



PUBLIC SECTOR INVESTMENT DATABASE FOR LESOTHO

(PSID LESOTHO)

DATA MANAGEMENT ADMINISTRATOR'S GUIDE

Version 1.1



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1. INTRODUCTION

This document describes the *Data Management* console in the *Public Sector Investment Database for Lesotho (PSID Lesotho)* application. It provides the necessary instructions which the administrators and/or users granted with administrative rights should follow in order to ensure successful application data management.

2. OVERVIEW

The *Public Sector Investment Database for Lesotho (PSID Lesotho)* is an automated information management system which is designed to improve efficiency and coordination of the efforts made by the Ministry of Planning of the Kingdom of Lesotho with the aim of tracking the external projects funded by the Development Partners and country government. The system serves as the main database and data collection and reporting tool for MoP as it ensures effective access to development data as well as provides an insight into the external projects and programs currently being implemented in the country.

The main objective of *PSID Lesotho* is to serve as a reliable and credible source of information on external projects implemented in Lesotho to support the Government in effectively monitoring the progress and performance of projects and programs and ensuring their alignment with the Government's development goals, priorities, and strategies. Moreover, *PSID Lesotho* promotes transparency and accountability of funds, improves governance, supports project implementation, and facilitates results-based decision-making on development assistance in Lesotho.

The *PSID Lesotho* application incorporates business intelligence and data management solutions with comprehensive application administration functions. As such, it is equipped with a number of administrative tools, which aim at providing the application administrators with the possibility of performing their daily assignments in an easily manageable way.

One of the administrative tools that *PSID Lesotho* is incorporated with is the *Data Management* console. The *Data Management* console is a space within the *PSID Lesotho* application that allows organizing the user-defined categories used in the application as well as their items. Through the *Data Management* console, the application administrator can manage the collection of categories and currency rates present in *PSID Lesotho*. They can view the categories used in the application, add new items to existing categories, etc.

PSID Lesotho provides a web-based user interface and requires a web browser pre-installed.

3. DATA MANAGEMENT CONSOLE

This chapter describes the *Data Management* console under the *Settings* section, where you can manage the **user-defined categories** and **currencies rates** existing in the *PSID Lesotho* application. You may organize the categories present in the system, view their items, add new items to them, edit the existing items, etc.

3.1 Accessing the Data Management Console

For accessing the *Data Management* console, go to Settings → Data Management (Figure 1).

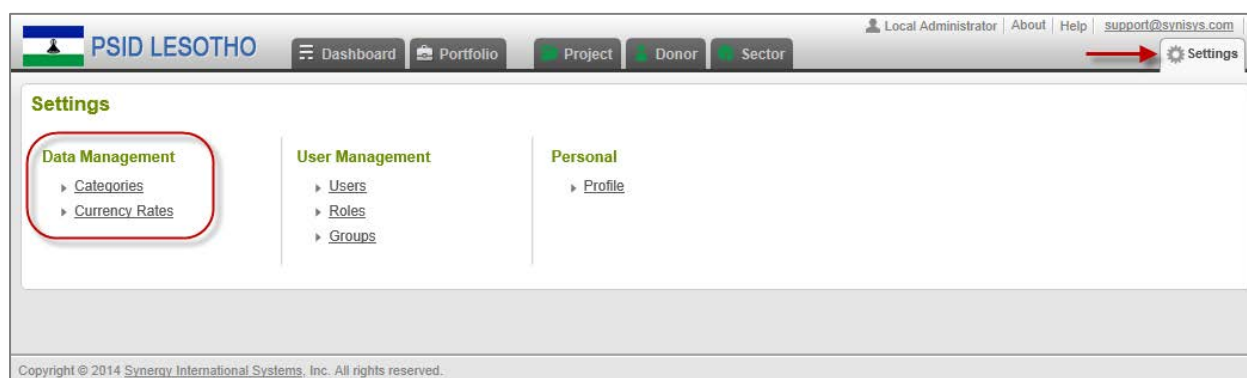


Figure 1: Data Management Console

The *Data Management* console consists of the following sections:

- **Categories** – to manage the user-defined categories existing in the system (see [MANAGING CATEGORIES](#)).
- **Currency Rates** – to manage the rates of the currencies that are used in the application (see [MANAGING CURRENCY RATES](#)).

4. MANAGING CATEGORIES

This chapter outlines how you can manage the items of the categories used in the *PSID Lesotho* application. More specifically, it describes how to add new category items, edit or delete existing category items, and search for them.

4.1 Accessing the Categories Section

The *Categories* section can be accessed at Settings → Data Management → Categories (Figure 1).

Once you access the *Categories* section, you will be presented with the list of all categories recorded in the application (Figure 2).

