LOCAL PROJECTS DATABASE

Release 1.05

User Guide | July, 2004

www.developmentgateway.org

Introduction

The purpose of this User Guide is to direct people in the use of the Local Projects Database (LPD). It has information for the final user, for the information provider and for the LPD administrator. The information found in this user guide is the same found in the LPD help screens. This user guide provides simple guidelines and examples for the successful projects adding, editing and publishing. It also serves as a tool for the LPD administrators to manage the LPD. It also provides a glossary with the definitions of the terminology used in the LPD. For a general description of the LPD, as well as information on the main functionality and technical documentation please see: http://ro-gateway.ro/node/212301/

The Local Projects Database (LPD) is a web-based tool for managing records on development assistance activities financed and/or implemented by development partners in a particular country. This open source java based application, allows inserting, maintaining and exchanging project data in a server cluster environment.

The main purpose of the LPD tool is to allow organizations to enter data on a specific development activity or project. That data is stored in the LPD database and then it can be retrieved and consulted for future needs. Also, thanks to the data structure similarities with AiDA, the data can be fed to that global repository of aid activities - http://aida.developmentgateway.org/

Summary of features:

- **Project Data Capture Tool** - allows the LPD host organization to generate project data from a number of local sources.
- **Project Search Tool** - allows users to search projects in the database.
- **Organization Management** - facilitates the management of organizations.
- **Person/Contact Management** - facilitates the management of people.

- **Alerts** – allows user to set up parameters which, when met, will send a notification to the user.
- **Personalization** - allows users a quick view to personal preferences.
- **Sending a Project by E-Mail** – allows sharing projects of interest with colleagues.
- **Statistics** - allows users to have a quick snapshot of the statistics by sectors, country and status.
- **Registration, Login And Preferences Management** - allows the user to register, log in and change password.
- **Admin Tools** – allows the administrators to manage the LPD.

1. Project Data Capture Tool

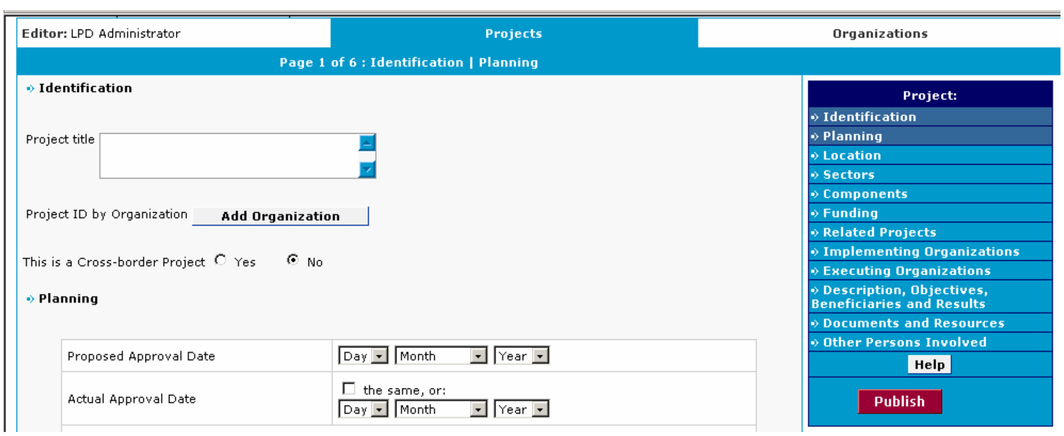
a ADD Projects

To add project a project, the user must be logged in. For this process, is assumed that the user is not an admin so the project would go trough the approval process before being published. For a list of functions that each role can perform please see Annex A.

Click on the **Add a New Project** link (on the home page), the system displays the project entry page (Page 1 of 6) called **Identification/Planning**. This page displays the project identification and planning information required, such us, project title, Project ID (donor)[1], proposed approval date, actual approval date, proposed closing date, actual closing date, status and an area to allow for project extension date and comments.

Page 1 of 6 - Project identification and planning

Figure 1. Project identification and planning



Step 1. On the ***Identification*** section, enter the project title (your project title)

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[1] For the definition of "Project ID", see the Glossary section in Annex A.

Step 2. In order to add the project ID, you first need to add an organization to which you will relate the Project ID. In order to do this, click on the "Add Organization" button next to Project ID . A pop-up window where you will be able to search the organizations, will be launched.

- Select the type of organization you are searching for (from the drop down menu).
- Entering a keyword (optional).
- Click on the search button.
- The search results will be displayed in the pop-up (the results contain only the organizations that are in the system, meaning that they have been added to the LPD via data migration or through the "Add organization" functionality – See section Add Organization).
- If you would like to do another search, click on "Clear list".
- On the search result pop-up window, select the organization(s) you are looking for by checking the check box at the left of the organization's name. Then, click on the "Save" button. The pop-up window will close and the organization(s) selected will be added to the project identification section.
- If you cannot locate an organization through the search, click on "Add it" at the bottom of the search pop-up window.
- A pop-up window for the Quick Add Organization functionality is displayed.
- Select the type of the organization from the drop-down menu
- Enter the name of the new organization
- You can also add comments in the next field
- Click on "orgselector.quickadd".
- A pop-up window with your added organization and assigned organization code is displayed.

