DEVELOPMENT ASSISTANCE DATABASE FOR SOMALILAND (DAD - Somaliland)

ANALYTICS USER MANUAL

Version 1.2

SYNERGY INTERNATIONAL SYSTEMS

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1. INTRODUCTION

The purpose of this document is to describe how the Development Assistance System (DAD) for Somaliland application functions and to provide the necessary instructions and 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 System (DAD) Somaliland* is an automated information management system which is designed to improve efficiency and coordination of donor activities in Somaliland. It is also a powerful tool for tracking and analyzing aid flows. The system serves as the main database and data collection and reporting system as it ensures effective access to the aid data.

The main objectives of the *DAD Somaliland* is to serve as a reliable and credible source of information on external aid offered to Somaliland to support the Government in effectively managing development assistance and promoting the accountable and transparent use of resources.

The *DAD Somaliland* is a powerful tool to view project data organized into lists, reports and charts, present the project data in the form of list and chart reports, memorize/save the reports, print them, and export them into various formats.

The *DAD Somaliland* is designed to provide quick access to the project and aid data remotely via Internet. Once you have accessed the application, you can view the project data stored in the database, add new projects, edit existing ones, etc.

In the current design, *DAD Somalialand* has following applications:

- **Projects** application which is designed to track the ongoing projects that are financed from external sources, e.g. funding agency, international NGOs, etc. In the project details you can track aid flows to the country, beneficiaries, outcomes and indicators. Moreover, in this application you can add new projects or modify the information of existing projects.
- **RDP Targets** application which is designed to provide target values for each indicator used for effective planning, implementation and monitoring of external aid flowing into Somaliland in support of the Reconstruction and Development Program (RDP).

3. LOGGING INTO DAD

The starting screen of *DAD* is the *Login Screen* (Figure 1). To login, 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 login 3 times, the system will be blocked. Contact your system administrator in order to unlock your user access.

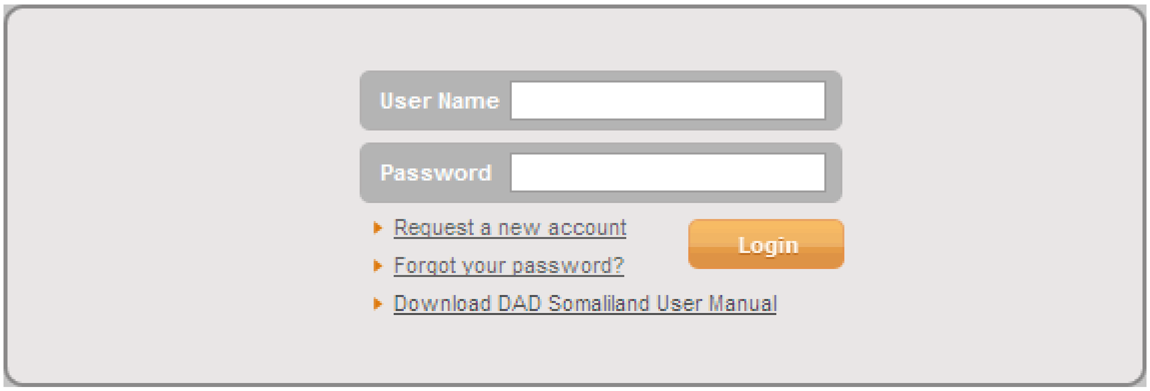


Figure 1: DAD Login Screen

A successful login directs you to the *List* 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 on the **Request a new account** link on 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.

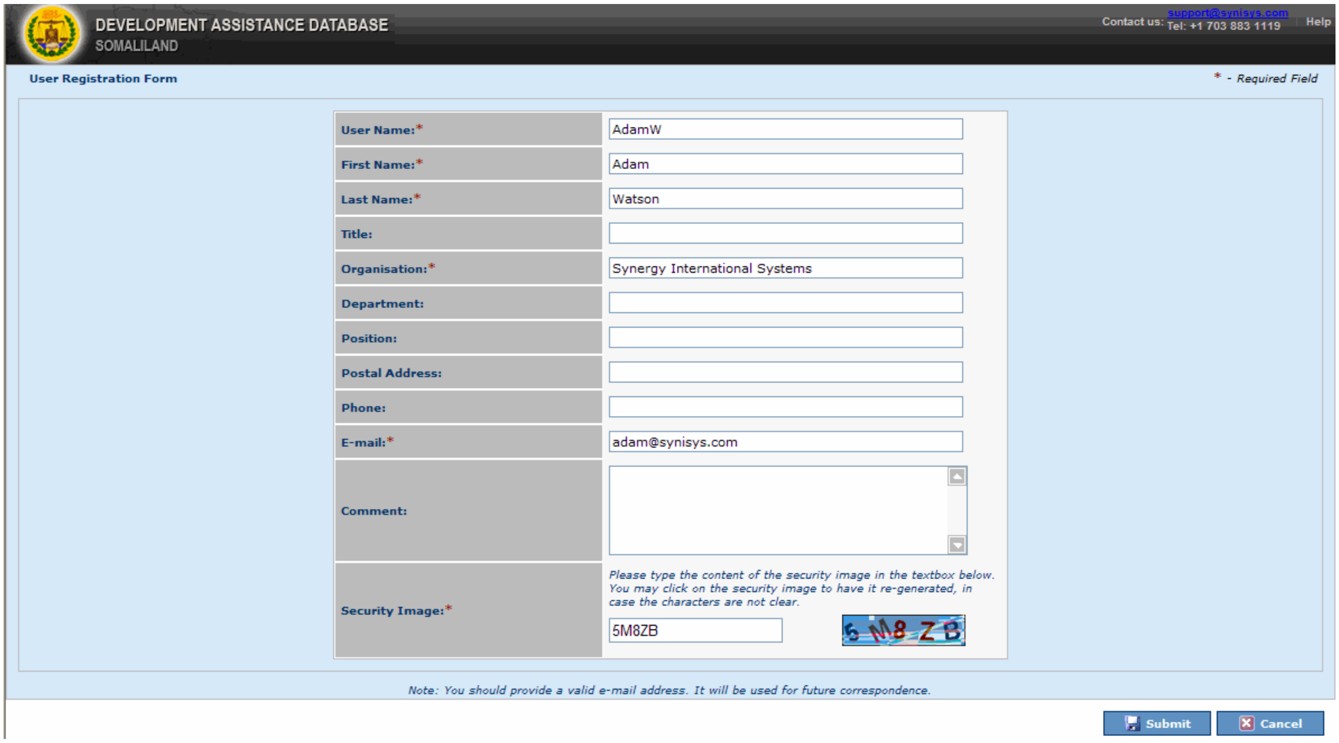


Figure 2: The User Registration Form

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

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

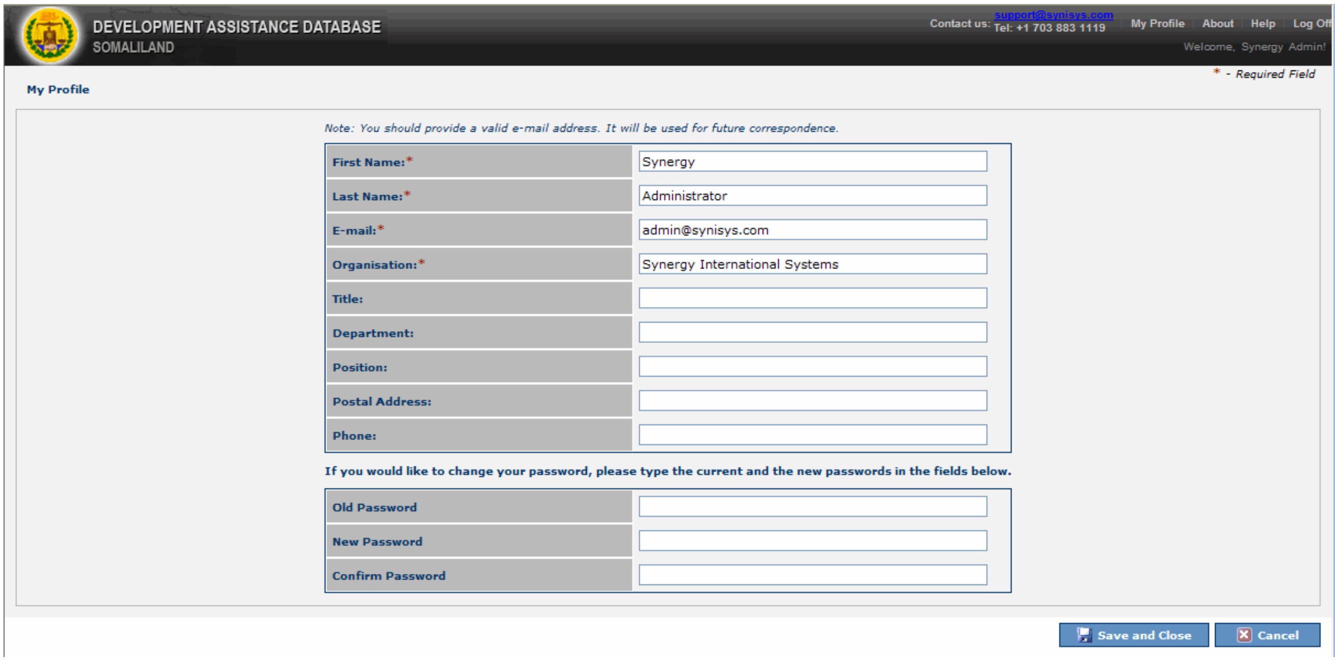


Figure 3: My Profile Window

3.2 Accessing DAD 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 on the **Enter** button in the *Enter as a Public User* section on the login screen (Figure 1). They will be directed to the *List* module of the application.

4. DAD ANALYTICS STRUCTURE

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

The *DAD* consists of the following main sections:

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

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

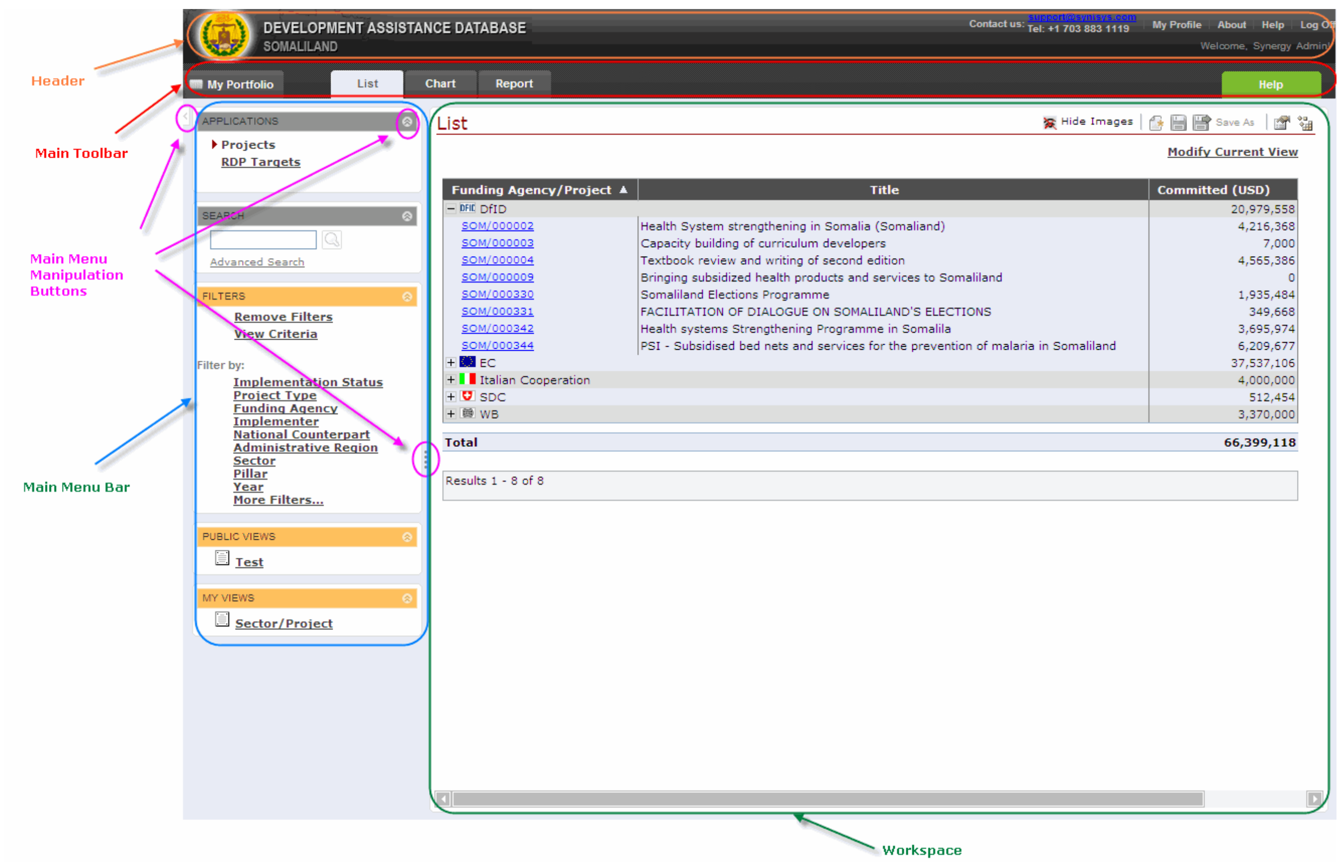


Figure 4: DAD Analytics Structure

It contains the following components:

Component Name	Description
Header	This is the application header that contains application name and the Somaliland logo. On the right side, following functions are available: • **Contact Us** – e-mail address of the DAD System Administrator. • **My Profile** – this opens your personal settings and details. For details, see Registering a New User. • **About** – opens application's about window. • **Log Out** – this button is used to log off the application.
Main Toolbar	This is the main toolbar of the DAD application. Following tabs are available here: • **My Portfolio** – opens MY PORTFOLIO MODULE to manage user specific projects. **List** – opens the LIST MODULE • LIST MODULE of the selected Application (see Main Menu description below). • **Chart** –opens the CHART MODULE. • **Report** - opens the REPORT MODULE. • **Help** – opens the DAD application's help.
Main Menu Bar	This menu contains sections with main functions of the DAD application: • **Search** – contains a common and advanced search functions among the selected application list. For details, see SEARCH. • **Filter** – contains filtering options. For details, see FILTERING. • **Public Views/Charts/Reports** – saved list views / charts / reports (depending on the opened module) available to all users of the application. • **My Views/Chart /Reports** – views / charts / reports (depending on the opened module) created by and available to the current user only.
Main Menu Manipulation Buttons	• **Left/Right arrows** () – used to hide/open the Main Menu bar. • **Up/Down arrows** () – used to collapse/expand the section in the Main Menu bar. • **Frame Divider** – used to adjust the width of the Main Menu bar.
Workspace	In this frame the projects analytics is managed. Here are filtering and search results displayed.

