom-out</u>

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

<u>Zoom by Selection</u>

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

10.4.2 Measuring Distance

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

To do this, click button, select the point on the map and drag the mouse to the second point to trace a path to measure (Figure 38). The measured distance will be expressed both in metric and English units of measure.

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

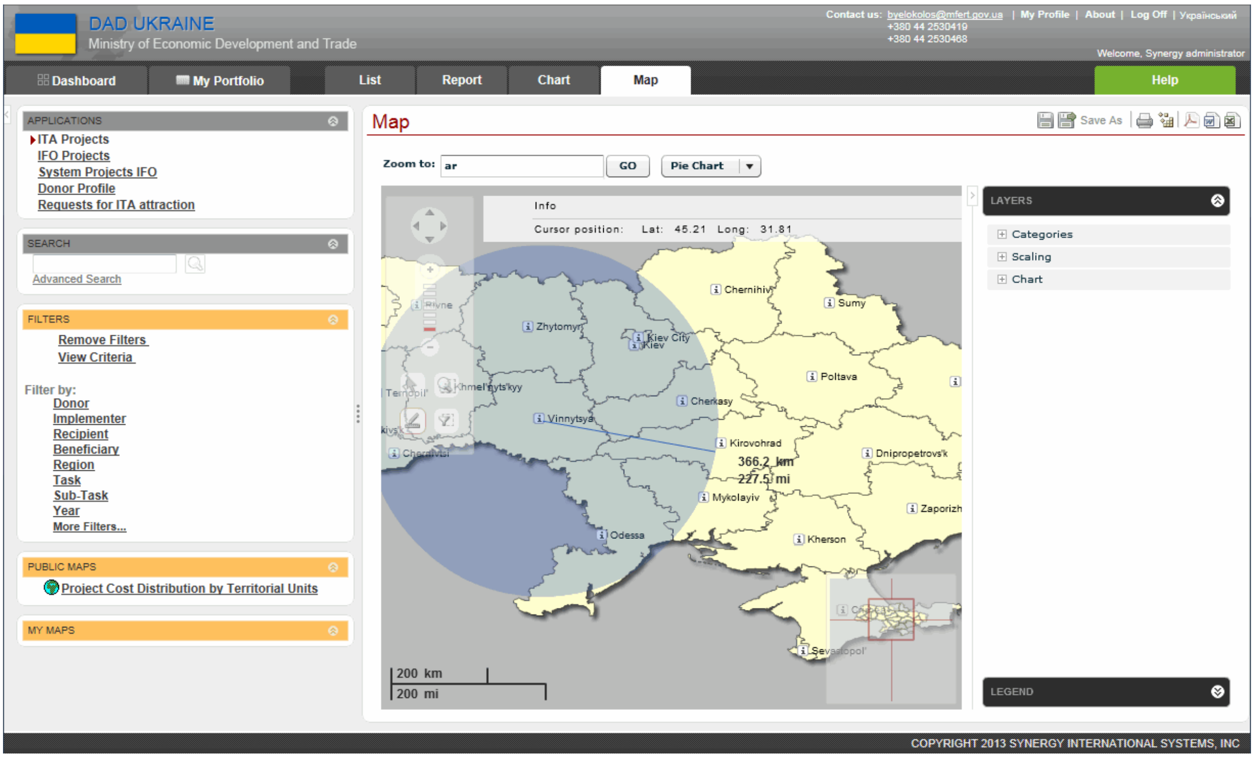


Figure 38: Measuring Distance

10.4.3 Buffered Zone Querying

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

To be able to create a buffered zone to view data for, select the button, and then select the region on the map to highlight. The selected area will be activated while the rest of the screen will be disabled (Figure 39). This tool may be useful for presentations on screenshots to mark the selected area on the map.

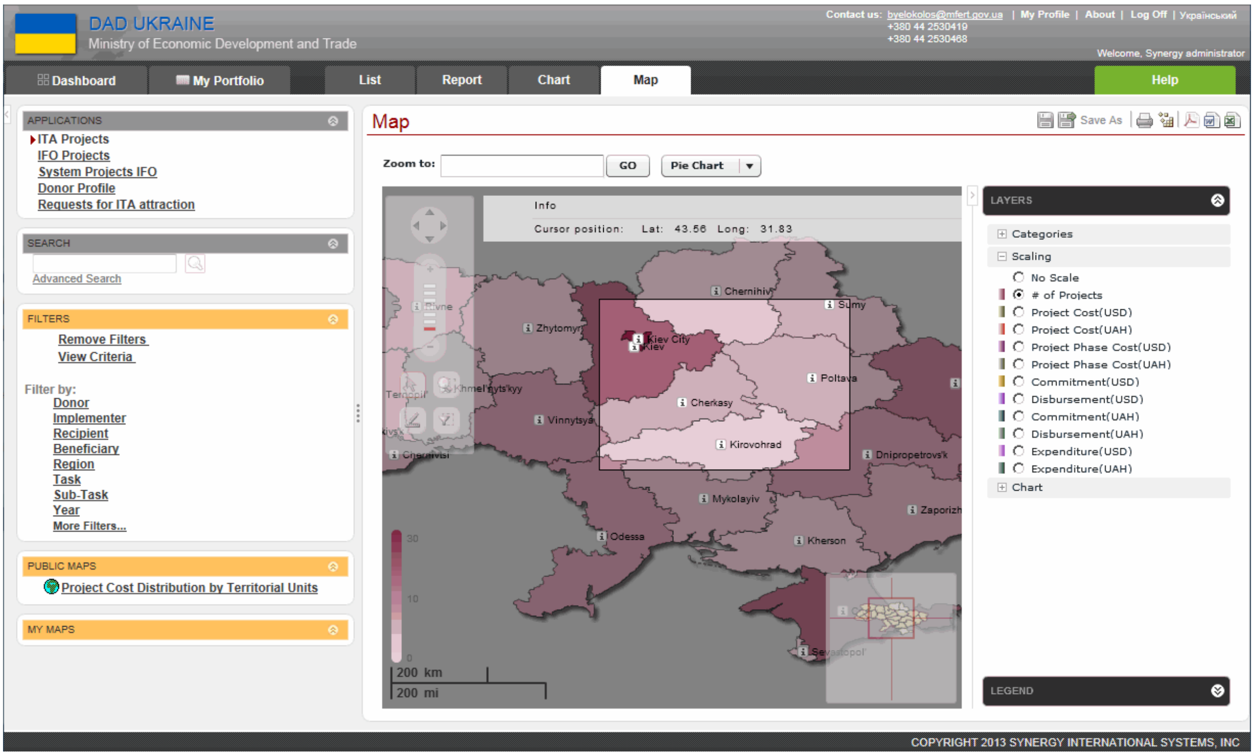


Figure 39: Buffered Zone Querying

10.4.4 Using Layers

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

- Display categories;
- Choose to view data on a scaling map;
- Plot data in the form of different graphs (pie chart or bar chart);

The following layers can be applied in *DAD Ukraine*:

Categories

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

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

Scaling

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

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

Chart

You can plot different data series on a map and view them in the form of different graphs, such as pie charts or bar charts. You can turn on this option by expanding the *Chart* section in the Layers panel and selecting the chart category(-ies) to be displayed on the map. By default, the selected category(-ies) will appear in the form of a bar chart. However, you can choose the view the data in the form of a pie chart by selecting the appropriate option from the **Chart Type** drop-down (Figure 40).

