

MANAGEMENT INFORMATION SYSTEM
MCA - Tanzania

(MCA - Tanzania MIS)

ANALYTICS
USER MANUAL

Version 1.5

SYNERGY INTERNATIONAL SYSTEMS

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TABLE OF CONTENTS

1. INTRODUCTION 4

2. OVERVIEW 4

3. WHO USES MIS? 5

4. LOGGING INTO MIS 6

4.1 Registering a New User 6
4.2 Accessing MIS without Registration 8

5. MIS ANALYTICS STRUCTURE 9

6. MY PORTFOLIO MODULE 11

6.1 Compact Performance in My Portfolio Module 12
6.1.1 Adding New Sub-Activity 13
6.1.2 Viewing Sub-Activity Details 13
6.2 M&E Indicators in My Portfolio Module 13
6.2.1 M&E Indicator Approval Procedure 15
6.2.2 User Privileges to Edit M&E Indicator Data 17
6.2.3 Adding new Indicator 18
6.2.4 Viewing Indicator Details 18

7. DASHBOARD MODULE 20

7.1 Key Features 20
7.2 Accessing the Dashboard Module 20
7.3 Main Screen and Its Components 21
7.4 Dashboard Management 22
7.4.1 Create a New Dashboard 22
7.4.2 Add an Item to a Dashboard 23
7.4.3 Customize a Dashboard 24
7.4.4 Save a Dashboard 25
7.4.5 Delete a Dashboard 25
7.4.6 Discard the Changes 26
7.4.7 Update Data 26

8. LIST MODULE 27

8.1 Accessing the List Module 27
8.2 Sorting List Items 28
8.3 Browsing List Items 28
8.4 Modifying the Current View 28
8.5 Adding List Groups/Columns/Column Groupings 29
8.6 Re-ordering Groups/Columns/Column Groupings 29
8.7 Removing Groups/Columns/Column Groupings 29
8.8 Setting a View as Default 29
8.9 Sample Views 30
8.9.1 Sample View 1: Sub-activities Distribution by Implementation Status 30
8.9.2 Sample View 2: Sub-activities Distribution by Location 31

9. CHART MODULE 33

9.1 Key Features 33
9.2 Accessing the Chart Module 33
9.3 Main Screen and Its Components 34

9.4 View Screen and Its Components 37
9.5 Sample Chart Reports 38
9.5.1 Sample Chart Report 1: Sub-activities Distribution by Implementation Status 38
9.5.2 Sample Chart Report 2: Sub-activities Distribution by Year/Quarter 39

10. REPORT MODULE 41

10.1 Accessing the Report Module 41
10.2 Creating a Report 42
10.3 Previewing a Report 44
10.4 Generating a Report 45
10.5 Indicator Tracking Table (ITT) 46
10.6 Managing Custom Reports 48
10.6.1 Uploading Custom Report Files 48
10.6.2 Deleting a Custom Report File 49
10.7 Customizing Reports 49
10.7.1 Formatting/Styling Report Components 49
10.7.2 Re-ordering Report Table Components 52
10.7.3 Sorting Report Table Components 52
10.7.4 Removing a Report Table Component 53
10.7.5 Switching Report Table Components 53
10.8 Sample Report Formatting 54

11. DETAILS SECTION 56

11.1 Accessing the Details Section 57
11.2 Browsing Sub-activities 57
11.3 Printing Sub-Activity Details 58
11.4 Editing an Existing Sub-Activity 58

12. CUSTOMISED REPORTING IN LIST, CHART, AND REPORT MODULES 59

12.1 Setting Report Options 59
12.2 Saving reports (List, Chart, and Report Modules) 60
12.3 How to Save New Reports 60
12.4 How to Save a Copy of the Report 61
12.5 Re-organising Reports (List, Chart, and Report Modules) 61
12.5.1 Renaming Reports and Report Groups 62
12.5.2 Deleting Reports or Report Groups 62
12.5.3 Adding a Sub-group 62
12.5.4 Re-ordering Reports and Groups 63
12.5.5 Setting a Report as Default 63
12.6 Exporting Reports (Chart and Report Modules) 63
12.7 Printing Reports (Chart and Report Modules) 63

13. FILTERING 64

13.1 Creating Filtering Criteria 64

14. SEARCH 66

14.1 Simple Search 66
14.2 Advanced Search 66

15. LOGGING OUT 68

16. REFERENCES 68

TABLE OF FIGURES

FIGURE 1: MIS LOGIN SCREEN....6
FIGURE 2: THE USER REGISTRATION FORM....7
FIGURE 3: MY PROFILE WINDOW....8
FIGURE 4: MIS ANALYTICS STRUCTURE....9
FIGURE 5: MY PORTFOLIO MODULE....11
FIGURE 6: COMPACT PERFORMANCE SECTION IN MY PORTFOLIO....12
FIGURE 7: M&E INDICATORS SECTION IN MY PORTFOLIO....14
FIGURE 8: INDICATORS APPROVAL PROCEDURE....16
FIGURE 9: M&E INDICATORS SECTION IN MY PORTFOLIO....19
FIGURE 10: DASHBOARD MODULE....21
FIGURE 11: ADDING A NEW DASHBOARD....22
FIGURE 12: LIST OF PRE-DEFINED REPORTS....23
FIGURE 13: ADDING A NEW REPORT....24
FIGURE 14: CUSTOMIZING A DASHBOARD....25
FIGURE 15: LIST MODULE....27
FIGURE 16: MODIFYING THE CURRENT VIEW....28
FIGURE 17: DEFINING LIST VIEW GROUPINGS FOR SAMPLE VIEW 1....30
FIGURE 18: DEFINING LIST VIEW COLUMNS FOR SAMPLE VIEW 1....30
FIGURE 19: SAMPLE VIEW 1....31
FIGURE 20: DEFINING LIST VIEW GROUPINGS FOR SAMPLE VIEW 2....31
FIGURE 21: DEFINING LIST VIEW COLUMNS FOR SAMPLE VIEW 2....32
FIGURE 22: SAMPLE VIEW 2....32
FIGURE 23: MAIN SCREEN OF THE CHART MODULE....34
FIGURE 24: VIEW SCREEN OF THE CHART MODULE....37
FIGURE 25: SAMPLE CHART REPORT 1....39
FIGURE 26: SAMPLE CHART REPORT 2....40
FIGURE 27: REPORT MODULE....41
FIGURE 28: SELECTING A GROUPING FOR A REPORT....43
FIGURE 29: COMPATIBILITY MATRIX....44
FIGURE 30: PREVIEWING THE REPORT....45
FIGURE 31: MIS CUSTOM REPORTS....46
FIGURE 32: INDICATOR TRACKING TABLE (ITT)....47
FIGURE 33: ADDING A CUSTOM REPORT....48
FIGURE 34: DELETING A CUSTOM REPORT....49
FIGURE 35: REPORTS WINDOW WITH PROPERTIES FOCUS ON THE TITLE FIELD....50
FIGURE 36: FORMATTING/STYLING TEXT ENTRIES....51
FIGURE 37: ASSIGNING PROPERTIES TO REPORT TABLE COMPONENTS....51
FIGURE 38: REORDERING REPORT TABLE COMPONENTS....52
FIGURE 39: DEFINING THE SORTING ORDER....53
FIGURE 40: SWITCHING REPORT TABLE COMPONENTS....54
FIGURE 41: CREATING AND FORMATTING A REPORT....55
FIGURE 42: DETAILS SECTION....56
FIGURE 43: SETTING THE CHART REPORT OPTIONS....59
FIGURE 44: MEMORIZING A REPORT....60
FIGURE 45: ORGANIZING THE REPORTS....62
FIGURE 46: CREATING A FILTERING CRITERIA....65
FIGURE 47: CREATING A SEARCH CRITERIA....67

1. INTRODUCTION

The purpose of this document is to describe how the Management Information System (MIS) developed for Millennium Challenge Account for Tanzania (MCA-Tanzania) functions and to provide the necessary instructions required to ensure successful work with the system. The use of this document and the compliance with the standards specified herein is mandatory for anyone working with the mentioned application.

2. OVERVIEW

The Management Information System (MIS) for MCA-Tanzania is an automated information management system which supports the management of MCA-Tanzania in making evidence-based decisions and performing their accountability role in the implementation of the signed Compact between the Government of Tanzania and the Government of United States of America (represented by MCC) on timely and reliable manner.

The aim of the MIS is to process data speedily and accurately and to provide reports when and where required and on demand. The fully developed and functional system shall support the MCA-Tanzania Management and Staff, Project Dedicated Teams, Service Providers and Project Contractors and other partners of MCA-Tanzania to collect project and client data, store, process, and deliver information relevant to the implementation and operation of the Compact.

The main outcome for this consultancy service will be a package of integrated data and information management system that shall work together to collect, store, process and analyze project level data needed to review the implementation of program activities, find and correct problems, look at the quality of activities, and evaluate the impact of the program. It should result in an automotive and formalize system that shall provide information on a regular basis and in a pre-defined manner to facilitate the overall Compact Management oversight responsibility.

The MIS application is a powerful tool that allows you to view data organized into lists, reports, and charts. In MIS application, the data can be presented in the form of list and chart reports, memorize/save the reports, print them, and export them into PDF, MS Word and MS Excel format files.

The MIS also allows you to quickly access the sub-activity and indicator data remotely via Internet. Once you access the application, you can see the data stored in the database, submit new data, edit the existing ones, etc.

3. WHO USES MIS?

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

Users Group	Who are they?	Why they need MIS access?
Administrators	As it is the M&E Unit in MCA that is responsible for MIS, the users in this group will be from MCA M&E Unit administrating the *MIS* application.	Access to the entire data stored in *MIS*.
M&E Directorate Users Group	Members of the M&E Directorate Unit of MCA.	Responsible for updating data on indicators.
Implementing Entity Users Group	Implementing Entities working with MCA.	Responsible for updating data on the progress of registered Indicators.
MCA Management Users Group	This group will contain users from MCA top management.	This group will have permissions to view all datasets in *MIS*.
MCC Users Group	This group will contain MCC users.	Certain access privileges to view data in the *MIS*. **Note:** This group might be split into two or more groups with individual permissions. In this case, additional groups will be defined.
Tanzania's Government Members and Staff	Tanzania's Government which may be a supervisor of a project.	Follows the lifecycle of sub-activities and indicators in Tanzania.
Public	Media, press, interested experts, etc. Also potential customers who want to get a general idea about MIS functionality.	Only M&E Indicators application is available to the public user. The public users access MIS in a read-only mode, however they can create and print reports, save them locally on the PC as well as refer to the MIS as an official resource. **Note:** It is up to MCA to decide whether to have the public access or not and what permission public access users may have.

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

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

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

4. LOGGING INTO MIS

The starting screen of *MIS* 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.

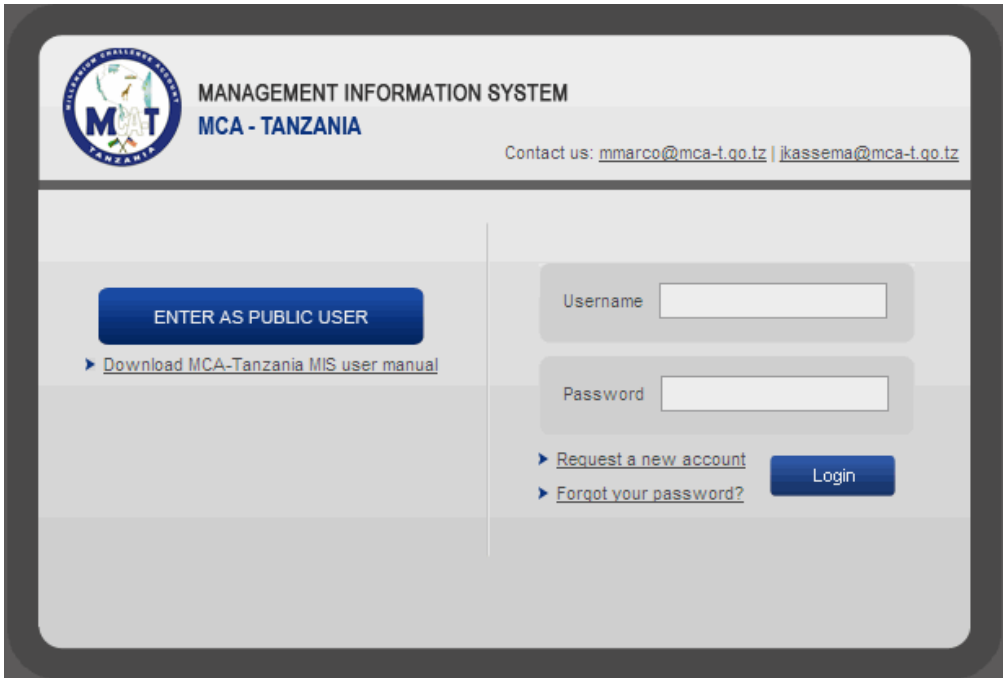


Figure 1: MIS Login Screen

A successful login directs you to the *My Portfolio* module of the *Compact Performance* application.

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

4.1 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.

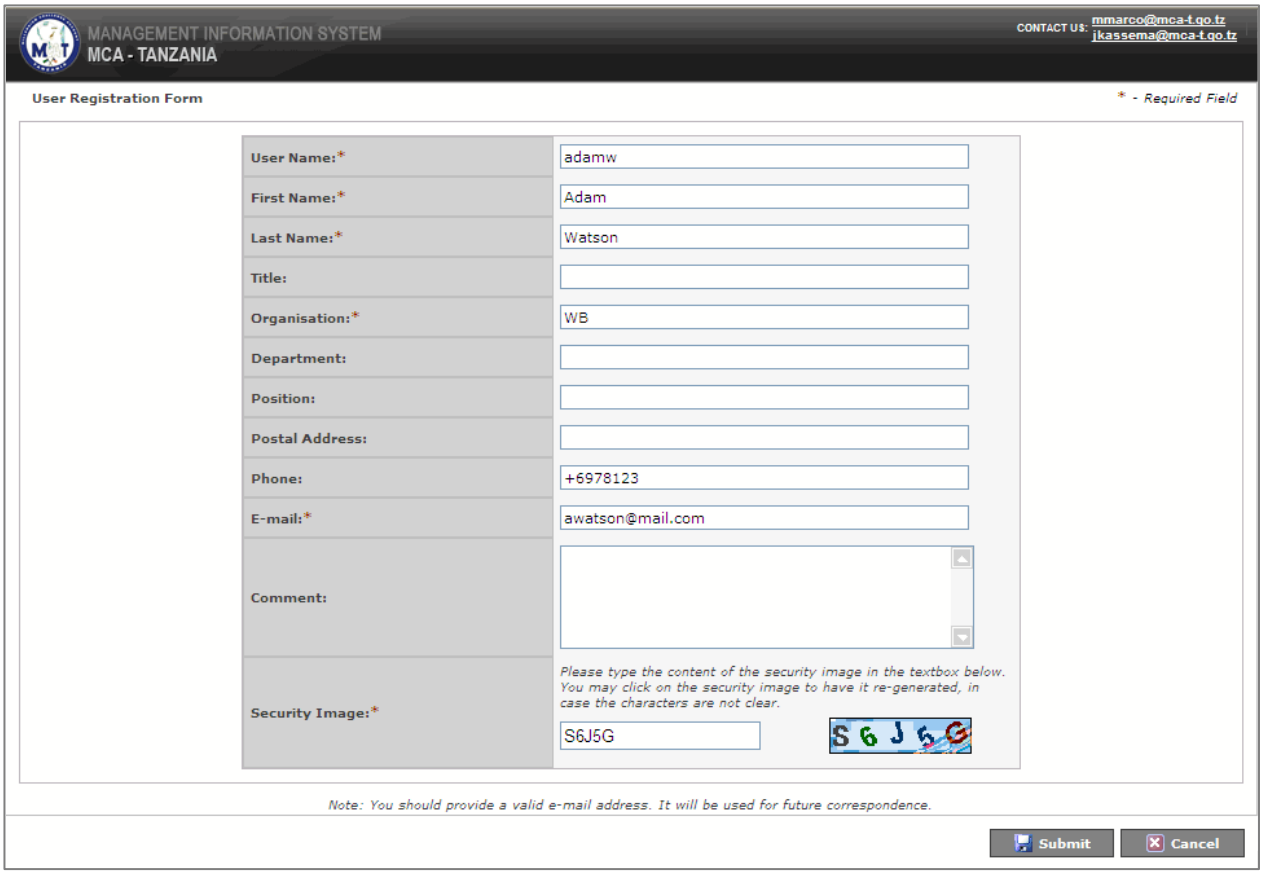


Figure 2: The User Registration Form

Once you submit the registration form, the MIS'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 MIS'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.

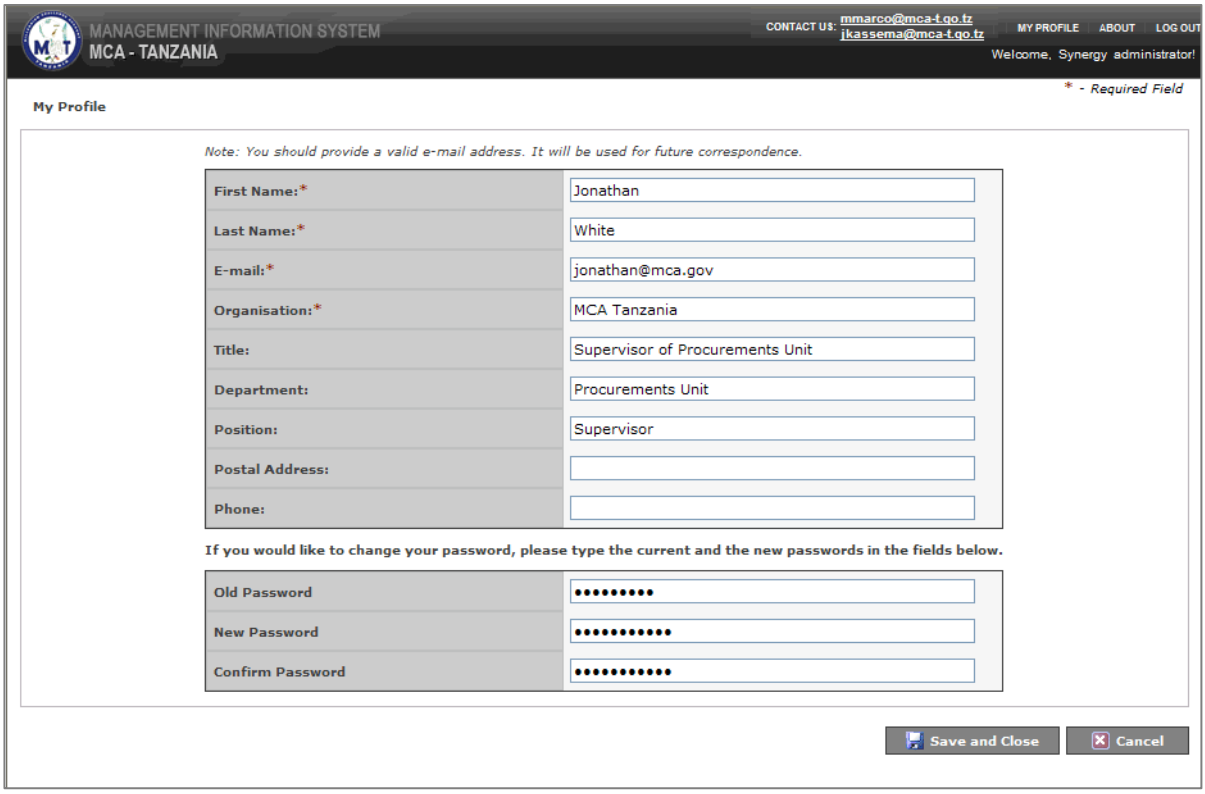


Figure 3: My Profile Window

4.2 Accessing MIS 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.

5. MIS ANALYTICS STRUCTURE

Following applications are available in the current design of *MIS*:

- **Compact Performance** – serves as a main information hub of all submitted sub-activities.
- **M&E Indicators**– collects and displays all information relevant to a particular indicator.

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

The *MIS* consists of the following main sections:

- MY PORTFOLIO MODULE – used for quick access to the sub-activities registered in the *MIS* system by the user's group.
- DASHBOARD MODULE – used for quick access to the data registered in the *MIS* system.
- 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 *MIS* main window has a complex preview as it is shown in the Figure 4.

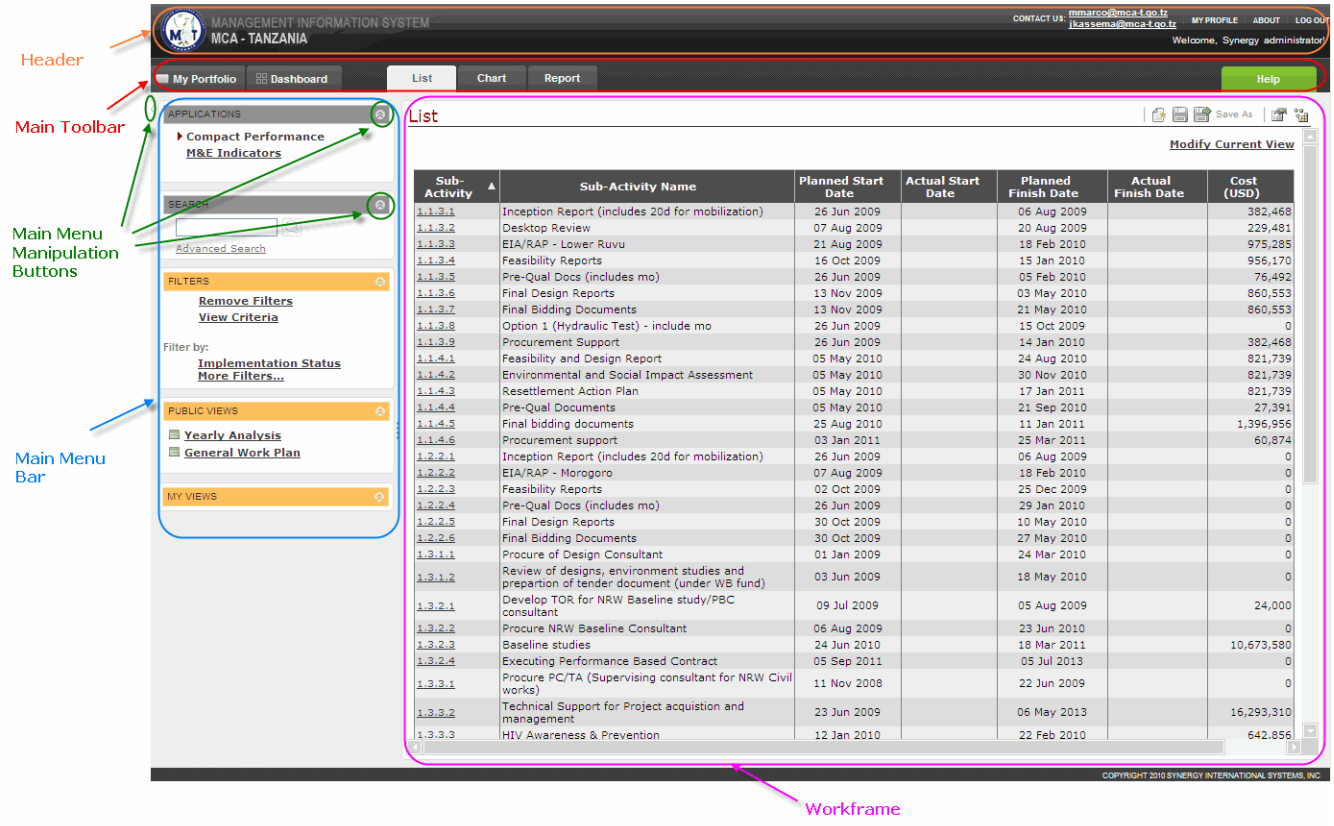


Figure 4: MIS Analytics Structure

It contains the following components:

Component Name	Description
Header	This is the application header that contains application name and the MCA-Tanzania logo. On the right side, following functions are available: • **Contact Us** – e-mail address of the MIS 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 MIS application. Following tabs are available here: • **My Portfolio** – opens MY PORTFOLIO MODULE to manage user specific sub-activities. • **Dashboard** – opens the DASHBOARD MODULE. • **List** – opens the LIST MODULE of the selected Application (see Main Menu description below). • **Chart** –opens the CHART MODULE. • **Report** - opens the REPORT MODULE. • **Help** – opens the MIS application's help.
Main Menu Bar	This menu contains sections with main functions of the MIS application: • **Application** – lists all applications present in the MIS. • **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/Charts/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.
Work Frame	In this frame all applications and modules are managed. Here are filtering and search results displayed.