5. MY PORTFOLIO MODULE

The *My Portfolio* section (Figure 5) of the *DAD* application provides quick access to the projects added by the corresponding user.

In order to access *My Portfolio* module, click on the **My Portfolio** tab in the Main Menu of DAD application. Editing permissions of 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). All these permissions are granted and managed from DAD Administration Center.

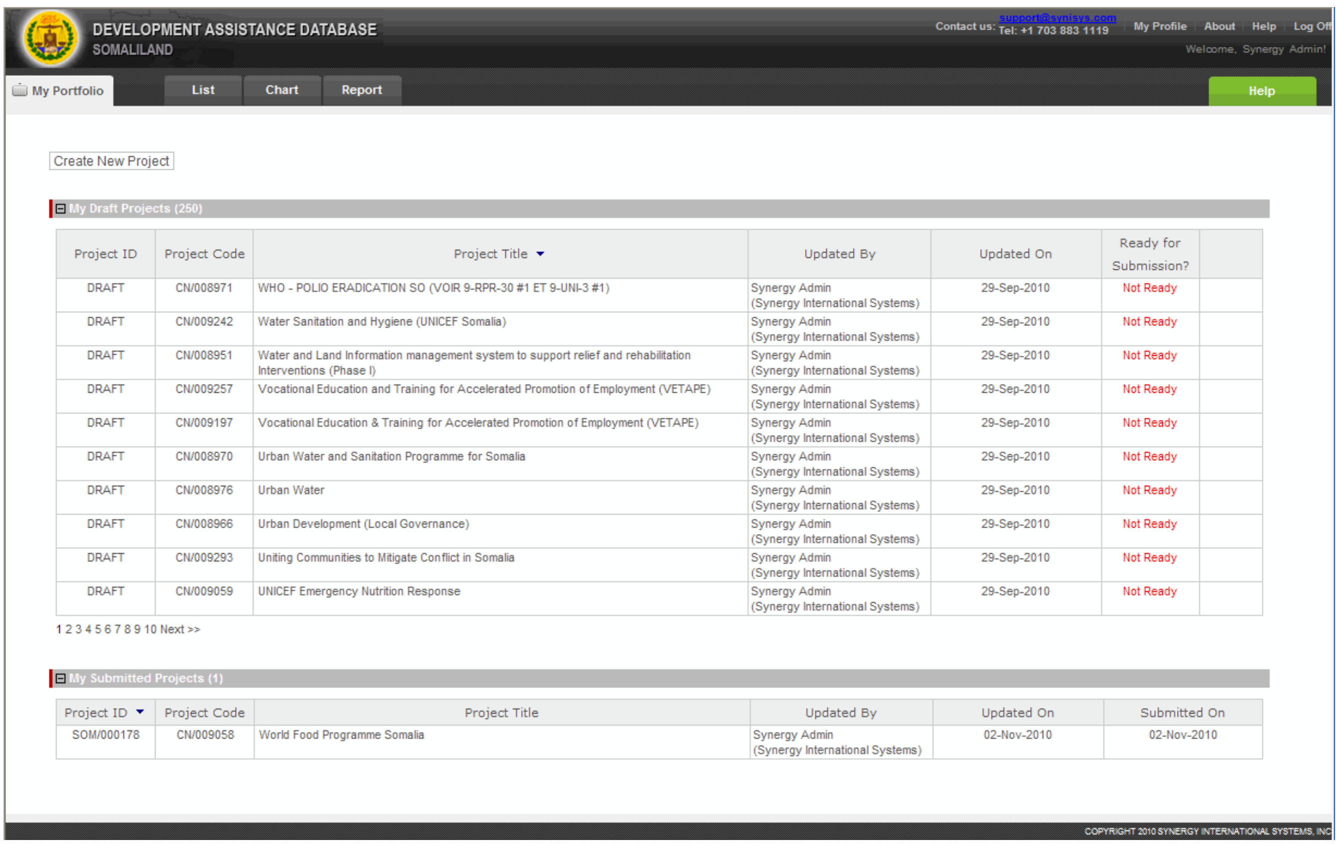


Figure 5: My Portfolio Module

In *My Portfolio* module you may see a list of draft and submitted projects. Each project created in DAD either from *My Portfolio* module or from Projects application should get submitted first in order to become public and official. Below is the procedure of project submission:

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

- Only drafts with the "Ready" state can be submitted. To submit the draft, press the **Submit** button ( ) in the *Drafts* table.

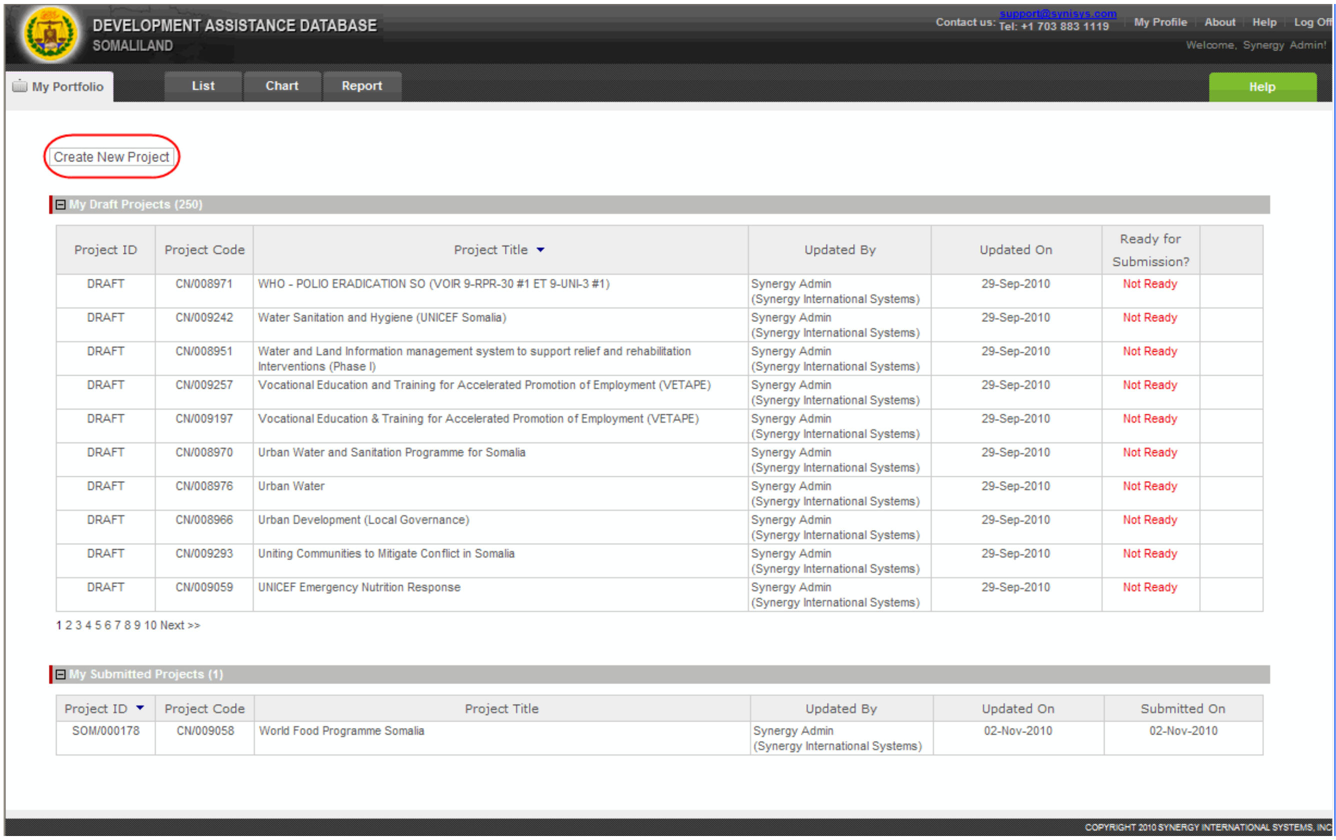


Figure 6: Create New Project button in My Portfolio

Note: Only submitted drafts are displayed in the **List** table (see REFERENCES) and accessible to other users of DAD application.
In this module, the project may be created; details of the existing projects can be viewed and edited.

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

- **Project ID** – the project identity number,
- **Project Title** – the title of the project,
- **Updated By** – last update author,
- **Updated On** – last update date,
- **Ready for Submission?** – displays whether the draft is ready for the submission or not. The draft is ready for submission when whole of the mandatory information is provided.
- **Submitted On** – the date of the project submission.

5.1 *Adding new Project*

To add a new project from *My Portfolio* module, follow the instructions below:

1. Click the **New Project** button in the main toolbar (Figure 6).
2. This will open an **Add Project** form which is described in the Projects Application Users Manual, see REFERENCES.

5.2 *Viewing Project Details*

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

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

1. Go to the *My Portfolio* module.
2. Expand the **Drafts** or **Submitted Projects** list correspondingly (Figure 6).
3. Click on the project you wish to see the details for. This will open project details. For details, see DETAILS SECTION.

6. LIST MODULE

In the *List* module (Figure 7) of *DAD* application, you can create and execute ad-hoc queries on the data, and acquire results in the form of a list.

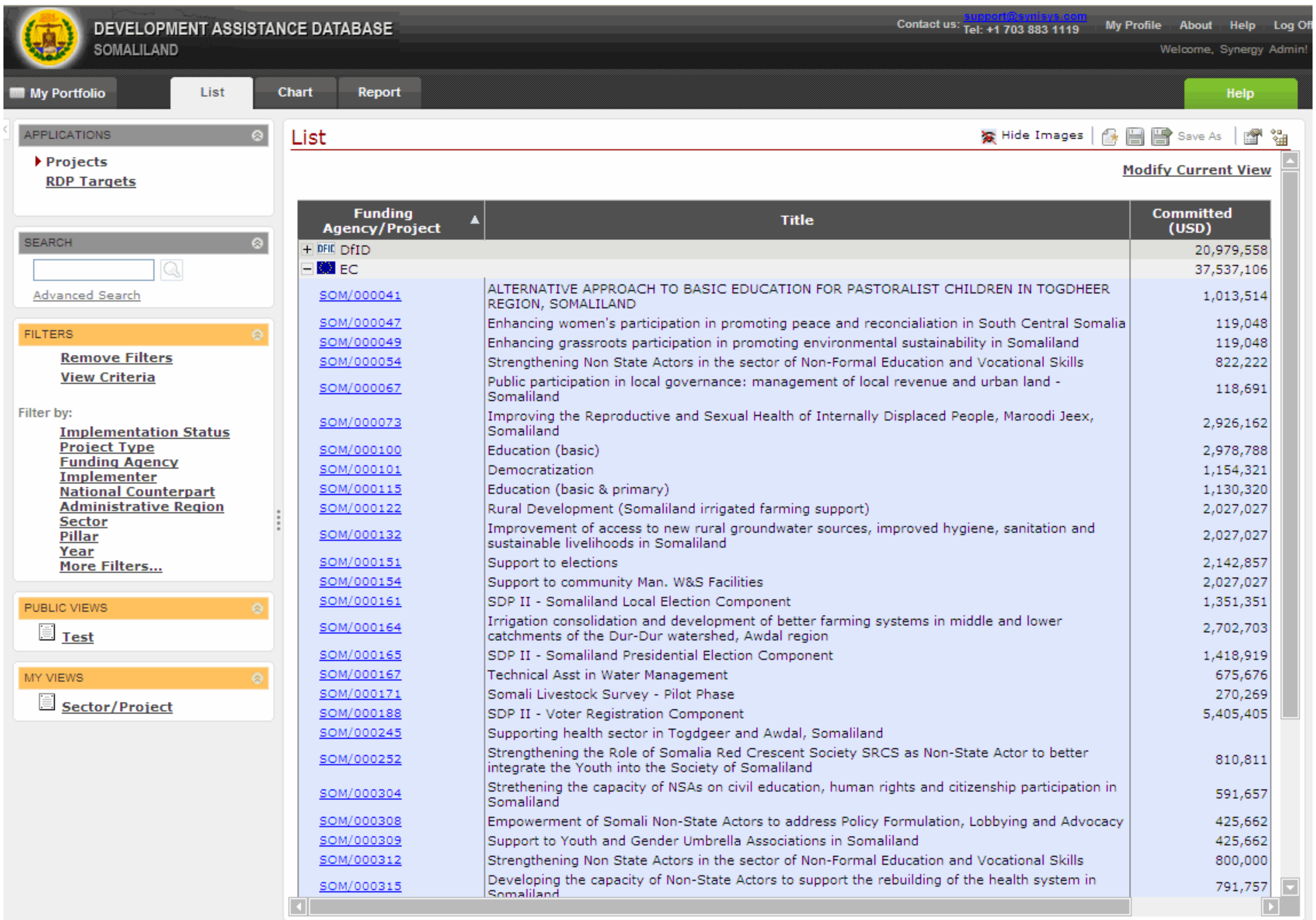


Figure 7: List Module

6.1 Accessing the List Module

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

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

6.2 Sorting List Items

Entries may be sorted by the column value. To achieve that, click on the name of the column. This will sort the list alphabetically or numerically depending on the type of data entered into that column. The red arrow that appears on the column can reverse the order of the list.