- If you want to confirm your selection, check the box next to the organization name and click on **'Save'**. If you want to delete the selection, check the box next to the name of the organization and click on **"Clear List".**

- The pop-up window closes down. The LPD Admin can now accept or reject the added organization through the LPD 'Admin Area', 'Organization Quick-Add Manager'.

Step 3. Now you can enter the Project ID in the space provided below the organization you selected.

- If you wish to remove an organization, you may do so by checking the check box at the left of the organization's name and then selecting the "Remove selected donors" button. Also, if you wish to add another organization, click the "Add Donors Organization" button and follow the same process as in Step 2.

Step 4. On the ***Planning*** section of the page 1 of 6;

- You may select the proposed approval date (Day/Month/Year). If the actual approval date is the same as the proposed date, just check the box "the same". If the date is different, then proceed to the selection.

- You may follow the same process to complete the rest of the selection (Proposed starting date and Proposed closing date)

Step 5. After finishing selecting the planning dates, you may select the project status from the "Status" dropdown menu. Different possibilities on projects status are provided. If the status of your project is not in the list, the LPD Admin can add the status type to the list. The LPD admin has up to 6 different options to add.. Users also have the option of adding comments to the "Reason" text box if necessary.

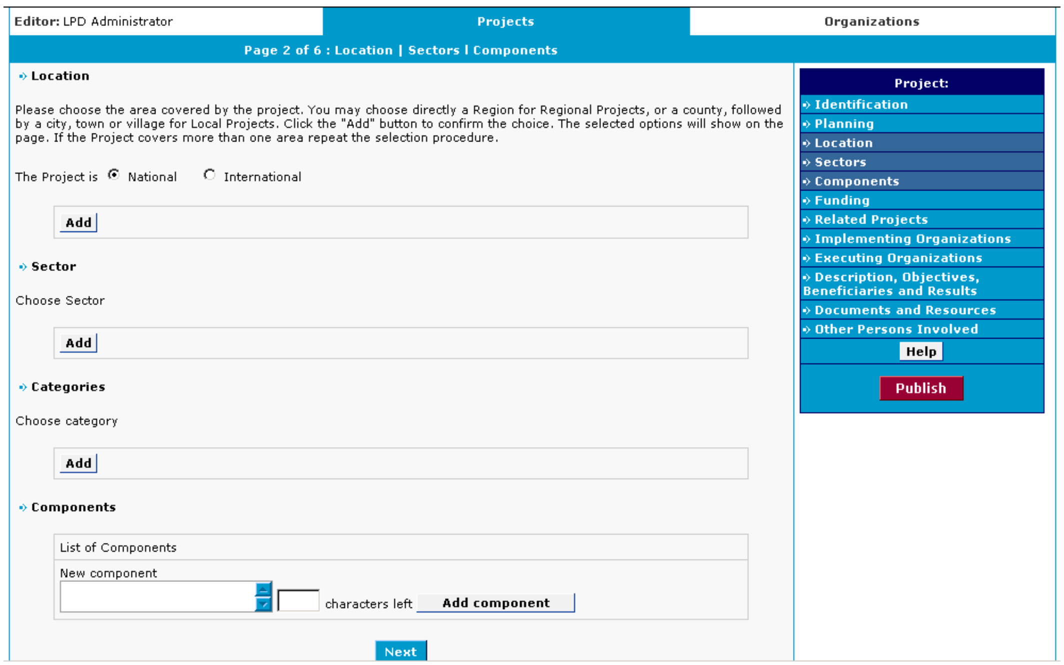
Step 6. Indicate if the project has been extended, the system gives you an option to choose from "Yes" or "No". If the project has been extended, select the Day/Month/Year of the new closing date. Enter any other relevant information such as the reason for the extension in the comments field provided.

Step 7. Click on "Next button" after completing all information. The second page (Page 2 of 6: Location/Sectors/Components) is displayed. On the right hand side you will notice a navigation menu displaying all of the sections and the current section will be highlighted.

Page 2 of 6 – Location/Sectors/Components

Location/Sectors/Components page displays the area covered by the project, the project sectors and it components.

Once the page is displayed you can choose location, sectors, categories and components. To accomplish these tasks you complete the following steps.



Step 1. Select the project location (you have the choice between National and International[2]) and then click "add"**. The location information** pop-up window is displayed. On the pop-up window you may select:

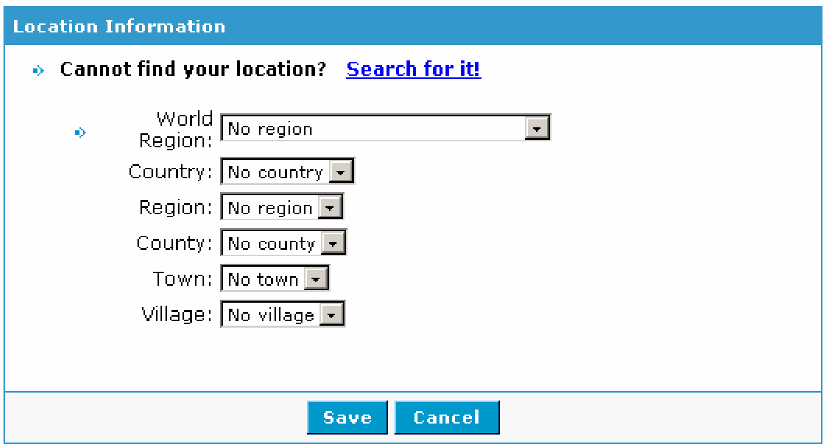
- World region
- Country
- Region

[2] For the definition of "National" and "International" projects, see the Glossary section in Annex A.