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

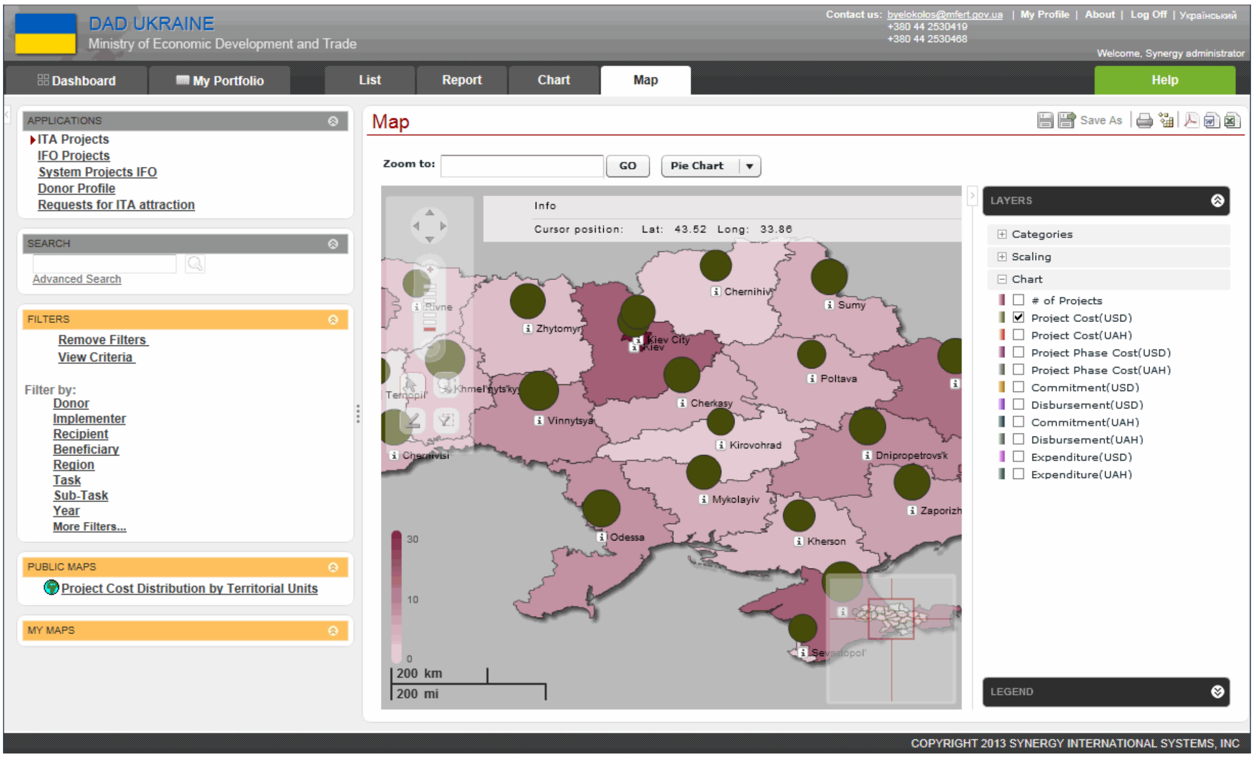


Figure 40: Selecting Chart Type

10.4.5 Viewing Legend

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

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

10.4.6 Using Mini Map

The Mini Map window feature displays an additional view of the country map with a position indicator that corresponds to the current view inside the main screen (Figure 41). One of the main features of the Mini Map is that while the Mini Map window responds to position adjustments in the main screen, you can also interact directly with it. Double-clicking any area within the window or dragging the position cursor to the desired place will adjust position both in the Mini Map and in the main screen to the point in the Mini Map window that the user selects.