6.3 Browsing List Items

You may browse among the list items by clicking on the number link of the page to navigate to. The **Previous** and **Next** buttons are used to navigate back and forth through the list pages.

6.4 Modifying the Current View

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

1. Click on the *Modify Current View* link at the top right corner of the *List* screen. A *Modify Current View* window (Figure 8) will appear presenting 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, add / re-order / remove column groupings.
5. Set the view as default, if necessary.
6. After finishing making changes in the view, click the **OK** button for the changes to take effect. Otherwise, click the **Cancel** button to discard the changes made.

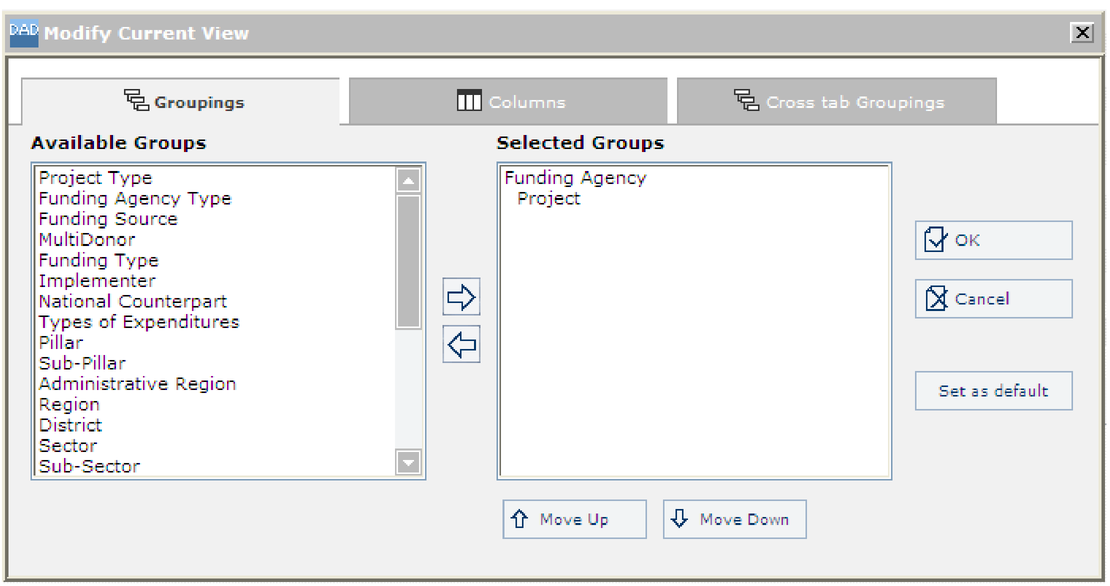


Figure 8: Modifying the Current View

6.5 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/column groupings using **Shift** or **Ctrl** keyboard buttons.
2. Click the  **(Select)** button. The selected group(s)/column(s)/column grouping(s) will appear in the *Selected Groups/Columns* panel.

6.6 Re-ordering Groups/Columns/Column Groupings

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.

6.7 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.

6.8 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.

7. CHART MODULE

The *DAD* 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.

7.1 Key Features

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

- ✓ 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.

7.2 Accessing the Chart Module

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

7.3 Main Screen and Its Components

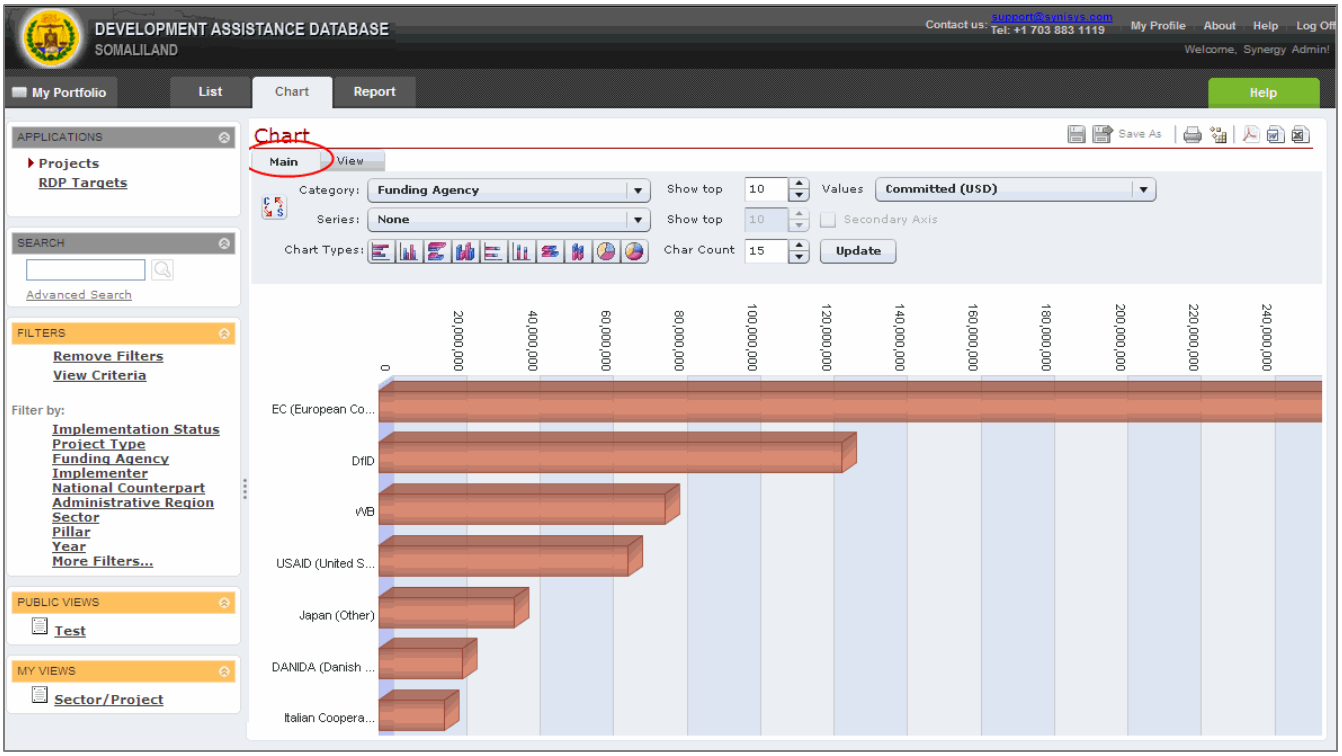


Figure 9: Main Screen of the Chart Module

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

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

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

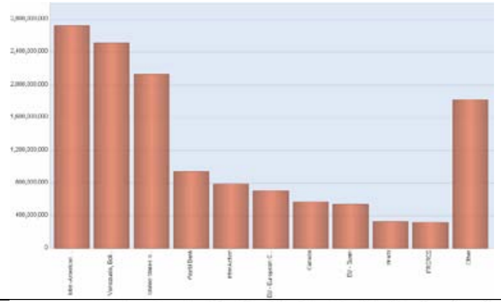
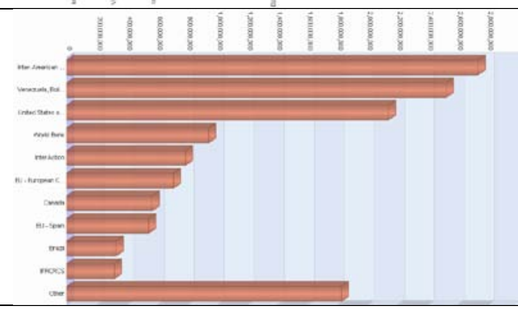
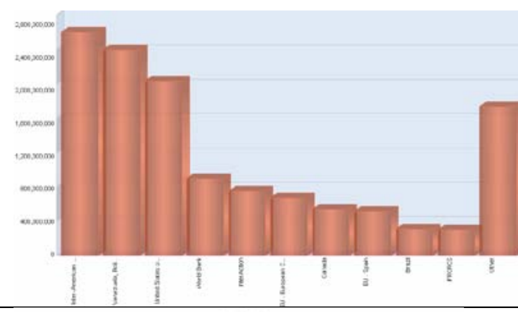
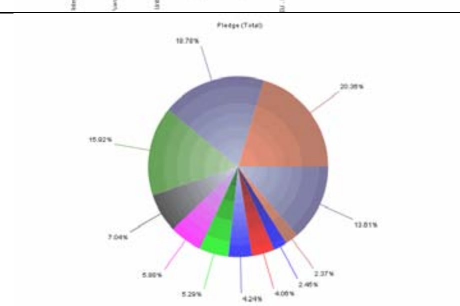
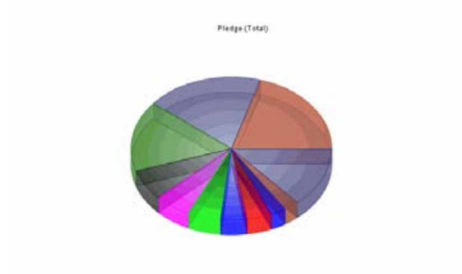
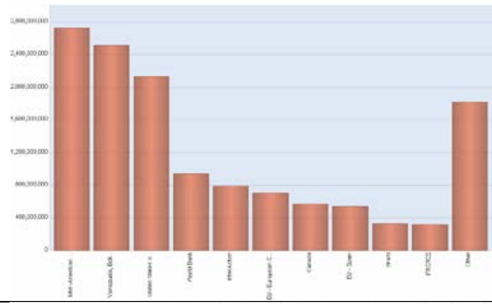
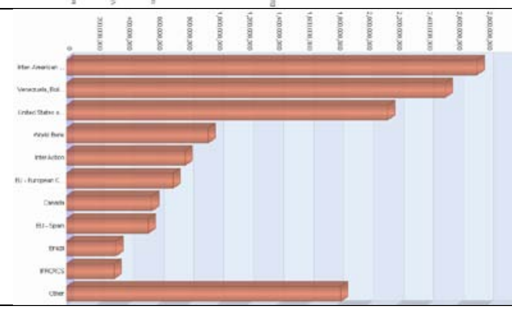
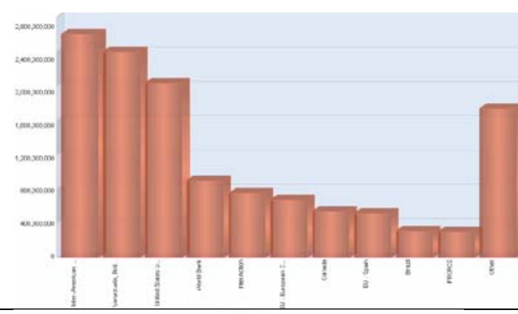
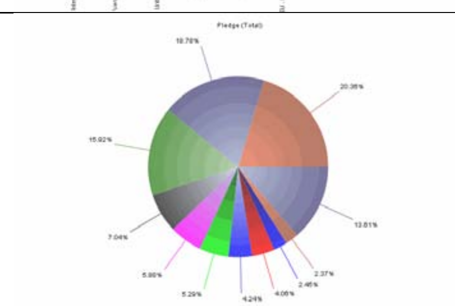
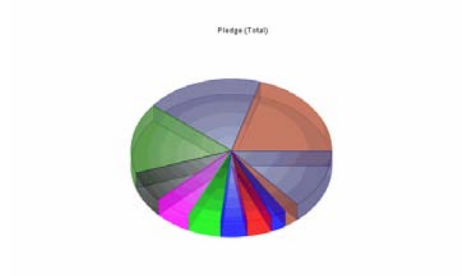
Chart Type	Example
1. Stacked Column chart 	
2. Stacked 3D Bar chart 	
3. Stacked 3D Column chart 	
4. Pie chart 	
5. 3D Pie chart 	

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

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

5. **Show Top <Number> on Secondary Axis** - indicates the maximal number of series items that should be displayed on the secondary axis in the chart. Becomes available only if a Series is selected.