6. MY PORTFOLIO MODULE

The *My Portfolio* section (Figure 5) of the *MIS* application provides quick access to the sub-activities and M&E Indicators that have been added to the *MIS* system by the corresponding user.

In order to access *My Portfolio* module, click on the **My Portfolio** tab in the Main Menu of *MIS* 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 user belongs to has created the record). All these permissions are granted and managed from MIS Administration Center.

My Portfolio contains the following pages:

- **Compact Performance** – the draft and submitted sub-activities are displayed here. See Compact Performance in My Portfolio Module.
- **M&E Indicators** – the draft and submitted M&E Indicators are displayed here. See M&E Indicators in My Portfolio Module.

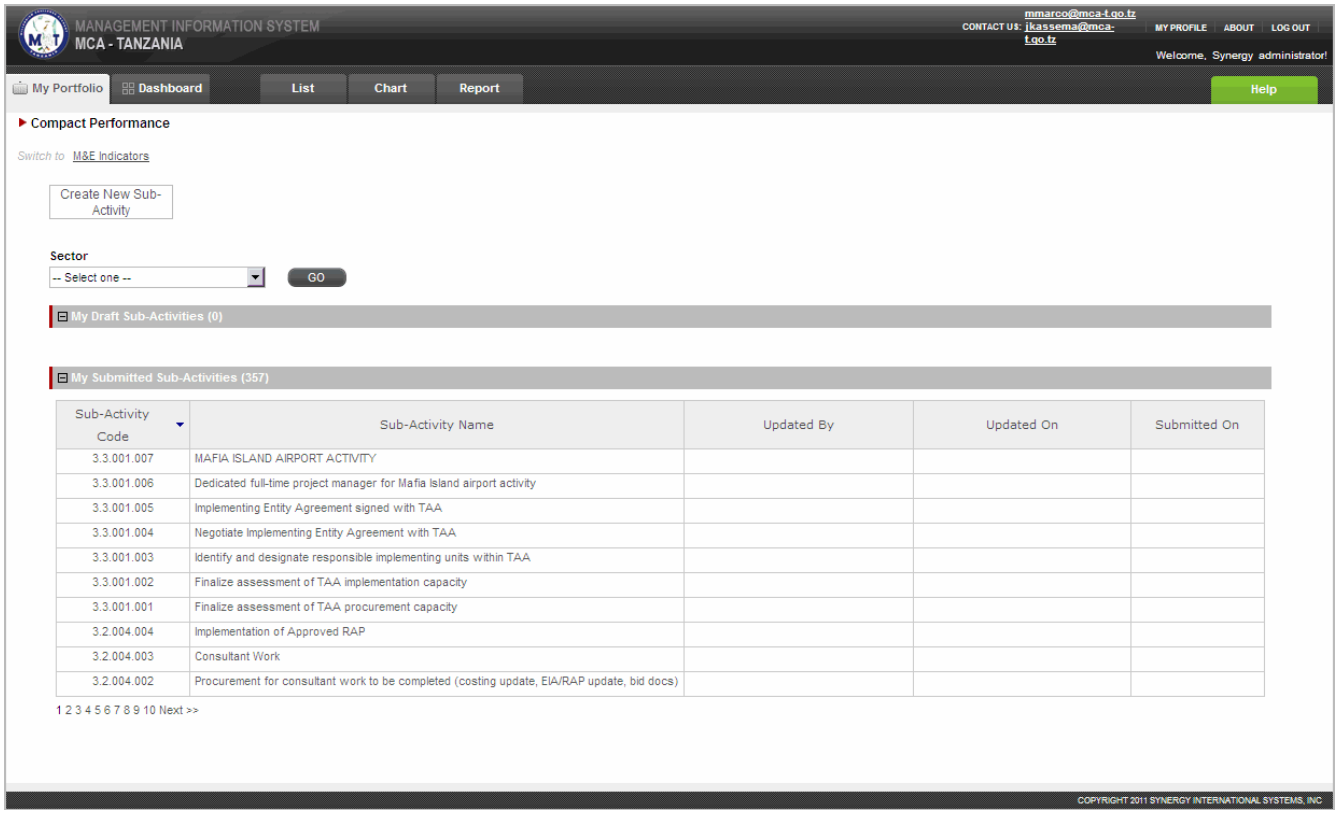


Figure 5: My Portfolio Module

6.1 Compact Performance in My Portfolio Module

In this page you may see a list of draft and submitted sub-activities. Each sub-activity created in MIS either from *My Portfolio* module or from the corresponding application should get submitted first in order to become public and official. Below is the procedure of sub-activity submission:

- User adds a sub-activity. It is saved as a draft in the user's portfolio, in the Draft Sub-Activities 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 sub-activity 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.

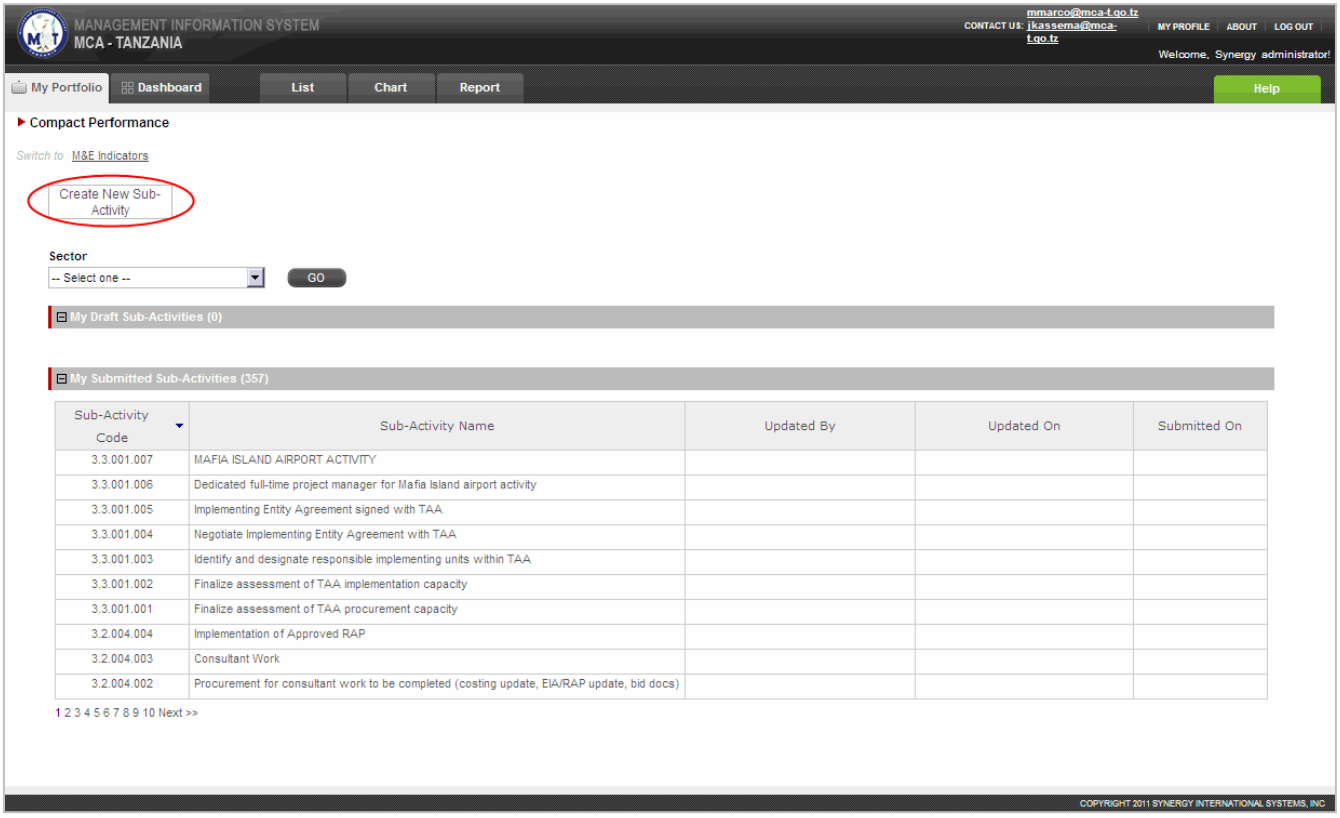


Figure 6: Compact Performance Section in My Portfolio

Note: Only submitted drafts are displayed in the Compact Performance application's **List** table (see LIST MODULE) and accessible to other users of MIS application.
In this module, the sub-activity may be created; details of the existing sub-activities can be viewed and edited.
The information displayed in **My Portfolio** for each sub-activity includes the following information:

- **Sub-Activity Code** – the code of the sub-activity,
- **Sub-Activity Name** – the name of the sub-activity,
- **Updated By** – last update author,
- **Updated On** – last update date,
- **Submitted On** – the date of the sub-activity submission.

The **Compact Performance** section in *My Portfolio* is equipped with a quick search mechanism which allows you to search for the sub-activities in *My Draft Sub-Activities* and *My Submitted Sub-Activities* lists depending on the given criteria in the **Sector** drop-down list.

To filter the list of sub-activities, select the needed criteria and press the **GO** button. The list will be filtered considering the defined criteria.

Note: To clear the filtering and get back to the whole list of sub-activities, clear the selected criterion and press the **GO** button.

6.1.1 Adding New Sub-Activity

To add a new sub-activity from *My Portfolio* module, follow the instructions below:

1. Go to the **Compact Performance** section of *My Portfolio* module.
2. Click the **Create New Sub-Activity** button (Figure 6).
3. This will open an **Add Sub-Activity** form which is described in the Compact Performance Application Users Manual, see REFERENCES.

6.1.2 Viewing Sub-Activity Details

Depending on your permissions you may also see or edit sub-activities added by other users.

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

1. Go to the *My Portfolio* module.
2. Click the **Compact Performance** link.
3. Expand the **Drafts** or **Submitted Sub-activities** list correspondingly (Figure 6).
4. Click on the sub-activity you wish to see the details for. This will open sub-activity details. For details, see DETAILS SECTION.

6.2 M&E Indicators in My Portfolio Module

In this page you may see a list of draft and submitted M&E Indicators as well as the progress for current quarter on each indicator separately (Figure 7).

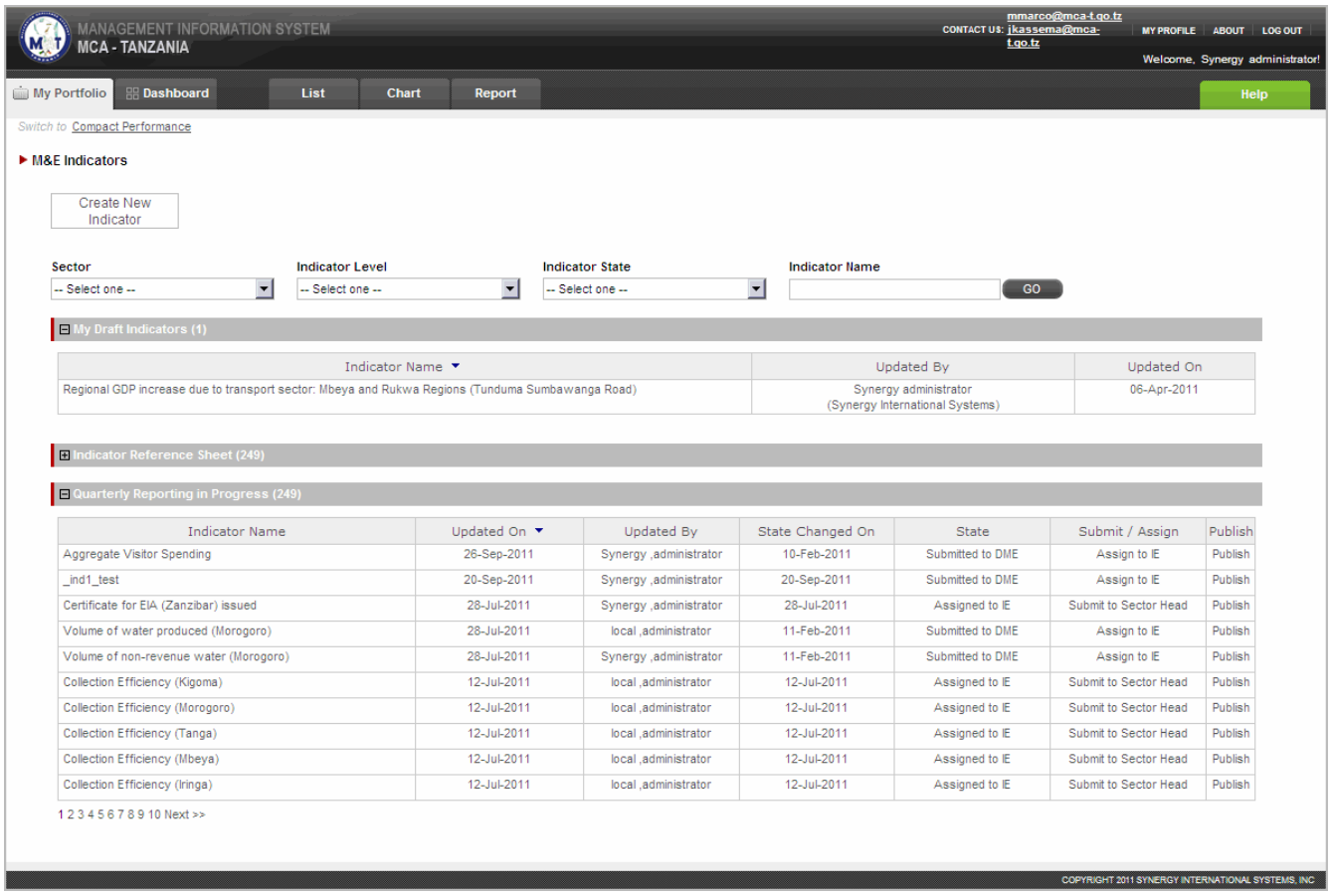


Figure 7: M&E Indicators Section in My Portfolio

Note: The M&E Indicators page appearance depends on the user permissions. For example, Implementing Entity (IE) group users may only see M&E Indicators' progress list in the My Portfolio module, while M&E Directorate (DME) group users may also see draft and submitted M&E Indicators' lists.

The following information is displayed in **My Portfolio** for each M&E indicator:

- **Indicator Name** – the name of the M&E indicator,
- **Updated By** – last update author,
- **Updated On** – last update date,
- **Submitted On** – the date when the indicator has been submitted,
- **Submitted By** – the author who submitted the indicator,
- **State Change On** – indicates the date when the indicator got the last status change.
- **State** – the current state of the indicator. Can be:
    - Submitted to DME
    - Assigned to IE
    - Submitted to Sector Head
    - Published

- **Submit/Assign** – indicates the next possible state(s) the indicator can pass. To submit/assign the indicator, press the corresponding button in the *Quarterly Reporting in Progress* table.
- **Publish –** indicates that the indicator can be published. To publish the indicator, press the corresponding **Publish** button in the *Quarterly Reporting in Progress* table. This function is available only for the administrator and M&E users.

The **M&E Indicators** section in *My Portfolio* is equipped with a quick search mechanism which allows you to search for the indicators in *My Draft Indicators*, *Indicator Reference Sheet* and *Quarterly Reporting in Progress* lists depending on the given criteria.

The following search criteria are available:

- **Sector** – filters the indicators under the specific sector of economy.
- **Indicator Level** – filters the indicator with the certain *Indicator Level*.
- **Indicator State** – filters the indicator with the certain *Indicator State*.
- **Indicator Name** – used to search for a specific indicator with the indicated name.

To filter the list of indicators, select the needed criteria and press **GO** button. More than one criterion may be selected at the same time. The list will be filtered considering the defined criteria.

Note: To clear the filtering and get back to the whole list of indicators, clear the selected criterion and press the **GO** button.

6.2.1 M&E Indicator Approval Procedure

Each M&E Indicator created in MIS either from *My Portfolio* module or from the corresponding application should get submitted first in order to become public and official. Indicator progress for current quarter should be published, in order to become public and official (Figure 8).

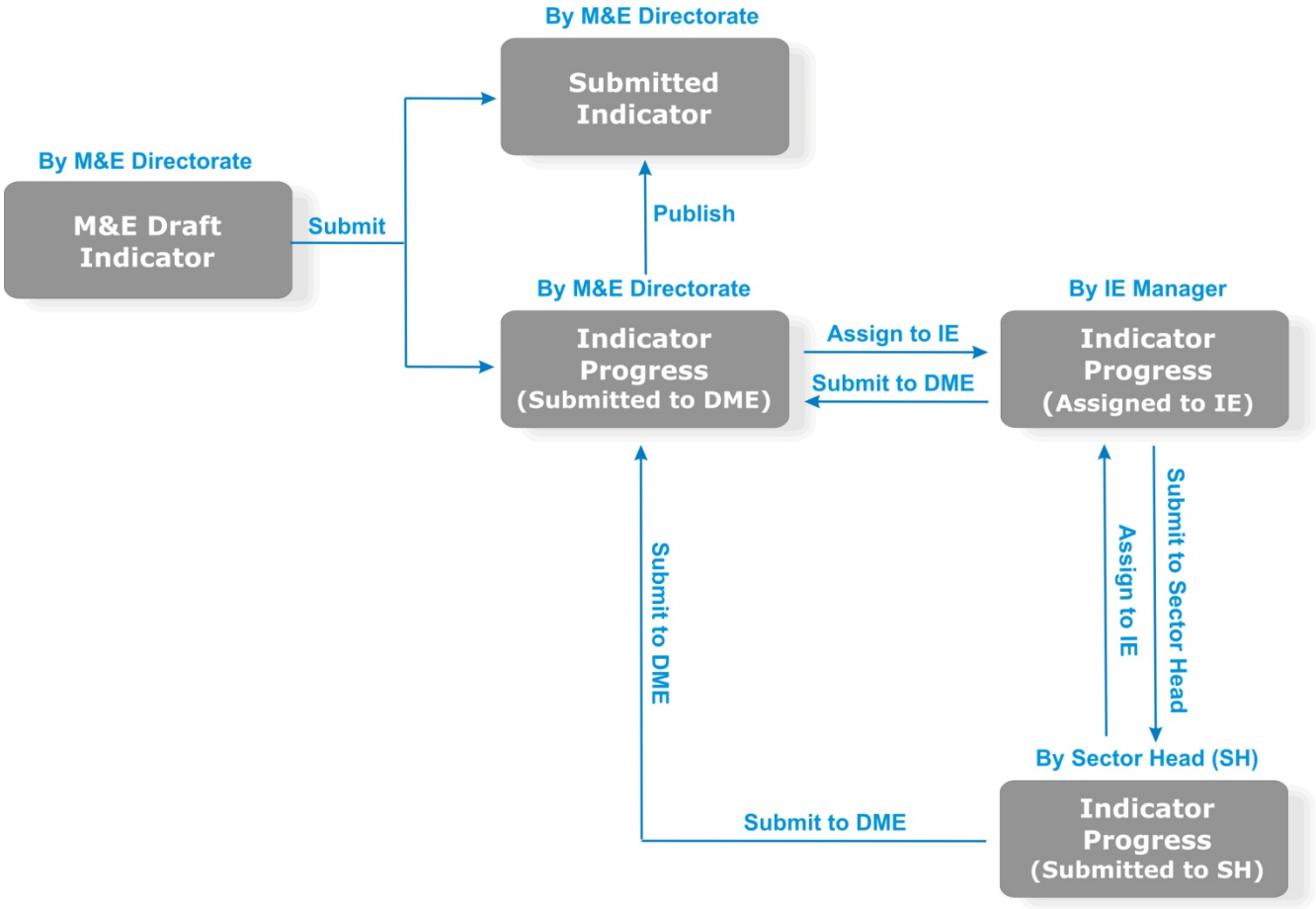


Figure 8: Indicators Approval Procedure

1. The M&E Directorate group user creates an indicator draft. It is saved as a draft in the *Draft M&E Indicators* list of user's portfolio, in the Draft Indicator's section (Figure 9). The created draft can be revised by MIS administrator or M&E Directorate (DME) group user.
   Note: Until the indicator is in a draft state, it may be fully edited and modified by the M&E Directorate group user.
2. When all required information is provided the M&E indicator should be submitted to the M&E directorate. To do that, press the **Submit to DME** button in the top of the M&E Indicator's form (see REFERENCES for details of M&E Indicator's form). The submitted indicators appear in the *Indicator Reference Sheet* list in user's portfolio, as well as under M&E Indicator Progresses list.
   Note: Once the indicator gets submitted, some of its key fields become not editable to all users.
3. The indicator progress for current quarter can be filled after the indicator is submitted to the M&E and should be revised by the manager of the M&E Directorate group users. The following data should be defined by the M&E Directorate:
   - Baseline,
   - End of compact Target,
   - Target for current period.