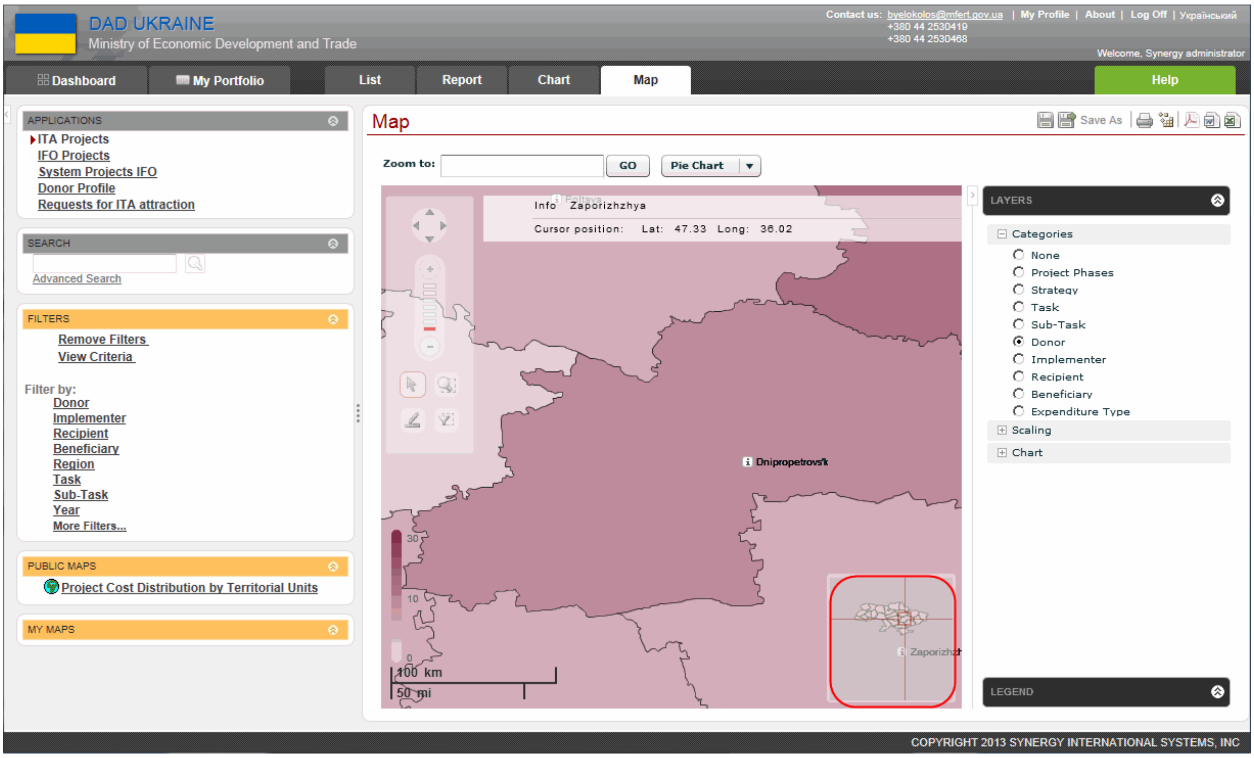


Figure 41: Using Mini Map

10.4.7 Viewing the Data Displayed on the Map

The Advanced GIS tool is used to view the data referring to definite territorial units when zoomed in to this level. In order to access the data for a specific territorial unit, point the mouse cursor on the button (Figure 42). The information that is displayed in the information window includes but is not limited to the number of projects implemented in the given location, project financial information, etc. If you have plotted any chart category on the map, the chart category details appear in the information window as well.

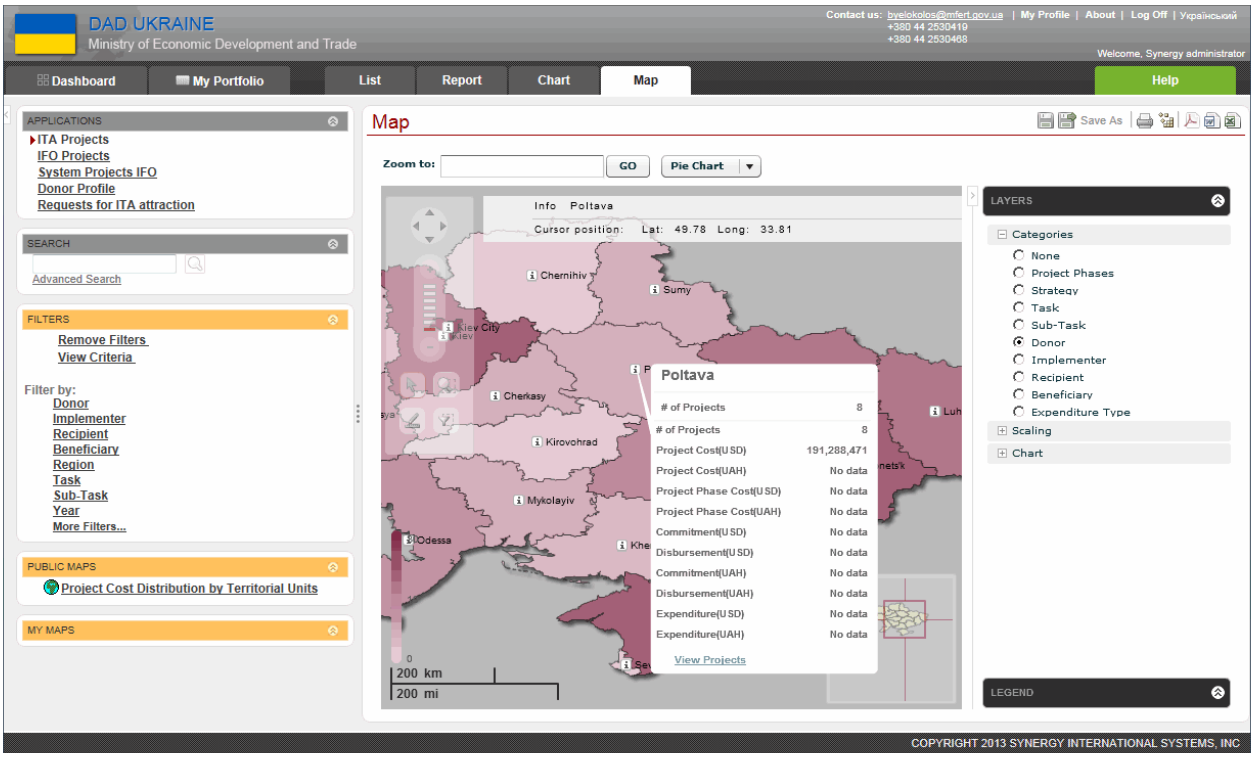


Figure 42: Viewing the Data Displayed on the Map

Also, you can view information on unspecified and unallocated projects that do not have any territorial unit reference. To view data on these projects, point the mouse cursor on button in the respective *Unspecified* or *Unallocated* section.

Note: Clicking the **View Projects** link at the bottom of the information window will take you to the *Details* section of the application. For more information about the actions that can be taken in this section, see DETAILS SECTION.

11. DETAILS SECTION

The *DAD Ukraine* application has a built-in *Details* section, where you can view detailed project information, e.g. project financial information, the sector(s) of economy it supports, the project location, etc.

The *Details* section can be accessed from the *My Portfolio*, *List*, *Report, Chart*, and *Map* modules. In the *Details* section, you can view detailed project information, browse among other projects listed under the same parent item, print project details, etc. If you have the corresponding permissions, you can also edit the existing projects.