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

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

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

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

7.4 View Screen and Its Components

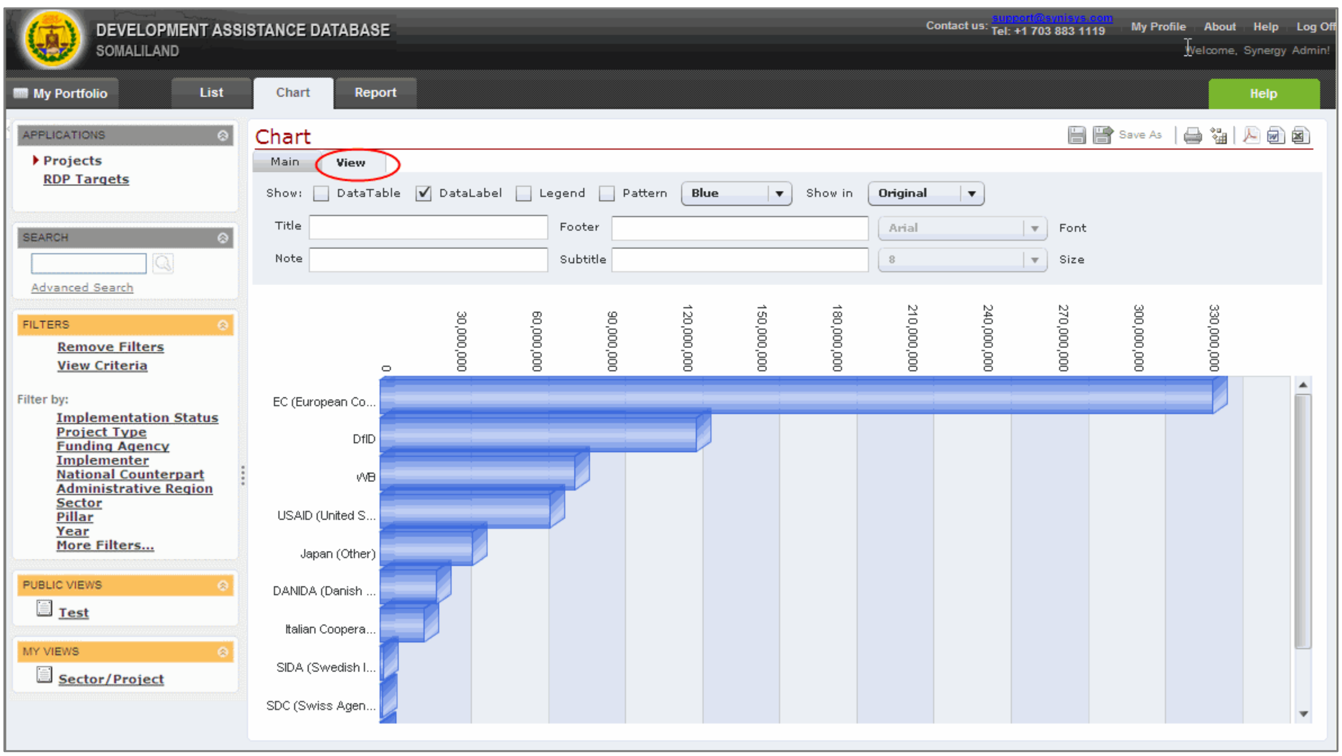


Figure 10: View Screen of the Chart Module

1. ***Show -*** allows selecting one or several of the following options:
   - ***Data Table -*** presents the information contained in the chart in a grid or matrix.
   - ***Data Label -*** shows the actual values of each chart cell.
   - ***Legend -*** explains the categories and data series displayed on the chart.
   - ***Pattern -*** allows choosing a pattern-filled chart for black and white printing.

- ***Coloring Option -*** allows defining whether the chart should be displayed in multiple colors or in one of the colors available.

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

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

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

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

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

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

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

Sample Chart Report

If you have selected the “Funding Agency” as a chart Category, “Beneficiary” as Series and “Committed (USD)” as Values to be shown on the chart, and click on the **3D Pie** chart button to specify the chart type and activate the Data Table and Data Label options in the View window, the following chart report will appear (Figure 11):

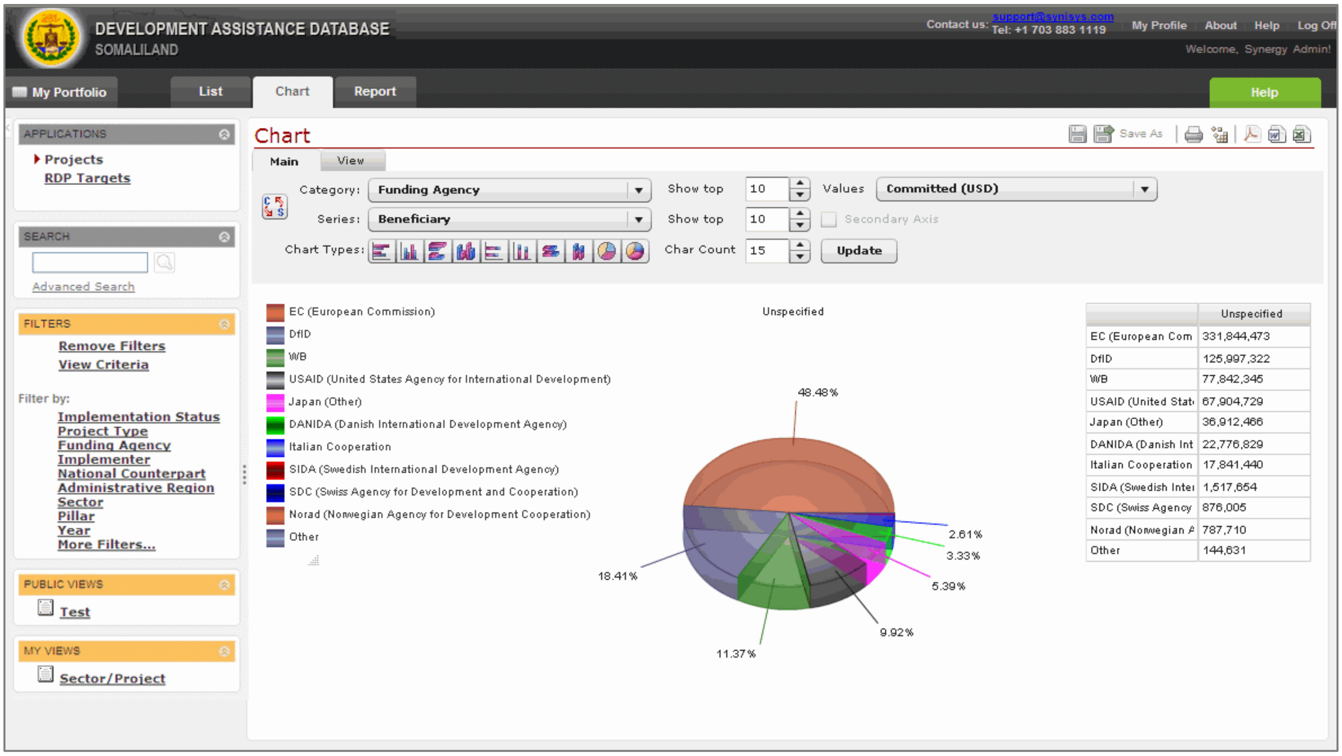


Figure 11: Sample Chart Report

8. REPORT MODULE

In the *Report* module of *DAD*, 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 on the **Report** tab. This will navigate to the *Report* module of the application where the Report Designer (Figure 12) will open.

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

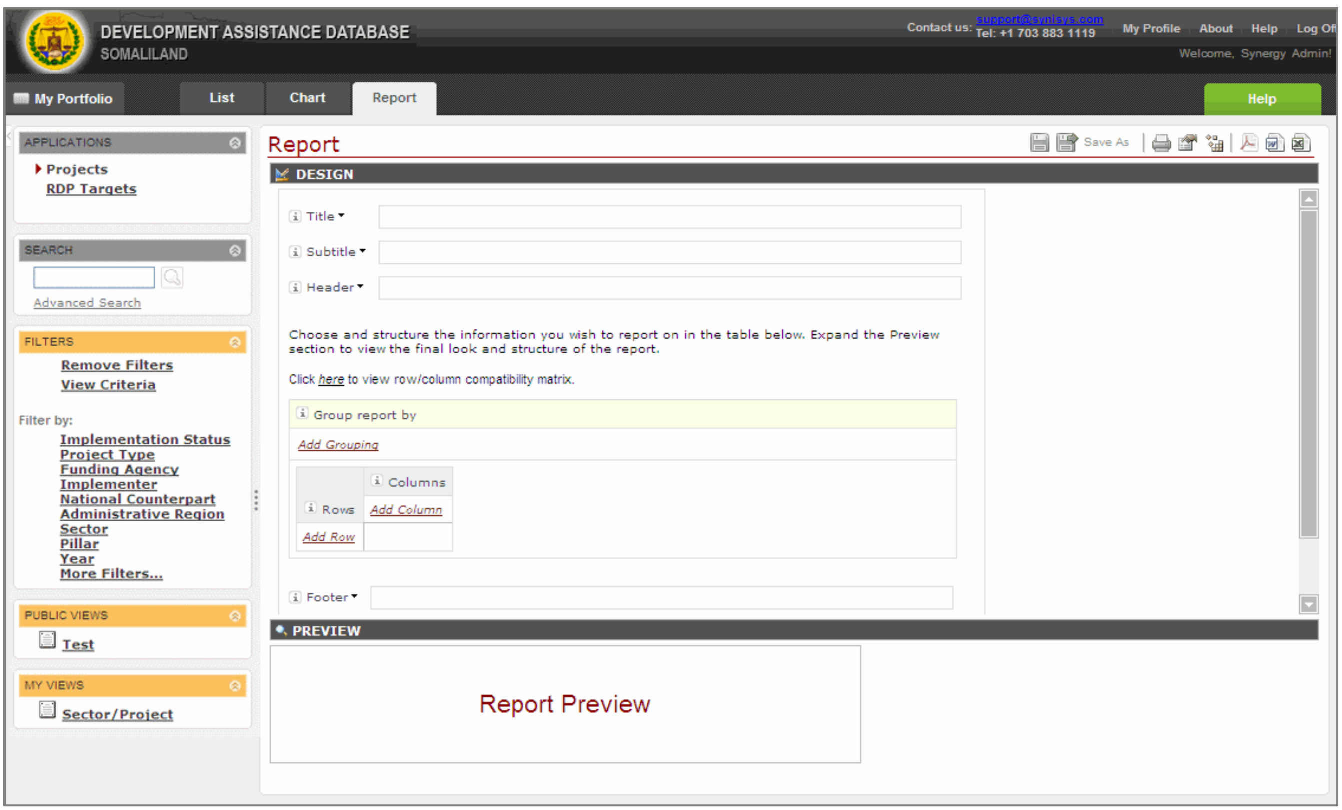


Figure 12: Report Module

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

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

1. Type the text that should appear as the report title in the 'Title' text box.
2. Enter a 'Subtitle', 'Header', and 'Footer' if needed.
3. In the *Group Report by* section, specify the category, which will be used to group data into different tables. To add a report grouping, click on the **Add Grouping** link in the *Group Report by* section and select the appropriate category from the menu that appears (Figure 13).
   Note: The report will be divided into as many tables as there are table groupings selected.
4. Select table rows by clicking on the **Add Row** link and selecting the appropriate item from the menu that appears. Please note that it is possible to select one row at a time from the list of available rows.
5. Select table columns by clicking on the **Add Column** link and selecting the appropriate item from the menu that appears. Please note that it is possible to select one column at a time from the list of available columns.

Note: Once 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.