4. When the above information is provided, the M&E Directorate assigns the indicator to Implementing Entity (IE) by pressing the **Assign to IE** button in the top of the M&E Indicator's form (see REFERENCES for details of M&E Indicator's form).
5. The IE in its turn should insert the actual values. When done, IE manager submits the indicator to the respective Sector Head for an approval, by pressing **Submit to Sector Head** button.
6. If the Sector Head is satisfied with the actual values inserted by the IE, the indicator is processed forward to the M&E Directorate to be published. This is done by pressing the **Submit to DME** button in the top of the M&E Indicator's form (see REFERENCES for details of M&E Indicator's form). Otherwise, if Sector Head considers the actual values inacceptable or incomplete, the indicator is assigned back to the IE for a revision. This is done by pressing **Assign to IE** button in the top of the M&E Indicator's form (see REFERENCES for details of M&E Indicator's form). Once IE is done with the actual values, the indicator is submitted back to the Sector Head and processed forward to the M&E manager for publishing.
7. The M&E Directorate can approve and publish the indicator progress by pressing **Publish** button, or resubmit it to IE for revision. If the indicator progress for current quarter is published, it will be public and available for analytics. Further from this point no previous data in the indicator's Progress can be modified by M&E Directorate and IE managers and the Sector Head, only the Administrator has the access to change data for previous quarters.

   Note: M&E can publish the indicator in any state.

   Attention: The indicator's progress should be published on the quarterly basis, independent on the interval the progress is defined in. Any published progress appears in a read-only mode and is available for analytics. The published progress can only be changed by MIS administrator. The indicator's progress for current quarter is available in the user's portfolio, under *Quarterly Reporting in Progress* list.

6.2.2 User Privileges to Edit M&E Indicator Data

The privileges of users in all states of the M&E Indicator are described in the table below:

User Role	Draft M&E Indicator	Submitted M&E Indicator	Indicator M&E Progress
Administrator	Full access to all fields	*General Information Section* – full access to all fields, except: ● Classification Type ● Frequency ● Disaggregated By *Progress Section* – access only to the up to current date data.	Has the same access privileges as M&E Directorate (described below), when M&E has access to the indicator, and has the privileges of IE (described below) when the IE has access to the indicator.

M&E Directorate Group	Full access to all fields	*General Information Section* – full access to all fields, except: ● Classification Type ● Frequency ● Disaggregated By *Progress Section* – no access.	The following fields are editable. ● Baseline, ● End of Compact Target, ● Target fields for current period. **Note:** M&E Directorate can update above mentioned fields, only if indicator is in the "Submitted to DME" state.
IE Group	No access	No access	The following fields are editable: ● Actual, ● Comment for current period. **Note:** IE can update above mentioned fields, only if indicator is in the "Assigned to IE" state.
Sector Head	No access	No access	The following fields are editable: ● Actual, ● Comment for current period. **Note:** Sector Head can update above mentioned fields, only if indicator is in the "Submitted to Sector Head" state.

6.2.3 Adding new Indicator

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

1. Go to the **M&E Indicators** section of *My Portfolio* module.
2. Click the **Create New Indicator** button (Figure 9).
3. This will open an **M&E Indicators** form which is described in the M&E Indicators Application Users Manual, see REFERENCES.

6.2.4 Viewing Indicator Details

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

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

1. Go to the *My Portfolio* module.
2. Click on the **M&E Indicators** link.

3. Expand the *My Draft Indicators*, *Indicator Reference Sheet* or *Quarterly Reporting in Progress* lists as needed (Figure 9).
4. Click on the M&E Indicator you wish to see the details for. This will open indicator's details. For details, see DETAILS SECTION.

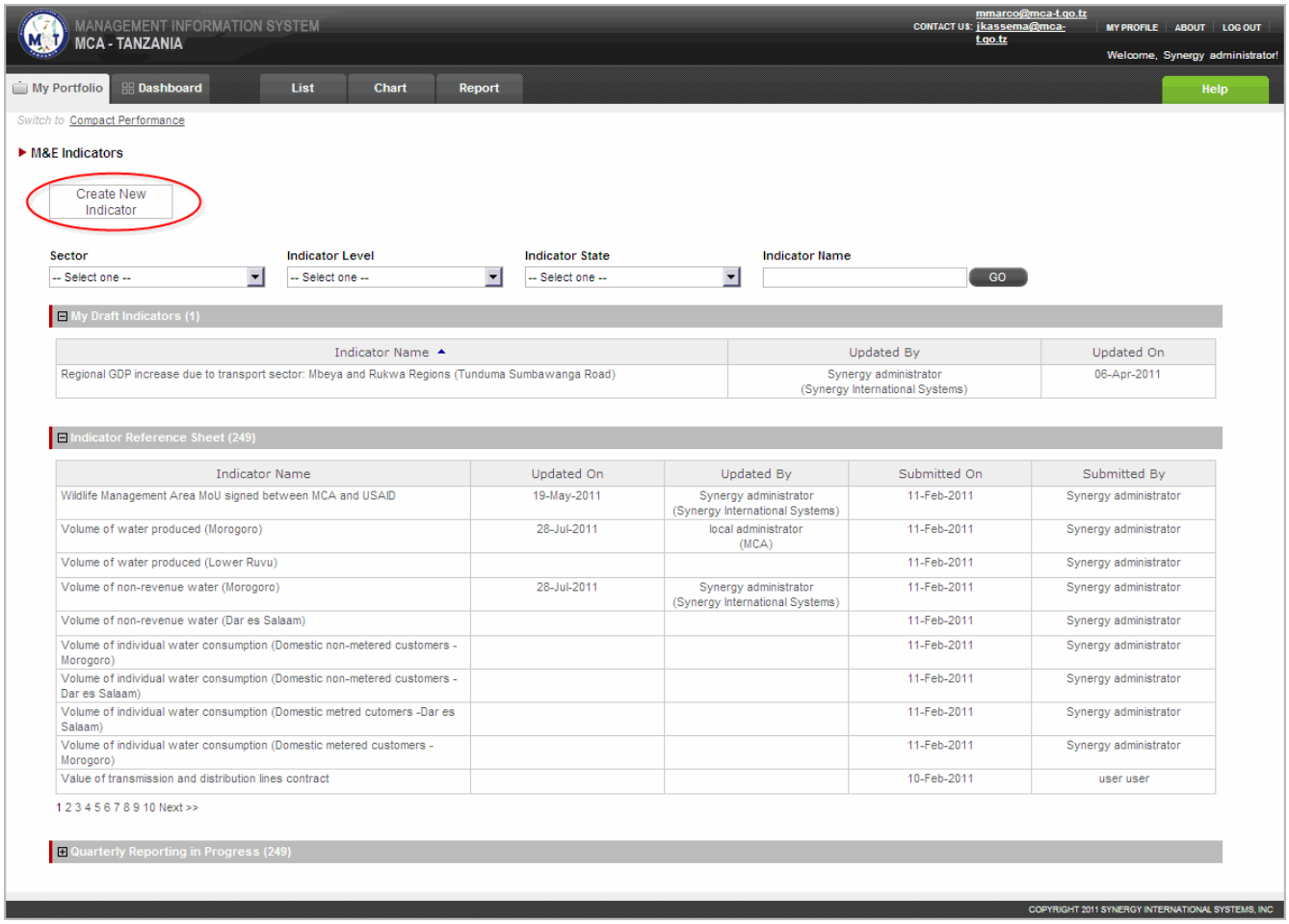


Figure 9: M&E Indicators Section in My Portfolio

7. 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, *MIS* 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.

7.1 Key Features

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

- ✓ 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.

7.2 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.

7.3 Main Screen and Its Components

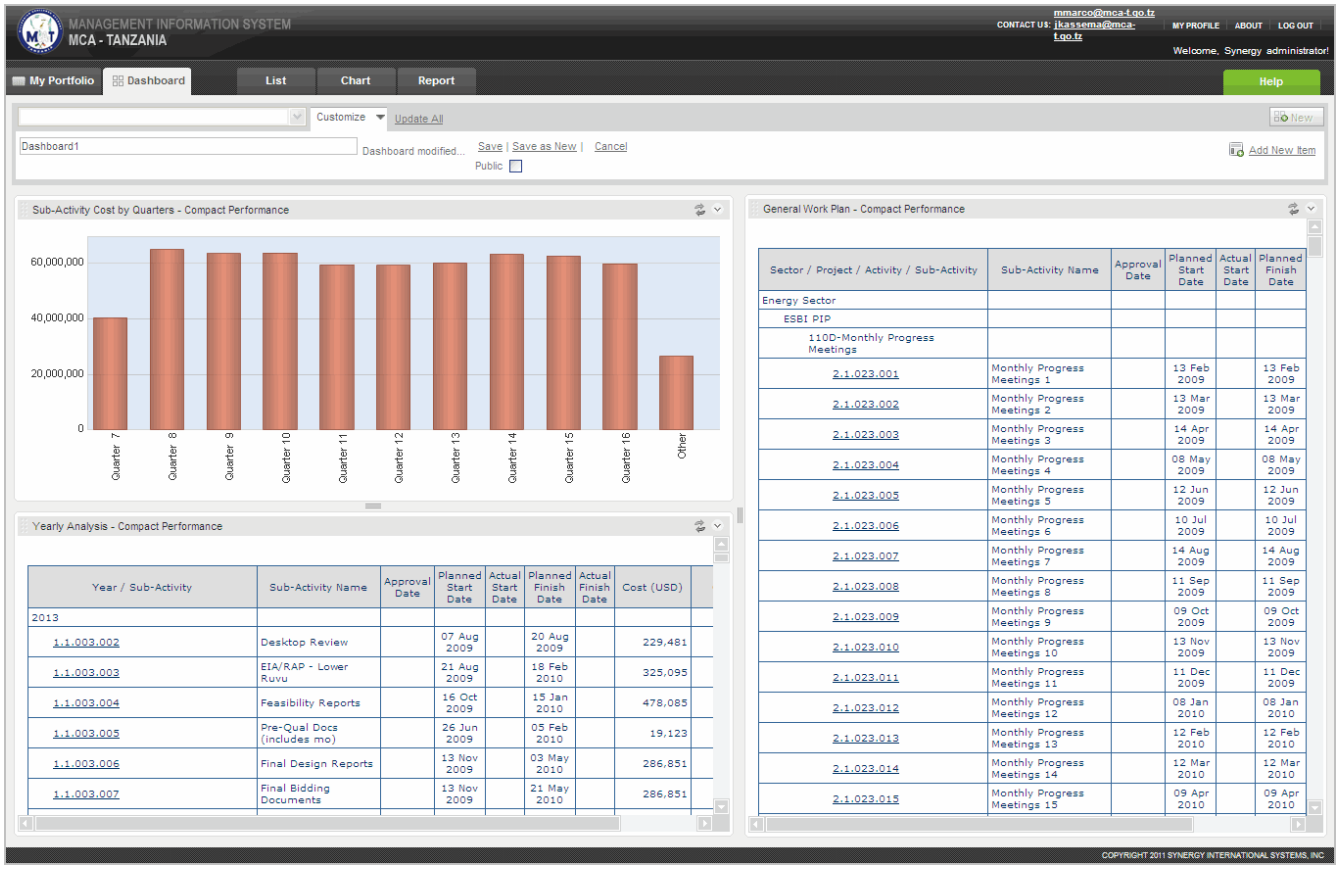


Figure 10: Dashboard Module

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

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

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

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

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

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

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

7.4 Dashboard Management

7.4.1 Create a New Dashboard

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

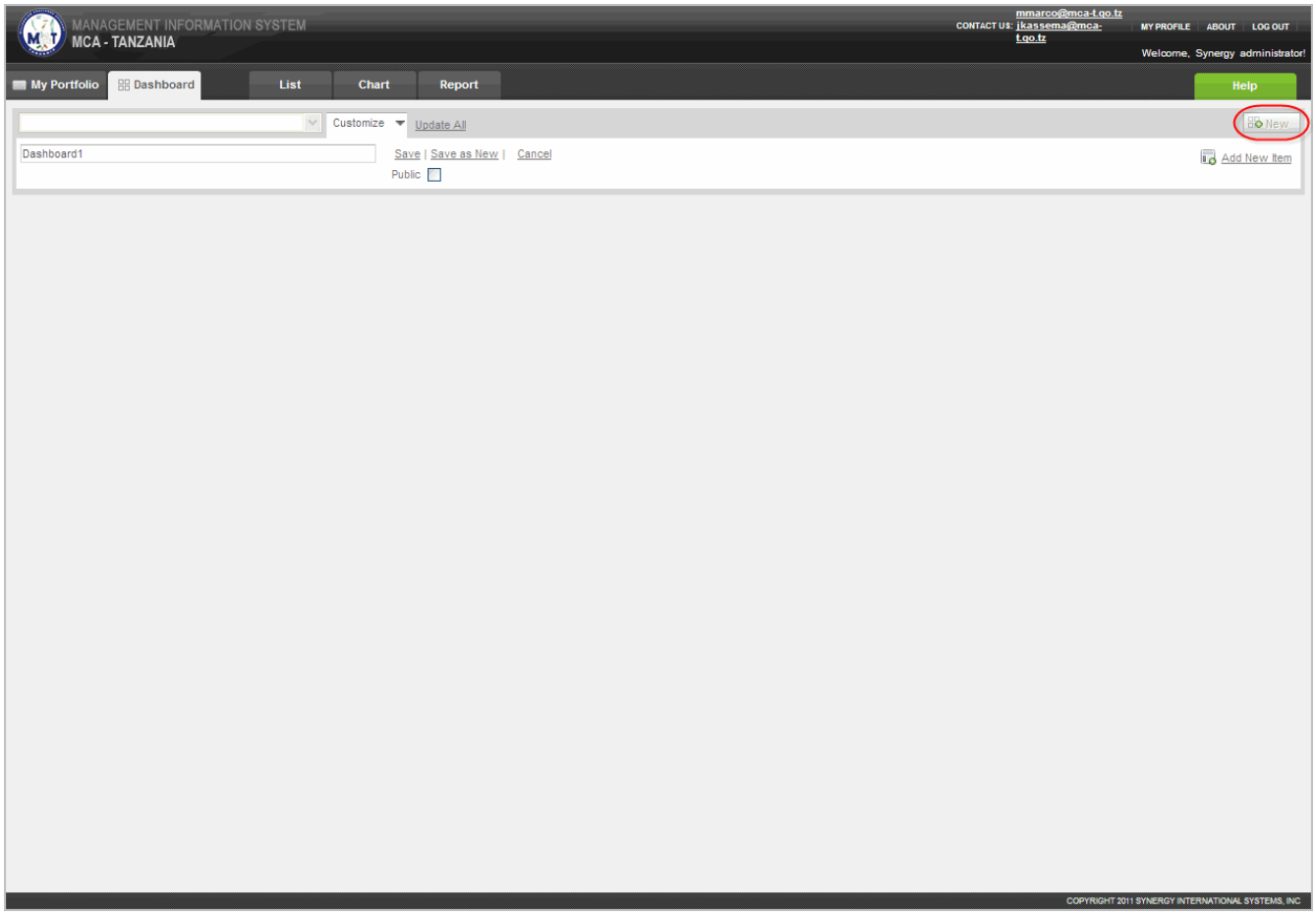


Figure 11: Adding a New Dashboard

1. Click the **New** button at the upper right corner of the screen. New field appears in the left part of the screen to give a name other than the default one to the dashboard and to save it. Also, the list of all existing pre-defined reports is used to add new items to the dashboard (Figure 11).
2. Give the desired name to the dashboard.
3. Add reports to the dashboard, see Add an Item to a Dashboard.
4. Save it.

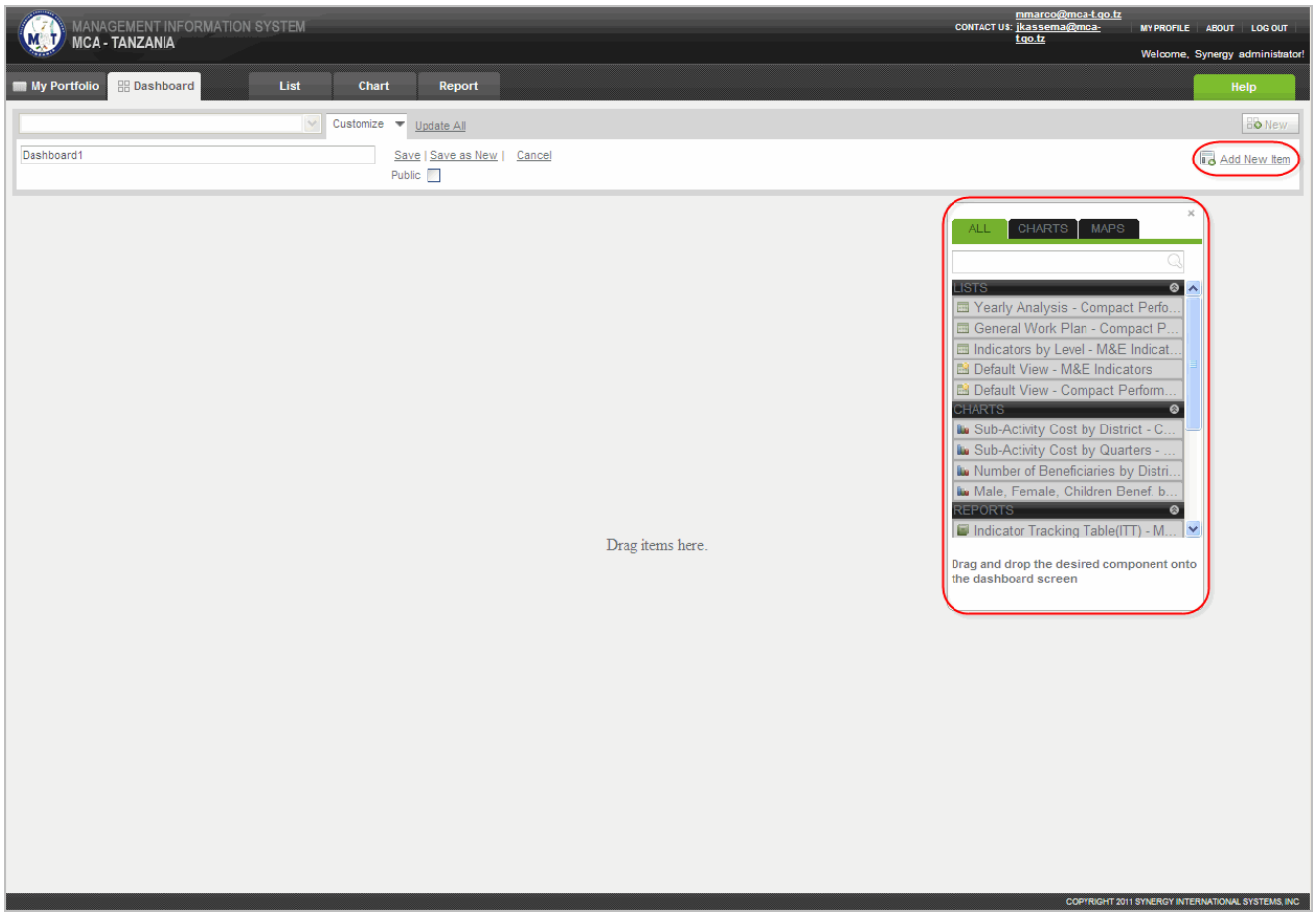


Figure 12: List of Pre-defined Reports

7.4.2 Add an Item to a Dashboard

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

1. Click the **Add New Item** link. The list of all reports previously saved reports will appear (Figure 12).
2. Select a report to add to a dashboard and drag-and-drop it onto the main screen.
3. If you want to add another report to the dashboard, select it in the list, drag it onto the main screen and hold the left mouse button until a green rectangle appears on the screen indicating an area where the new report can be placed (Figure 13).
4. You may add multiple reports to the dashboard.

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

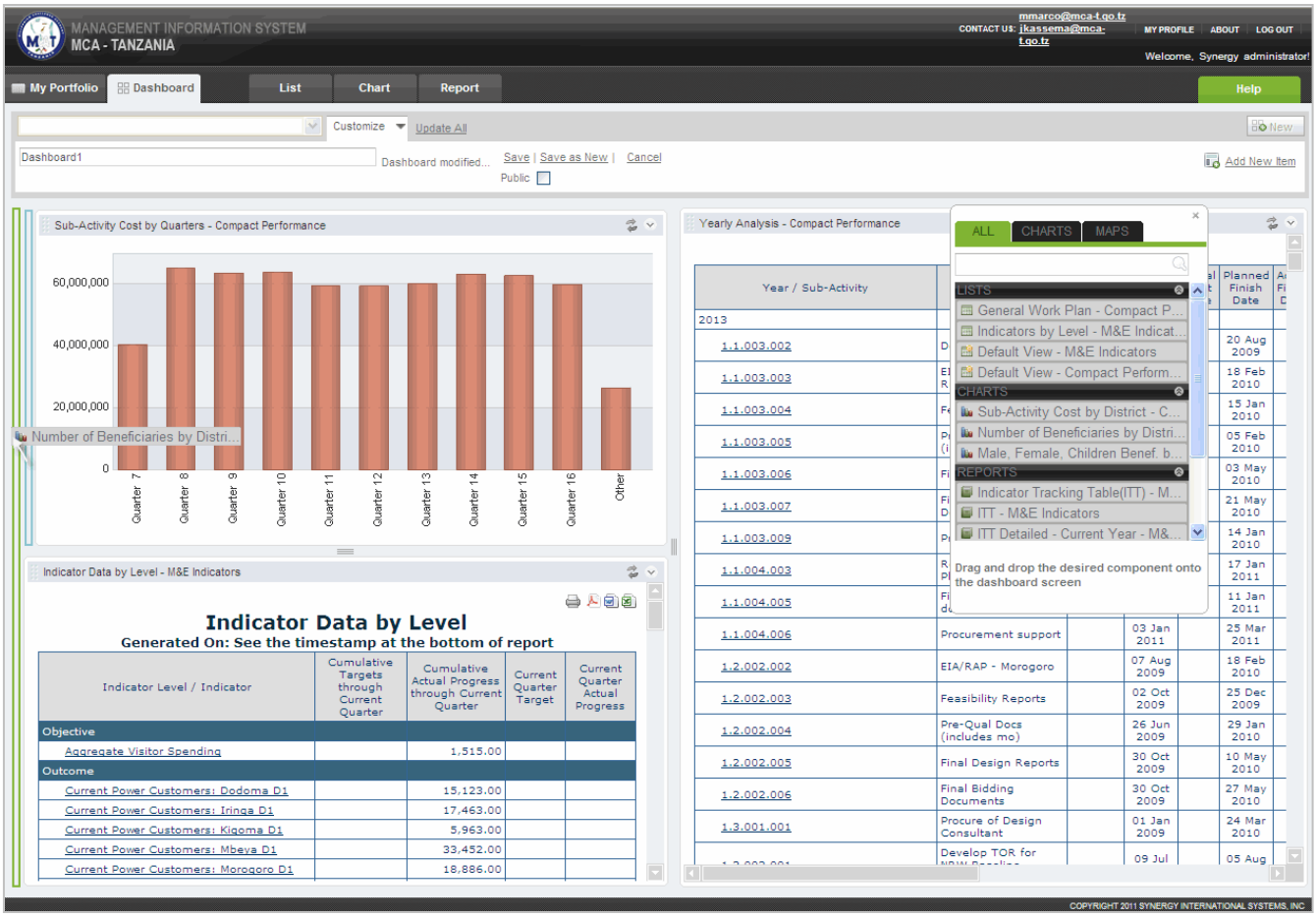


Figure 13: Adding a New Report

7.4.3 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 14).
2. Take the necessary action.
3. Save the changes.