- County
- Town
- Village

The location must be selected in the same order that the dropdowns are displayed. You can also click the “Search for it” link, which will bring you a search window where you can conduct a search for the location.

Figure 2 Project Location



- First, you have to select the “World Region”. After you select the World Region, the window refreshes and the Country’s dropdown is populated with all Countries of the selected World Region.

- Next, you have to select the “Country”. After you select the country, the window refreshes and the Region’s dropdown is populated with all regions of the selected country.

- Next, you may select a region from the Region dropdown or you may just select the “no region” option. After you select the region, the window refreshes and the County’s dropdown is populated with all counties of the selected region.

- Then you may select a county from the County dropdown or you may just select the “no county” option. After you select the county, the window refreshes and the Town’s dropdown is populated with all the towns of the selected county.

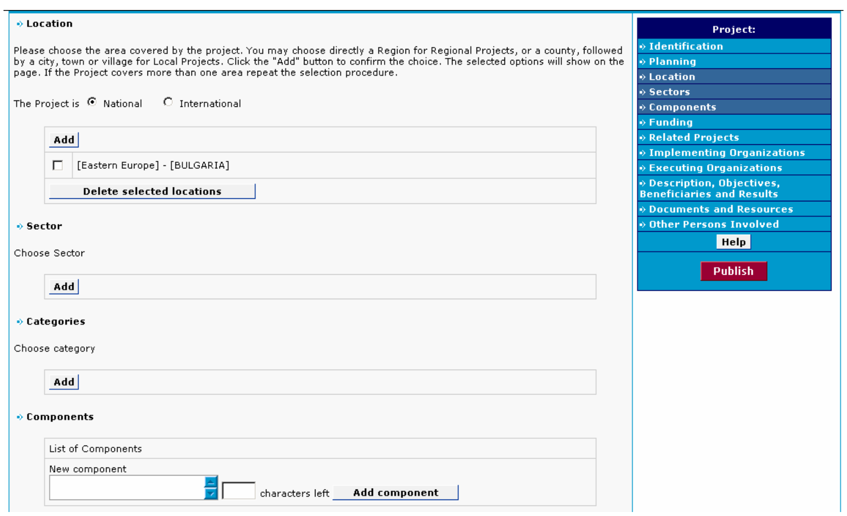
- Then you may select a town from the Town dropdown or you may just select the “no town” option. The window refreshes and in the village dropdown all villages of the selected town are displayed.

- Final, you may select a village from the Village dropdown or you may just select the “no village” option.

- When you have finished your selection either by using the dropdowns or by conducting a search, click the “Save” button. The location window will disappear and the page 2 of 6 is redisplayed with all your selection.

- To delete a location you may select the check box to at the left of the location previously selected and click “delete selected locations” button.

Figure 3 Add Location and Sectors



Step 2. The section “Add Sectors” will allow you to add the sectors[3] for the project.

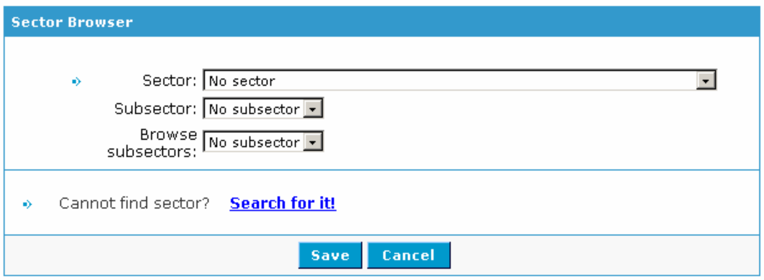
[3] For the definition of “Sector”, see the Glossary section in Annex A.

- You can add sectors by clicking the “Add” button below the Sectors section.

- The **Sector Browser** pop-up window is displayed with the dropdown menu to select sectors. You can also click the “Search for it” link, which will bring you a search window (**Sector Finder)** where you can conduct a search for the sector.

- When using the dropdown menu, once you select a sector, the window refreshes and the Sub-sectors dropdown is populated with the sub-sectors for the selected sector.

Figure 4 Sector Browser



- When you have finished making your selection, either by using the dropdowns or by conducting a search, you may click the “save selected” button. The pop-up will close and the sector and the sub-sector you selected will be added on the page.

- To delete a sector, you may check the box next to the selected sector and then click the “Delete Selected Sector” button.

Step 3. To add categories to the project you click the “Add” button on the Categories[4] section.

- The select categories pop-up window is displayed.

- From the select categories dropdown menu select the project category and click the “Add” button. To add more categories, just repeat the previous process.

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[4] For the definition of “Category”, see the Glossary section in Annex A.

- Once you finish adding categories, click the "Save" button. The page 2 of 6 is redisplayed with the selected project category.

- To delete Categories, check the box next to the selected categories and click the "Remove Selected" button.

- If the user is unable to find the category that is needed, the LPD Admin can access the Categories Manager on the Administration Page to add new categories.