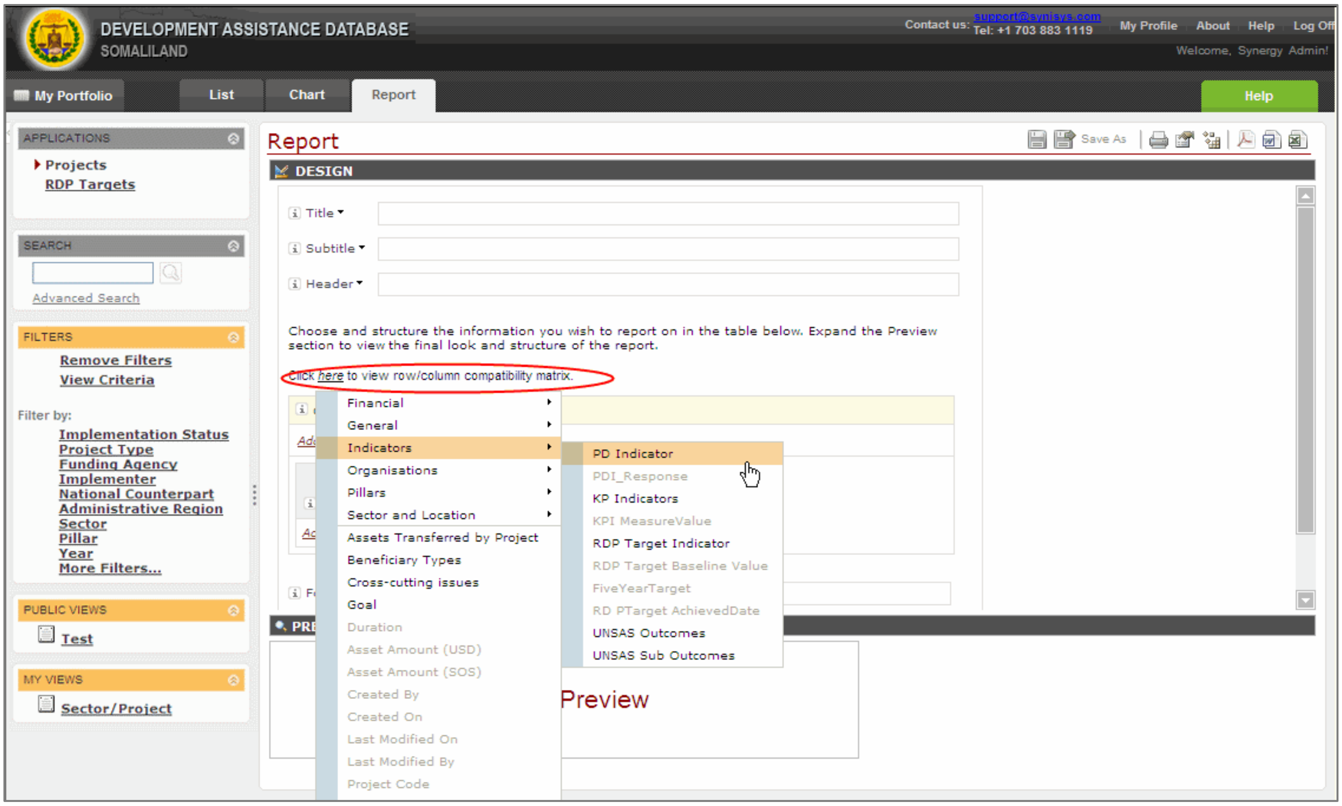


Figure 13: Selecting a Grouping for a Report

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

Note: If you have defined a report which has incompatible columns (columns over which reports cannot be generated), they will be marked in red and an error message will occur. To make your reports productive, use the link (as marked in red, Figure 13) to open the Compatibility Matrix table (Figure 14). 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	Asset Amount (SOS)	Asset Amount (USD)	Committed (SOS)	Committed (USD)	Created By	Created On	Disbursed (SOS)	Disbursed (USD)	Duration	End Date	Expended (SOS)	Expended (USD)	FiveYearTarget	KPI MeasureValue	Last Modified By	Last Modified On	Lead Agency	Num Of Beneficiaries	PDI_Response	Percent Of PD4 Indicator	Project Code	Project Cost (SOS)	Project Cost (USD)	RD PTarget AchievedDate	RDP Target Baseline Value	Start Date	Title
Administrative Region	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
Assets Transferred by Project	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
Beneficiary	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
Beneficiary Types	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
Cross-cutting issues	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
District	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
Funding Agency	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
Funding Agency Type	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
Funding Source	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
Funding Type	•	•	•	•	•			•	•					•	•				•	•			•	•	•	•		
Goal	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
Implementation Status	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
Implementer	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
KP Indicators	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
Month/Year	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
MultiDonor	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
National Counterpart	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
PD Indicator	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
Pillar	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
Project	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Project Type	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
RDP Target Indicator	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
Region	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
Sector	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
Sub-Pillar	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
Sub-Sector	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
Types of Expenditures	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
UNSAS Outcomes	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
UNSAS Sub Outcomes	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		
Year	•	•	•	•	•			•	•			•	•	•	•				•	•			•	•	•	•		

Figure 14: Compatibility Report

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 15). The *Preview* will not be ready for viewing unless the user has at least one table row defined.

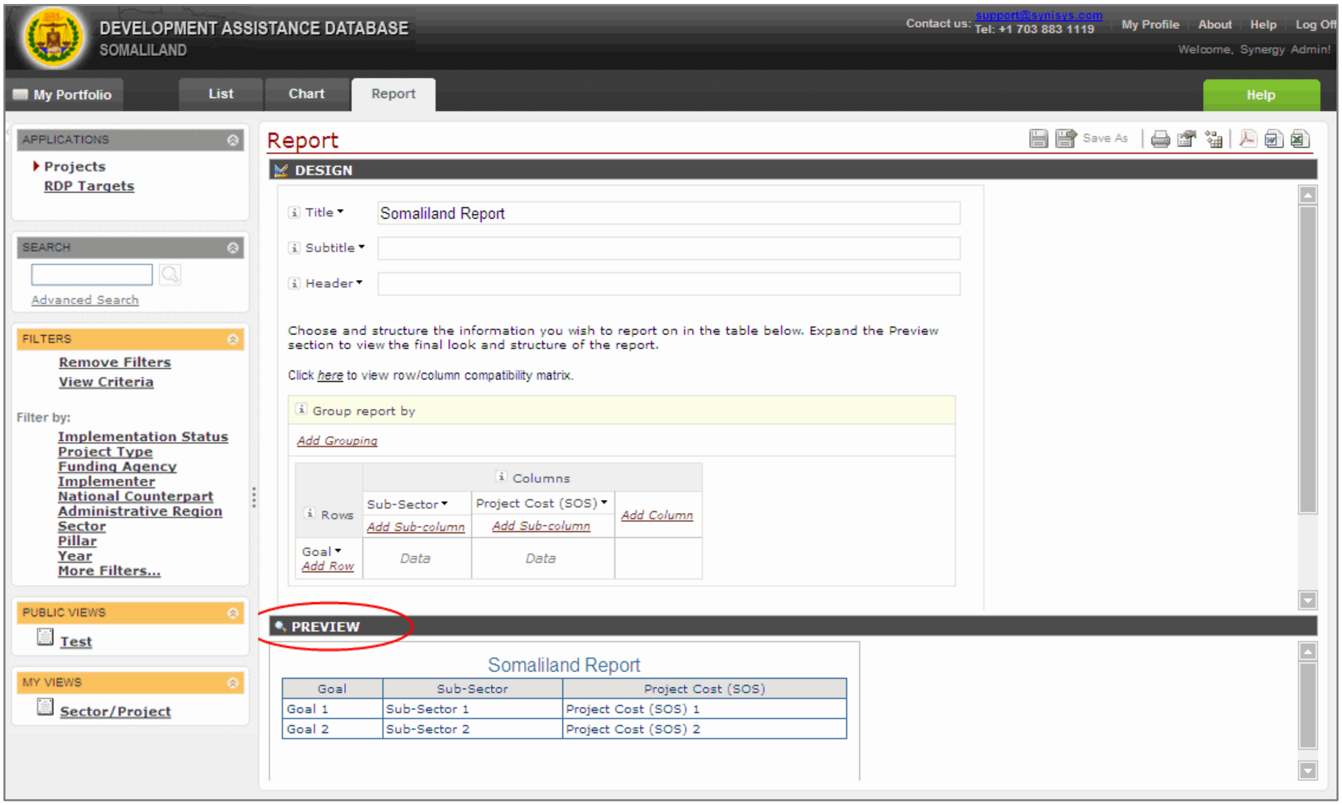
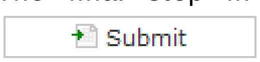


Figure 15: Previewing the Report

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

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 on the report component that needs to be formatted / styled.
2. Select the **Properties** option from the actions list that appears (Figure 16).

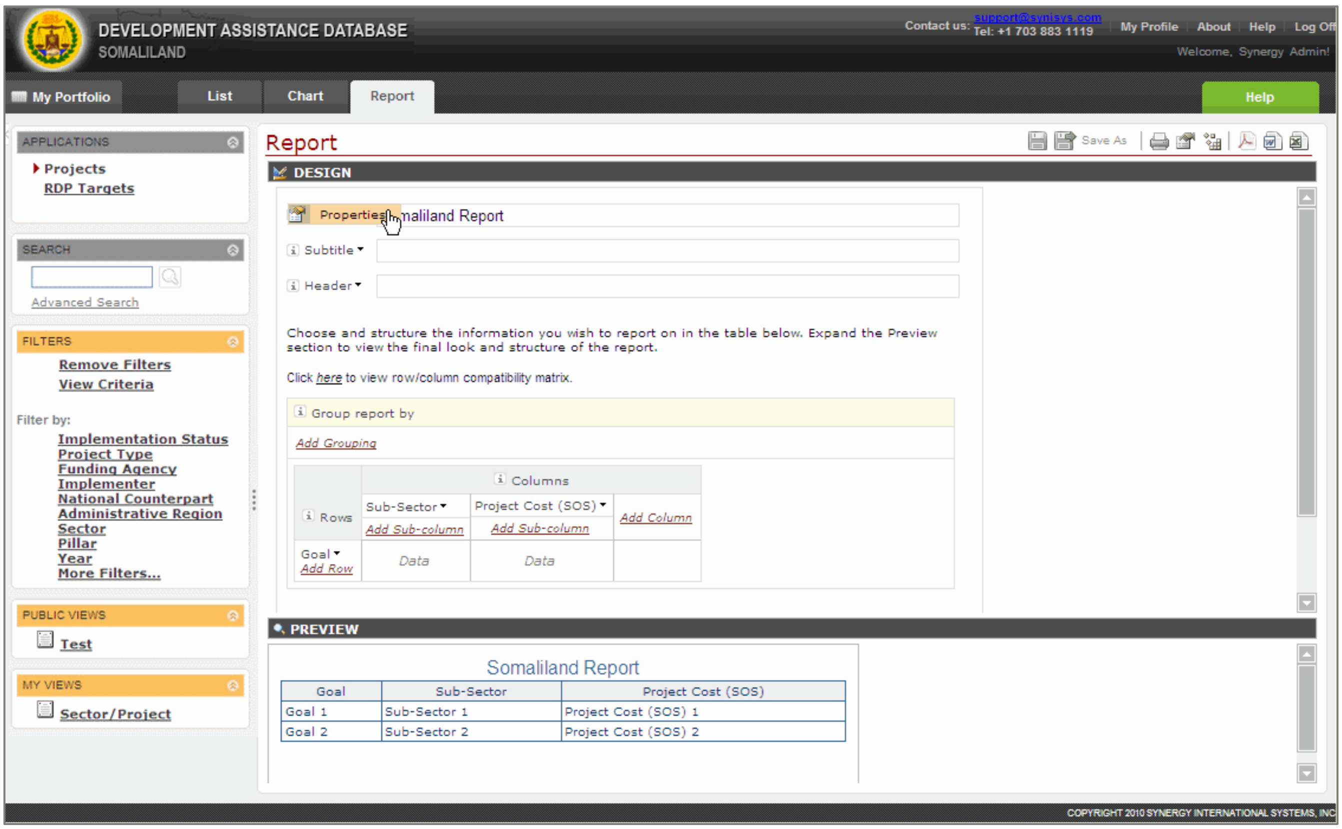


Figure 16: Reports Window with Properties Focus on the Title Field

The *Properties* window will appear. Please note that for text entries the *Properties* window includes text formatting buttons and a text area (Figure 16). For other report components, like rows, columns, etc., the *Properties* window also allows assigning additional characteristics, e.g. sorting order, reference text, etc. (Figure 17).

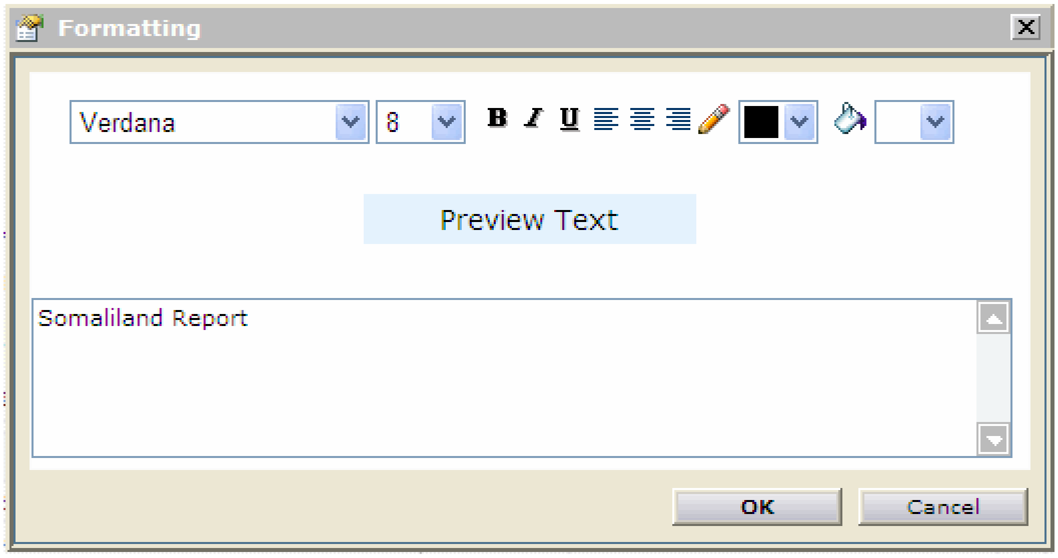


Figure 17: Formatting/Styling Text Entries

3. Change the properties as needed.
   Note: To prevent from 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, 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 the user to the **Report** module.