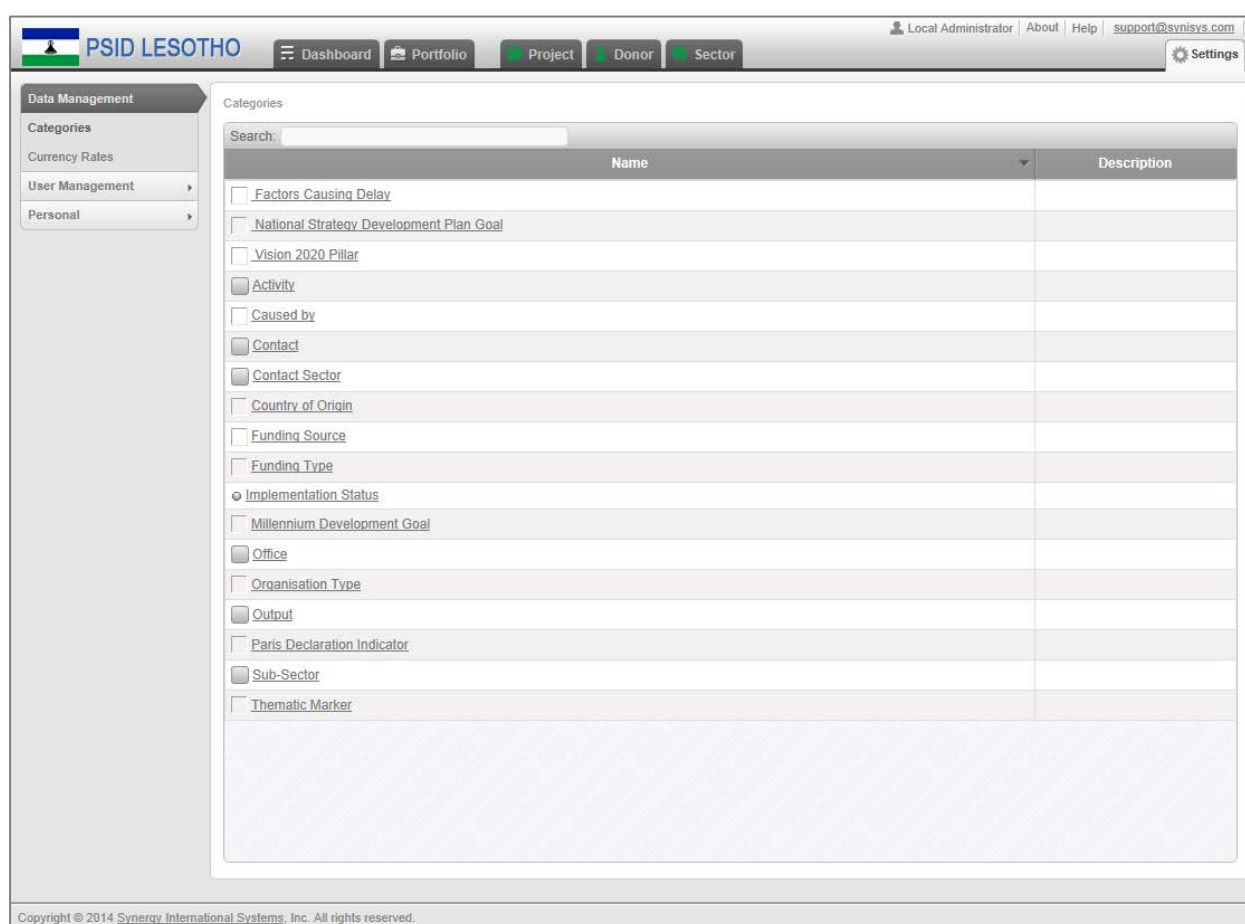


Figure 2: Categories Section

The information displayed on the screen for each category includes the following:

Column Name	Description
Icon	This is a graphical image (icon, logo, etc.) that is associated with a certain category and is used for better visualization.
Name	This is a name that is used for the category. Please note that the name is what users see when displaying search results.

Description	This is a brief description of the category, understandable to the general public. It provides additional information about the category.
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4.2 Searching for a Category / Category Item

The list of category items can be long and hard to browse in. This is the reason why the option of searching for a category item has been designed in the *Categories* section. It is intended for locating the appropriate category items easily and instantly.

In order to search for a definite category item, you need to enter the keyword in the search box above the category items table. The results returned will display the category items that match the search criteria.

4.3 Defining the Sorting Order for Categories / Category Items

In the *Categories* section, you have the possibility of sorting the items listed in each sub-section alphabetically in ascending or descending order.

In order to define the sorting order for the section items, follow the steps below:

1. Go to the section for which you want to define the sorting order different from the default one.
2. Click the arrow that appears in the header of the column according to which you want to sort the section items. Clicking the arrow once again will sort the items in the list in reverse order (Figure 3).

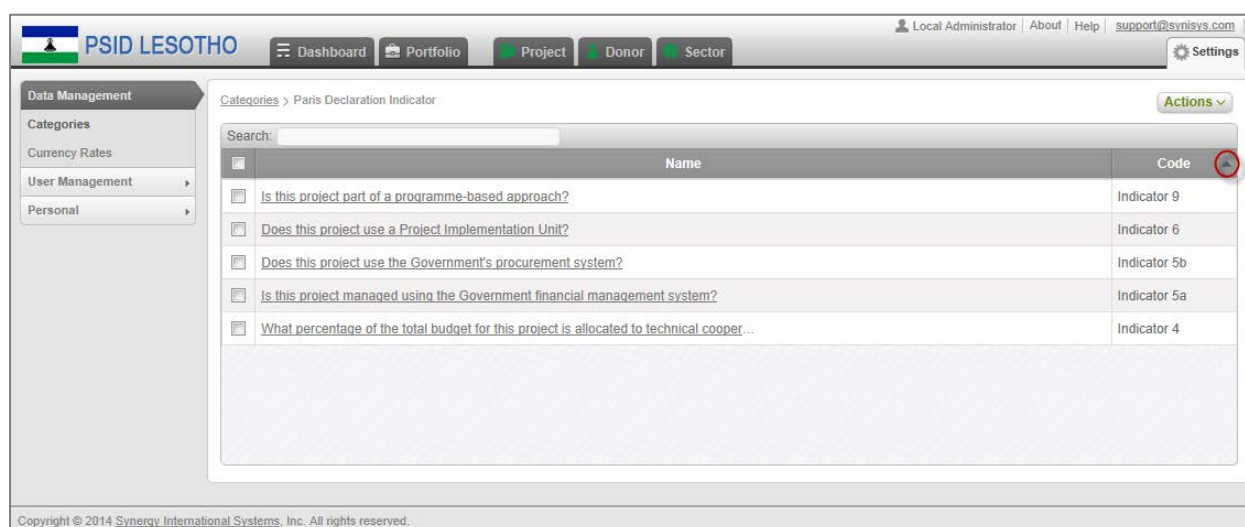


Figure 3: Defining Sorting Order

4.4 Managing Category Items

This section outlines how to view, add, edit, and delete category items.

4.4.1 Viewing Category Items

Categories listed in the *Data Management* console consist of a number of items that comprise category instances. In order to view the items of a specific category, click the category name. The list of the items that comprise the selected category will display (Figure 4).