Step 4. On the Components[5] section, in the new component text box, enter the project component (for example component 1).

- Then, click the "Add component" button. The page is redisplayed and the component is added to List of Components.

- To delete a Component, check the box next to the component and click the "Remove Selected component(s)" button.

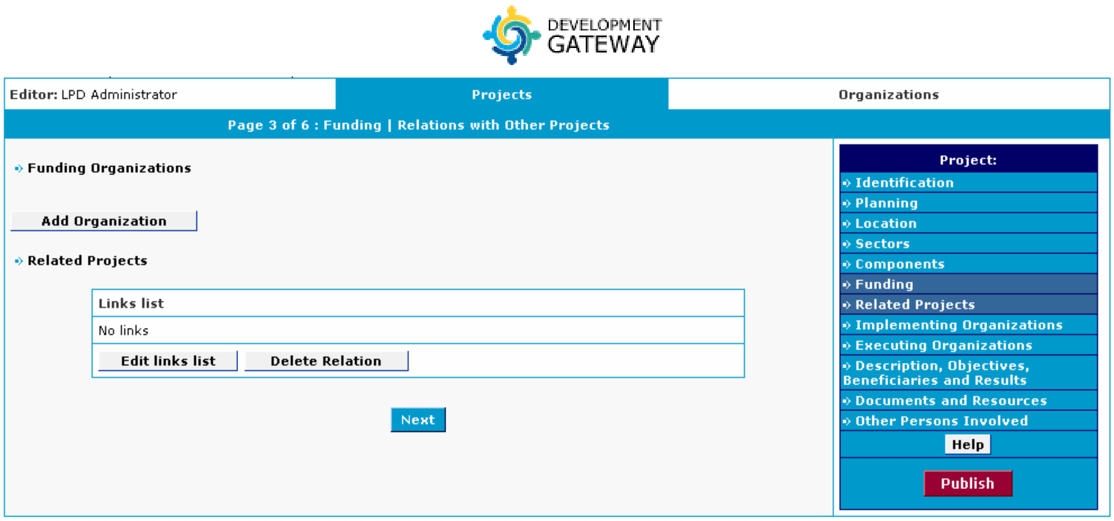
Step 5. When you have finish completing the Location/Sectors/Components page you may click on the "Next" button. The third page of the project entry section is displayed. **(Page 3 of 6 - Funding/Relation with Other Projects)**.

Page 3 of 6 – Funding and Relations with Other Projects

This page allows you to select the project's Funding Organizations[6] and the relation with other projects.

[5] For the definition of "Component", see the Glossary section in Annex A.

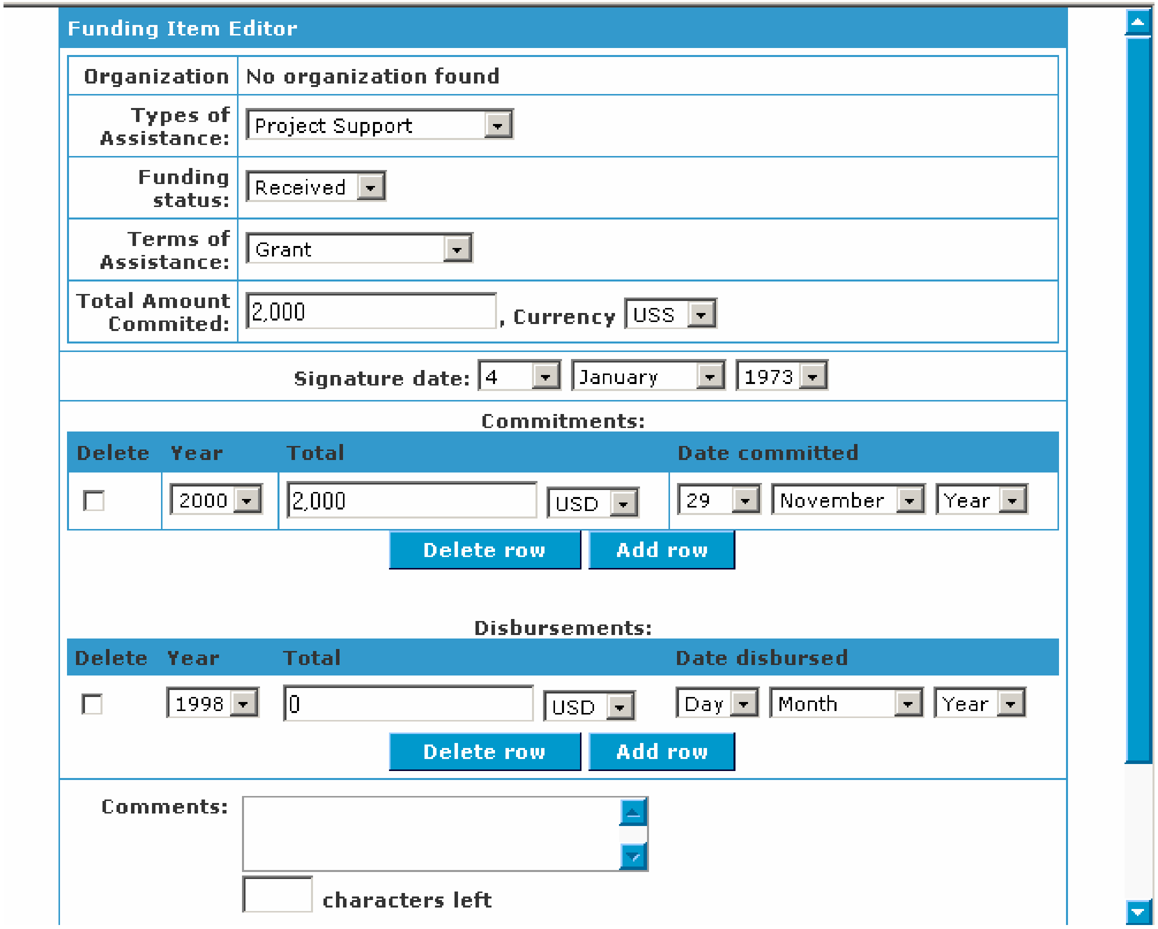
[6] For the definition of "Funding Organizations", see the Glossary section in Annex A.