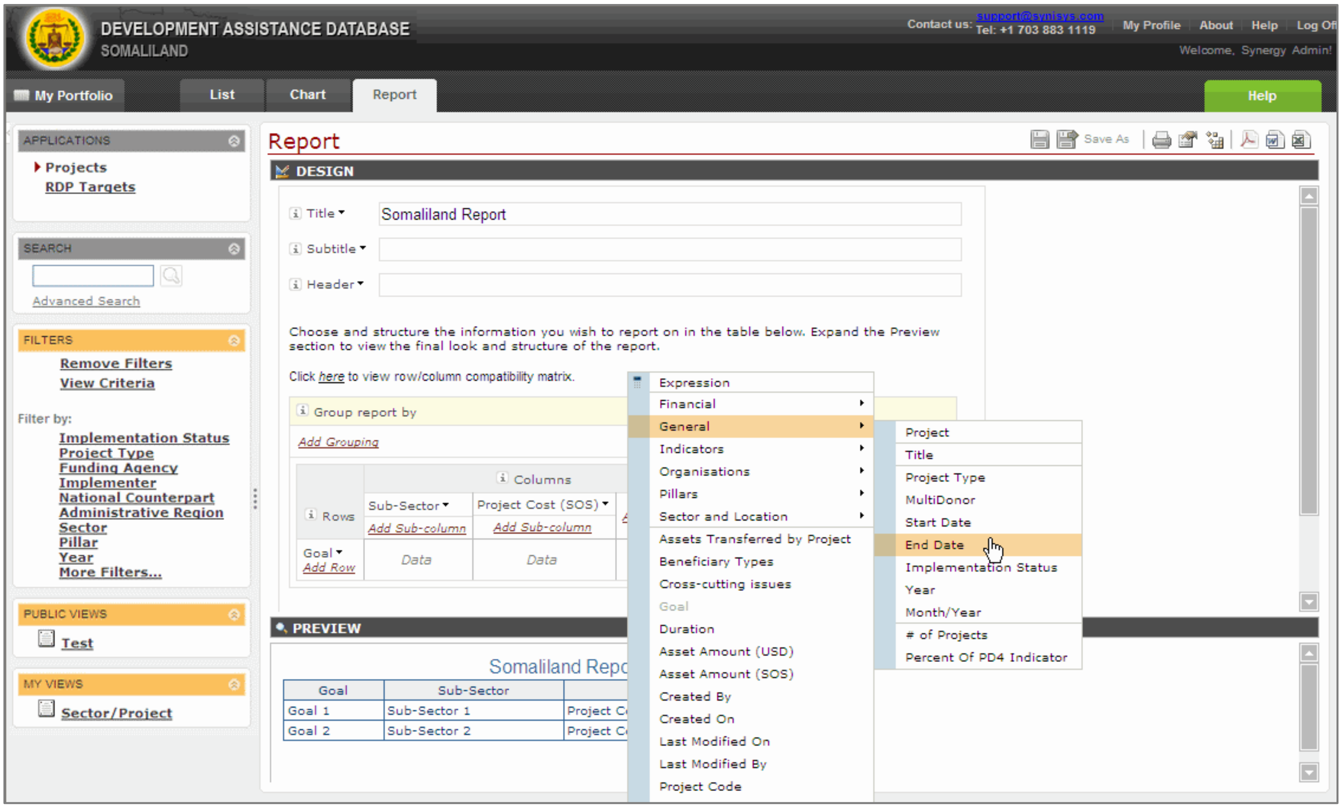


Figure 18: Reports Window with Properties Focus on the Column

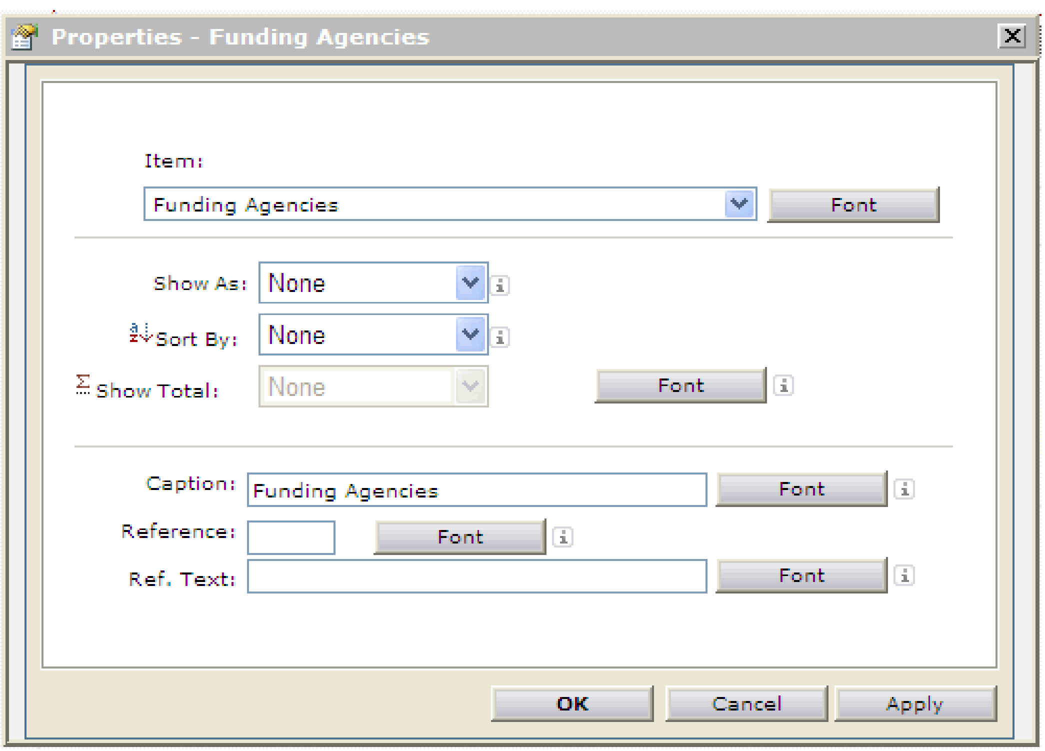


Figure 19: Assigning Properties to Report Table Components

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 on the component item that needs to be reordered in the report.
2. Select the respective *Move Up* / *Move Down* / *Move Right* / *Move Left* option from the menu that appears. The report generated will maintain the order of the items that was displayed in the *Report Designer* (Figure 20).

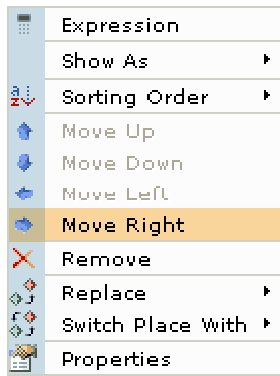


Figure 20: Reordering Report Table Components

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 on the component item for which the sorting order needs to be changed.
2. Select the **Sorting Order** option from the actions list (Figure 21).
3. Define whether the report item values should be sorted in the ascending or descending order. Please note that selecting the **None** option from the list removes the sorting criteria.

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

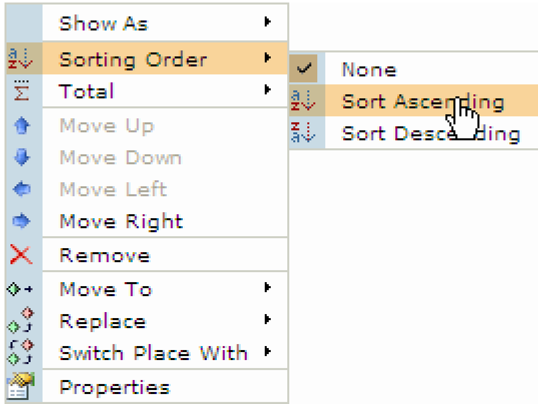


Figure 21: Defining the Sorting Order

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

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 on the component item that needs to be switched.
2. Select the ***Switch Place with*** option from the menu that appears (Figure 22).

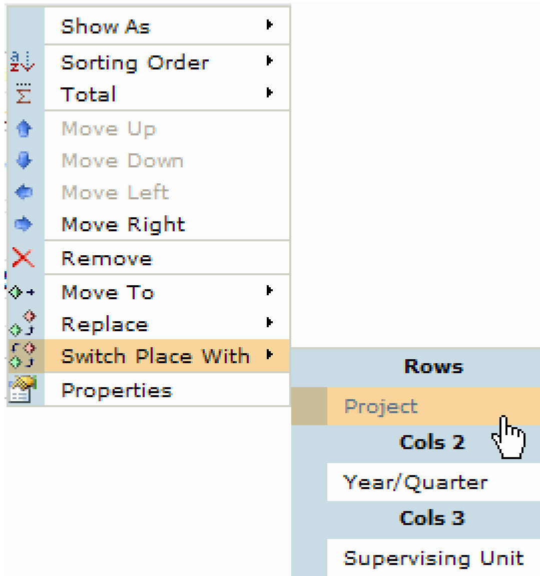


Figure 22: Switching Report Table Components

3. Define what component item the selected instance needs to switch place with. The selected component item will be removed from its current position and added as an item to the specified component. For instance, 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. DETAILS SECTION

The project **Details** section can be accessed from the List, Chart and My Portfolio modules. Here, the project information, contacts and monitoring and evaluation details are displayed for each project. You may 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.

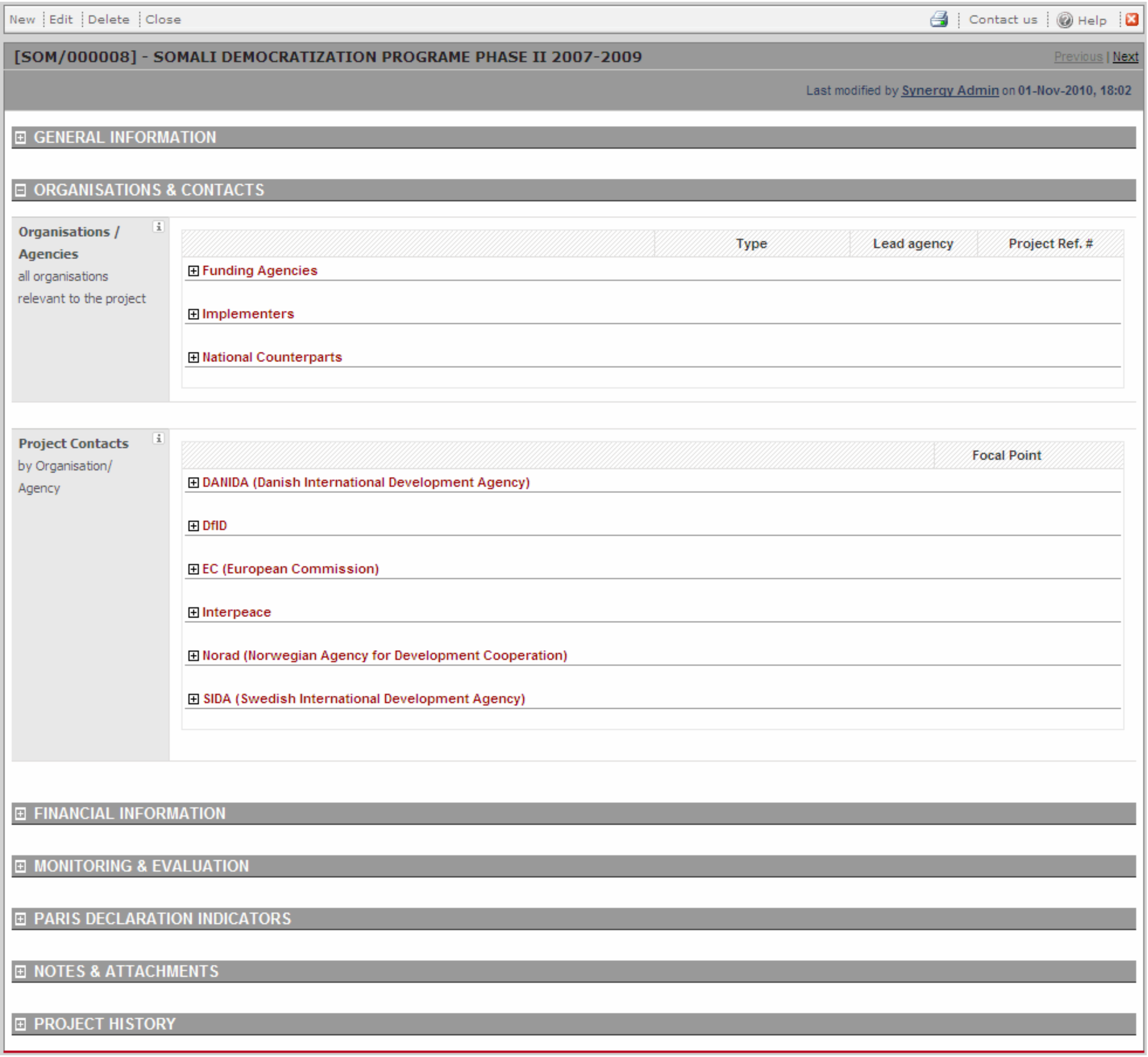


Figure 23: Details Section

9.1 Accessing the Details Section

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

1. Access the *Details* section by clicking on the one of the following:
   - In the *My Portfolio* module: Click the respective project. You will be directed to the **Details** section (Figure 23).
   - In the *List module*: Click the project for the details to be displayed. This will open the *Details* section of the application where more detailed information about the project will be displayed.
     Note: Depending on the list representation settings, additional expanding the list items may be required to reach the project.
   - In the *Chart* module: Click the chart for the details to be displayed (e.g., click on a relevant bar to see what it consists of). This will open the *Details* section of the application where all items matching the selection will be listed. The first item in the list will be displayed in an expanded mode.
     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.

9.2 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 23).

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

9.3 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**.

9.4 *Editing an Existing Project*

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

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

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

10. CUSTOMISED REPORTING IN LIST, CHART AND REPORT MODULES

The *DAD* application allows you to customize the already-created reports in the List, Chart, and Reports modules, i.e. to define the way the numeric values can be displayed, their format, the number of the items to be displayed, etc. You may 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* application can also export the reports to the desired format (Word, Excel, etc.) or print them out.

10.1 Setting Report Options (List, Chart and Report Modules)

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

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

1. Click the **(Set Options)** button in the top toolbar. An *Options* window (Figure 24) will appear.
2. Define the format in which the numeric values should be displayed, i.e. whether the original values should be displayed or they should be shown in thousands, millions, etc. This prevents large numeric values represented by many zeros from taking a lot of space in the report.
3. For charts, indicate the number of items to be displayed on the chart by selecting the appropriate value from the relevant pull-down list.