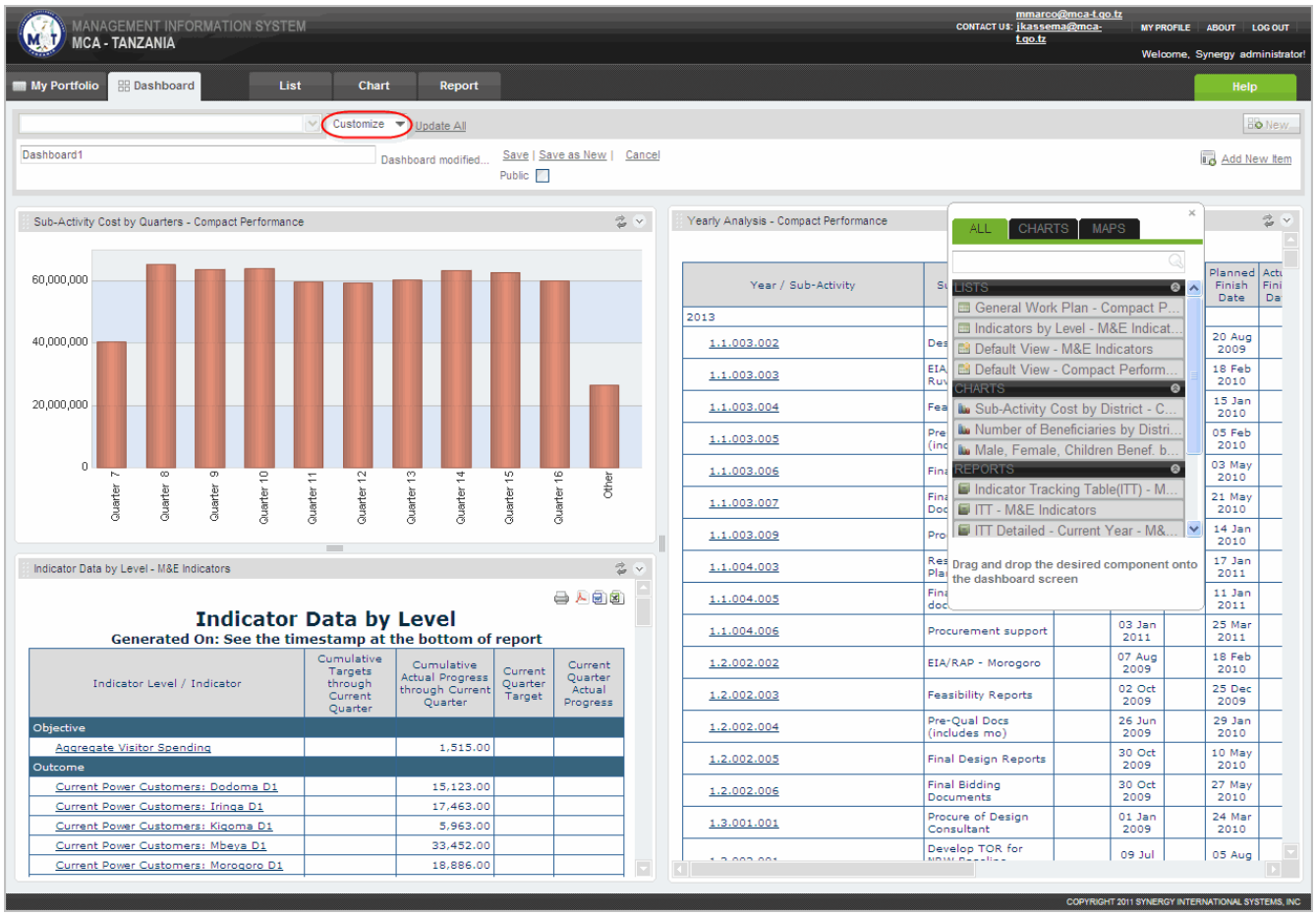


Figure 14: Customizing a Dashboard

7.4.4 Save a Dashboard

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

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

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

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

7.4.5 Delete a Dashboard

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

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

7.4.6 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.

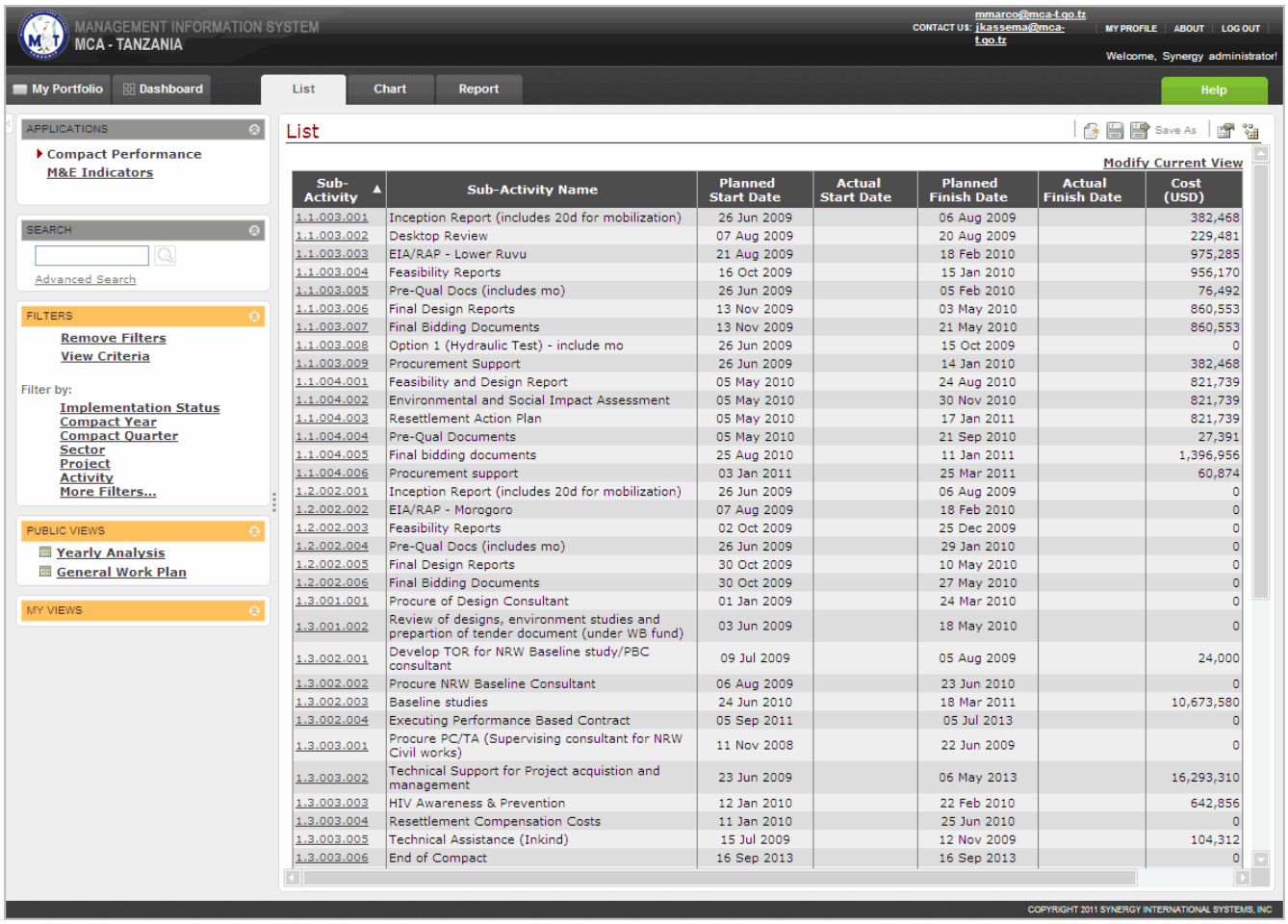
7.4.7 Update Data

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.

8. LIST MODULE

In the *List* module (Figure 15) of *MIS* application, you can create and execute ad-hoc queries on the data, and acquire results in the form of a list.



Sub-Activity	Sub-Activity Name	Planned Start Date	Actual Start Date	Planned Finish Date	Actual Finish Date	Cost (USD)
1.1.003.001	Inception Report (includes 20d for mobilization)	26 Jun 2009		06 Aug 2009		382,468
1.1.003.002	Desktop Review	07 Aug 2009		20 Aug 2009		229,481
1.1.003.003	EIA/RAP - Lower Ruvu	21 Aug 2009		18 Feb 2010		975,285
1.1.003.004	Feasibility Reports	16 Oct 2009		15 Jan 2010		956,170
1.1.003.005	Pre-Qual Docs (includes mo)	26 Jun 2009		05 Feb 2010		76,492
1.1.003.006	Final Design Reports	13 Nov 2009		03 May 2010		860,553
1.1.003.007	Final Bidding Documents	13 Nov 2009		21 May 2010		860,553
1.1.003.008	Option 1 (Hydraulic Test) - include mo	26 Jun 2009		15 Oct 2009		0
1.1.003.009	Procurement Support	26 Jun 2009		14 Jan 2010		382,468
1.1.004.001	Feasibility and Design Report	05 May 2010		24 Aug 2010		821,739
1.1.004.002	Environmental and Social Impact Assessment	05 May 2010		30 Nov 2010		821,739
1.1.004.003	Resettlement Action Plan	05 May 2010		17 Jan 2011		821,739
1.1.004.004	Pre-Qual Documents	05 May 2010		21 Sep 2010		27,391
1.1.004.005	Final bidding documents	25 Aug 2010		11 Jan 2011		1,396,956
1.1.004.006	Procurement support	03 Jan 2011		25 Mar 2011		60,874
1.2.002.001	Inception Report (includes 20d for mobilization)	26 Jun 2009		06 Aug 2009		0
1.2.002.002	EIA/RAP - Morogoro	07 Aug 2009		18 Feb 2010		0
1.2.002.003	Feasibility Reports	02 Oct 2009		25 Dec 2009		0
1.2.002.004	Pre-Qual Docs (includes mo)	26 Jun 2009		29 Jan 2010		0
1.2.002.005	Final Design Reports	30 Oct 2009		10 May 2010		0
1.2.002.006	Final Bidding Documents	30 Oct 2009		27 May 2010		0
1.3.001.001	Procure of Design Consultant	01 Jan 2009		24 Mar 2010		0
1.3.001.002	Review of designs, environment studies and prepartion of tender document (under WB fund)	03 Jun 2009		18 May 2010		0
1.3.002.001	Develop TOR for NRW Baseline study/PBC consultant	09 Jul 2009		05 Aug 2009		24,000
1.3.002.002	Procure NRW Baseline Consultant	06 Aug 2009		23 Jun 2010		0
1.3.002.003	Baseline studies	24 Jun 2010		18 Mar 2011		10,673,580
1.3.002.004	Executing Performance Based Contract	05 Sep 2011		05 Jul 2013		0
1.3.003.001	Procure PC/TA (Supervising consultant for NRW Civil works)	11 Nov 2008		22 Jun 2009		0
1.3.003.002	Technical Support for Project acquistion and management	23 Jun 2009		06 May 2013		16,293,310
1.3.003.003	HIV Awareness & Prevention	12 Jan 2010		22 Feb 2010		642,856
1.3.003.004	Resettlement Compensation Costs	11 Jan 2010		25 Jun 2010		0
1.3.003.005	Technical Assistance (Inkind)	15 Jul 2009		12 Nov 2009		104,312
1.3.003.006	End of Compact	16 Sep 2013		16 Sep 2013		0

Figure 15: List Module

8.1 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.

8.2 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.

8.3 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.

8.4 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 16) 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.

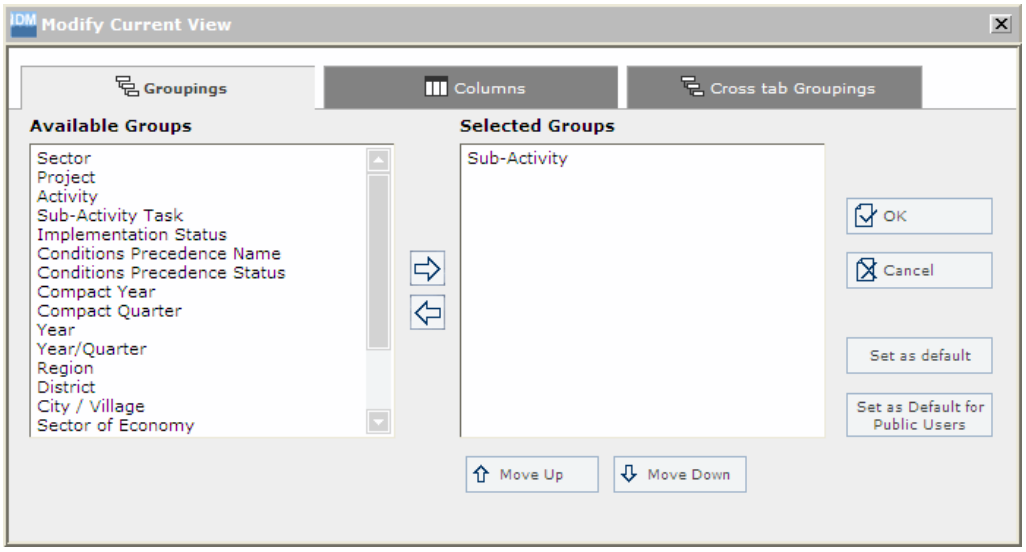


Figure 16: Modifying the Current View

8.5 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.

8.6 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.

8.7 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.

8.8 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.

8.9 Sample Views

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

8.9.1 Sample View 1: Sub-activities Distribution by Implementation Status

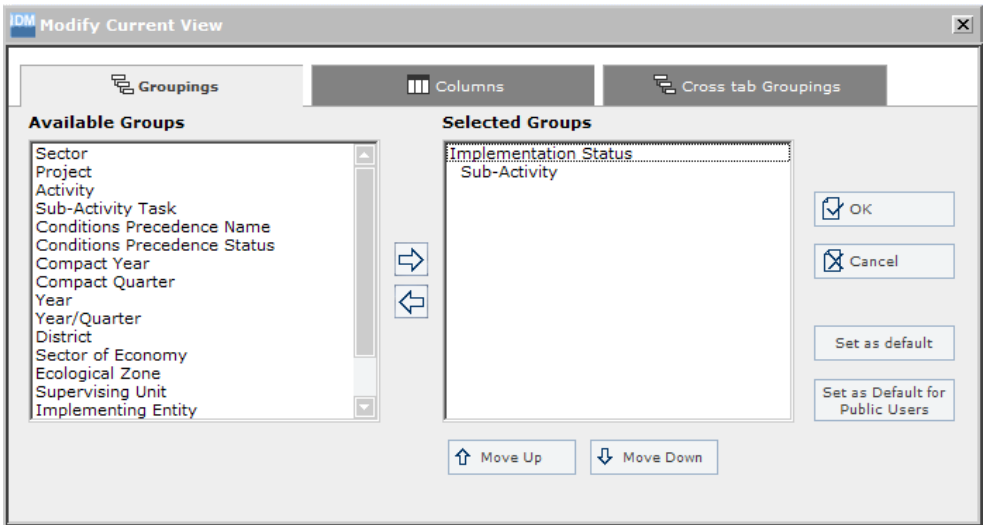


Figure 17: Defining List View Groupings for sample view 1

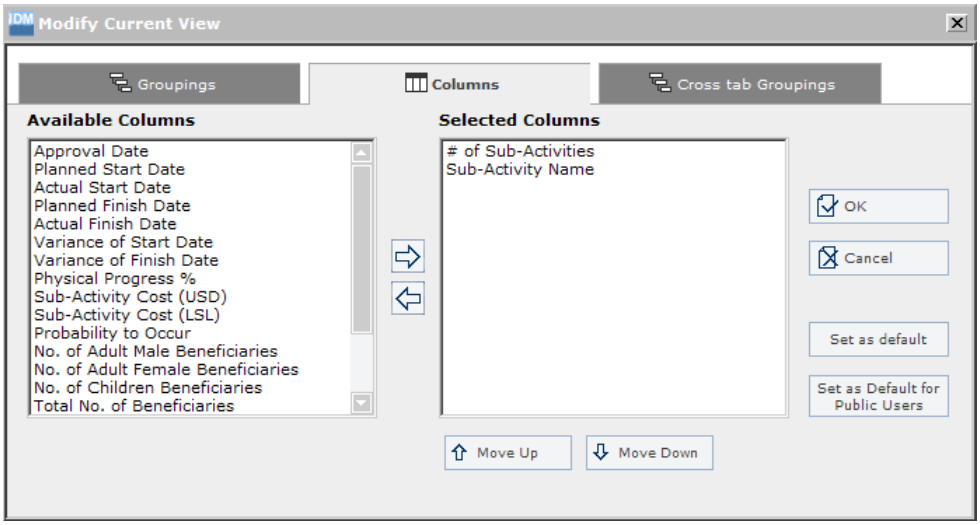


Figure 18: Defining List View Columns for sample view 1

If you have indicated **Implementation Status** / **Sub-Activity** hierarchy as a grouping (Figure 11) and, **# of Sub-Activities** / **Sub-Activity Name** as columns (Figure 12), following list view will appear (Figure 13):

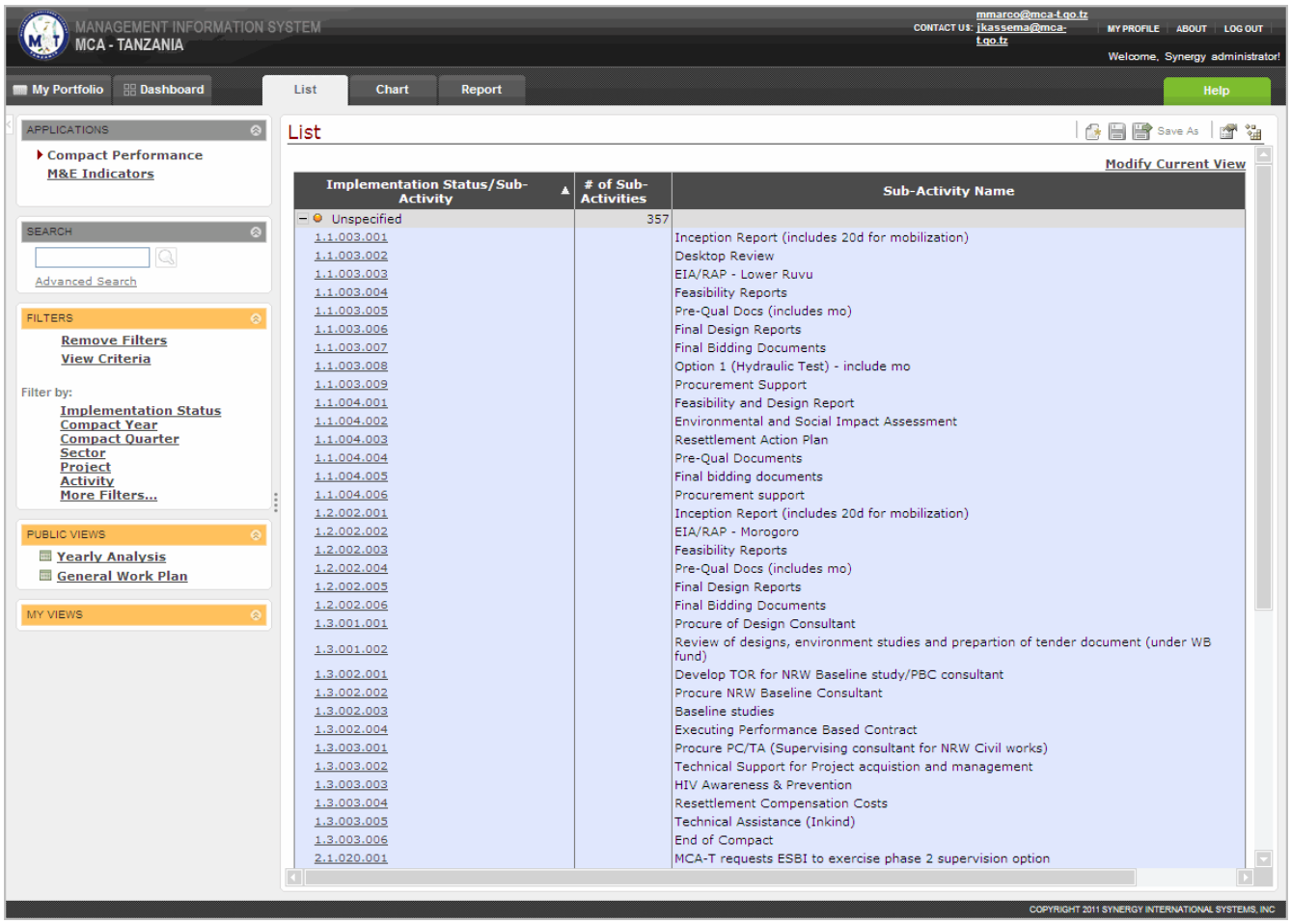


Figure 19: Sample View 1

8.9.2 Sample View 2: Sub-activities Distribution by Location

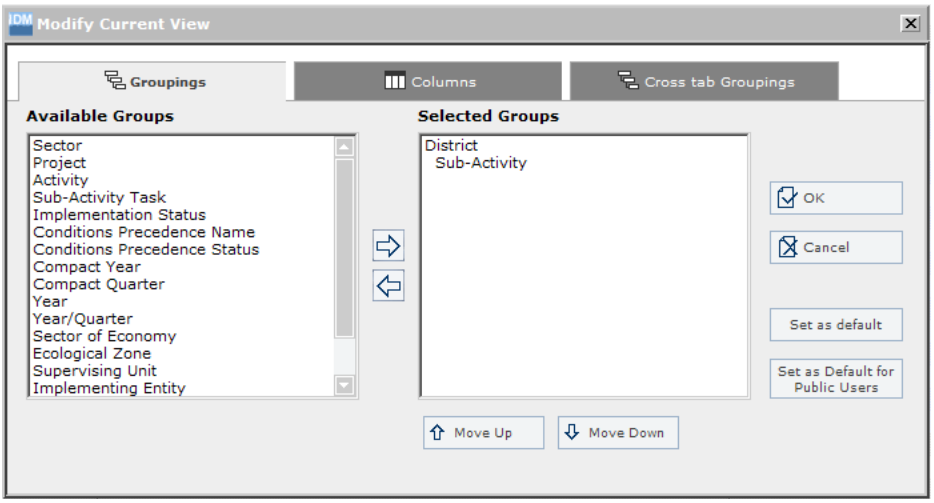


Figure 20: Defining List View Groupings for sample view 2

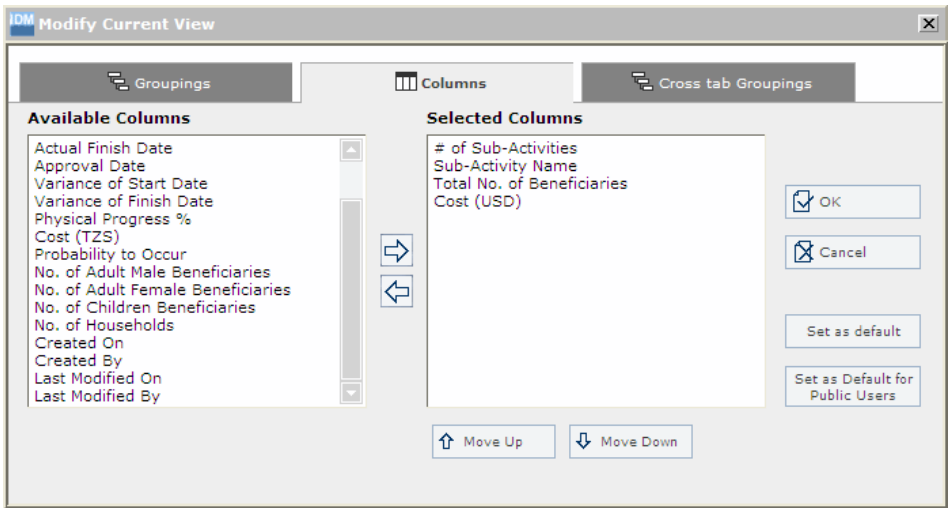


Figure 21: Defining List View Columns for sample view 2

If you have indicated **District** / **Sub-activity** hierarchy as a grouping (Figure 14) and, **# of Sub-Activities** / **Sub-Activity Name** / **Total No. of Beneficiaries** / **Cost (USD)** as columns (Figure 15), following list view will appear (Figure 16):