Step 1. To select the funding organization, you may click the "Add Organization" button in the Funding Organizations section. The "Organization Selector" search window will pop-up. Follow the same process as explained in page 1 of 6, Step 2 in order to add an organization.

Step 2. After adding an organization, the "Add Funding" button is available for entering the details of the funding information.

- Click on the "Add Funding" button. The Funding Item Editor pop-up window is displayed. You will notice that the funding organization you have previously selected is display in the pop-up window.



- Select the type of assistance, the funding status, and terms of assistance from the drop-down menus; enter the amount of the funding and select the currency; select the funding signature date.
- You can now enter information on Commitments and Disbursements. Click on "Add Row".
- Select the year of the commitment from the drop-down menu, enter the amount and currency of the commitment, and select the date.
- You can enter as many rows as you like.
- To delete any of the rows, check the box next to the year of Commitment and click on "Delete row".
- Follow the same steps for the Disbursements field.

- You can enter any other additional information in the “Comments field.

- Click the “Save” button. The page 3 of 6 is redisplayed with all the information you just entered.

- You can click the “Edit Item” link to make a correction or the “Delete Item” button to delete your entries. You can also add another “funding item” for the same organization in case the same organization is providing different sources or types of funding for the same project.

- To remove an organization from this section, you may check the box next to organization name and click the “Remove Selected Organization” button. Keep in mind that ALL the funding information will be deleted once the organization is deleted.

Step 3. On the **Related Projects section** click the “**Edit Links list**” button.

- A pop-up window is displayed where related projects can be searched.

- Enter the search criteria into the Search text field and click on the **Search** button. Note: this search text field searches project titles only.

- The pop-up window refreshes displaying all projects meeting the search criteria.

- Select the radio button to the left of the project name and the relation type, then click the “**Save**” button. The pop-up window refreshes with the selected project listed.

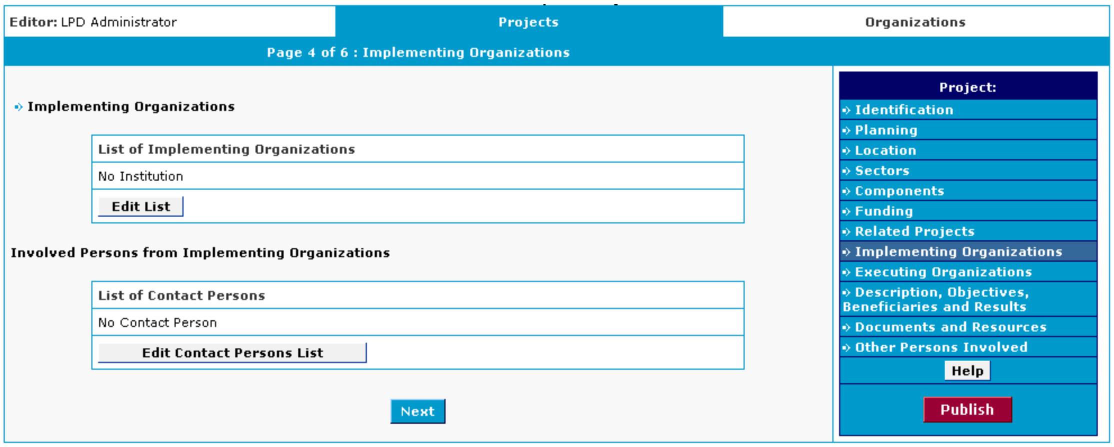
- You can also add another “**Related Project**” by clicking on the “**Edit Links List**” button and following the steps above.

- To remove “**Related Project**” from this section, you may check the box next to project name and click the “**Delete Relation**” button

Step 4. Click the “Next” button. **The Page 4 of 6 (Implementing Organizations)** is displayed.

Page 4 of 6 – Implementing Organizations

This page allows you to select the **Implementing Organizations**[7] and enter people involved in the project.



Step 1. On the **Implementing Organizations** section, click the “Edit List” button.

- The **Organization Selector pop-up window** is displayed. Follow the same process as before for adding organizations.
- Once you find and select the organization, the page 4 of 6 is redisplayed with the name of the selected organization as a link.
- Click on the link. The **View Organization** pop-up window displays with the organization details.
- To remove the organization, select the check box next to the organization’s name and click on the “**Remove Selected Organizations**” button.

Step 2. On the **Involved Persons** section click on “**Edit Contact People List**” button.