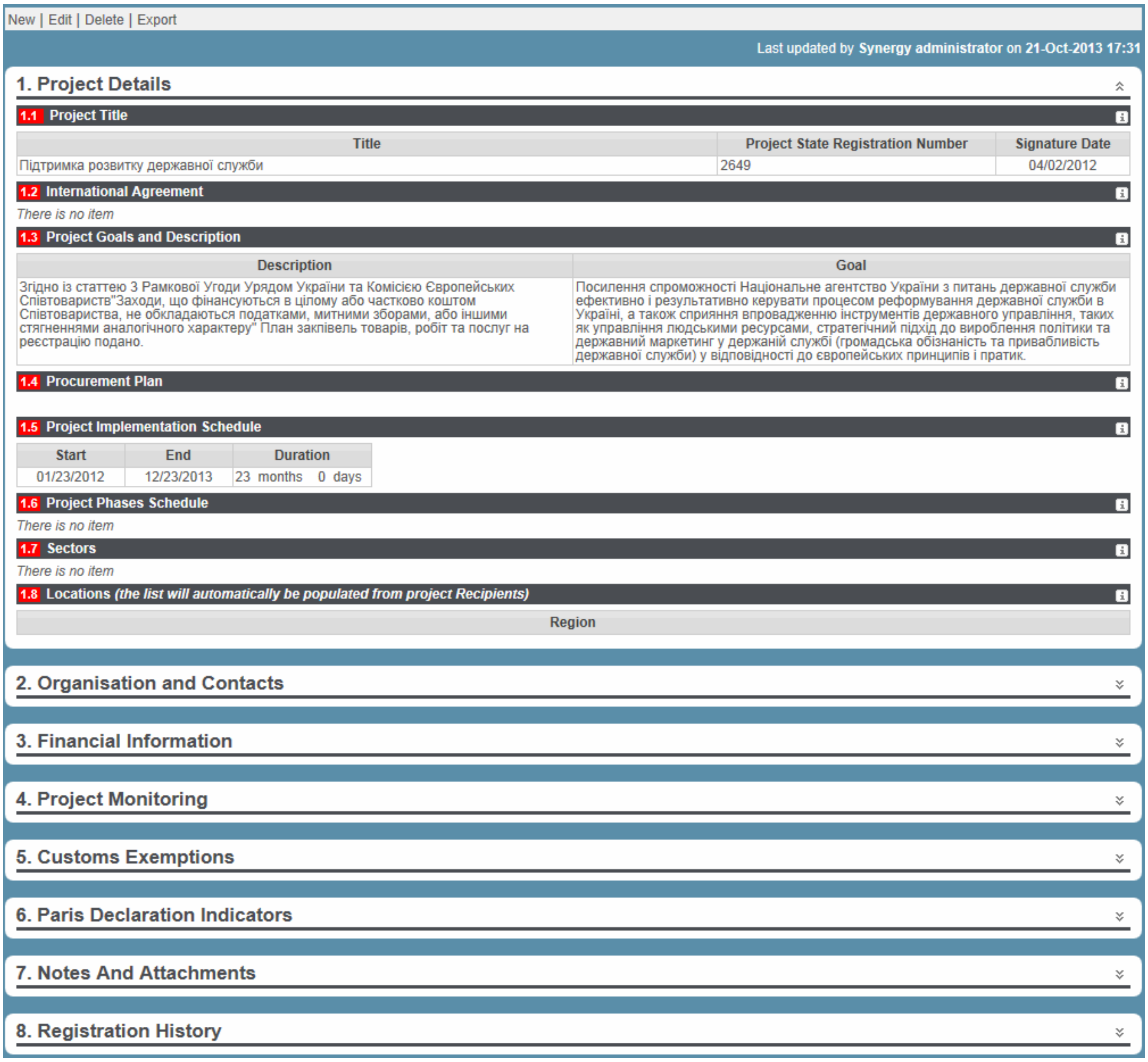


Figure 43: Details Section

11.1 Accessing the Details Section

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

1. Access the *Details* section by clicking on the one of the following:
    - <u>In the *My Portfolio* module:</u> Click the respective project. You will be directed to the *Details* section (Figure 43).

- In the *List* module: Click the project for the details to be displayed. This will open the *Details* section of the application where more detailed information about the project will be displayed.
  Note: Depending on the list representation settings, additional expanding the list items may be required to reach the project.
- In the *Report* module: Create a report indicating **Project** as a value for the report row and click the **Submit** button. For more details on how to create and generate reports, please see Creating a Report. In the report generated, click the project link.
- In the *Chart* module: Click the chart for the details to be displayed (e.g., click a relevant bar to see what it consists of). This will open the *Details* section of the application where all items matching the selection will be listed. Click the **Project Title** link for the details of the selected project to be displayed. This will open the *Project Details* section.
- In the *Map* module: Point the mouse cursor on the object on the map. The project information window will appear. In order to access the project details section select the **View Projects** link. This will open the *Details* section where all items matching the selection will be listed. Click the **Project Title** link for the details of the selected project to be displayed. This will open the *Project Details* section.
  Note: You can also choose to view the detailed information on all the projects that are in progress in the given territorial unit by pointing the mouse cursor on the button.

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

11.2 Browsing Projects

In the *Details* section, you can browse among the projects. To browse projects, use correspondingly **Previous** or **Next** buttons in the top of the *Details* window (Figure 43).

Note: if you are accessing the *Details* section from the *Chart* and *Map* modules, you can also find the corresponding project in the table displayed above the project details window and click it to view its details.

11.3 Printing Project Details

In the *Details* section, you can print out the details of the selected project.

In order to print out the selected project details, follow the steps below:

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

11.4 Adding a New Project

In the *Details* section, you may add new projects if you have been granted with the appropriate permissions.

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

1. Click the **Add** button at the top of the *Details* window. The data input window appears which is described in the respective user manual in REFERENCES.
2. Provide the information requested and save.

11.5 Editing an Existing Project

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

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

1. Click the **Edit** button at the top of the *Details* window. The data input window appears which is described in the respective user manual in REFERENCES.
2. Make the appropriate changes in the input window and save.

12. CUSTOMIZED REPORTING

The *DAD Ukraine* application allows you to customize the already-created reports in the *List*, *Report, Chart*, and *Map* modules, i.e. to define the way the numeric values can be displayed, their format, the number of the items to be displayed, etc. You may also re-organise the reports in the desired way, i.e. include it into a group of reports or create a new report group for it, rename the report, etc. The *DAD Ukraine* application can also export the reports to the desired format (Word, Excel, etc.) or print them out.

12.1 Setting Report Options

In the *List* and *Report* modules, you can set the report options, i.e. define whether the numeric values should be displayed in thousands, millions, etc.

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

1. Click the **(Set Options)** button in the top toolbar. An *Options* window (Figure 44) will appear.
2. Define the format in which the numeric values should be displayed, i.e. whether the original values should be displayed or they should be shown in thousands, millions, etc. This prevents large numeric values represented by many zeros from taking a lot of space in the report.