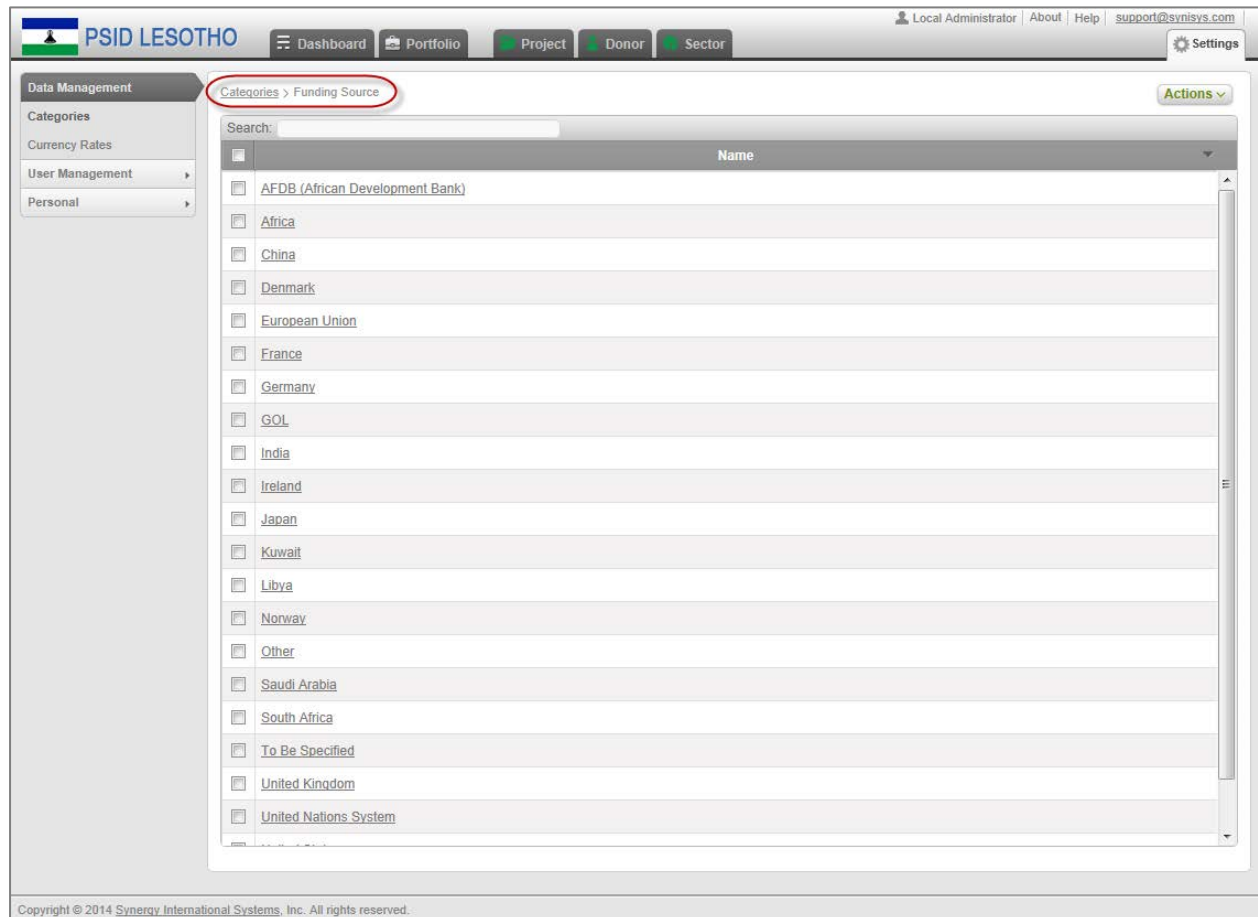


Figure 4: Viewing Category Items

To go back to the list of categories, you can make use of the navigation control (breadcrumb trail) found at the top of the screen (Figure 4).

4.4.2 Adding a Category Item

In order to add an item to a category, follow the steps below:

1. Click the name of the category that you want to add an item for. All existing items of the selected category will display (Figure 4).
2. Select the **Add** option from the *Actions* list found at the top right corner of the screen (Figure 5). A data entry form will open (Figure 6).
3. Fill in the information requested. Please note that this information may vary depending on the type of the category selected.

Note: Some category items may require uploading images associated with them. For more details on how to upload images, [Managing Category Item Images](#).