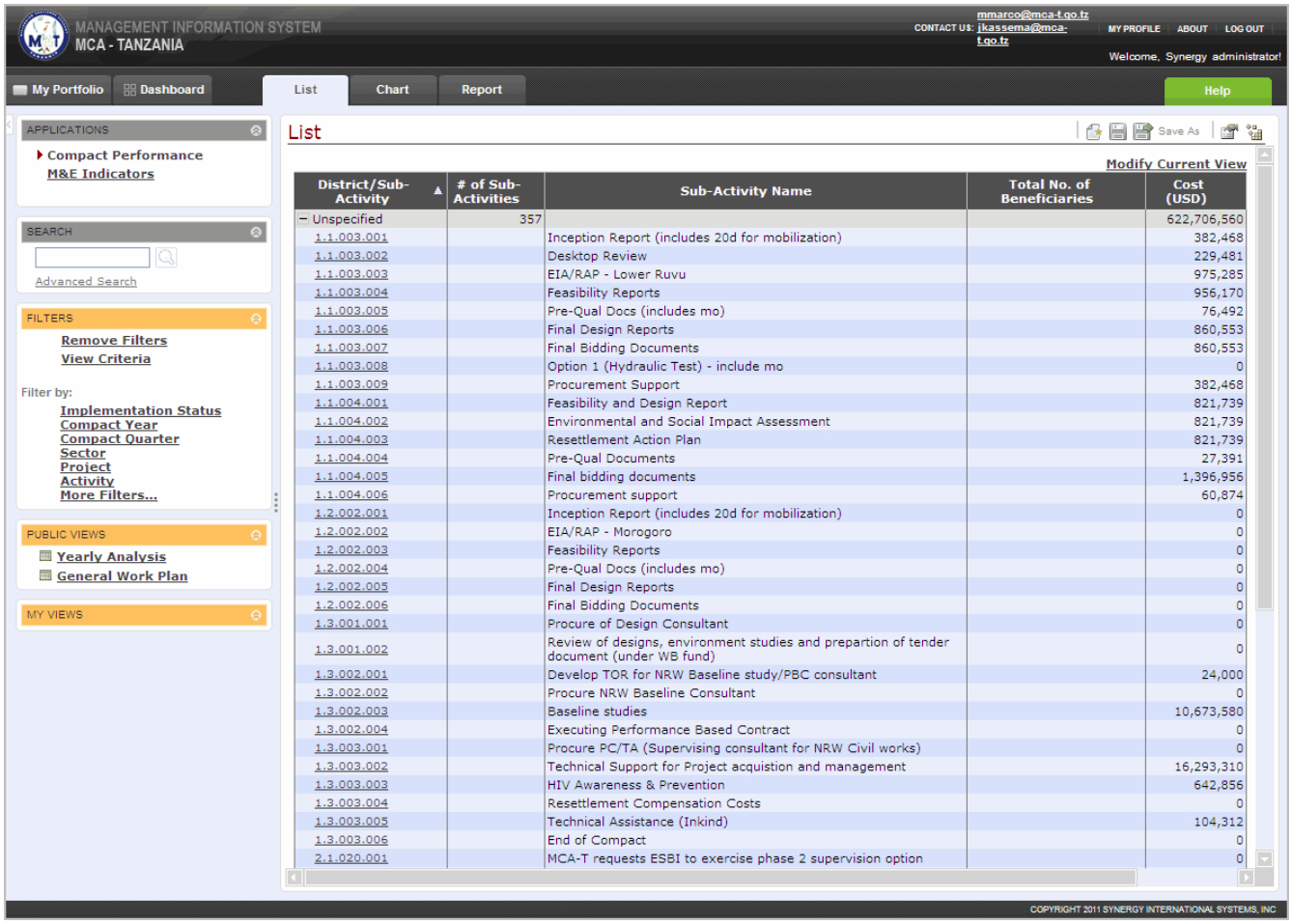


Figure 22: Sample View 2

9. CHART MODULE

The *MIS* 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 Key Features

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

- 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 on the **Chart** tab. The *Chart* module appears where a pre-defined chart is displayed.

9.3 Main Screen and Its Components

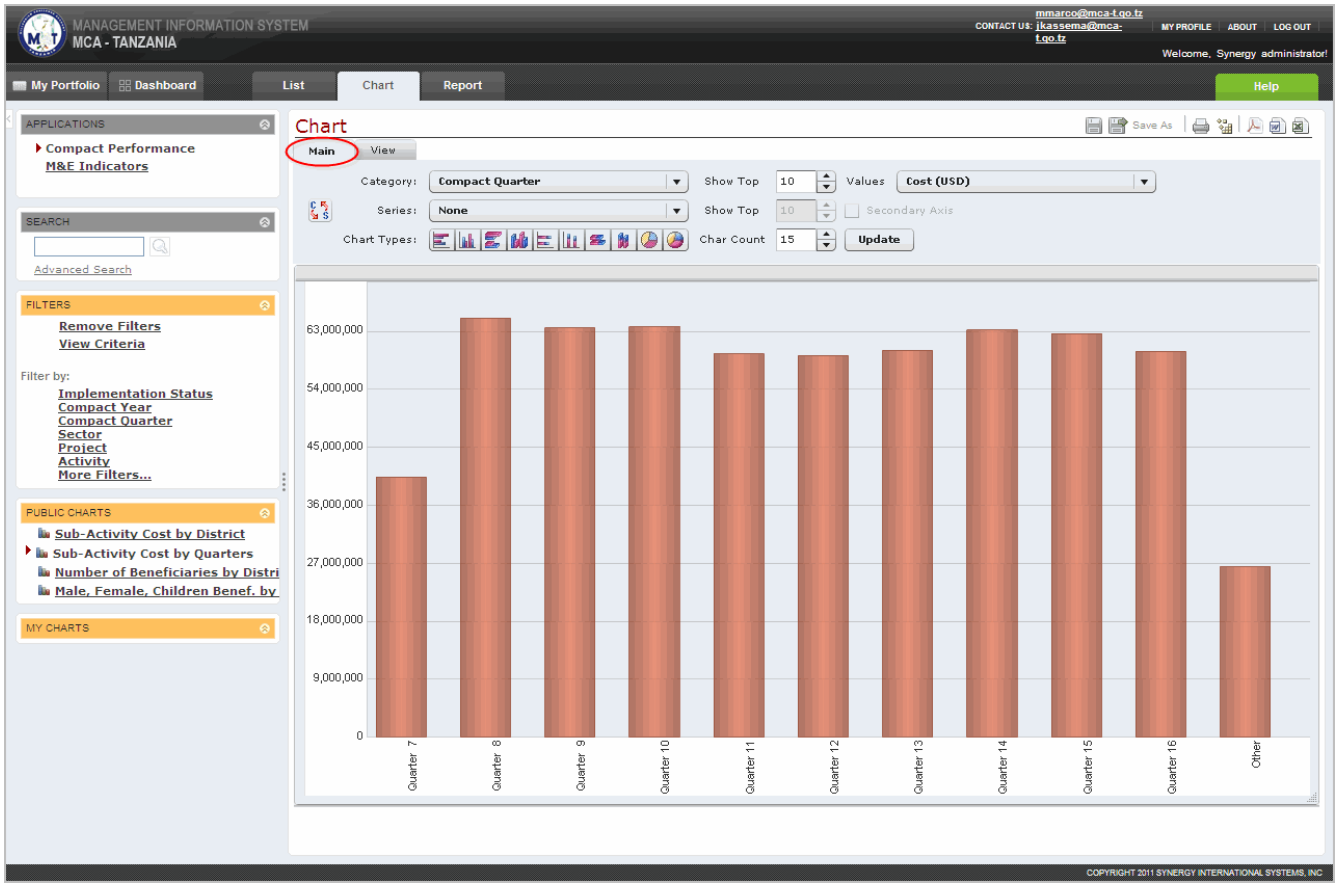


Figure 23: Main Screen of the Chart Module

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

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

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

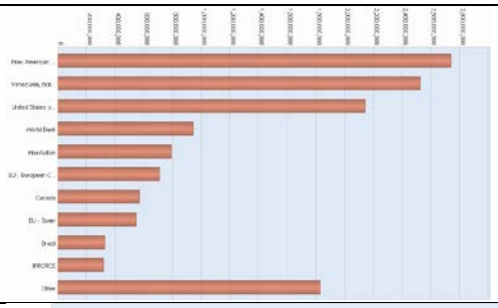
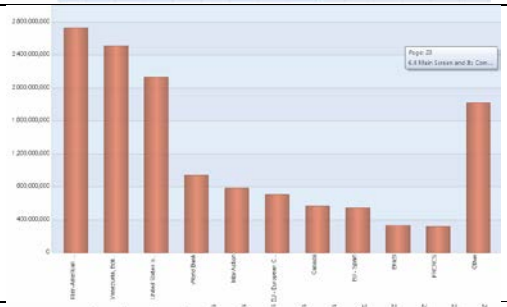
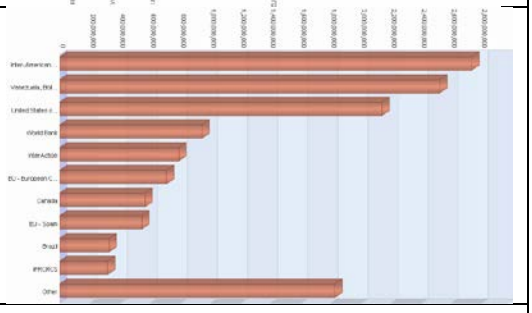
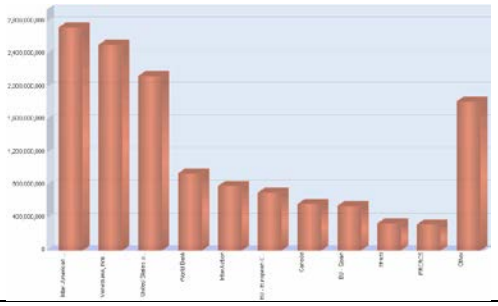
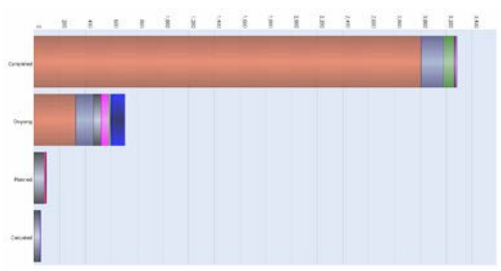
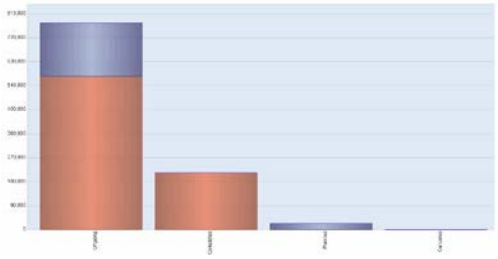
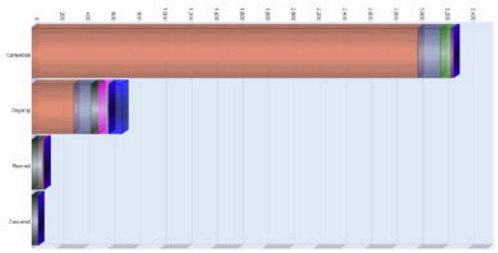
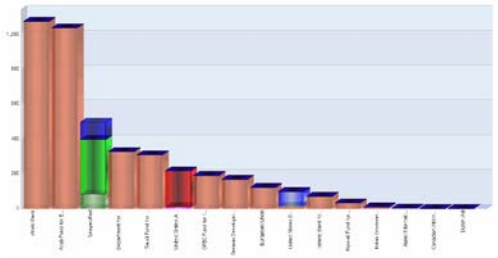
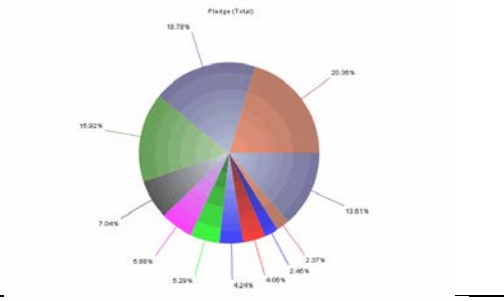
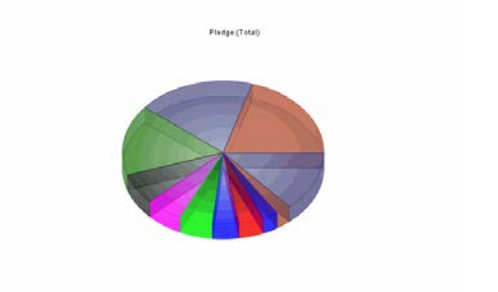
Chart Type	Example
1. Bar chart 	
2. Column chart 	
3. 3D Bar chart 	
4. 3D Column chart 	
5. Stacked Bar chart 	

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

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

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

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

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

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

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

9.4 View Screen and Its Components

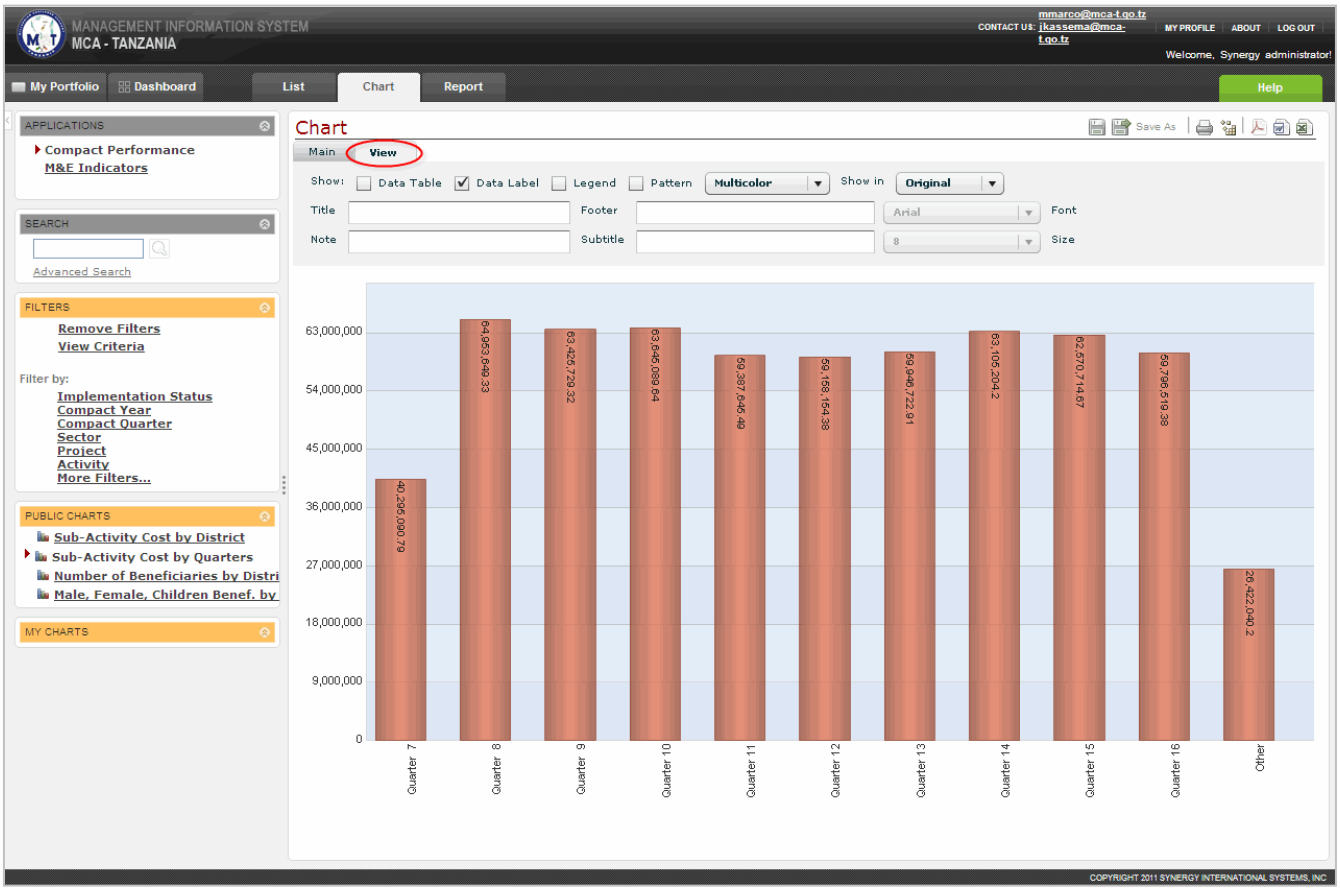


Figure 24: View Screen of the Chart Module

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.

9.5 Sample Chart Reports

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

9.5.1 Sample Chart Report 1: Sub-activities Distribution by Implementation Status

If you have selected the “Implementation Status” as a chart Category, and “No. of Sub-Activities” as values to be shown on the chart, and click on the **3D Column** chart button to specify the chart type and activate the **Data Table** option in the *View* window, the following chart report will appear (Figure 25):

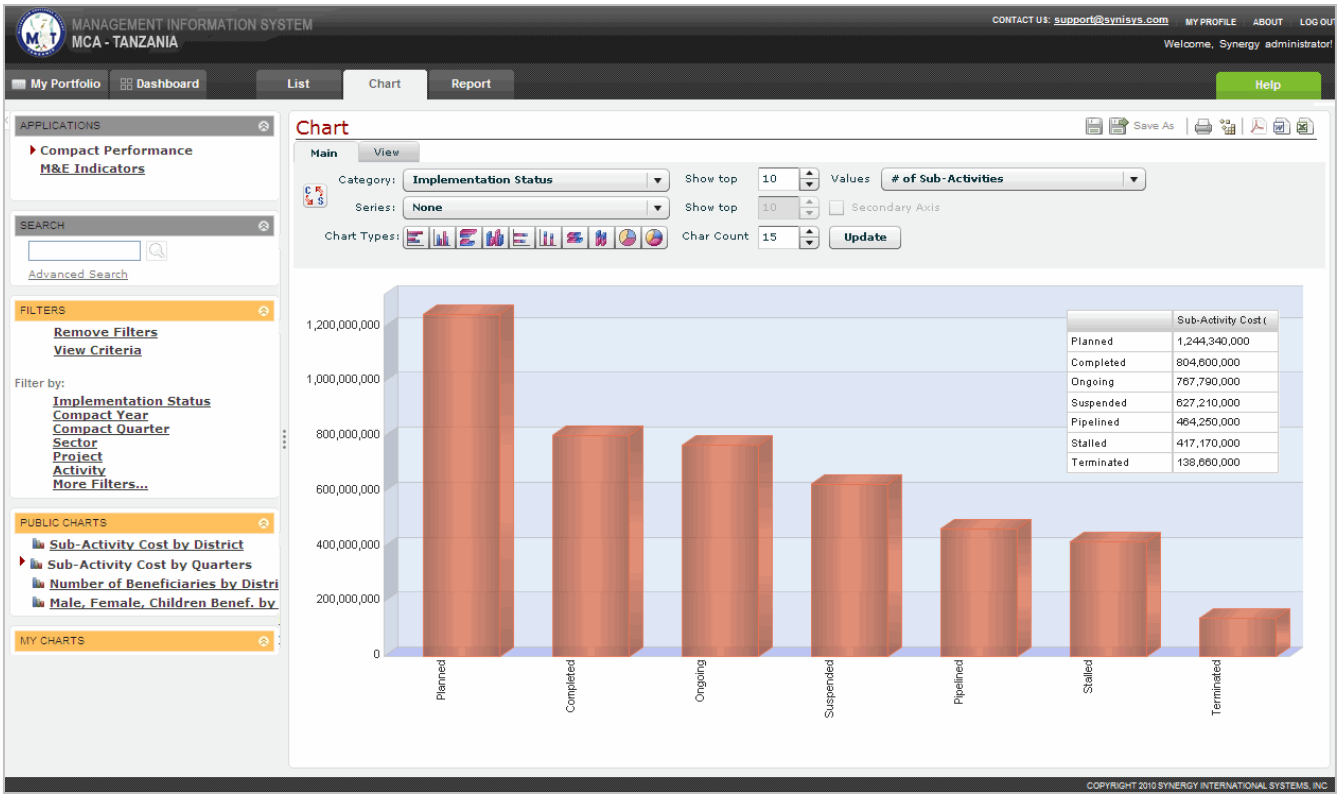


Figure 25: Sample Chart Report 1

9.5.2 Sample Chart Report 2: Sub-activities Distribution by Year/Quarter

If you have selected the “Year/Quarter” as a chart Category, and “No. of Sub-Activities” as values to be shown on the chart, and click on the **Pie** chart button to specify the chart type and activates the **Data Table** and **Legend** options in the *View* window, the following chart report will appear (Figure 26):