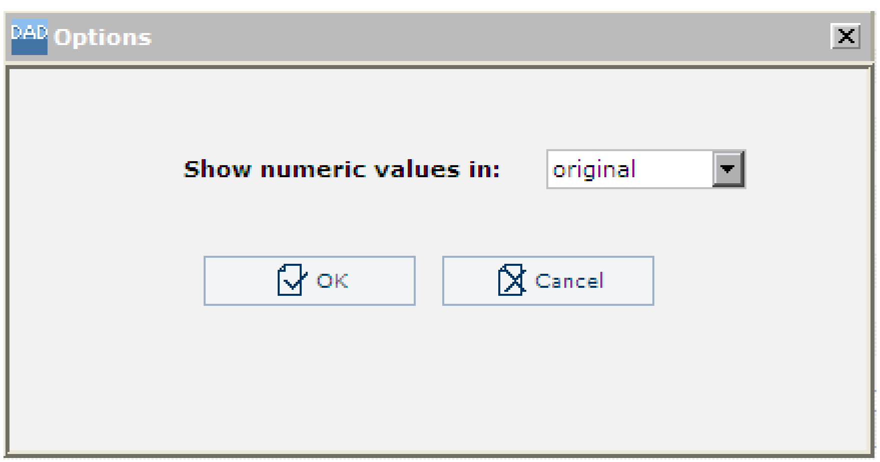


Figure 24: Setting the Chart Report Options

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

10.2 Saving reports (List, Chart and Report Modules)

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 *DAD* 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.

10.3 How to Save New Reports

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

1. Click on the **(Save)** button on the top right side of the screen. A *Memorize Report* window (Figure 25) will appear.
2. Define the report name in the *Memorized Name* field.

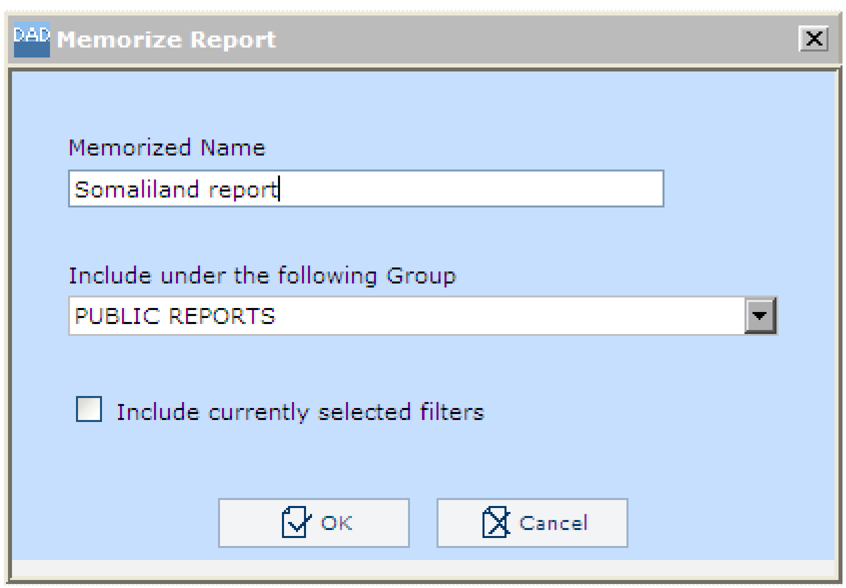


Figure 25: Memorizing a Report

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

10.4 How to Save a Copy of the Report

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

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

1. Click on the Save As button on the top right side of the screen. A *Memorize Report* window (Figure 25) will appear.
2. Save the report by the steps described in the section above.

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

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

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

1. Click on the respective **(Organise Views / Charts / Reports)** button at the top right side of the Screen. An *Organise Reports* window (Figure 26) 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

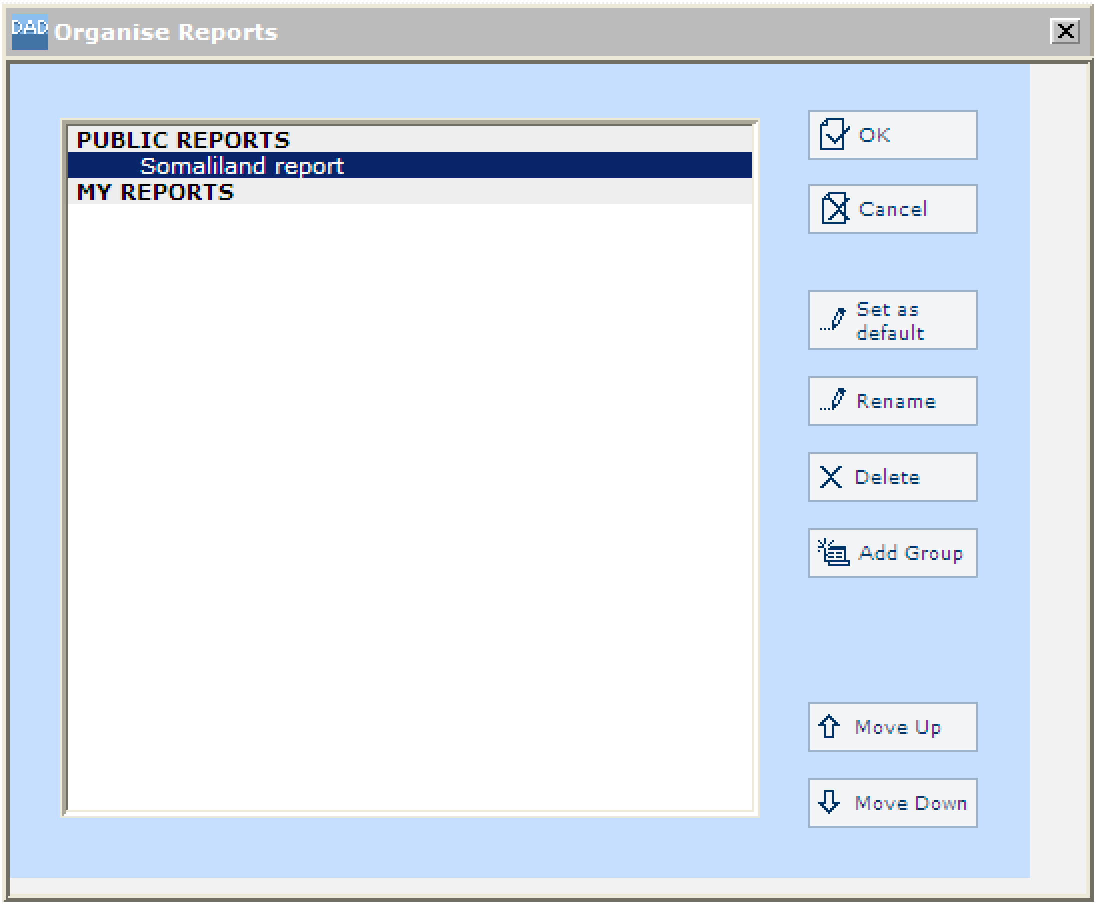


Figure 26: Organizing the Reports

10.5.1 Renaming Reports and Report Groups

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

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

10.5.2 Deleting Reports or Report Groups

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

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

10.5.3 Adding a Sub-group

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

10.5.4 Re-ordering Reports and Groups

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

10.5.5 Setting a Report as Default

1. Highlight the report to be displayed in the respective module when you access it.
2. Click the **Set as Default** button. The selected report will be marked with *(default for me)* option.

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

10.6 Exporting Reports to Word, Excel, PDF (Chart and Report Modules)

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

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

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

10.7 Printing Reports (Chart and Report Modules)

From the *Chart* and *Report* modules, you can design appropriate reports and print them out. In order to print out the selected report, follow the steps below:

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

11. FILTERING

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

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

11.1 Creating Filtering Criteria

Follow the instructions below to create filtering criteria:

1. Click on the hyperlink under the *Filters* section that represents the *Category* according to which the filtering will be carried out. A *Filters* window (Figure 34) 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 hyperlink “View Criteria”.
2. Select a *Category* item from the list in the first text area.
3. Click on the downward-pointing arrow button to add the item selected to the list in the second text area (Figure 27).
4. Repeat steps 2 and 3 to add more than one *Category* item.
   Note: If a *Category* item needs to be removed from the second text area, select it from the list in the second text area and click on the upward-pointing arrow button.
5. Click on the **OK** button to apply the filtering to the ad-hoc query and to the screen that was active prior to the filtering alterations (i.e. List or Chart). The system will regenerate and download, to the client’s side, an updated report that applies the updated filtering criteria.

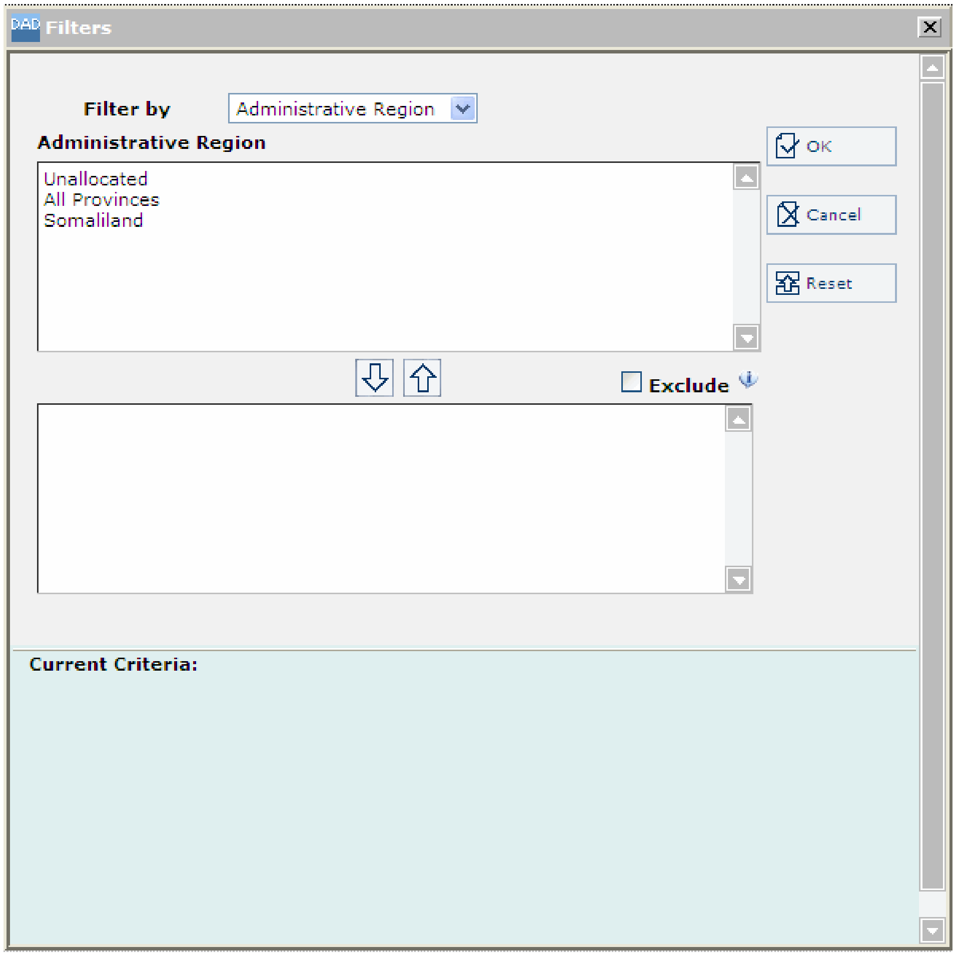


Figure 27: Creating a Filtering Criteria

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

Sample Filtering Criteria

If "Funding Agency" is the filtering criteria and "Netherlands Government" and "USAID" are selected (Figure 28) the following results will be acquired (Figure 29).