4. Click the **Ok** button to save the information input.

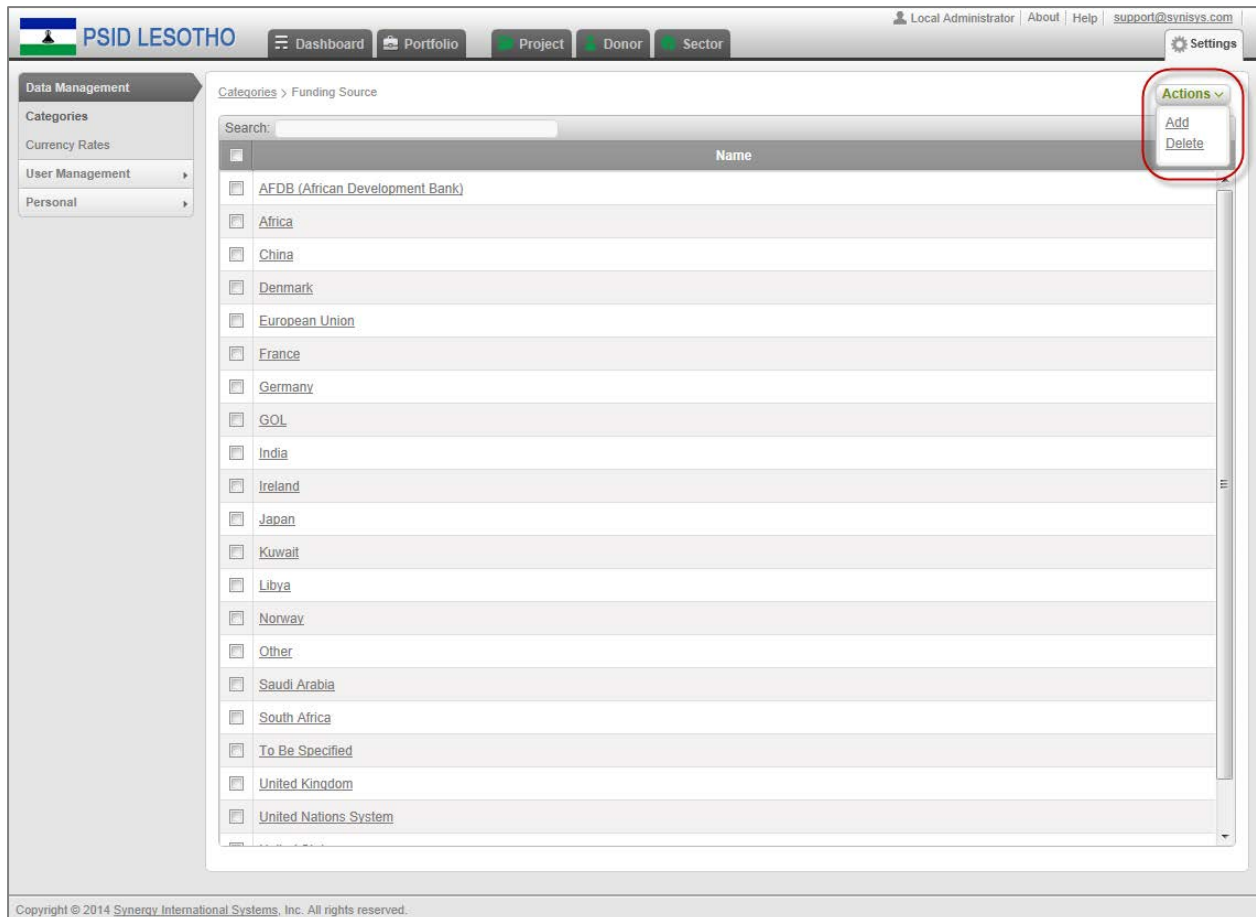


Figure 5: Selecting an Action to Perform

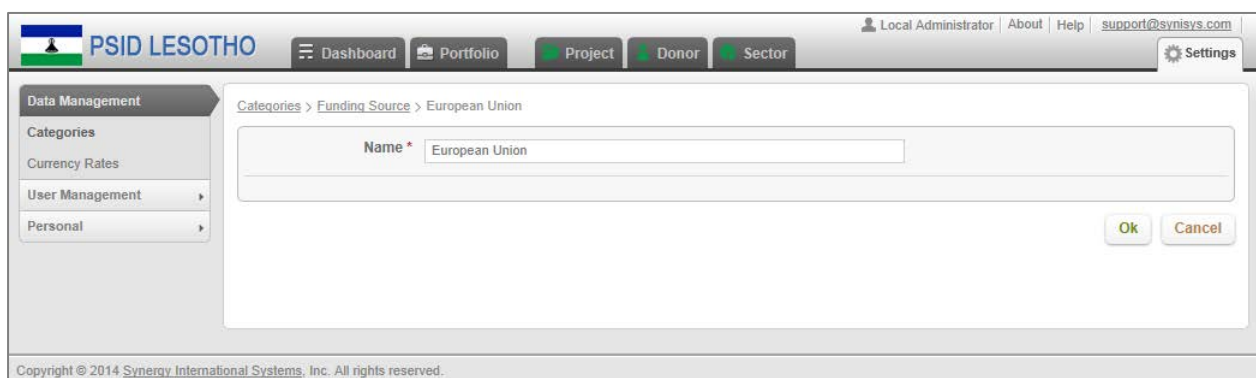


Figure 6: Adding a Category Item

4.4.3 Editing Category Items

In order to edit a category item, follow the steps below:

1. Click the name of the category. All existing items of the selected category will display (Figure 4).
2. Click the name of the category item that you want to edit. The item details will display.
3. Make the required changes.
4. Click the **Ok** button to apply the changes made.

4.4.4 Deleting Category Items

In order to delete a category item, follow the steps below:

1. Click the name of the category. All existing items of the selected category will display (Figure 4).
2. Select the checkbox to the left of the category item that you want to delete. Please note that you can select multiple checkboxes to simultaneously delete several category items.
3. Select the **Delete** option from the *Actions* list found at the top left corner of the screen.

4.5 Managing Category Item Images

The *Categories* section allows you to associate unique images with each item of some categories (e.g. Organizations, Sectors, etc.) used in *PSID Lesotho*. These images can be country flags, company logos, graphic images representing a sector, etc. The images are displayed next to the category item they represent in the *List* and *Map* modules of the *PSID Lesotho* application (see *PSID Lesotho Analytical Interface User Manual* in [REFERENCES](#)) and are used for better visualization.

4.5.1 Adding an Image

In order to add an image to a category item, follow the steps below:

1. Select the appropriate category in the list. The list of all category items will display (Figure 7).
2. Locate the category item that you want to add an image for and click its name. The category item data entry form will open (Figure 8).

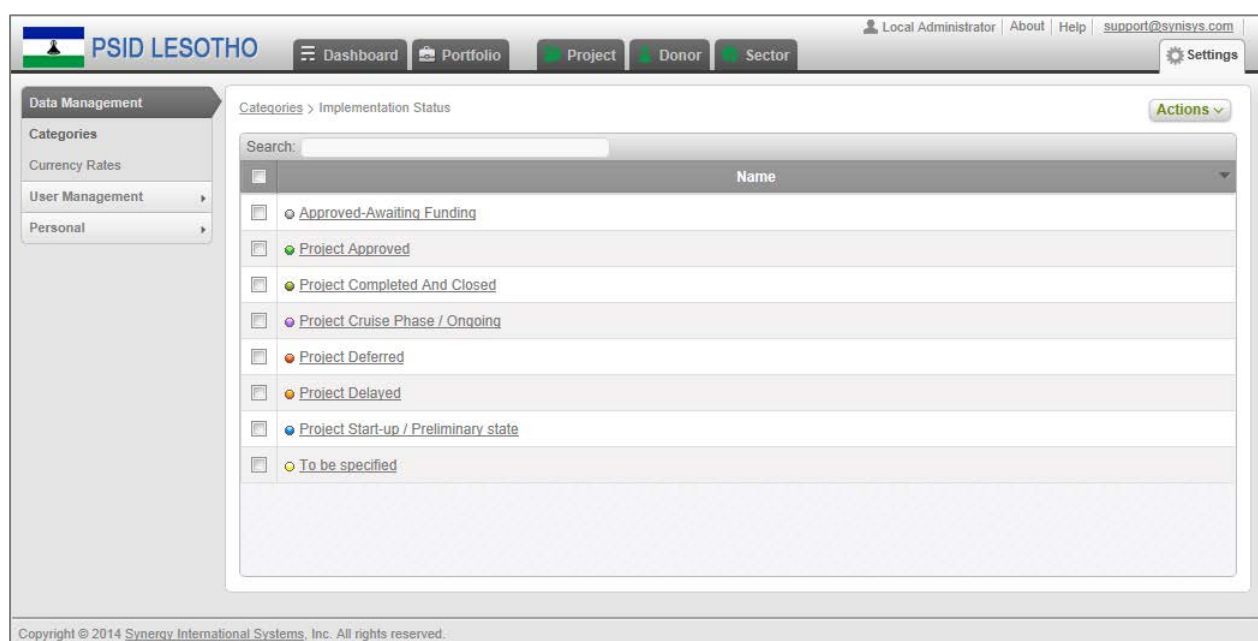
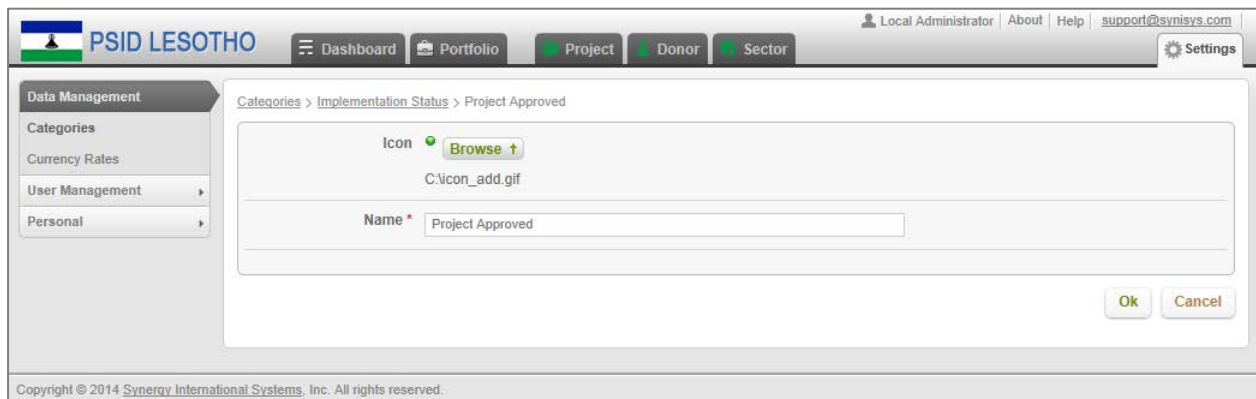