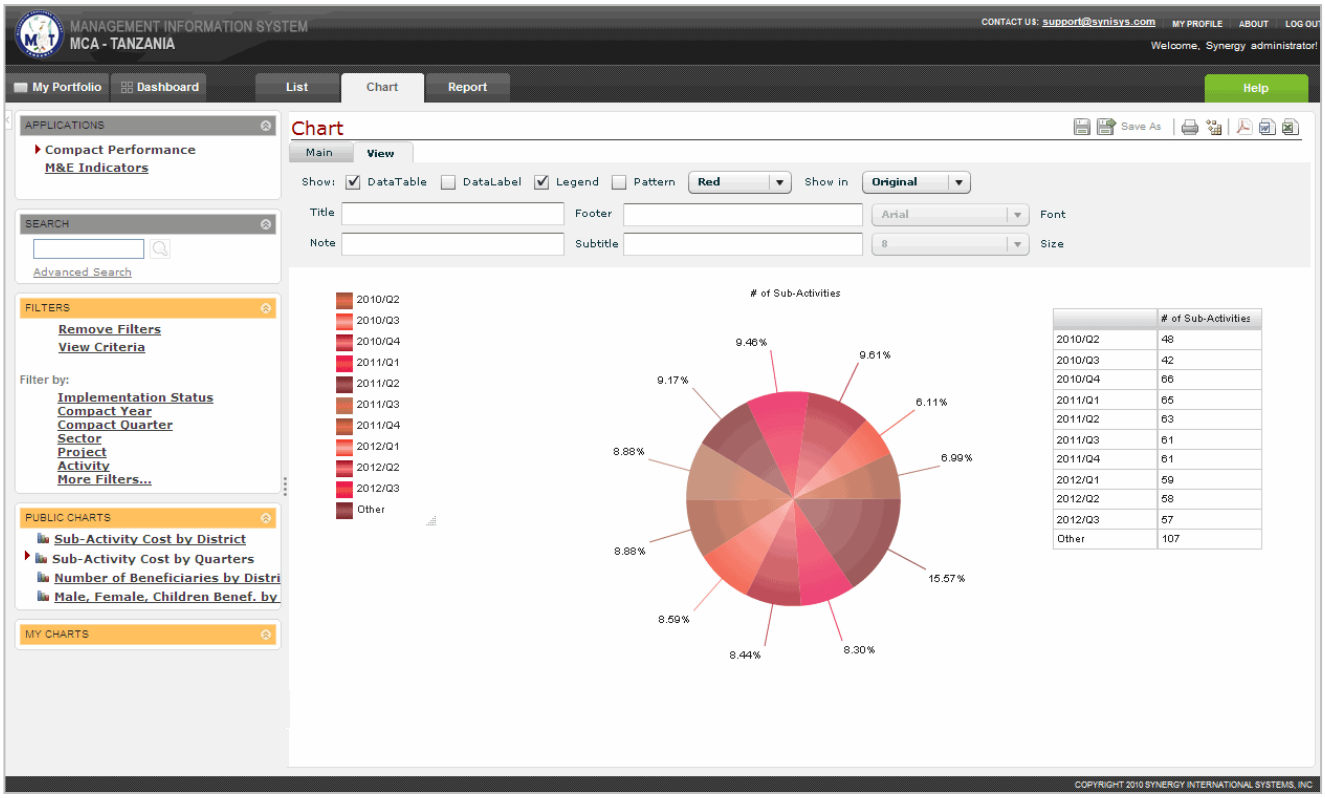


Figure 26: Sample Chart Report 2

10. REPORT MODULE

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

10.1 Accessing the Report Module

As it has been stated above, the system provides for the opportunity to create different sorts of list reports. In order to access the *Report* module of the system, click on the **Report** tab. This will navigate to the *Report* module of the application where the Report Designer (Figure 27) will open.

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

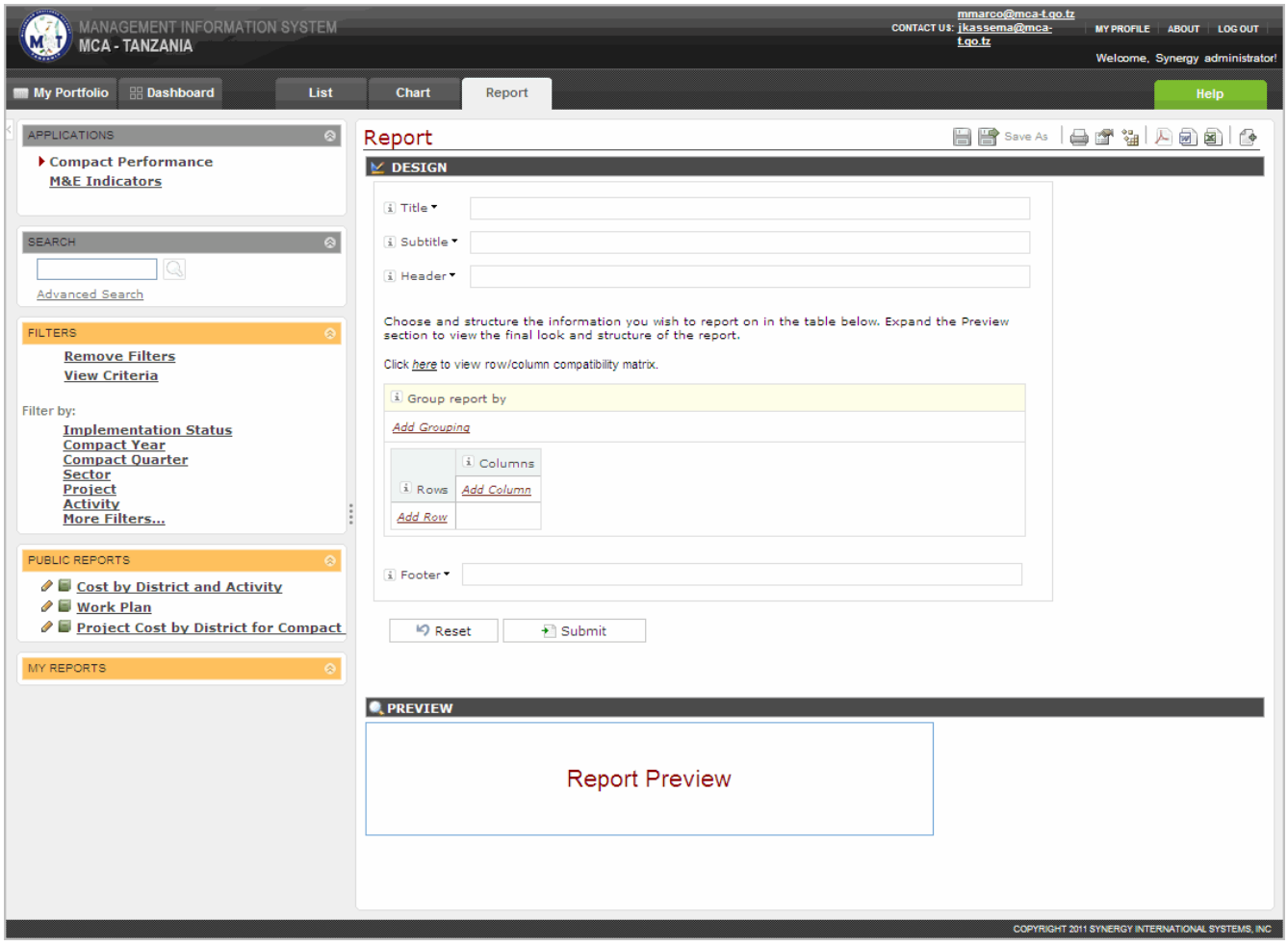


Figure 27: Report Module

10.2 Creating a Report

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

- Text entries – title, subtitle, header, and footer. For these fields, the expected input is a free text.
- Report grouping - allows grouping data according to a specific category. Grouped data appear in different tables. Each table contains data that fall under one group of the category specified.
- Rows - group data within the report table.
- Columns - show details specific to each table row.
- Sub-columns - divide the row details displayed under each column.

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

1. Type the text that should appear as the report title in the 'Title' text box.
2. Enter a 'Subtitle', 'Header', and 'Footer' if needed.
3. In the *Group Report by* section, specify the category, which will be used to group data into different tables. To add a report grouping, click on the **Add Grouping** link in the *Group Report by* section and select the appropriate category from the menu that appears (Figure 28).
   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.

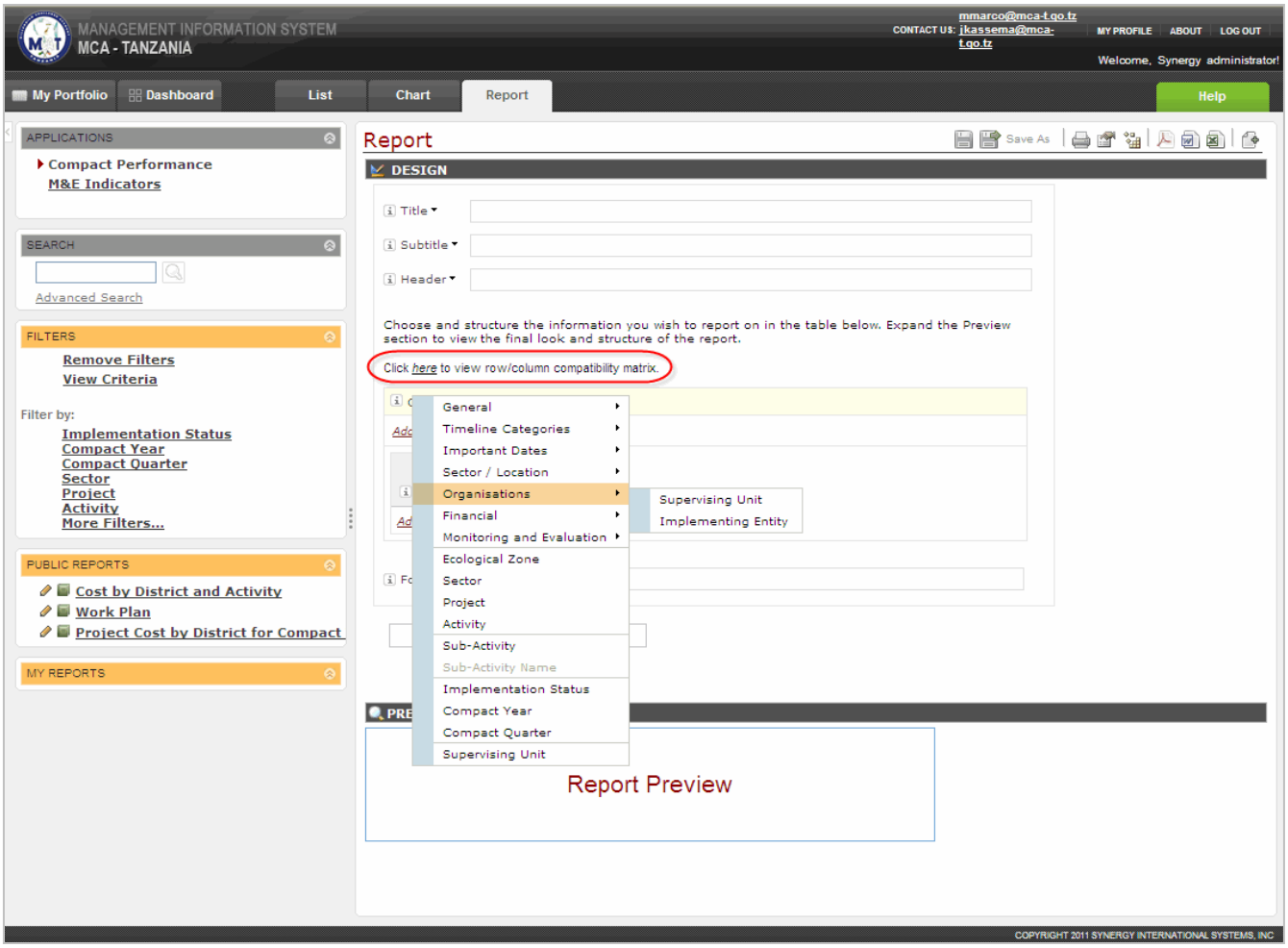
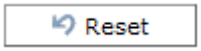


Figure 28: Selecting a Grouping for a Report

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

(Reset) button.

Note: If you have defined a report which has incompatible columns (columns over which reports cannot be generated), they will be marked in red and an error message will occur. To make your reports productive, use the link (as marked in red, Figure 28) to open the Compatibility Matrix table (Figure 29). 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 Sub-Activities	Actual Finish Date	Actual Start Date	Approval Date	Cost (TZS)	Cost (USD)	Created By	Created On	Last Modified By	Last Modified On	No. of Adult Female Beneficiaries	No. of Adult Male Beneficiaries	No. of Children Beneficiaries	No. of Households	Physical Progress %	Planned Finish Date	Planned Start Date	Probability to Occur	Sub-Activity Name	Total No. of Beneficiaries	Variance of Finish Date	Variance of Start Date
Activity	•				•	•					•	•	•	•						•		
City / Village	•				•	•					•	•	•	•						•		
Compact Quarter	•				•	•																
Compact Year	•				•	•																
Conditions Precedence Name	•				•	•					•	•	•	•						•		
Conditions Precedence Status	•				•	•					•	•	•	•						•		
District	•				•	•					•	•	•	•						•		
Ecological Zone	•				•	•					•	•	•	•						•		
Factor Causing Delay	•																					
Implementation Status	•				•	•																
Implementing Entity	•				•	•																
Project	•				•	•					•	•	•	•						•		
Region	•				•	•					•	•	•	•						•		
Risk	•																	•				
Sector	•				•	•					•	•	•	•						•		
Sector of Economy	•				•	•					•	•	•	•						•		
Sub-Activity		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Sub-Activity Task	•				•	•					•	•	•	•						•		
Supervising Unit	•				•	•																
Year	•				•	•																
Year/Quarter	•				•	•																

Figure 29: Compatibility Matrix

10.3 Previewing a Report

At any time during the process of creating a report, look in the *Preview* section at the bottom of the page, in order to view the final structure of the report (Figure 30). The *Preview* will not be ready for viewing unless the user has at least one table row defined.

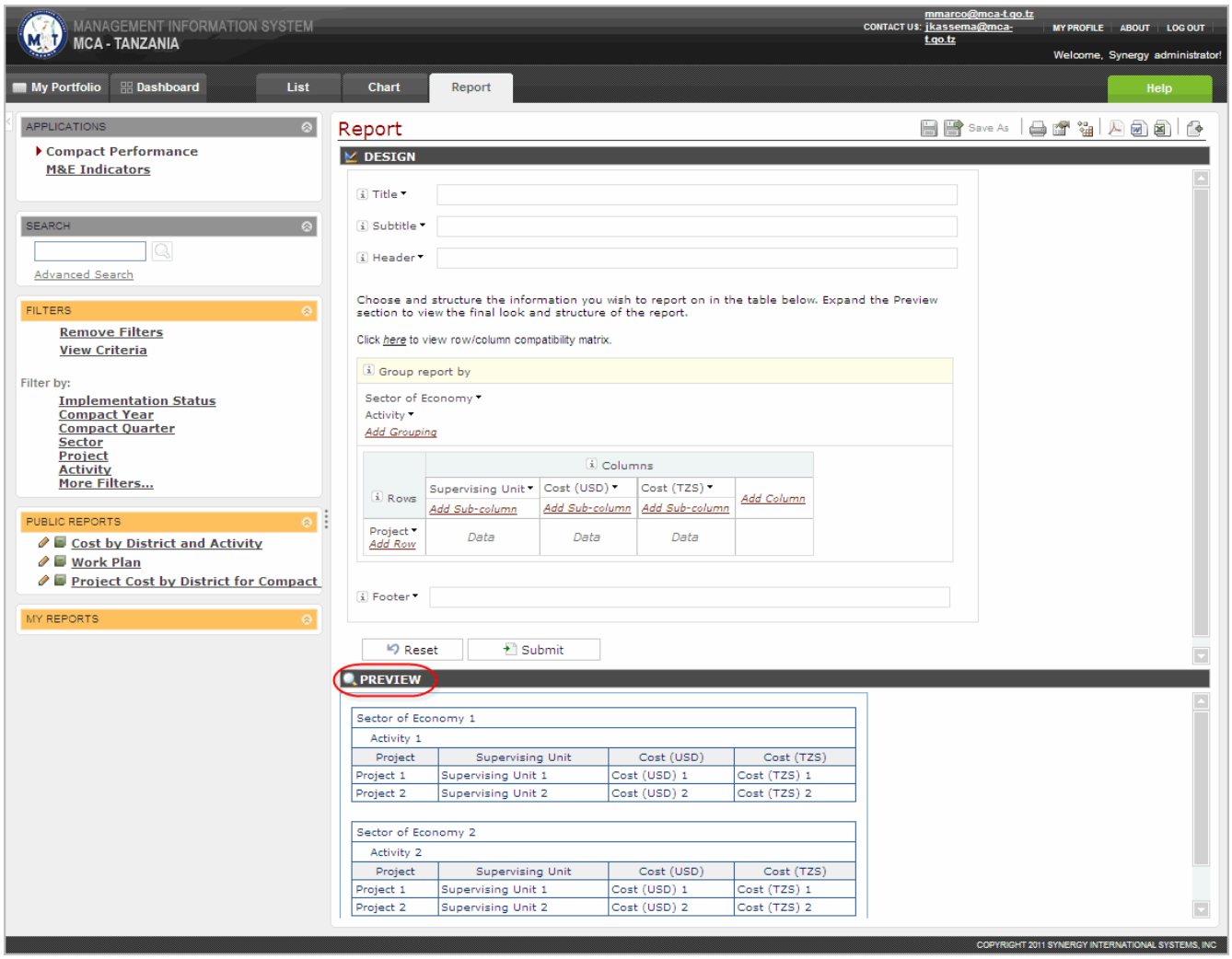


Figure 30: Previewing the Report

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

10.4 Generating a Report

The final step in the process of creating a report is report generation. By clicking the Submit **(Submit)** button, a request to the Reporting Engine is submitted in order to access the database, gather the required data and present it in the manner required. The Report containing all the real data appears in a new window.

10.5 Indicator Tracking Table (ITT)

The **Indicator Tracking Table (ITT)** is a custom report that tracks progress on the indicators included in a country's M&E Plan and it is part of the Quarterly Disbursement Request and Reporting Package (QDRP).

MIS application allows for generating ITT over the data stored in the system.

To access the Indicator Tracking Table (ITT) go to the *Report* module of the *M&E Indicators* application and click the **Indicator Tracking Table (ITT)** link in the *Public Reports* section (Figure 31).