- The **Involved Persons Selector** window pop-up is displayed.

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[7] For the definition of “Implementing Organizations”, see the Glossary section in Annex A.

- You can either search by name or by keyword. Once you have entered your search criteria, you can click on the **Search Button**. The system will display the list of search results.

- From the Involved Persons Selector pop-up, select people involved and click the "Save" button. The window refreshes and redisplays page 4 of 6 with the name of people involved under the **List of Contact People.**

- To edit the list, select the check box next the person's name and click on the "**Edit Contact People List**" button.

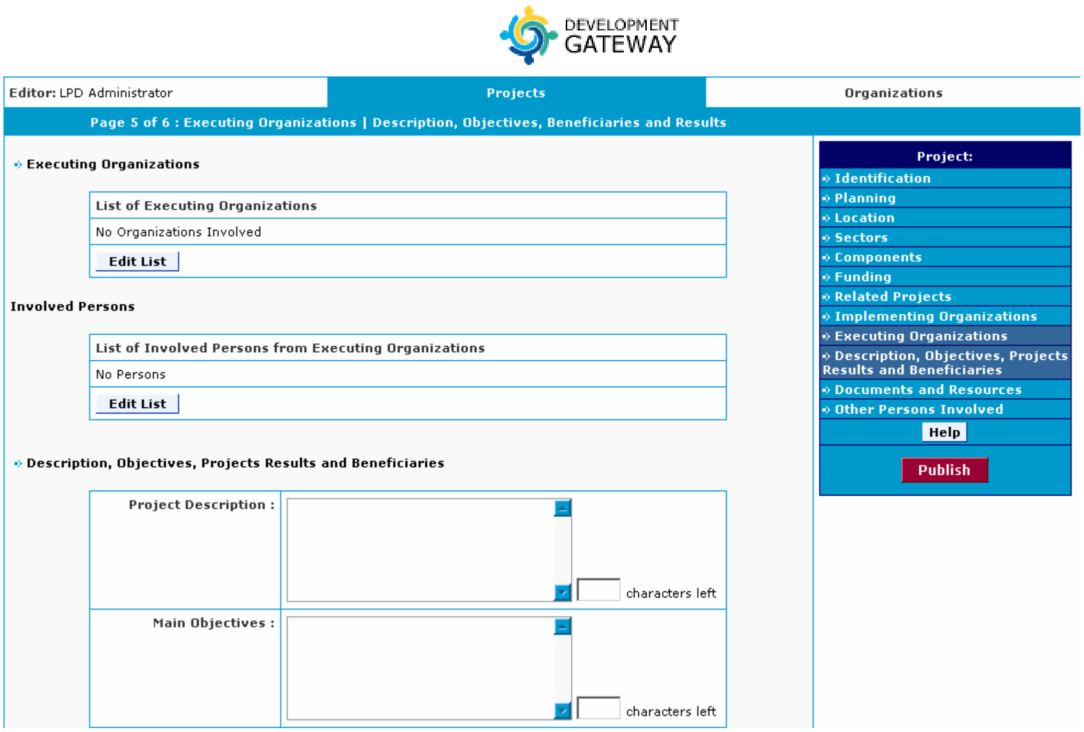
- To remove people from the list, click the "**Remove selected person**" button.

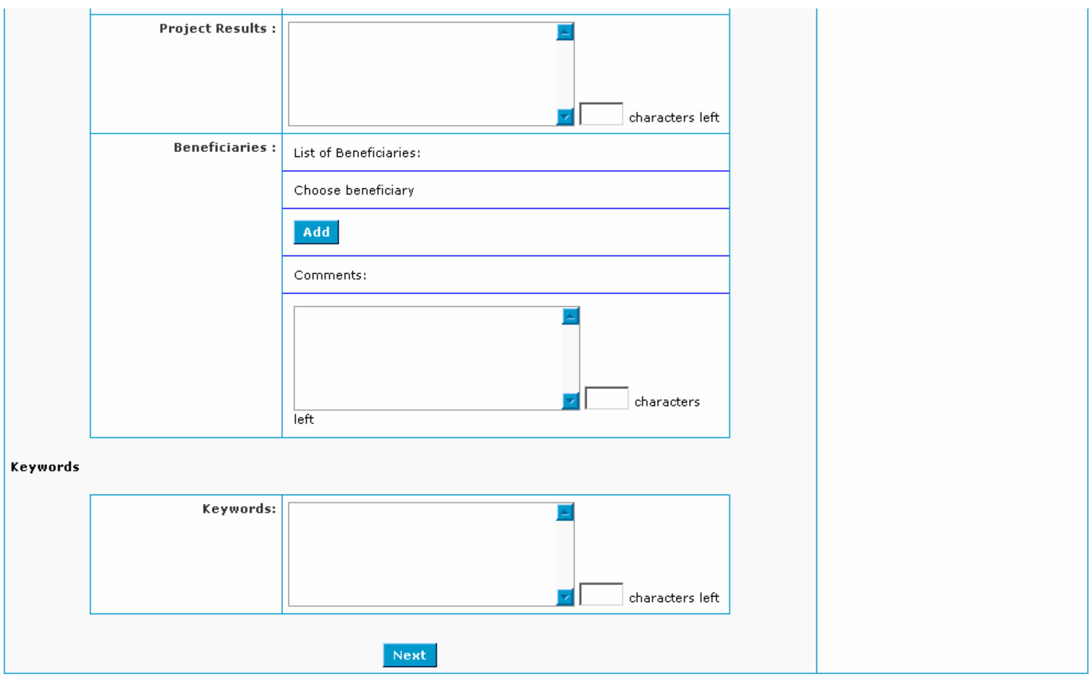
Step 3. Now that you have finished to complete the page, click the "Next" button. **The Page 5 of 6 (Executing Organizations, Description, Objectives, Beneficiaries and Results)** is displayed.