Figure 7: Selecting a Category Item to Add an Image

3. In the data entry form, click the **Browse** button and upload an image for the selected category item.
4. Click the **Ok** button to save the changes made.



The screenshot shows the PSID Lesotho Data Management application interface. The top navigation bar includes the PSID Lesotho logo, a menu with 'Dashboard', 'Portfolio', 'Project', 'Donor', and 'Sector', and user information for 'Local Administrator'. The left sidebar lists 'Data Management' with sub-items: 'Categories', 'Currency Rates', 'User Management', and 'Personal'. The main content area shows the breadcrumb 'Categories > Implementation Status > Project Approved'. The form for 'Project Approved' has an 'Icon' field with a 'Browse' button and a file path 'C:\icon_add.gif'. Below it is a 'Name' field with the text 'Project Approved'. At the bottom right are 'Ok' and 'Cancel' buttons. A copyright notice at the bottom reads: 'Copyright © 2014 Synergy International Systems, Inc. All rights reserved.'

Figure 8: Uploading an Image

4.5.2 Replacing Images

In order to replace the image associated with a definite category item, follow the steps below:

1. Select the appropriate category in the list. The list of all category items will display (Figure 7).
2. Locate the category item for which you want to use a different image and click its name. The category item data entry form will open (Figure 8).
3. In the data entry form, click the **Browse** button and select another image.
4. Click **Ok** to apply the changes made.

5. MANAGING CURRENCY RATES

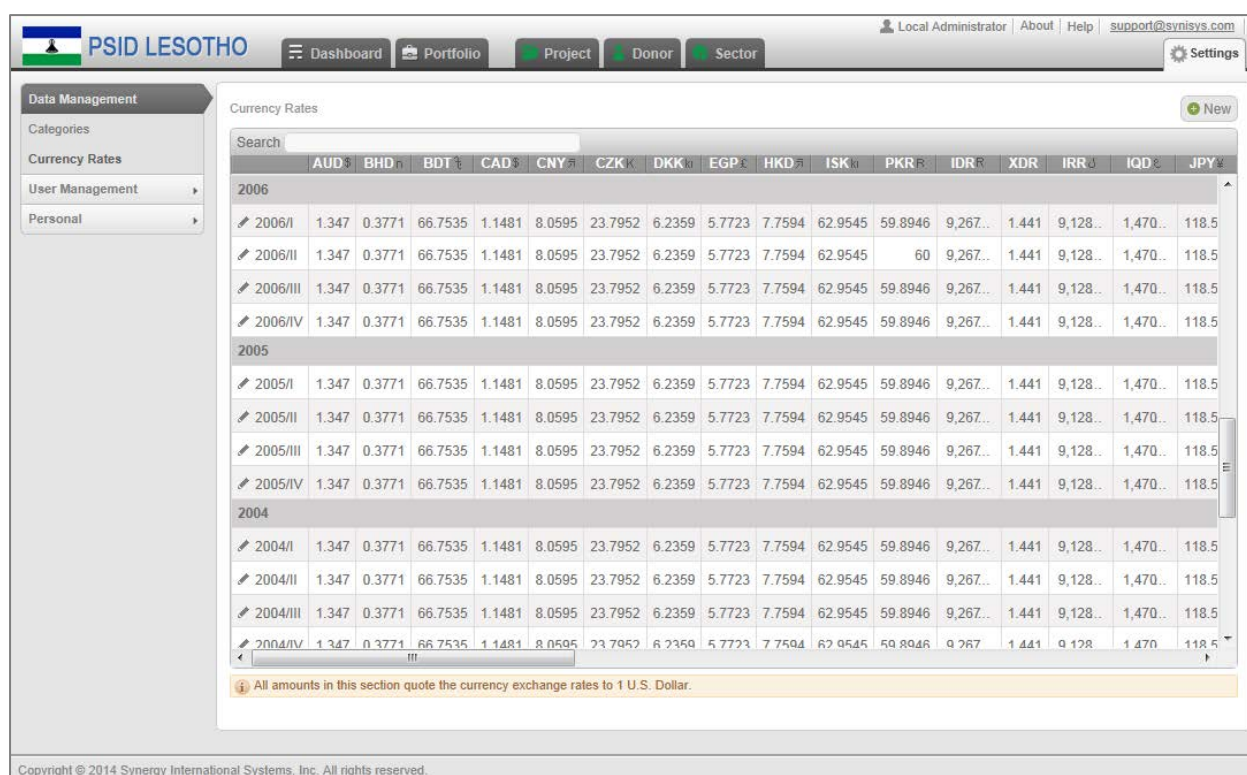
This chapter outlines how you can manage the currencies rates used in the *PSID Lesotho* application for converting amounts in the source (original) currency into the target one. More specifically, it describes how to add new currencies exchange rates, edit or delete existing rates, and search for them.