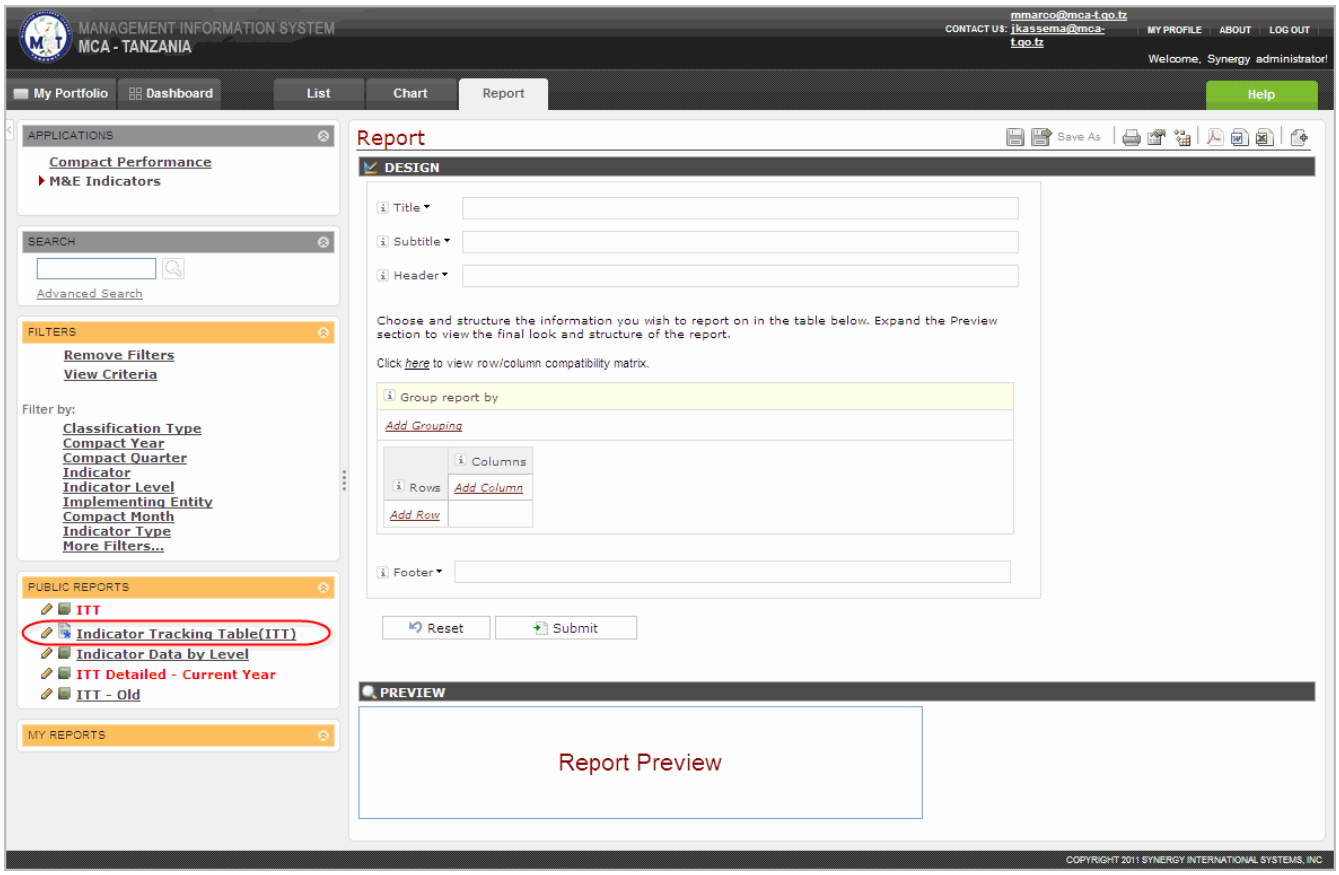
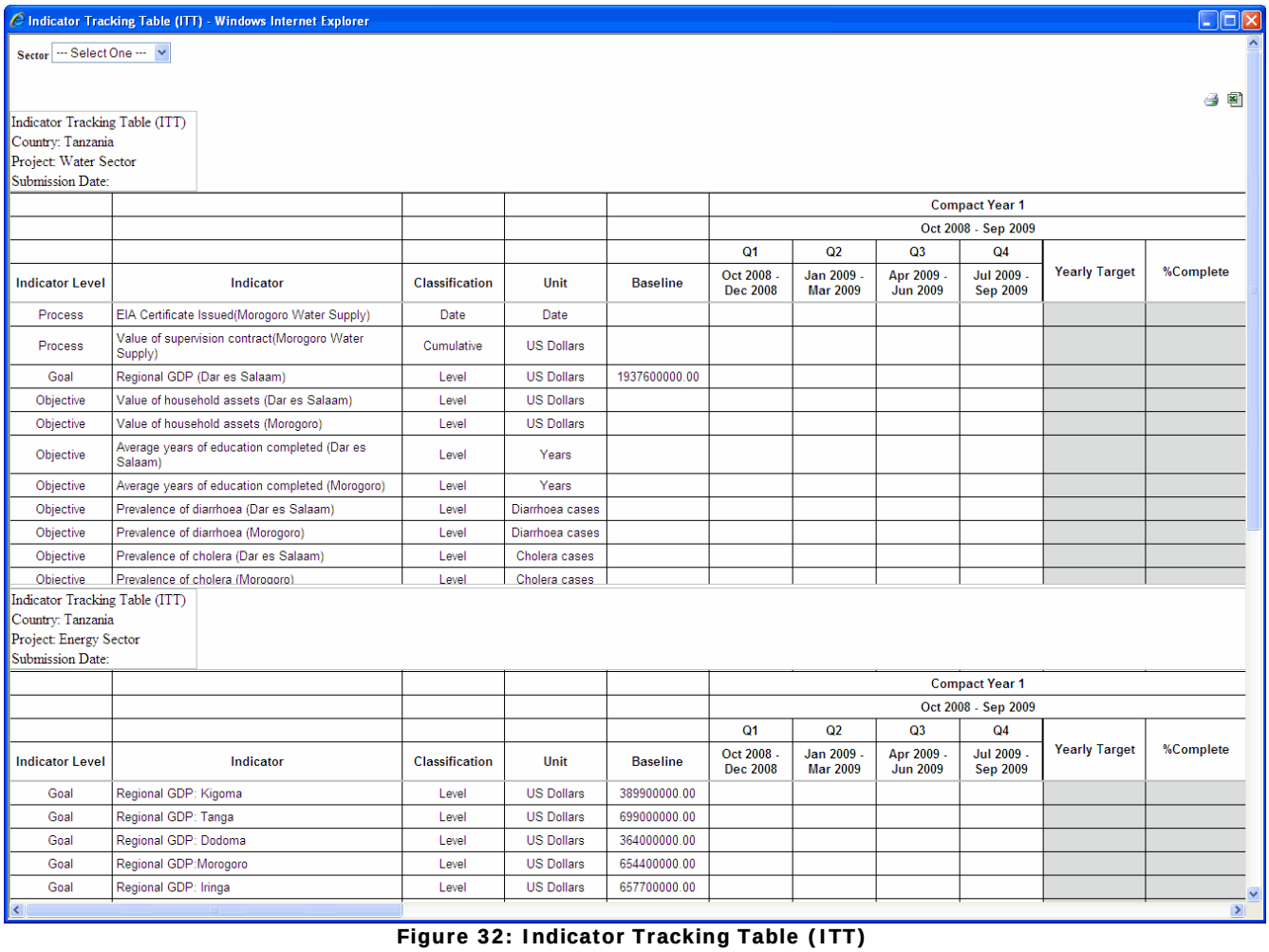


Figure 31: MIS Custom Reports

The selected report will appear in your browser (Figure 32).



Indicator Tracking Table (ITT) - Windows Internet Explorer

Sector --- Select One ---

Indicator Tracking Table (ITT)
Country: Tanzania
Project: Water Sector
Submission Date:

					Compact Year 1					
					Oct 2008 - Sep 2009					
					Q1	Q2	Q3	Q4		
Indicator Level	Indicator	Classification	Unit	Baseline	Oct 2008 - Dec 2008	Jan 2009 - Mar 2009	Apr 2009 - Jun 2009	Jul 2009 - Sep 2009	Yearly Target	%Complete
Process	EIA Certificate Issued(Morogoro Water Supply)	Date	Date							
Process	Value of supervision contract(Morogoro Water Supply)	Cumulative	US Dollars							
Goal	Regional GDP (Dar es Salaam)	Level	US Dollars	1937600000.00						
Objective	Value of household assets (Dar es Salaam)	Level	US Dollars							
Objective	Value of household assets (Morogoro)	Level	US Dollars							
Objective	Average years of education completed (Dar es Salaam)	Level	Years							
Objective	Average years of education completed (Morogoro)	Level	Years							
Objective	Prevalence of diarrhoea (Dar es Salaam)	Level	Diarrhoea cases							
Objective	Prevalence of diarrhoea (Morogoro)	Level	Diarrhoea cases							
Objective	Prevalence of cholera (Dar es Salaam)	Level	Cholera cases							
Objective	Prevalence of cholera (Morogoro)	Level	Cholera cases							

Indicator Tracking Table (ITT)
Country: Tanzania
Project: Energy Sector
Submission Date:

					Compact Year 1					
					Oct 2008 - Sep 2009					
					Q1	Q2	Q3	Q4		
Indicator Level	Indicator	Classification	Unit	Baseline	Oct 2008 - Dec 2008	Jan 2009 - Mar 2009	Apr 2009 - Jun 2009	Jul 2009 - Sep 2009	Yearly Target	%Complete
Goal	Regional GDP: Kigoma	Level	US Dollars	389900000.00						
Goal	Regional GDP: Tanga	Level	US Dollars	699000000.00						
Goal	Regional GDP: Dodoma	Level	US Dollars	364000000.00						
Goal	Regional GDP:Morogoro	Level	US Dollars	654400000.00						
Goal	Regional GDP: Iringa	Level	US Dollars	657700000.00						

Figure 32: Indicator Tracking Table (ITT)

Each project has its own table in the ITT custom report. All indicators are classified as Level, Cumulative, or Date.

You may narrow down the data displayed in this report by applying filtering criteria to it. The following filtering options are available:

- Energy Sector
- Transport Sector
- Water Sector

To filter the list of projects, select the needed criteria from the **Sector** drop-down list at the top of the window. The list will be filtered considering the defined criteria.

In the MIS application you can also export the ITT to Excel format file or print it out. For details, see Exporting Reports (Chart and Report Modules) and Printing Reports (Chart and Report Modules).

10.6 Managing Custom Reports

MIS is equipped with a functionality that allows you to add and work with custom reports without having to design them through the Report Designer. Instead, you can create reports directly in JSP considering familiarity with the Java Server Pages (JSP) technology and *MIS* database structure.

Once the custom report files are created and uploaded into the application, they are stored under the *Public Reports* section and are treated the same way as any other pre-defined report.

10.6.1 Uploading Custom Report Files

In order to upload a custom report and associated files (e.g. pictures contained in the report, etc.), follow the steps described below:

1. Click the **(Add Custom Report)** button found in the top toolbar. A *Custom Report* window will appear (Figure 33).

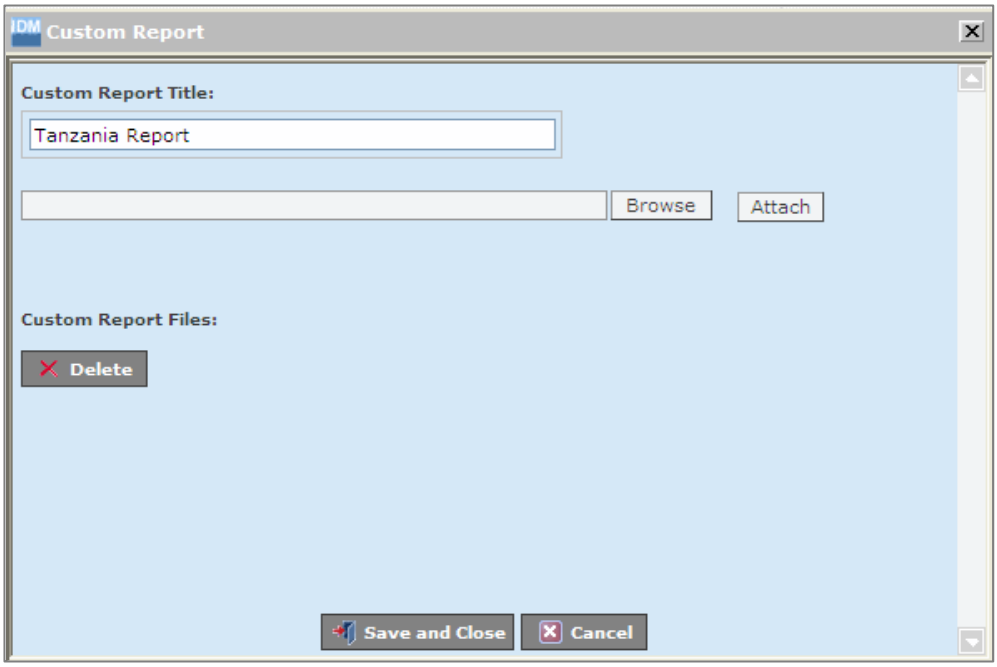


Figure 33: Adding a Custom Report

2. Click the **Browse** button to locate the index.jsp (the main file holding the report information) and other files associated with the report.
3. Enter the **Custom Report Title**.
4. Click the **Attach** button. The selected file will be uploaded into the application and displayed in the *Custom Report* window.
5. Repeat the steps described above to upload more files.

6. Click the **Save** button to preserve the changes made and remain in the screen. Or, click the **Save and Close** button to save the changes and return to the Report module main screen.

10.6.2 Deleting a Custom Report File

If the user has uploaded a wrong file, it can easily be removed by selecting the file in the *Custom Report* window and clicking the **Delete** button (Figure 34).

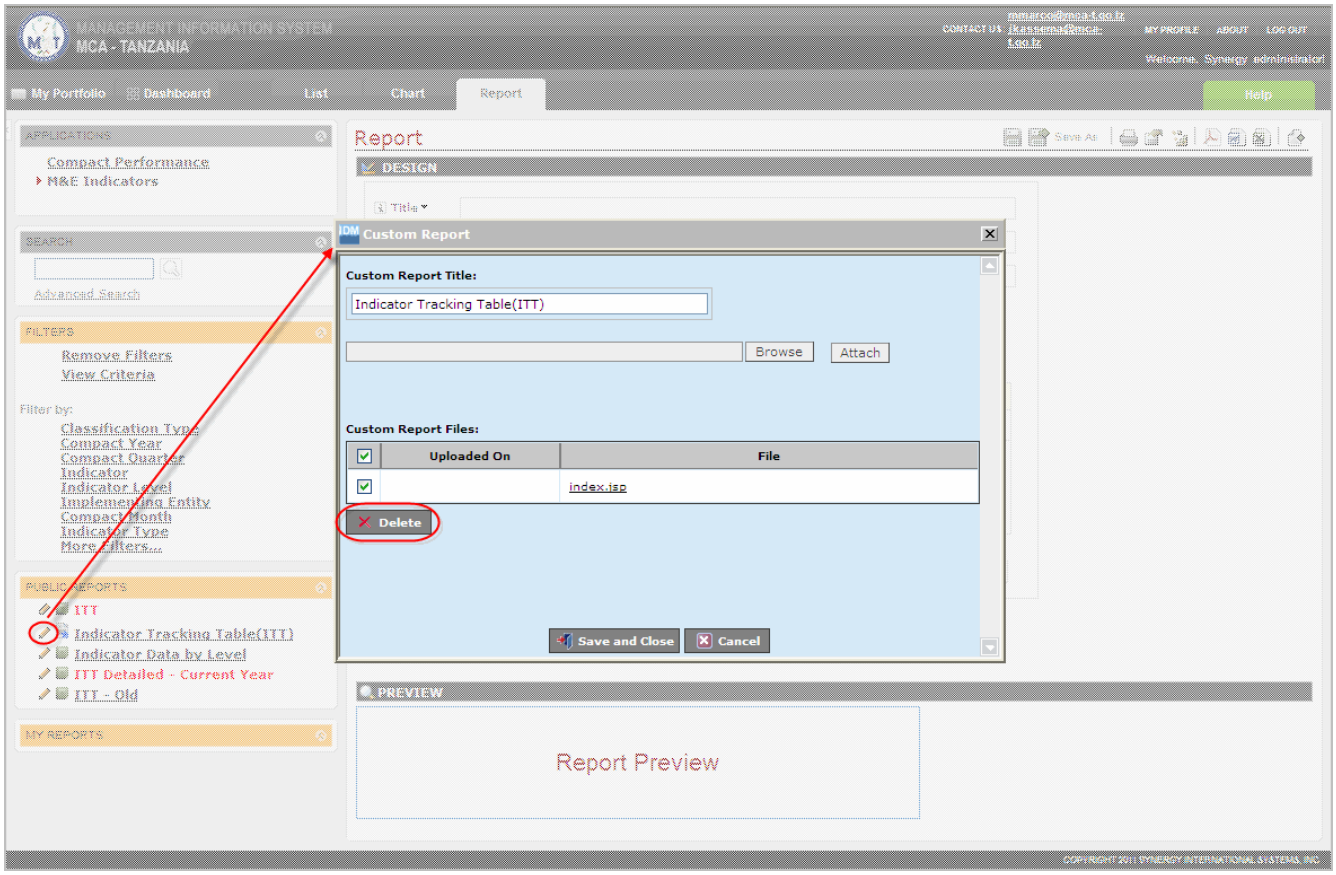


Figure 34: Deleting a Custom Report

10.7 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.

10.7.1 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 35).

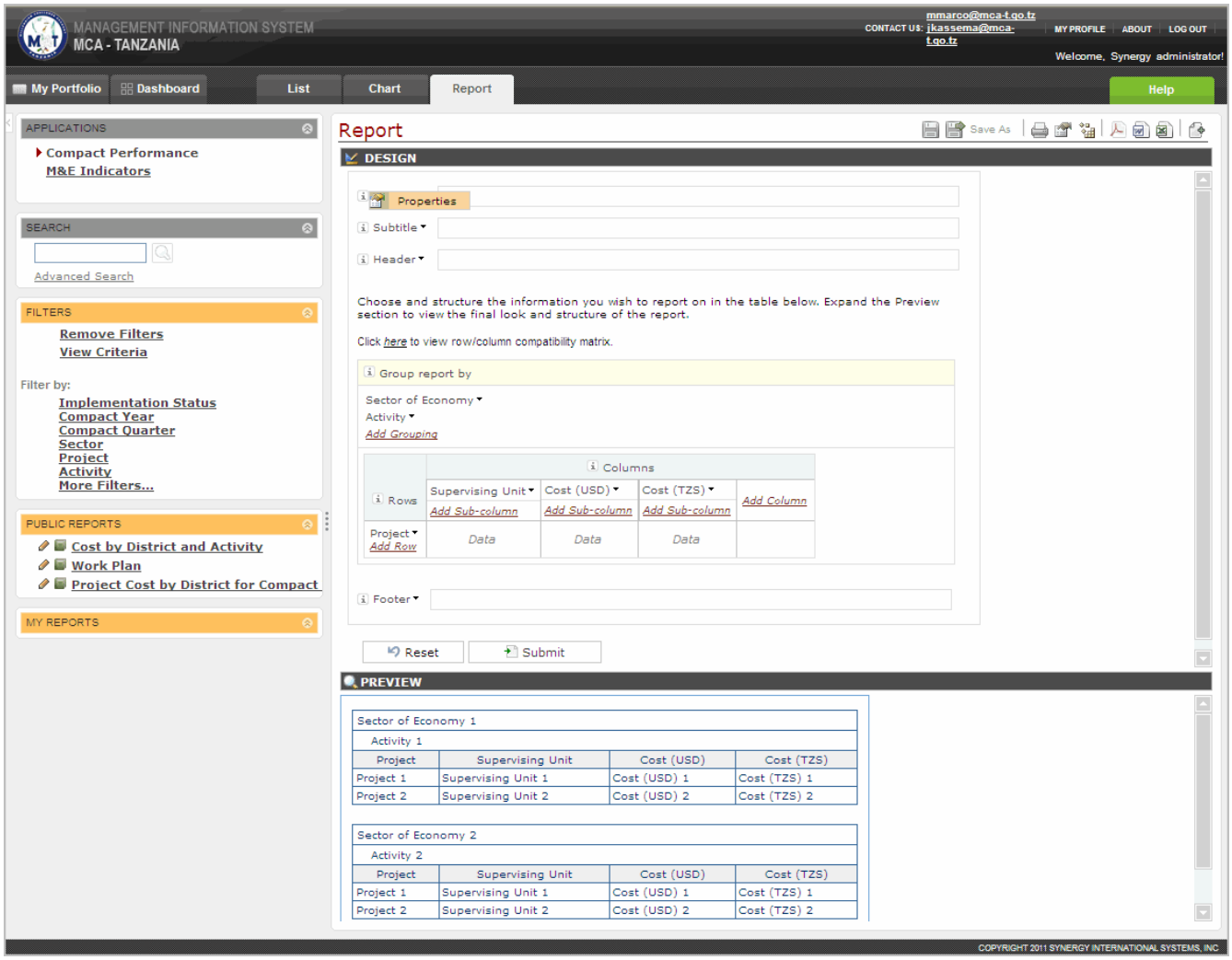


Figure 35: Reports Window with Properties Focus on the Title Field

The *Properties* window will appear. **Please note** that for text entries the *Properties* window includes text formatting buttons and a text area (Figure 36). For other report components, like rows, columns, etc., the *Properties* window also allows assigning additional characteristics, e.g. sorting order, reference text, etc (Figure 42).

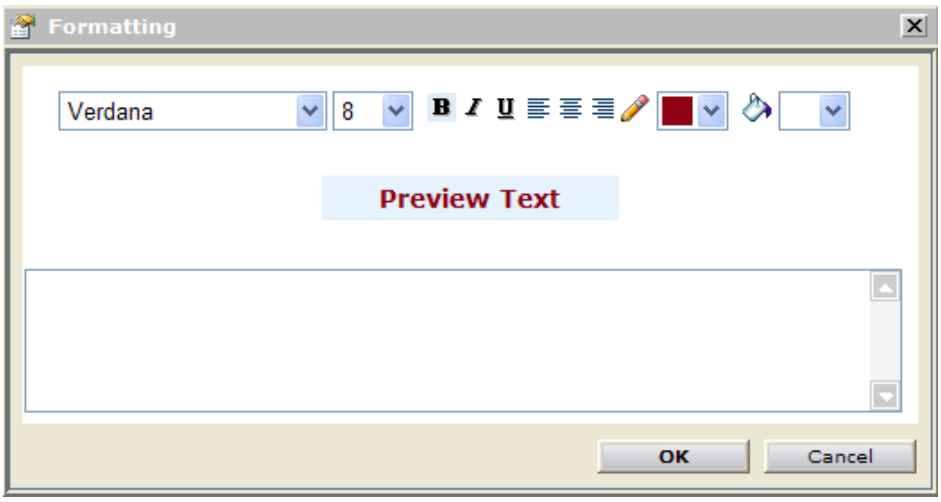


Figure 36: Formatting/Styling Text Entries

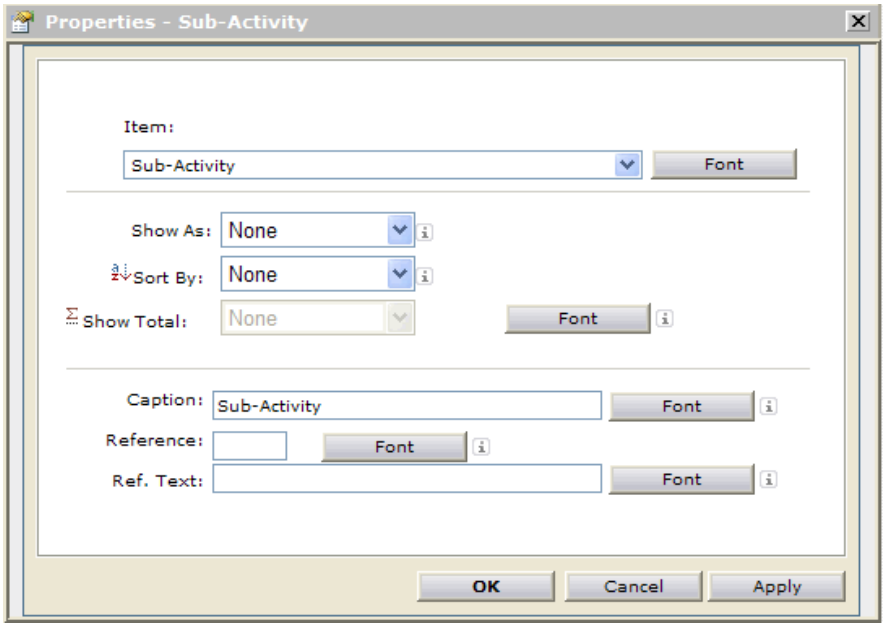


Figure 37: Assigning Properties to Report Table Components

3. Change the properties as needed.
   Note: To prevent the user 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, the user needs to select the appropriate instance from the *Items* drop-down list in the *Properties* window. The list contains the report table components previously selected by the user.
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.

10.7.2 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 38).



Figure 38: Reordering Report Table Components

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

10.7.3 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 39).
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.

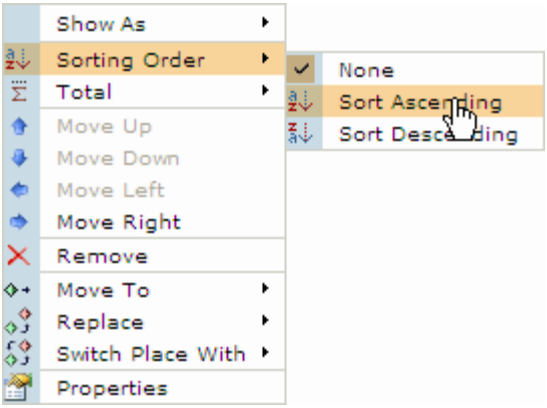


Figure 39: Defining the Sorting Order

10.7.4 Removing a Report Table Component

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

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

10.7.5 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 40).