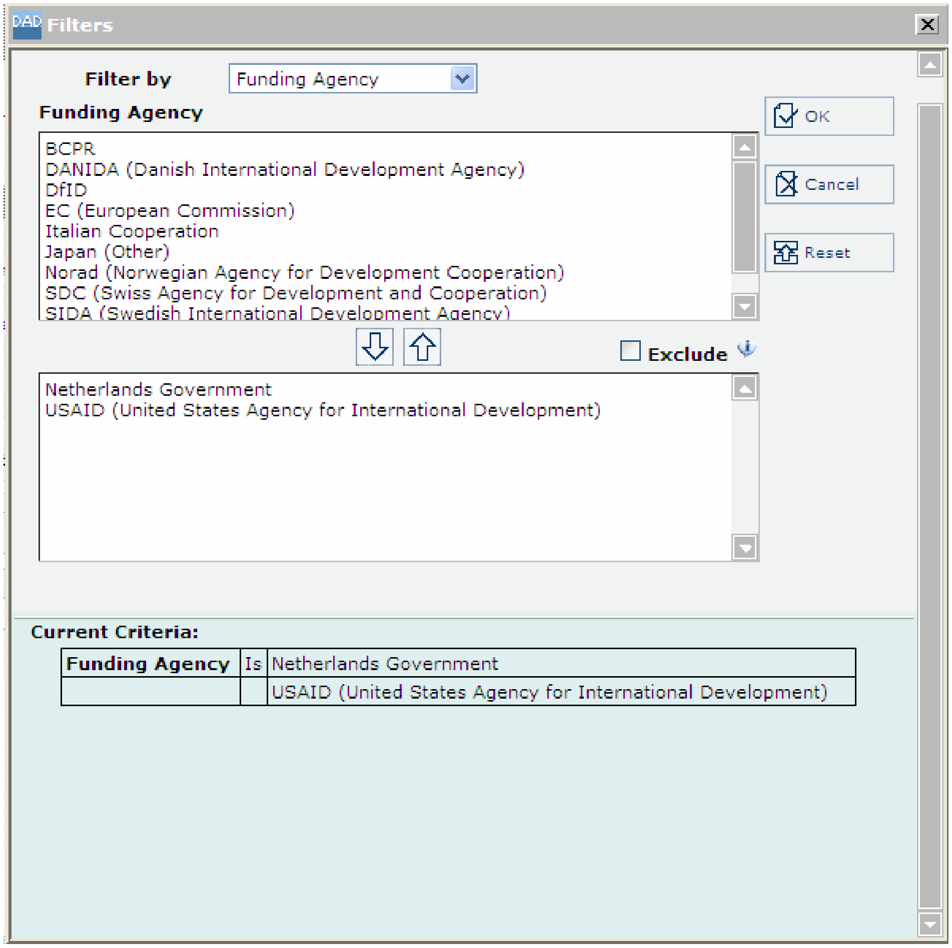


Figure 28: Sample Filtering Criteria

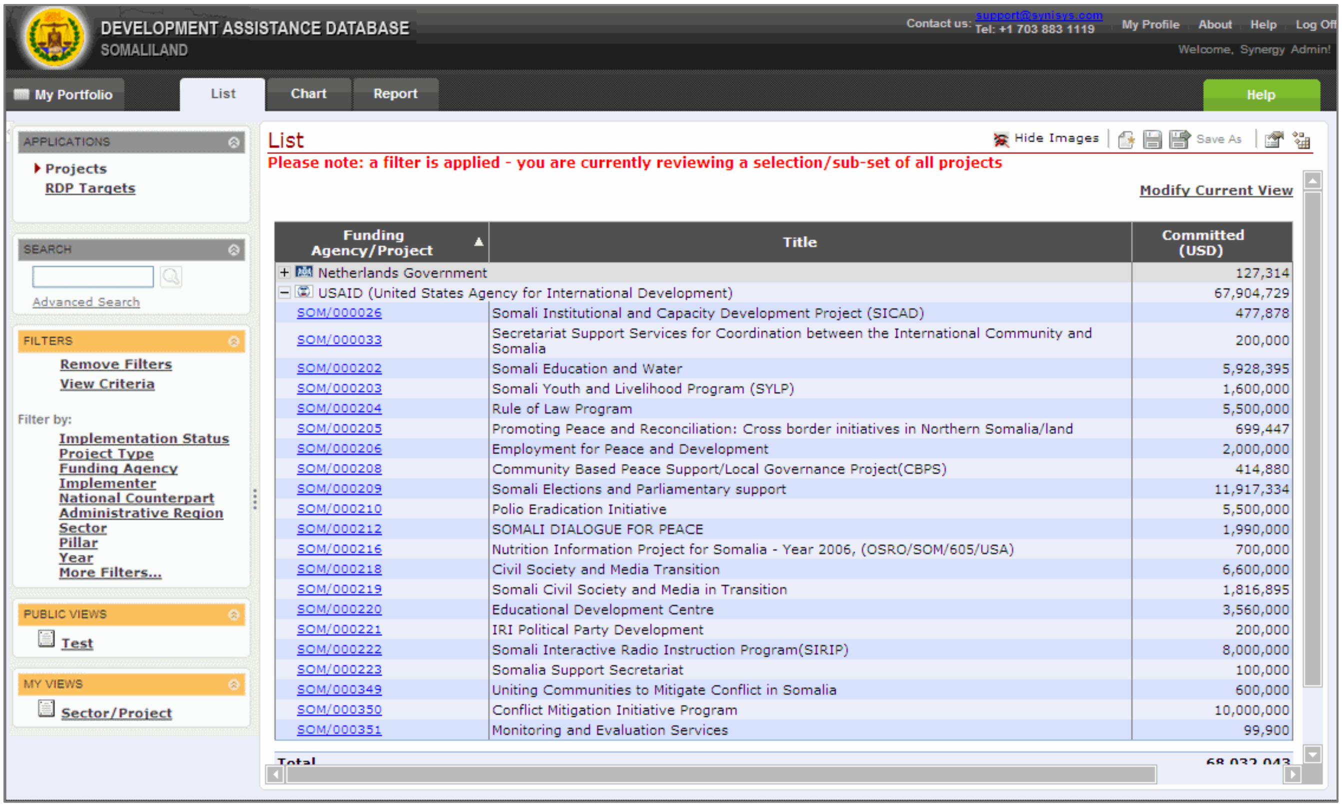


Figure 29: Filtered List

12. SEARCH

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

12.1 Simple Search

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

12.2 Advanced Search

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

Follow the instructions below to create search criteria:

1. Click the **Advanced Search** link under the *Search* section. The **Advanced Search Form** appears (Figure 30).

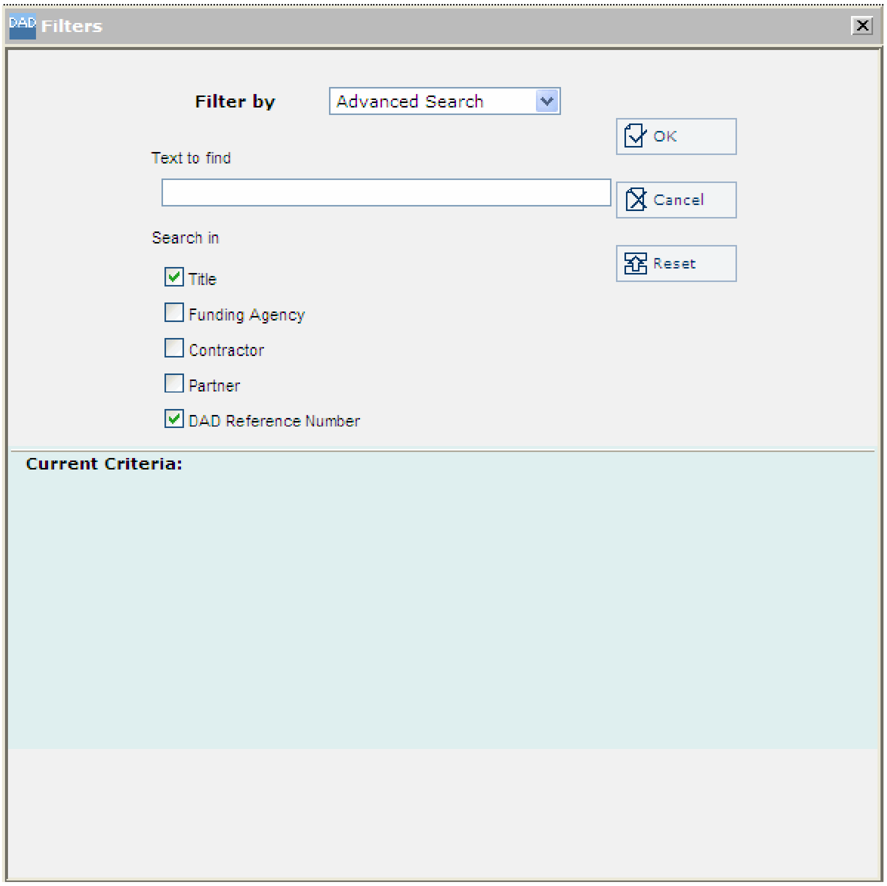


Figure 30: Creating a Search Criteria

1. Define the text to search for in the appropriate field.
2. Specify the fields to look in by selecting the appropriate checkbox(es).
3. 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 or Chart).

Sample Search Criteria

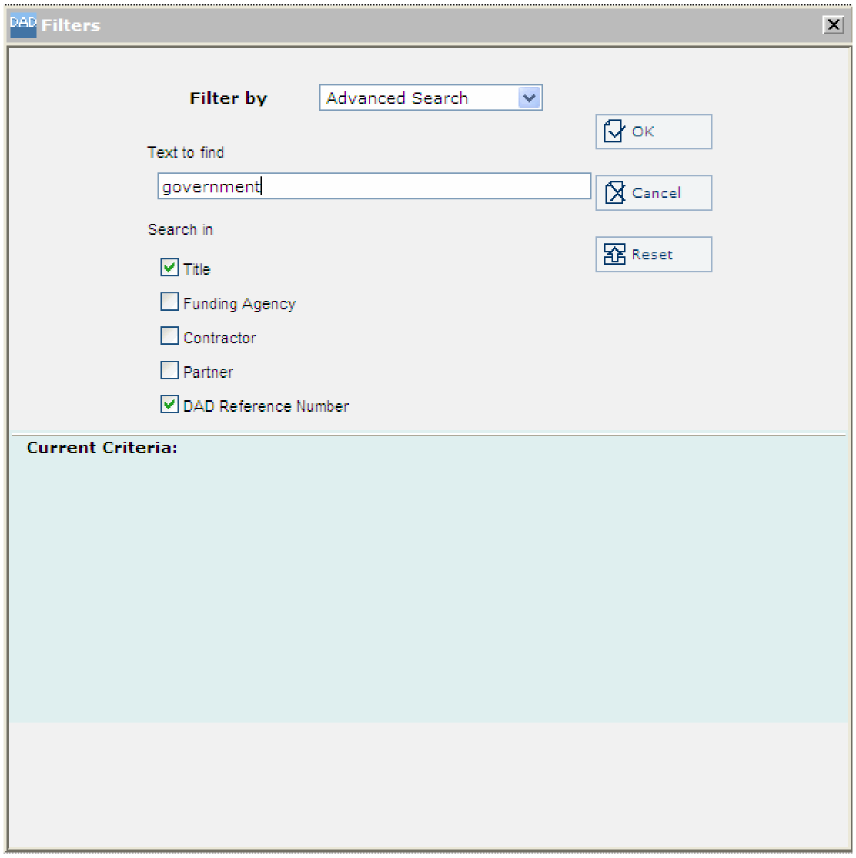


Figure 31: Defining Search Criteria

If the "government" is selected to search among "Titles" and "DAD Reference Numbers" (Figure 31), the following results will be displayed (Figure 32):

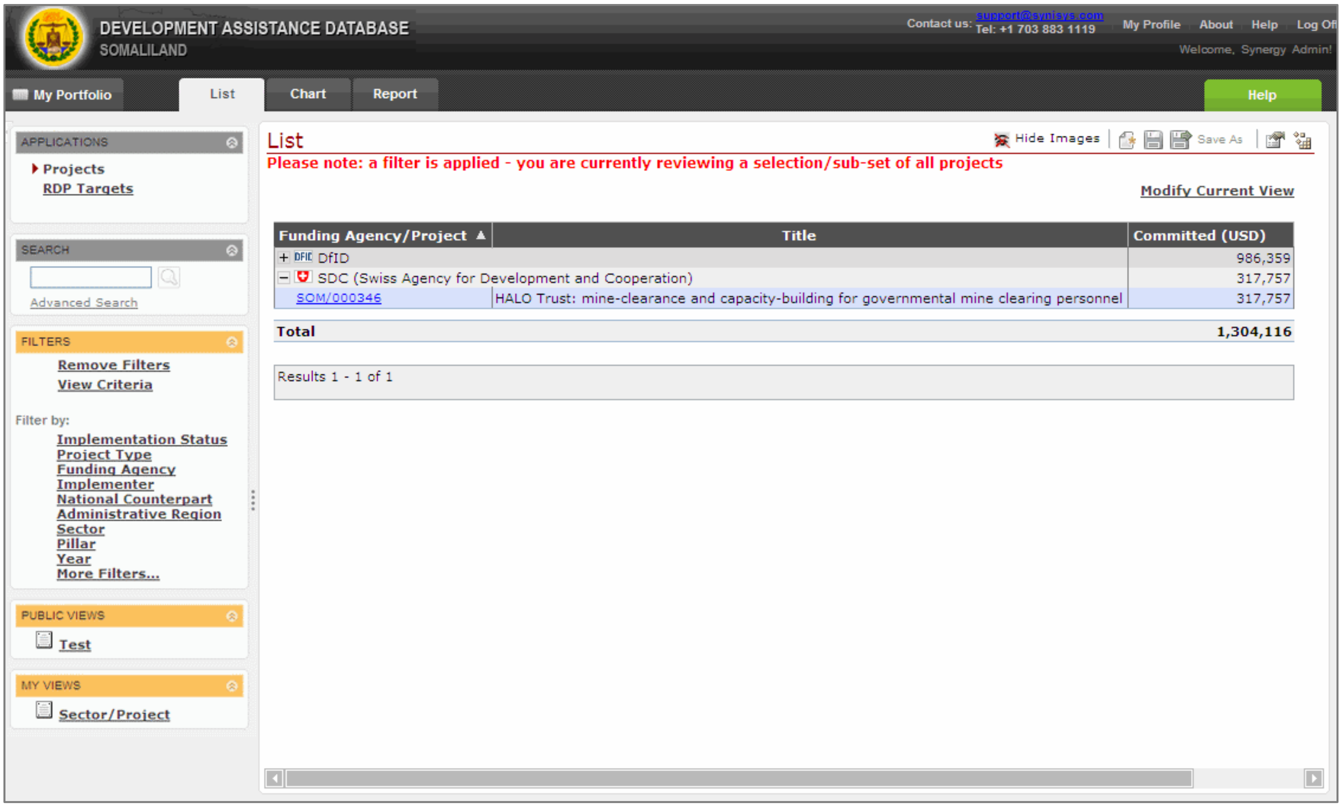


Figure 32: Search Results

13. LOGGING OUT

Once you have finished using the *DAD* application, it is necessary to log out. In order to log out from the application, press the **Log Out** button in the upper right corner of the application window.

14. REFERENCES

Please refer to the following *DAD* related document:

- DAD Somaliland Projects Application User Manual
- DAD Somaliland RDP Targets Application User Manual
- DAD Somaliiland Administration Center User Manual