5.1 Accessing the Currency Rates Section

The *Currency Rates* section can be accessed at Settings → Data Management → Currency Rates (Figure 1).

Once you access the *Currency Rates* section, you will be presented with the list of all currency exchange rates recorded for the application (Figure 9). Moreover, the currency exchange rates will be organized into groups according to the year/quarter that they denote.

Note: All amounts in this section quote the currency exchange rates to 1 US Dollar.



	AUD\$	BHD	BDT	CAD\$	CNY	CZK	DKK	EGP	HKD	ISK	PKR	IDR	XDR	IRR	IQD	JPY
2006																
2006/I	1.347	0.3771	66.7535	1.1481	8.0595	23.7952	6.2359	5.7723	7.7594	62.9545	59.8946	9,267...	1.441	9,128...	1,470...	118.5
2006/II	1.347	0.3771	66.7535	1.1481	8.0595	23.7952	6.2359	5.7723	7.7594	62.9545	60	9,267...	1.441	9,128...	1,470...	118.5
2006/III	1.347	0.3771	66.7535	1.1481	8.0595	23.7952	6.2359	5.7723	7.7594	62.9545	59.8946	9,267...	1.441	9,128...	1,470...	118.5
2006/IV	1.347	0.3771	66.7535	1.1481	8.0595	23.7952	6.2359	5.7723	7.7594	62.9545	59.8946	9,267...	1.441	9,128...	1,470...	118.5
2005																
2005/I	1.347	0.3771	66.7535	1.1481	8.0595	23.7952	6.2359	5.7723	7.7594	62.9545	59.8946	9,267...	1.441	9,128...	1,470...	118.5
2005/II	1.347	0.3771	66.7535	1.1481	8.0595	23.7952	6.2359	5.7723	7.7594	62.9545	59.8946	9,267...	1.441	9,128...	1,470...	118.5
2005/III	1.347	0.3771	66.7535	1.1481	8.0595	23.7952	6.2359	5.7723	7.7594	62.9545	59.8946	9,267...	1.441	9,128...	1,470...	118.5
2005/IV	1.347	0.3771	66.7535	1.1481	8.0595	23.7952	6.2359	5.7723	7.7594	62.9545	59.8946	9,267...	1.441	9,128...	1,470...	118.5
2004																
2004/I	1.347	0.3771	66.7535	1.1481	8.0595	23.7952	6.2359	5.7723	7.7594	62.9545	59.8946	9,267...	1.441	9,128...	1,470...	118.5
2004/II	1.347	0.3771	66.7535	1.1481	8.0595	23.7952	6.2359	5.7723	7.7594	62.9545	59.8946	9,267...	1.441	9,128...	1,470...	118.5
2004/III	1.347	0.3771	66.7535	1.1481	8.0595	23.7952	6.2359	5.7723	7.7594	62.9545	59.8946	9,267...	1.441	9,128...	1,470...	118.5
2004/IV	1.347	0.3771	66.7535	1.1481	8.0595	23.7952	6.2359	5.7723	7.7594	62.9545	59.8946	9,267...	1.441	9,128...	1,470...	118.5

All amounts in this section quote the currency exchange rates to 1 U.S. Dollar.

Figure 9: Currency Rates Section

The information displayed on the screen for each currency rate includes the following:

Column Name	Description
Edit Icon	By clicking this icon, you can edit the currencies rate values for the selected year/quarter. For more details, see Editing Currency Rates .

Year/Quarter	<p>This is a period of time that the selected currency rate is related to.</p> <p>Note: The table holds only the years and quarters for which there exist data.</p>
Currency	<p>This is the list of currencies used in the <i>PSID Lesotho</i> application. The currency names are represented with a three-letter acronym. However, upon the mouse-over event, the full name of the currency will be displayed.</p>

5.2 Adding a Currency Rate

In order to add a currency rate, follow the steps below:

1. Click the **New** button found at the top right corner of the screen (Figure 10). The *Add Currency Rates* data entry form will open (Figure 11). Please note that you will be able to add currency rates only for the year/quarter that holds no data recorded for it. Otherwise, you will have to edit the respective year/quarter data to introduce any changes in the currency rates recorded or fill in the missing information. For more details, see [Editing Currency Rates](#).