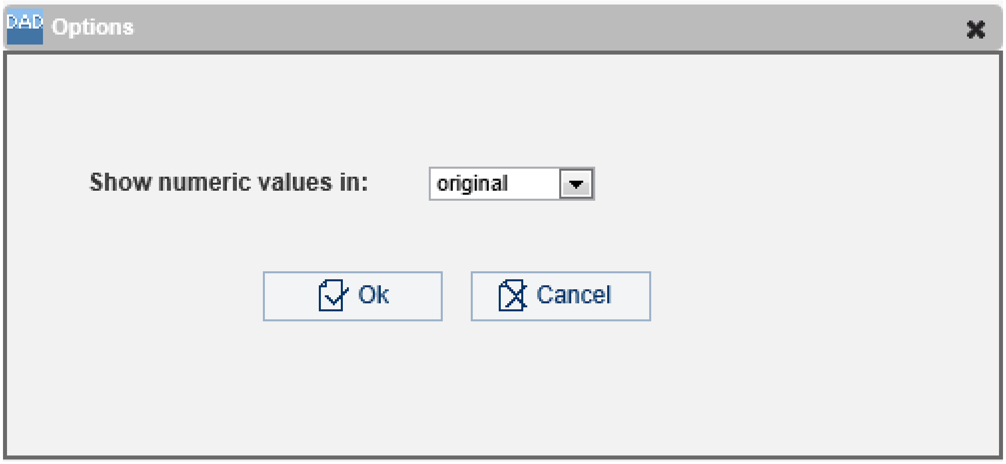


Figure 44: Setting the Chart Report Options

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

12.2 Saving Reports

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

There are two ways of saving a report in the *DAD Ukraine* application. You can save a newly-created report, or save a copy of an existing report with a different name, in a different location, or with a different content.

12.2.1 How to Save New Reports

From the *List*, *Report, Chart,* and *Map* modules, you can design an appropriate report and save it.

In order to save the report created, follow the steps below:

1. Click the **(Save)** button on the top right side of the screen. A *Memorize Report* window (Figure 45) will appear.
2. Define the report name in the *Memorized Name* field both in English and Ukrainian.

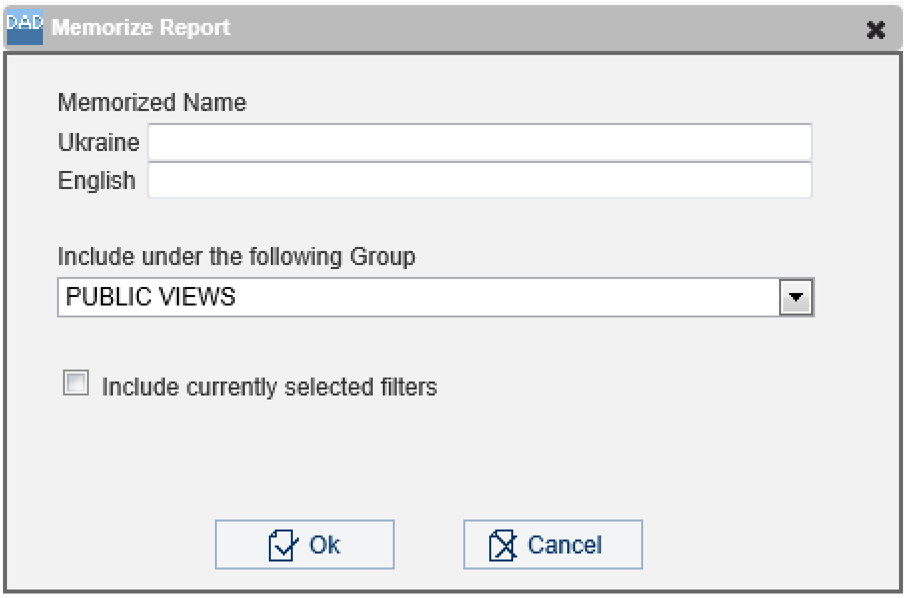


Figure 45: Memorizing a Report

3. Specify the group the report will be included in by selecting the appropriate value from the *Include under the Following Group* combo box.
4. Check the *Include currently selected filters* checkbox to save filtering defined along with the report.
5. Click the **OK** button to save the report for future reference or click **Cancel** to discard the changes made.

12.2.2 How to Save a Copy of the Report

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

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

1. Click the Save As button on the top right side of the screen. A *Memorize Report* window (Figure 45) will appear.
2. Save the report by the steps described in the section above.

12.3 Re-organising Reports

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

From the *List*, *Report, Chart,* and *Map* modules, you can design appropriate reports and organise them in the preferred way. In order to organise the reports, click the respective **(Organise Views / Reports / Charts / Maps)** button at the top right side of the screen. An *Organise Reports* window (Figure 46) will appear. You may perform the following actions:

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

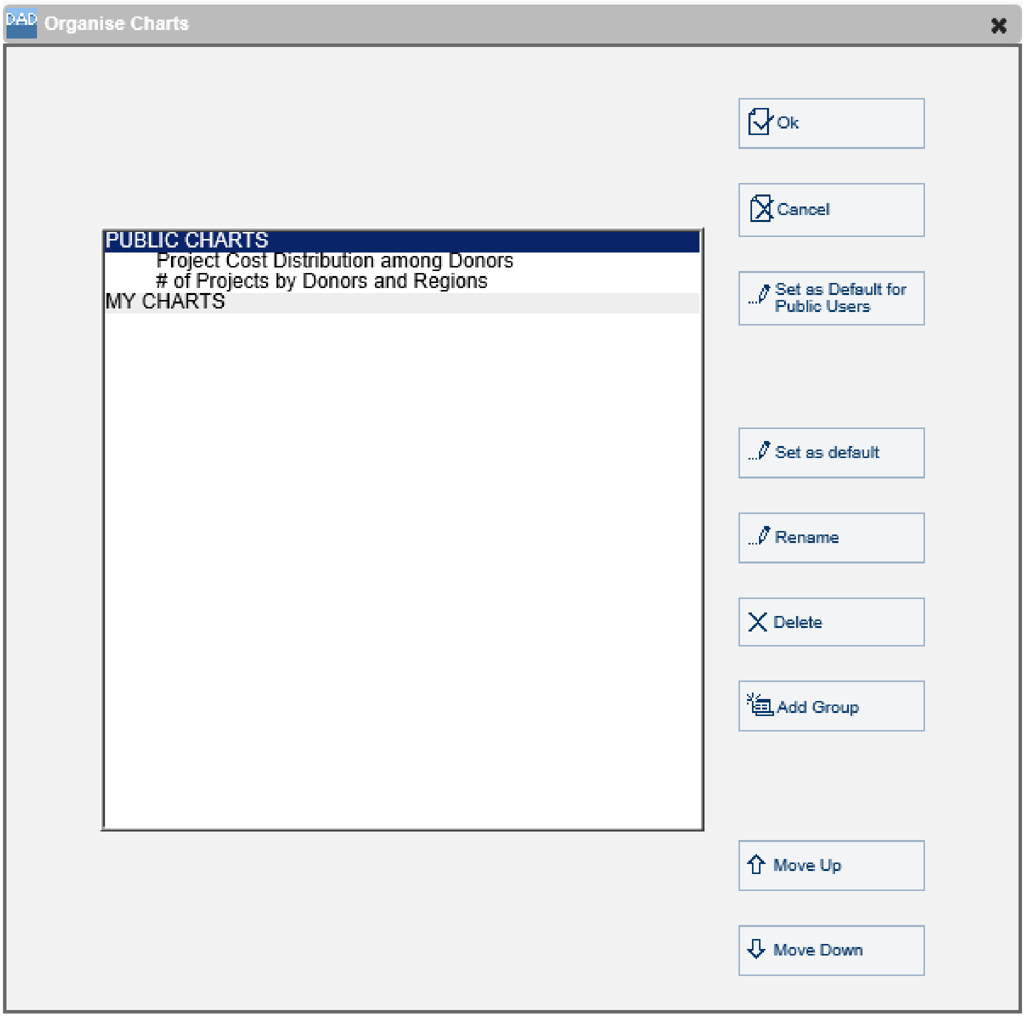


Figure 46: Organising the Reports

12.3.1 Renaming Reports and Report Groups

In order to rename a report / report group, follow the steps below:

1. Highlight the report / report group to be renamed.
2. Click the **Rename** button.
3. Fill in the desired name for the report / report group.
4. Click the **OK** button to confirm renaming.

Note: *Public Reports* and *My Reports* groups cannot be renamed.

12.3.2 Deleting Reports or Report Groups

In order to delete a report / report group, follow the steps below:

1. Highlight the report / report group to be deleted.
2. Click the **Delete** button.
3. Click the **OK** button to confirm deletion.

Note: *Public Reports* and *My Reports* groups cannot be deleted.

12.3.3 Adding a Sub-group

In order to add a sub-group, follow the steps below:

1. Click the **Add Group** button.
2. Fill in the desired name for the sub-group.
3. Click the **OK** button to confirm adding.

12.3.4 Re-ordering Reports and Groups

In order to re-order reports / report groups, follow the steps below:

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

12.3.5 Setting a Report as Default

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

1. Highlight the report to be displayed in the respective module when you access it.
2. Click the **Set as Default** button. The selected report will be marked with *(default for me)* option.
3. If you need to set the report as default for public user access, click the **Set as Default for Public Users** button. The selected report will be marked with *(default for public users)* option.

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

12.4 Viewing Pre-defined Reports

In the *List, Chart*, *Map*, and *Report* modules, you can view the pre-defined reports stored under **Public Views/Reports/Charts/Maps** or **My Views/Reports/Charts/Maps** section (see *Main Menu Bar* description in DAD UKRAINE ANALYTICAL INTERFACE STRUCTURE) for data analysis and comparison. For this purpose, select the report to display and click one of the following **Generate Report** buttons to the left of the report name:

- - in the *List* module;
- - in the *Report* module;
- - in the *Chart* module;
- - in the *Map* module.

The selected report will open in the application window (*List, Chart, and Map* modules) or a new window (*Report* module). The same results can be achieved if you click the report name.

12.5 Editing Pre-defined Reports

To save you the time and the effort of structuring a report from the scratch when it is necessary to introduce some modifications in any of the pre-defined reports stored under **Public Reports** or **My Reports**, the *Edit* option has been designed in the *Report* module.

In order to edit reports, click the **(Edit)** button to the left of the report to edit. The selected report structure will be loaded in the application window giving you the possibility of formatting and styling it in the desired way. For more details on how to apply formatting to the reports, see Customizing Reports.

The pre-defined *List, Chart,* and *Map* reports stored in **Public Views/Charts/Maps** or **My Views/Charts/Maps** can also be edited after you have selected to view them (see Viewing Pre-defined Reports). Once the selected report is loaded in the application window, make the appropriate changes and save them. If you wish to keep the modifications, do not forget to save the modified report, see Saving Reports.

12.6 Exporting Reports

From the *Report, Chart,* and *Map* modules, you can design appropriate reports and export them in the PDF, MS Word and MS Excel formats.

In order to export the reports in the PDF, MS Word and MS Excel formats, follow the steps below:

1. Click the respective **(Export in PDF Format)** / **(Export in MS Word Format)** / **(Export in MS Excel Format)** button. A separate window will open.
2. Make changes, if necessary.

12.7 Printing Reports

From the *Report, Chart,* and *Map* modules, you can design appropriate reports and print them out.

In order to print out the selected report, follow the steps below:

1. Click the **(Print)** button on the top toolbar in the right side of the screen. A separate window will open.
2. Select the **Print** option.

13. FILTERING

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

The list of the most frequently-used filter categories is displayed under the *Filters* section. The list of all available filter categories is displayed when you click the **More Filters** link.

13.1 Creating Filtering Criteria

In order to create filtering criteria, follow the steps below:

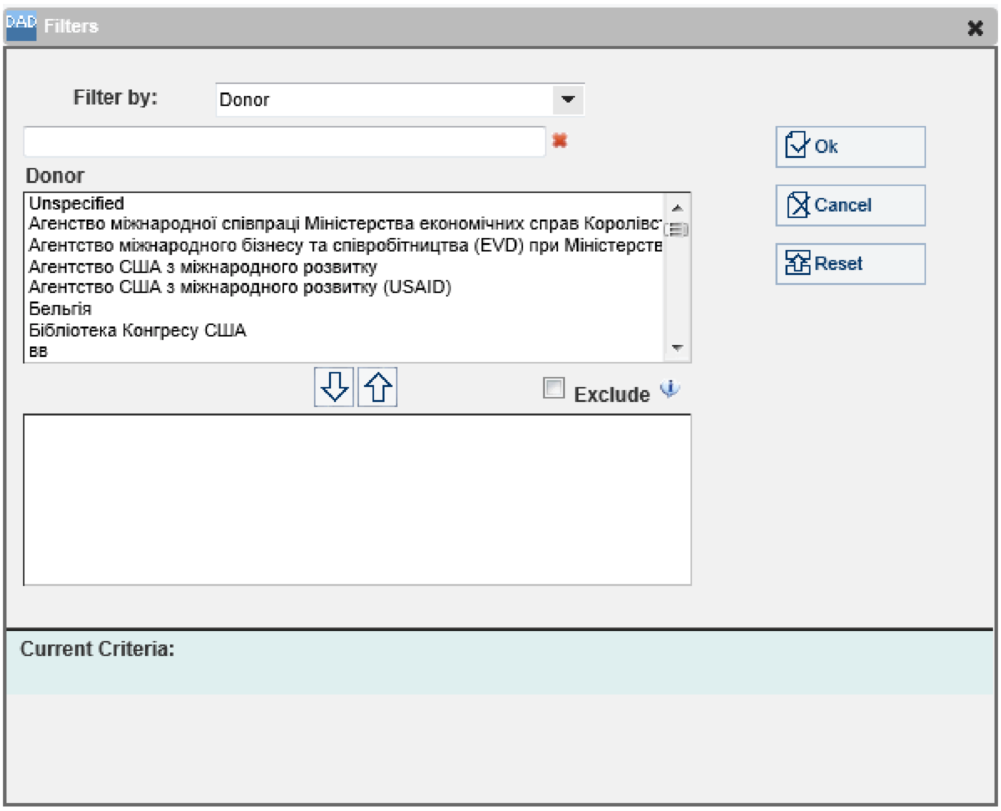


Figure 47: Filters

1. Click the hyperlink under the *Filters* section that represents the *Category* according to which the filtering will be carried out. A *Filters* window (Figure 47) will appear having the *Category Item* pull down menu set to the selected *Category*. The first text area holds a list of all the available *Category* items that the report could display, whereas the second text area holds a sub-set list of the first one. You may only edit the sub-set list in the second text area. At the end of the filtering, if the sub-set list is empty, all the *Category* items will be included in the report. If, however, the sub-set is non-empty, only the items in the sub-set list will be included in the report. At the bottom of the pop-up window the selection criteria from all categories are presented. This view is also available from the main screen under the **View Criteria** hyperlink.

2. Select a *Category* item from the list in the first text area.
   Note: To make it easier to locate the appropriate category item in the long list, the *Filters* window has a search capability. To find the relevant category item, you can enter any combination of letters in the search field. The list of all category items matching the criteria will be displayed in the first text area (Figure 48). To remove the search criteria, use the **(Delete)** button to the right of the search field.
3. Click the downward-pointing arrow button to add the item selected to the list in the second text area (Figure 49).
4. Repeat steps 2 and 3 to add more than one *Category* item.
   Note: If a *Category* item needs to be removed from the second text area, select it from the list in the second text area and click the upward-pointing arrow button.
5. Click the **OK** button to apply the filtering to the ad-hoc query and to the screen that was active prior to the filtering alterations (i.e. List, Chart, or Map). The system will regenerate and download, to the client's side, an updated report that applies the updated filtering criteria.