Page 5 of 6 – Executing Organizations, Description, Objectives, Beneficiaries and Results

This page allows you to select the Executing Organizations[8] of the project. It also allows you to state the project's description and its main objectives.

[8] For the definition of "Executing Organizations", see the Glossary section in Annex A





Step1. On the **Executing Organizations** section click the "**Edit List**" button.

- The **Organizations Selector** search pop-up window will display. Follow the same process as before for adding organizations.

- Once you find and select the organization, the Page 5 of 6 redisplays with the selected executing organization name added to the list. To remove an organization from the list select the check box next to it, and click the "**Removed selected organization**" button.

Step 2. To add a person to the list of Involved Persons, click the "**Edit List**" button.

- The **Involved Persons** pop-up window is displayed. Follow the same process as before for adding people.

- Once you find and select the person, the page 5 of 6 is displayed with the selected person added to the list.

Step 3. Now you may proceed with the **Project Description, Objectives, Beneficiaries and Project Results Section.**

- In text boxes provided, write the project description, main objectives, and the project results. Make sure to respect the number of characters required.

Step 4. The next section allows you to add **Beneficiaries**.

- To add a beneficiary you may click on the **Add Button**. A Beneficiaries Pop-up will be displayed.

- You may select the Beneficiary from the drop down list and click the **Add Button.** Next you need to select the check box next to the Beneficiary you wish to add and click on the **Save Button.** The Beneficiary name will be added to the list. Note: The LPD Admin can add Beneficiary Names in the Administration Pages of the LPD if the Beneficiary Name you need does not appear.

- To Add more Beneficiaries, repeat the steps above. To delete a Beneficiary, select the check box next to the Beneficiary you wish to delete and click on the **Delete Button.**

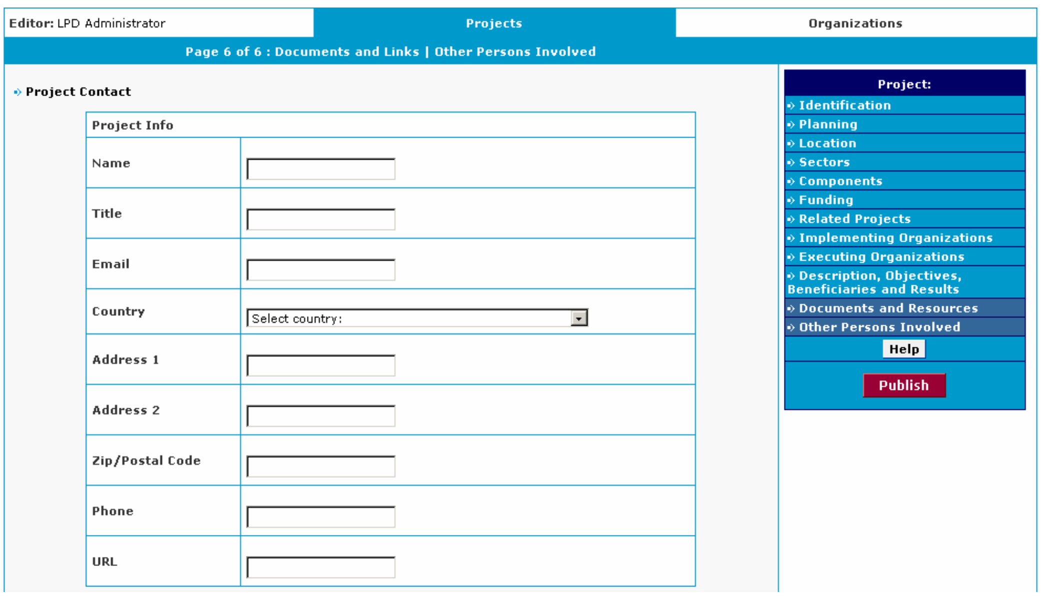
- If you wish to add comments about the Beneficiaries you may do so in the **Comments** text box provided.

Step 5. Now you may proceed with entering the keywords describing the project.

Step 6. When you finish, click the “Next” button. The sixth page of the project entry section is displayed. Page 6 of 6: Documents and Links, Other Persons Involved.

Page 6 of 6 - Documents and Links, Other Persons Involved.

The sixth page of the project entry section allows you to add other people involved in the project and to attach relevant documents.



Step 1. In the **Project Info** Section add the Project Contact information. This section contains the Name, Title, Email, Country, Address, Phone and URL fields to be completed.

Step 2. On the **Other Involved Persons** section, click the “**Edit list**” button.

- The **Involved Persons selector** pop-up window displays. Follow the same process as before for adding people.
- Once you find and select the person(s), the page 6 of 6 redisplays and the people selected are added to the “**List of Involved Persons**”.
- To correct the list, select the check box and click the “ **Edit list**” button.