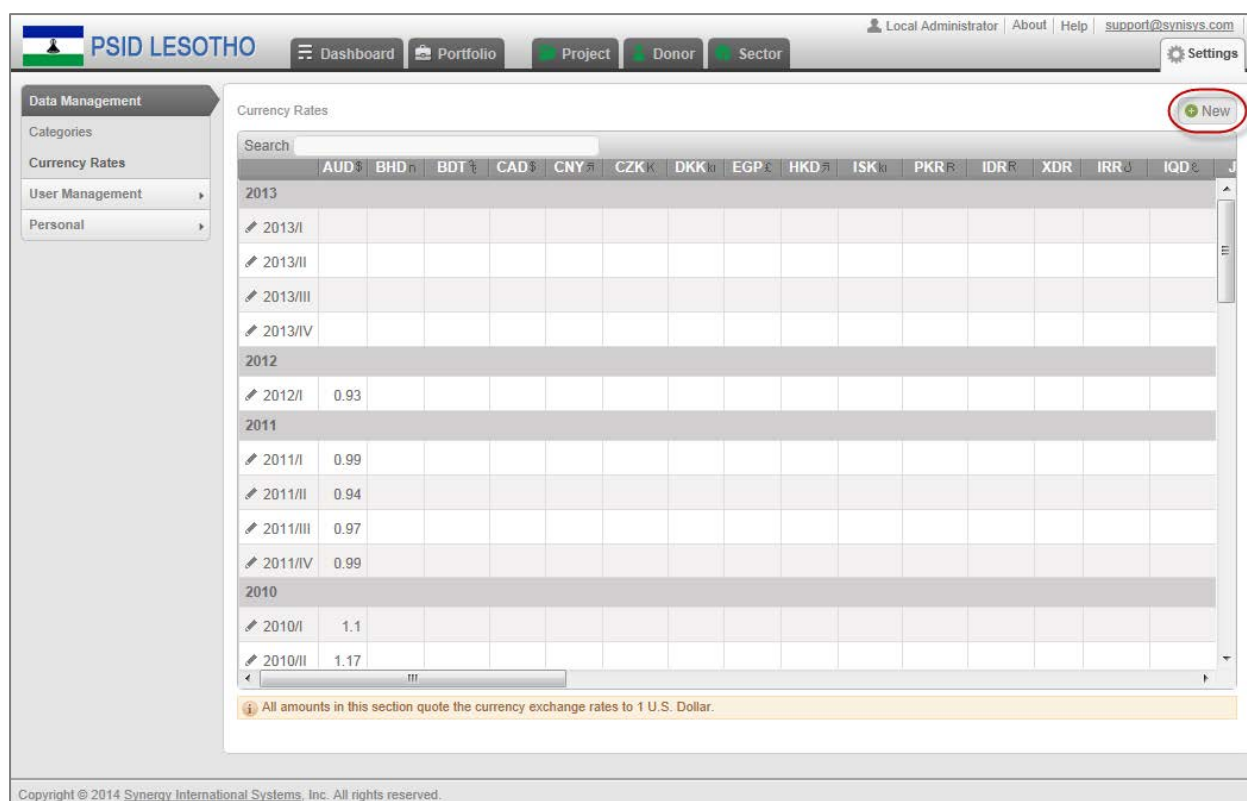


Figure 10: Add Button in the Currency Rates Section

2. Specify the period to provide the currency rates for by selecting the corresponding **Year** and **Quarter** from the drop-down lists.
3. Provide the currency rates for the selected period. Please note that you can enter up to four digits after the decimal symbol.

Note: The currency rates displayed in the table hold five digits. If the currency rate holds more than five digits, the extra digits will be replaced with dots (...). However, you can hover the mouse upon a currency rate, and the tooltip will display it in the full.

- Click the **Save** button to save the information input.

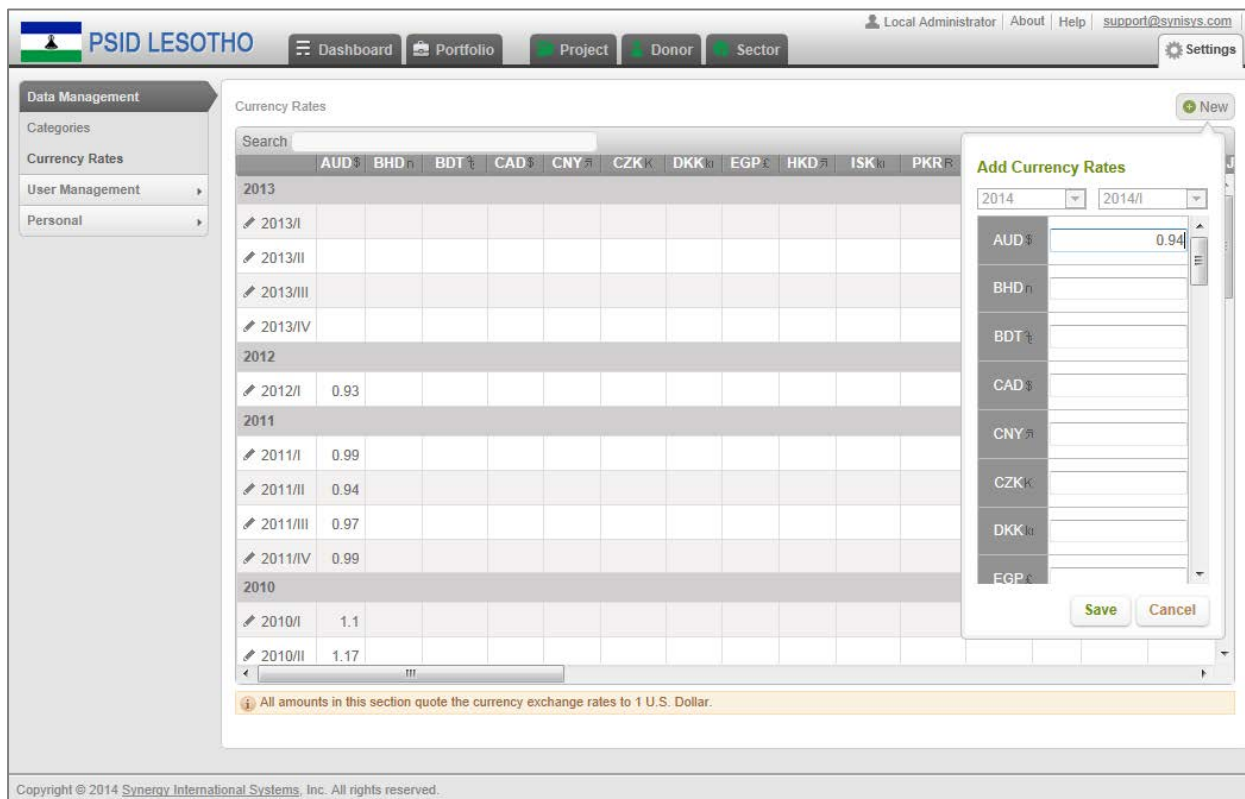


Figure 11: Adding Currency Rates

5.3 Editing Currency Rates

In order to edit the currency rates already recorded for a definite period, follow the steps below:

- Select the year/quarter to edit the currency rates for.
- Click the **Edit** icon to the left of the selected year/quarter. The currency rates for the selected period will display (Figure 12).
- Make the required changes.
- Click the **Save** button to apply the changes made.

After making changes to the currency rates, you can define whether you want to perform recalculation over the older data according to the new rates provided.