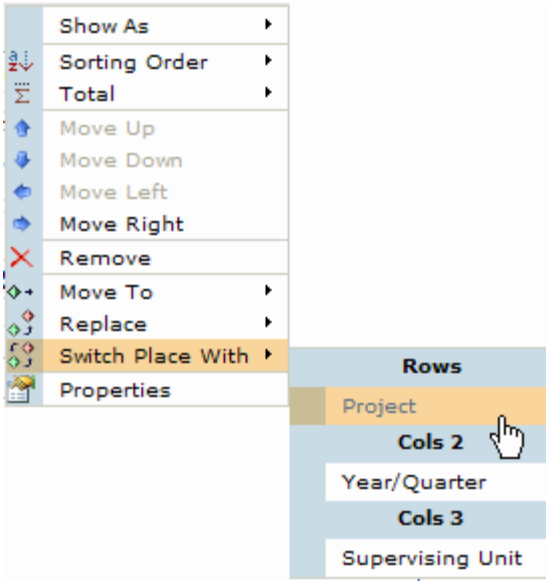


Figure 40: Switching Report Table Components

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.

10.8 Sample Report Formatting

If you have indicated:

- "Sector of Economy" and "Activity" as the report table grouping;
- "Project" as the report row;
- "Supervising Unit", "Cost (USD)" and "Cost (TZS)" as columns;
- Assign some value characteristics (e.g. font size, background color, etc.);

You will have the following result (Figure 41):

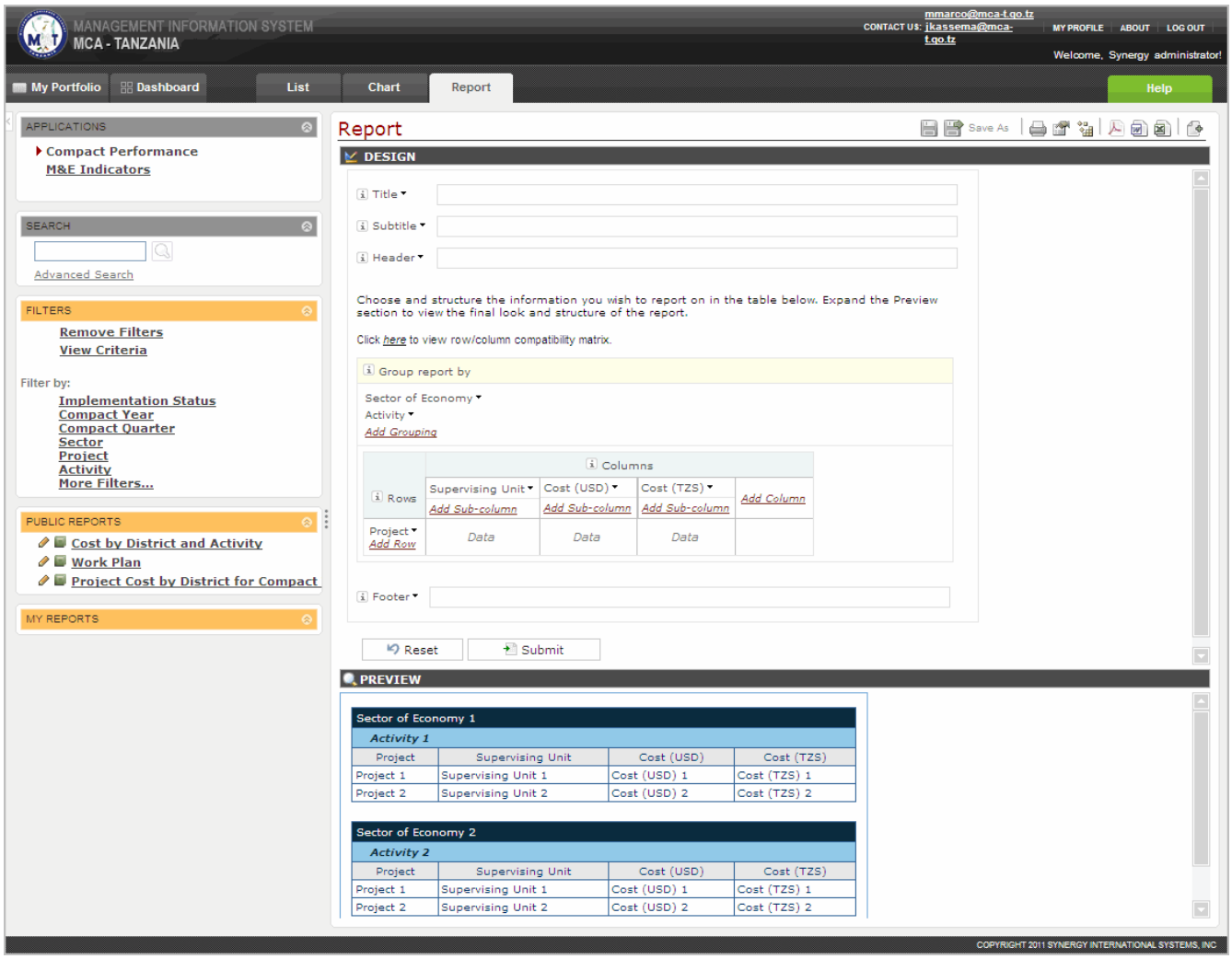


Figure 41: Creating and Formatting a Report

11. DETAILS SECTION

The **Details** section of *Compact Performance* and *M&E Indicator's* applications can be accessed from the List, Chart and My Portfolio modules. Depending on the details you are accessing, you may see the sub-activity or M&E indicator details, contacts and monitoring and evaluation details are displayed for each sub-activity. You may browse among other sub-activities or M&E indicators listed under the same parent item, print sub-activity details, etc.

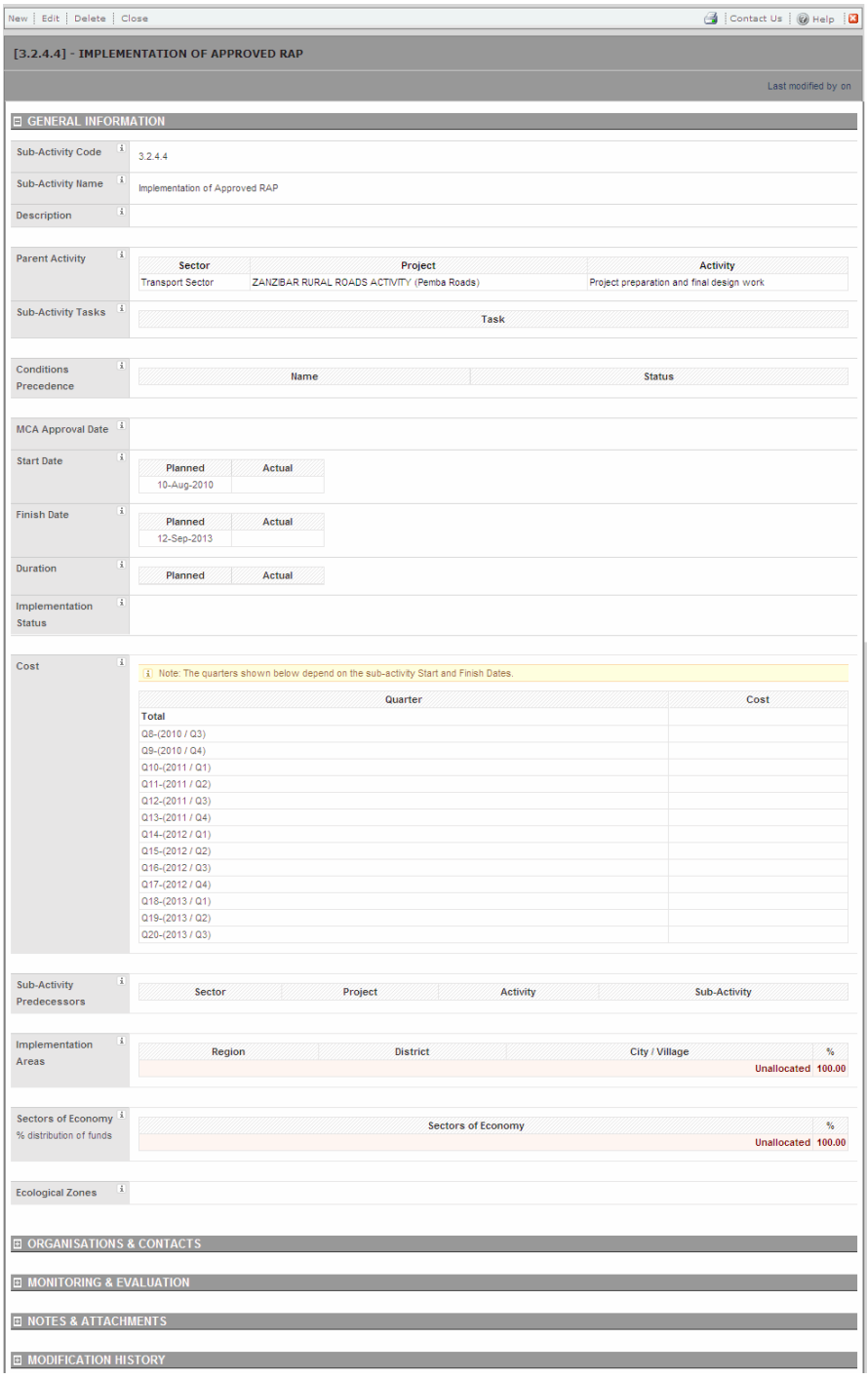


Figure 42: Details Section

If you have the corresponding permission you can also edit the existing sub-activities/M&E indicators. Depending on your permissions of accessing the M&E Indicator's details, you may see the following buttons in the toolbar of the Details section:

- **Switch to Indicator Reference Sheet** – this button will display the complete details of an M&E Indicator.
- **Switch to Quarterly Reporting in Progress** – this button will display the details of M&E Indicator's quarterly progress only.

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:
   - In the *My Portfolio* module: Click the respective sub-activity. You will be directed to the **Details** section (Figure 42).
   - In the *List module*: Click the sub-activity for the details to be displayed. This will open the *Details* section of the application where more detailed information about the sub-activity will be displayed.
     Note: Depending on the list representation settings, additional expanding the list items may be required to reach the sub-activity.
   - 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 sub-activities 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 sub-activity details, see Printing Sub-Activity Details for details. The **Close** button is used to return to the main screen.

11.2 Browsing Sub-activities

In the *Details* section, you can browse among the sub-activities/M&E indicators. To browse the details, use correspondingly **Previous** or **Next** buttons in the top of the *Details* window (Figure 42).

Note: In the Chart module, you can also scroll down to the bottom of the page, find the appropriate sub-activity or M&E indicator in the list presented and click it for the details to be displayed.

11.3 Printing Sub-Activity Details

In the *Details* section, you can print out the details of the selected sub-activity. 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 Editing an Existing Sub-Activity

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

In order to edit existing sub-activities, 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 Compact Performance Application related document, see REFERENCES.
2. Make the appropriate changes in the input window and save.

12. CUSTOMISED REPORTING IN LIST, CHART, AND REPORT MODULES

The *MIS* 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 *MIS* 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 43) 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.

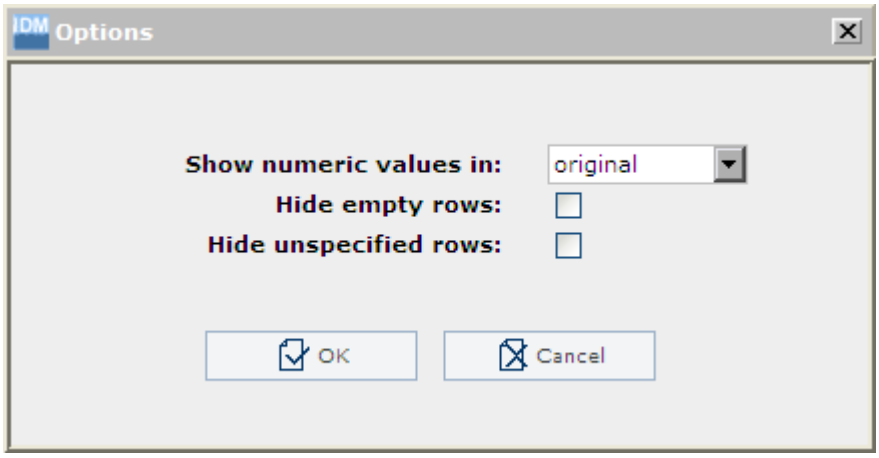


Figure 43: Setting the Chart Report Options

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 (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 *MIS* 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.

12.3 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 44) will appear.
2. Define the report name in the *Memorized Name* field.

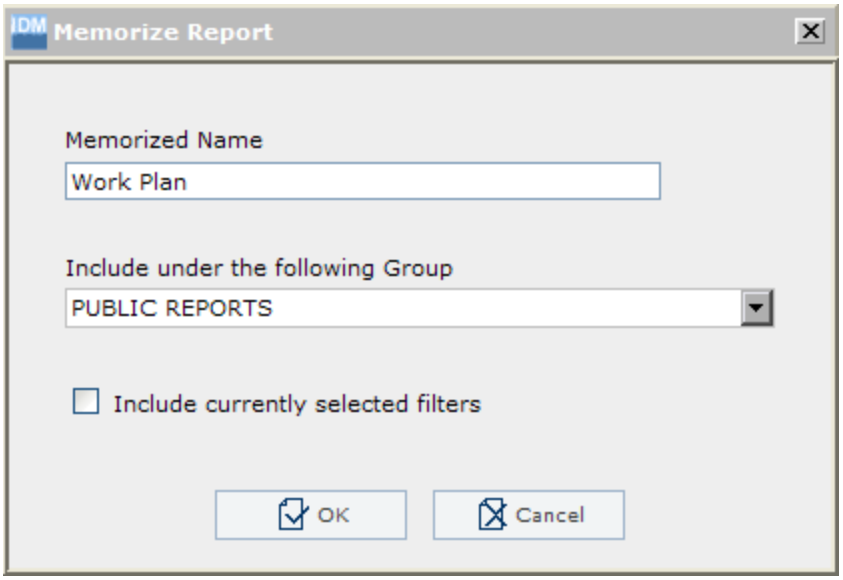


Figure 44: Memorizing a Report

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.

12.4 How to Save a Copy of the Report

In *MIS* 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 50) will appear.
2. Save the report by the steps described in the section above.

12.5 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 45) 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

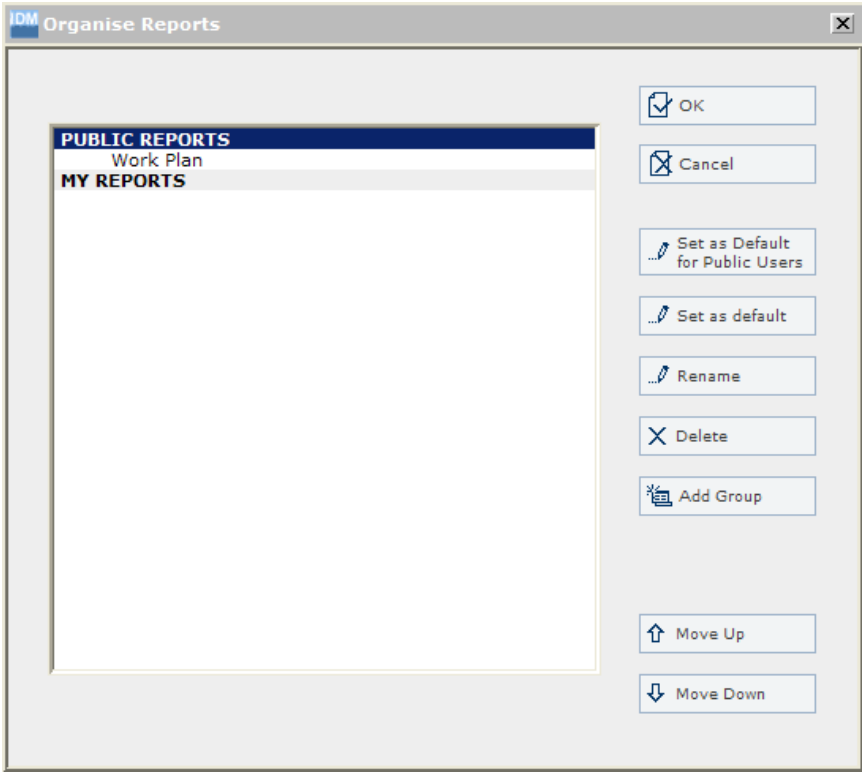


Figure 45: Organizing the Reports

12.5.1 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.

12.5.2 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.

12.5.3 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.

12.5.4 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.

12.5.5 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.

12.6 Exporting Reports (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.

12.7 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.

13. 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.

13.1 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 46) 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 46).
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.

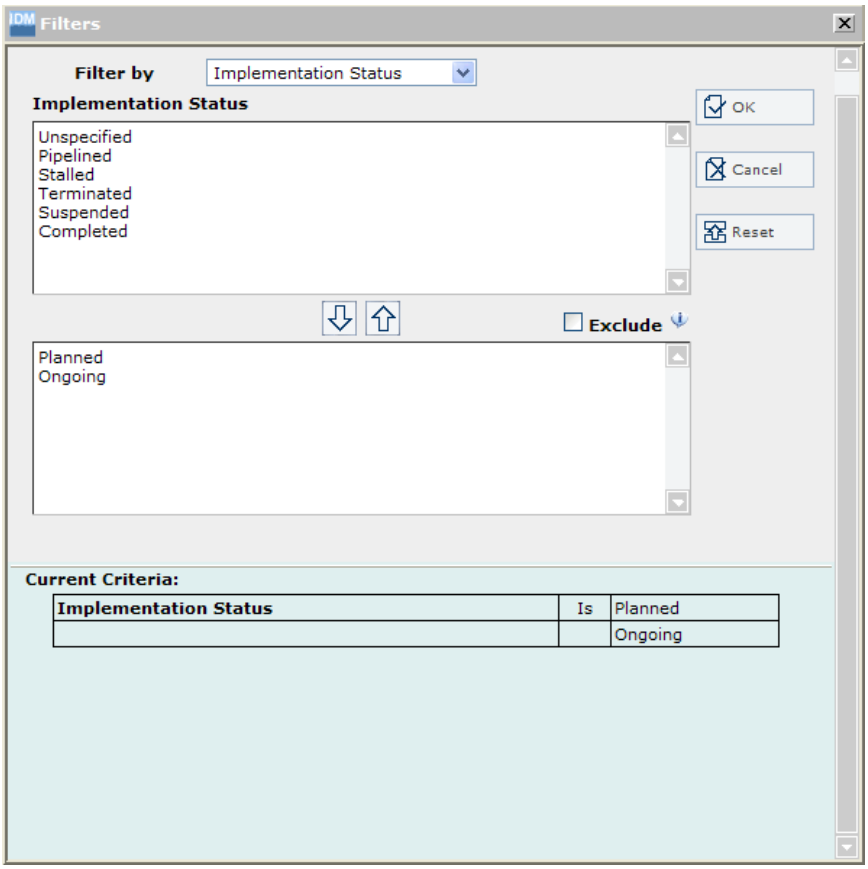


Figure 46: Creating a Filtering Criteria

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* checkbox. All the *Category* items that appear in the second text area will be excluded from the filtering criteria to be created.

14. SEARCH

The *MIS* 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 *MIS* 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, *MIS* 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 47).

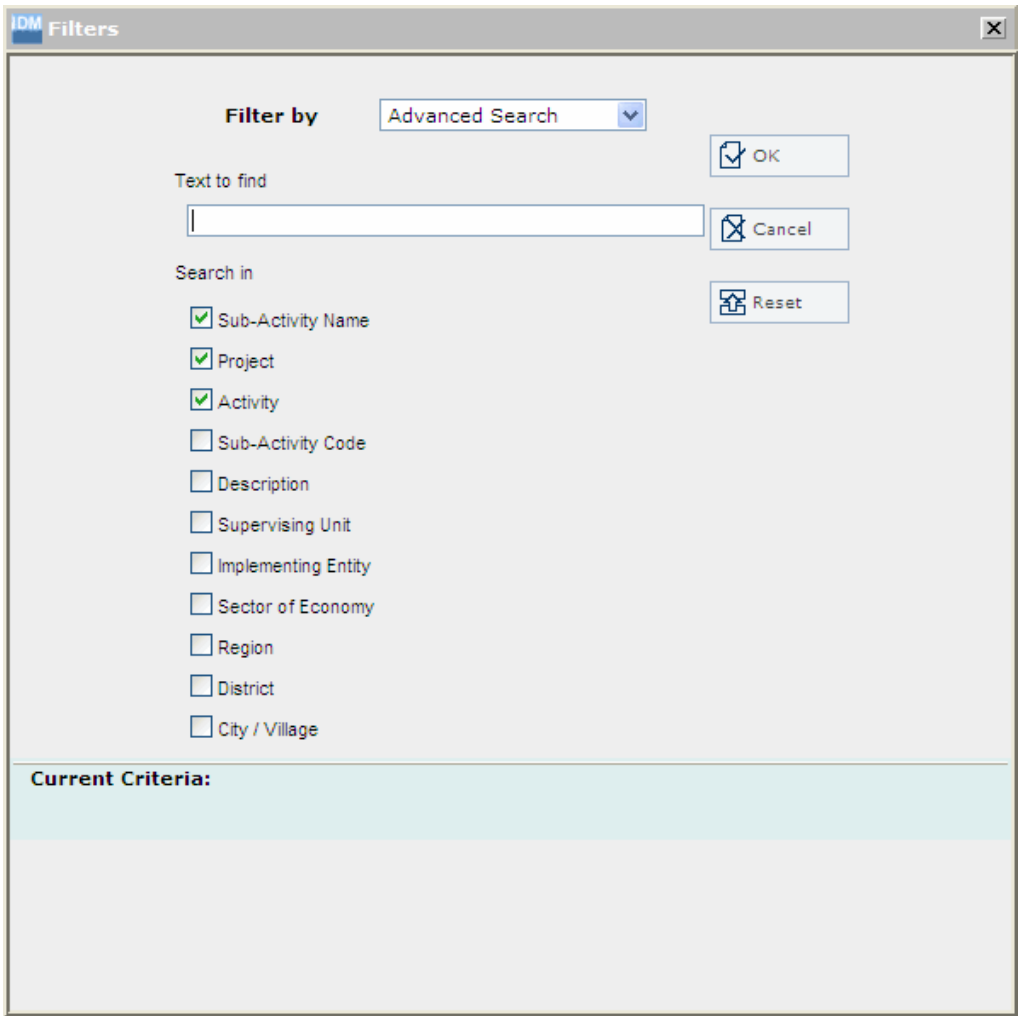


Figure 47: Creating a Search Criteria

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).

15. LOGGING OUT

Once you have finished using the *MIS* 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.

16. REFERENCES

Please refer to the following *MCA Tanzania MIS* related document:

- MCA Tanzania MIS Compact Performance Application User Manual
- MCA Tanzania MIS M&E Indicators Application User Manual
- MCA Tanzania MIS Administration Center User Manual