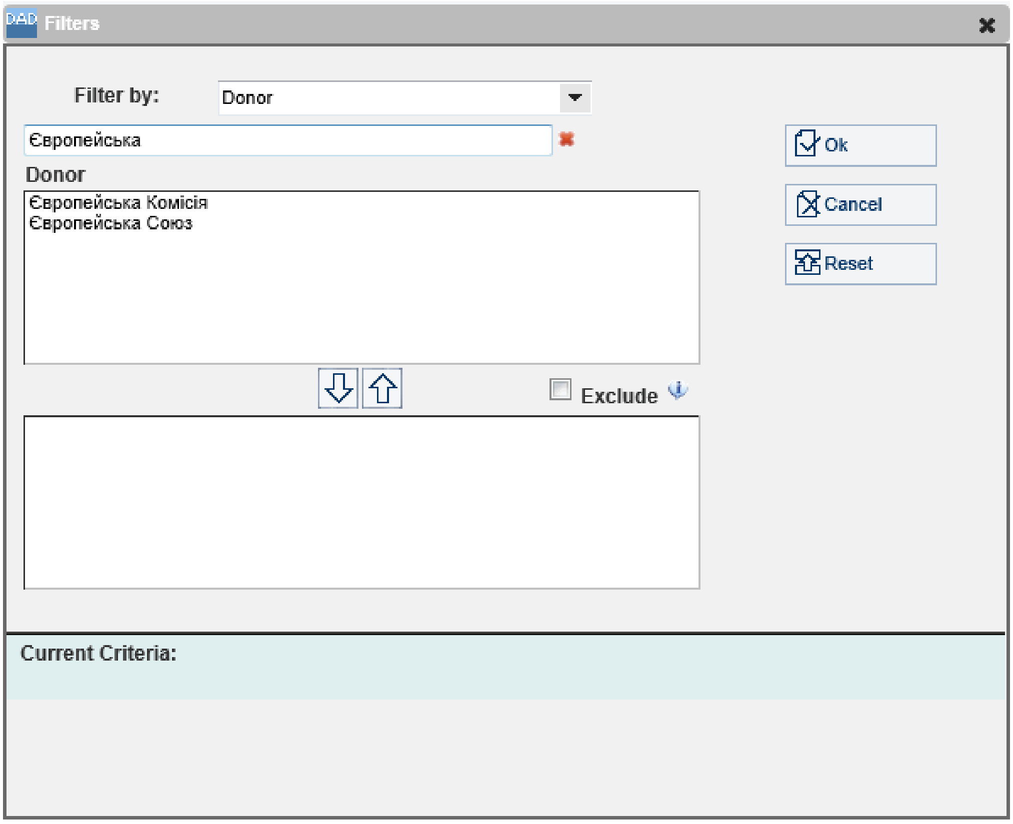


Figure 48: Searching for a Category Item

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

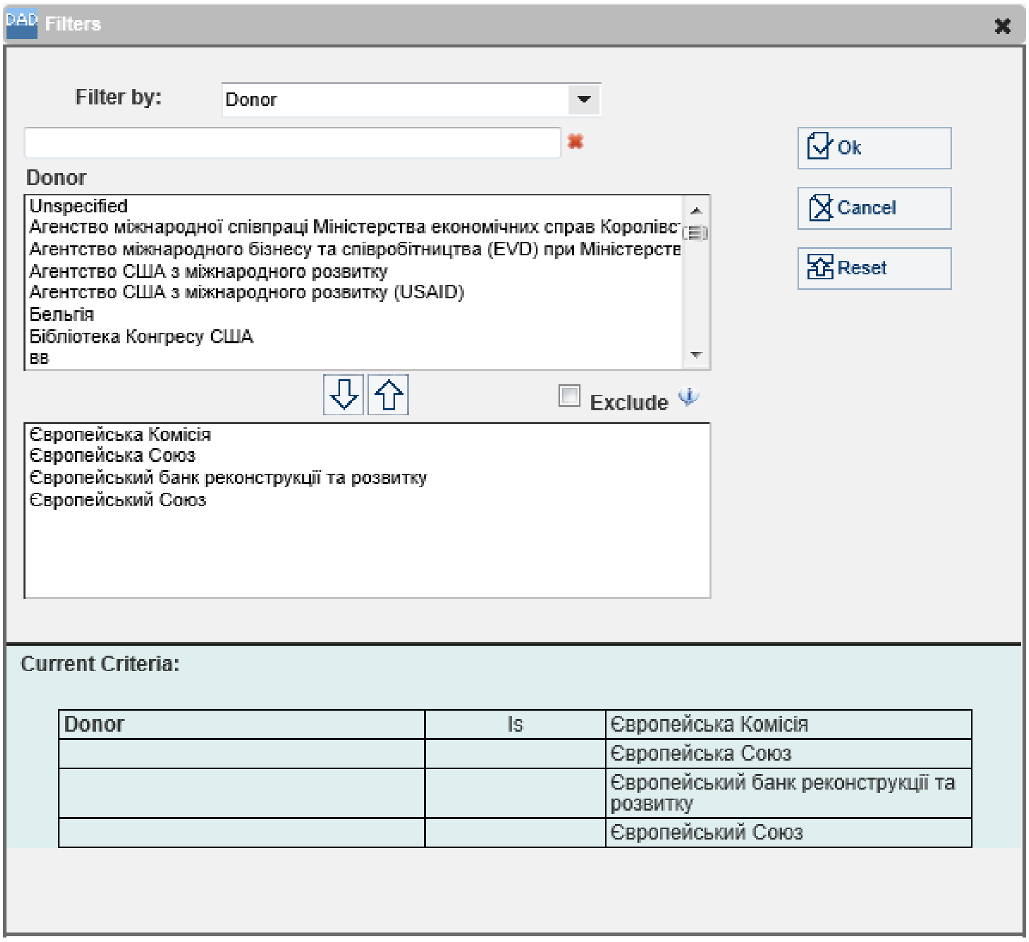


Figure 49: Creating Sample Filtering Criteria

14. SEARCH

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

14.1 Simple Search

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

14.2 Advanced Search

In addition to providing easy access to the content, the *DAD Ukraine* application has a number of specific features that is used to find exactly what is looked for. One of these features is advanced search that allows setting different complex conditions using the *Advanced Search* form. It gives several additional fields which may be used to qualify searches by organisations involved into the project implementation, regions where the projects are implemented, etc.

In order to create search criteria, follow the steps below:

1. Click the **Advanced Search** link under the *Search* section. The *Advanced Search* form appears (Figure 50).

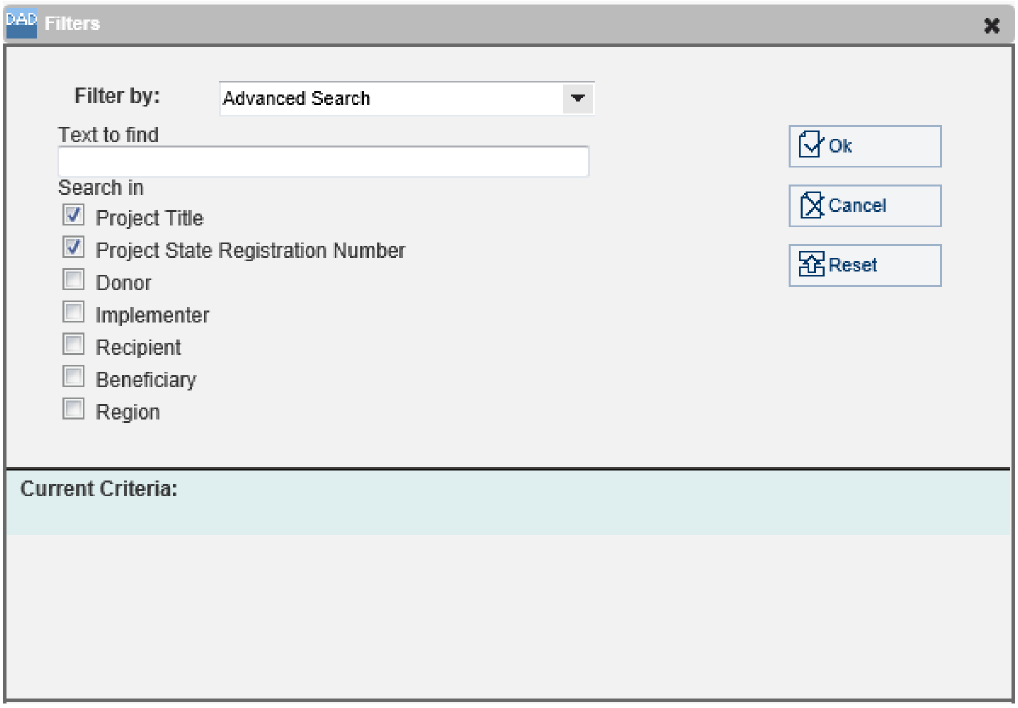


Figure 50: Advanced Search Section

2. Define the text to search for in the appropriate field.
3. Specify the fields to look in by selecting the appropriate checkbox(es).
4. Click the **OK** button to apply the search criteria to the ad-hoc query and to the screen that was active prior to the filtering alterations (i.e. List, Chart, or Map).

15. LOGGING OFF

Once you have finished using the *DAD Ukraine* application, it is necessary to terminate the session and log off. In order to log off from the application, press the **Log Off** button in the upper right corner of the application window.

16. REFERENCES

Please refer to the following DAD Ukraine related documents:

- DAD Ukraine International Technical Assistance Projects Application User Manual
- DAD Ukraine International Agreement Application User Manual
- DAD Ukraine Implementer Accreditation Application User Manual
- DAD Ukraine International Financial Organisations Projects Application User Manual
- DAD Ukraine System Projects IFO Application User Manual
- DAD Ukraine Donor Profile Application User Manual
- DAD Ukraine Requests for ITA Attraction Application User Manual
- DAD Ukraine Administration Center User Manual