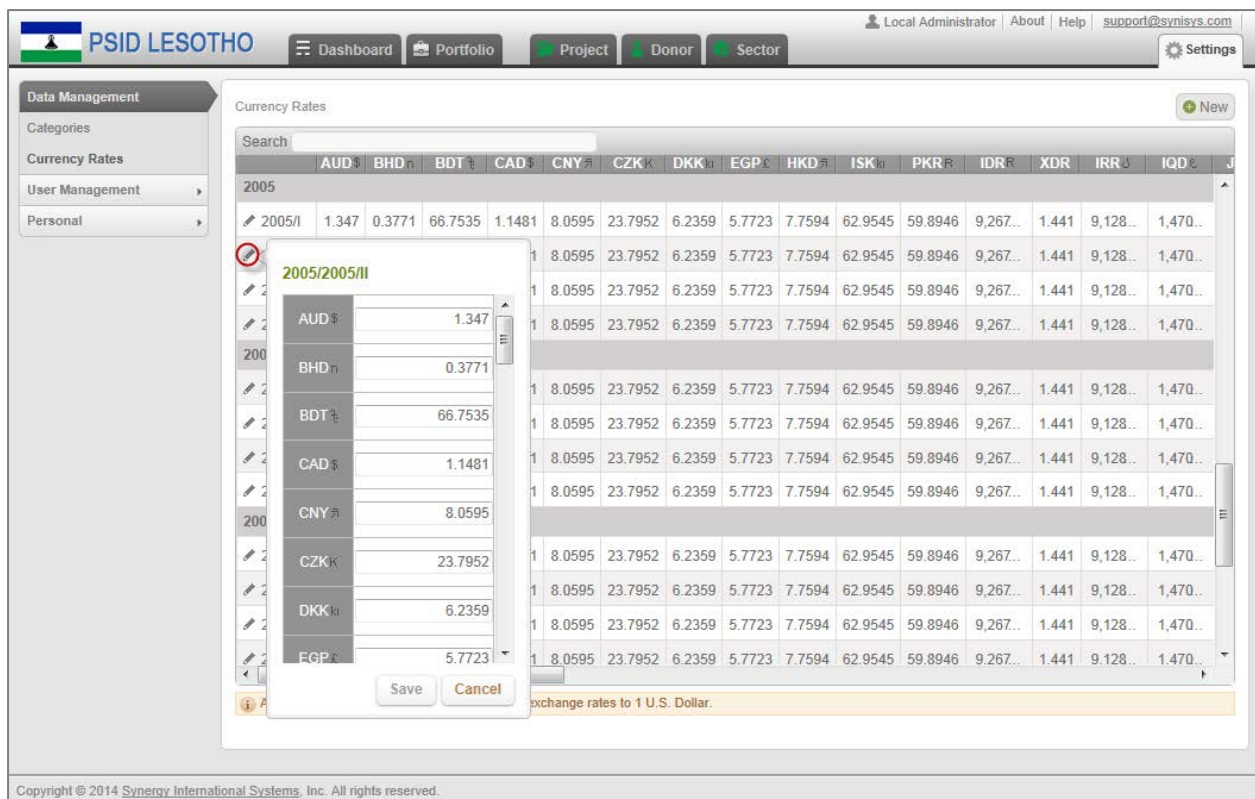


Figure 12: Editing Currency Rates

5.4 Searching for a Currency Rate


The list of currency rates can be long and hard to browse in. This is the reason why the option of searching for a currency rate has been designed in the *Currency Rates* section. It is intended for locating the appropriate currency rate for the selected year and quarter easily and instantly.

In order to search for a definite currency rate for the selected year and quarter, you need to enter the year (and quarter) in the search box above the *Currency Rates* table. The results returned will display the currency rates that match the search criteria.

5.5 Expanding / Collapsing Currency Year Group

The Currency Rates section can hold almost unlimited quantity of data related to different periods of time, thus making the section hard to work in. To avoid this problem as well to provide the users with an environment where they can easily drill down the wealth of information to focus on the data that they are looking for, the option for collapsing/expanding the year groups has been designed.

In order to expand/collapse a definite year group, i.e. to show/hide the data (quarter) rows associated with the group, you need to scroll right to the end of the year row and click the **Expand/Collapse** icon. The selected year group will be shown/hidden.


PSID LESOTHO

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Donor
Sector

Local Administrator | About | Help | support@synsys.com
Settings

Data Management
Categories
Currency Rates
User Management
Personal

Currency Rates

Search

	AUD \$	BHD n	BDT ₳	CAD \$	CNY ¥	CZK K	DKK kr	EGP £	HK \$	RUB р	EUR €	GBP £	HUF ₳	PLZ	ROL	LSL
2005																
✎ 2005/I	1.347	0.3771	66.7535	1.1481	8.0595	23.7952	6.2359	5.7723	7.7594	12.2552	0.7773	0.5724				
✎ 2005/II	1.347	0.3771	66.7535	1.1481	8.0595	23.7952	6.2359	5.7723	7.7594	12.2552	0.8196	0.5724				
✎ 2005/III	1.347	0.3771	66.7535	1.1481	8.0595	23.7952	6.2359	5.7723	7.7594	12.2552	0.8193	0.5724				
✎ 2005/IV	1.347	0.3771	66.7535	1.1481	8.0595	23.7952	6.2359	5.7723	7.7594	28.2552	0.8405	0.5724				
2004																
✎ 2004/I	1.347	0.3771	66.7535	1.1481	8.0595	23.7952	6.2359	5.7723	7.7594	28.2552	0.7995	0.5724				
✎ 2004/II	1.347	0.3771	66.7535	1.1481	8.0595	23.7952	6.2359	5.7723	7.7594	12.2552	0.8229	0.5724				
✎ 2004/III	1.347	0.3771	66.7535	1.1481	8.0595	23.7952	6.2359	5.7723	7.7594	12.2552	0.8227	0.5724				
✎ 2004/IV	1.347	0.3771	66.7535	1.1481	8.0595	23.7952	6.2359	5.7723	7.7594	12.2552	0.7796	0.5724				
2003																
✎ 2003/I	1.347	0.3771	66.7535	1.1481	8.0595	23.7952	6.2359	5.7723	7.7594	28.2552	0.9334	0.5724				
✎ 2003/II	1.347	0.3771	66.7535	1.1481	8.0595	23.7952	6.2359	5.7723	7.7594	28.2552	0.8877	0.5724				
✎ 2003/III	1.347	0.3771	66.7535	1.1481	8.0595	23.7952	6.2359	5.7723	7.7594	12.2552	0.888	0.5724				
✎ 2003/IV	1.347	0.3771	66.7535	1.1481	8.0595	23.7952	6.2359	5.7723	7.7594	12.2552	0.852	0.5724				

All amounts in this section quote the currency exchange rates to 1 U.S. Dollar.

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Figure 13: Expanding / Collapsing Year Group

6. REFERENCES

Please refer to the following PSID Lesotho related documents:

- PSID Lesotho Analytical Interface User Manual
- PSID Lesotho User Management Administrator's Guide
- PSID Lesotho Project Application User Manual
- PSID Lesotho Sector Application User Manual
- PSID Lesotho Donor Application User Manual