- To remove a person from the list, select the check box and click the "**Remove selected people**" button.

Step 2. On the **Relevant Documents** section click the "**Add a Document**" button.

- The upload pop-up window displays. Enter the Title and the Description of the Document that will be uploaded.
- Click the "**Browse**" button to find the document you want to upload; then click the "Save" button.
- The page 6 of 6 redisplays with the document you have selected as a link.
- To Edit the Document Title or Description check the box next to the document link then click the **Edit Documents** button. A pop-up will appear and allow you to make the edits. Click the **Save** button and your edits will appear on the page.
- To delete a document, select the check box next to it and click the "Delete Selected Documents" button. The page redisplays without the document.
- To add more documents, click the "**Add a Document**" button and repeat the process.

Step 3. On the **Web Resources** (links) section, click the **Add a Web Resource** Button then enter a resource title and description in the text box and the URL. Then click the "**Save**" button. The page redisplays with the information on the resource added description and a link to it.

Step 4. On the **Project Logo** section, click the "**Image Upload**" button.

- A pop-up window will be displayed.
- Enter your image file name if you know it or click the "Browse" button to select it in your PC. Then click the "Submit" button.
- The page 6 of 6 is redisplayed with the image you just uploaded.

Step 5. In the '**Project Information Source Organization'** section you can add the organization that is the source of information for this project by clicking on **'Edit List'**, selecting the organization, and saving the selection.

Step 6. Click the "Next" button. A **confirmation page** is displayed with ALL the information that you have entered.

- Verify each of the fields.
- You may click the "Back to Activity Editor" button.
- The page 1 of 6 is displayed with the information entered; and you can review the project before saving it.
- Click the "Review Before Saving" button. The confirmation screen is redisplayed again.

Step 7. Now you may click the "Save project" button. The project is saved and a page is displayed with detail information.

Congratulations!! You have completed your project entry into the Local Project Database. To verify whether your project is successfully entered into LPD, click "My Desktop" at the top of the LPD. Your project will be listed in the "Project Title" section as a link.

Please not that your project is not Published yet. It has to go through an "Approval" process to be published.

b EDIT Project

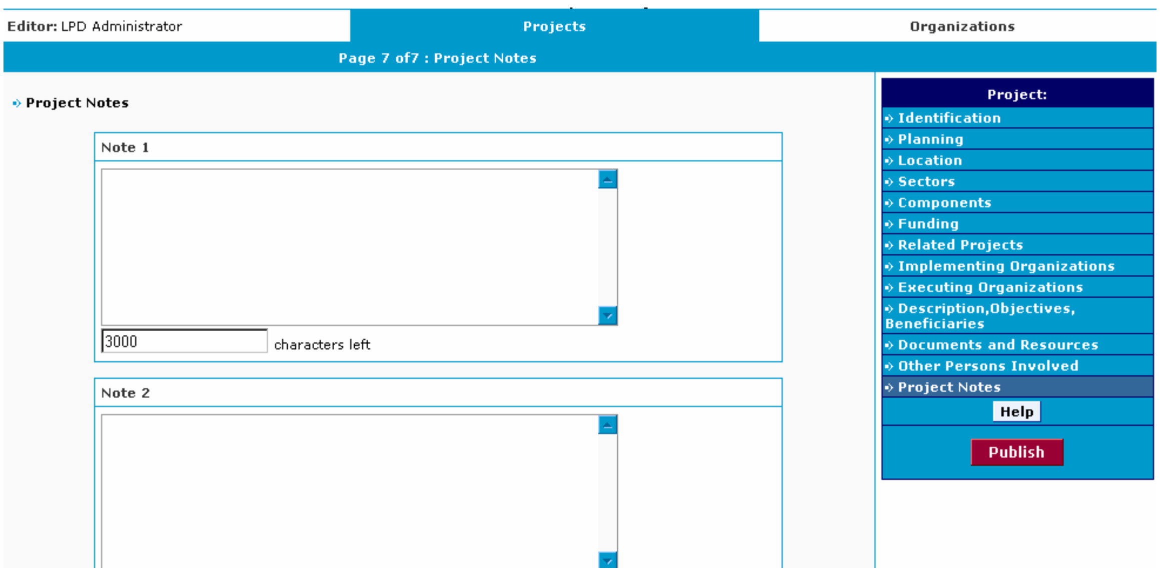
Step 1. Find the project you would like to edit either by doing a search or by going to "My Desktop".

Step 2. Click on the name of the project (which is a link). The project's details are displayed. Click the "Edit this Project" link. (You need the appropriate permission to do this – see roles and permissions section). The project Editor page (Activity Editor) is displayed.

Step 3. You can now access all section on the project and make any correction if necessary. After you make a change or correction, click the “Review Before Saving” button at the bottom-right section. A confirmation screen is displayed with the change you just made.

If you wish to make more changes, you may click the “Back to Activity Editor” button to go back to editor page. To save the project with the changes you have made, click the “Save Project” button. The project details screen is displayed with your changes. To make sure the change is made in the LPD , click “My Desktop”. “My Desktop” page is displayed. In “My Latest Edited Projects” section, click the project in the Project Title column. Details page of the project is displayed with you changes.

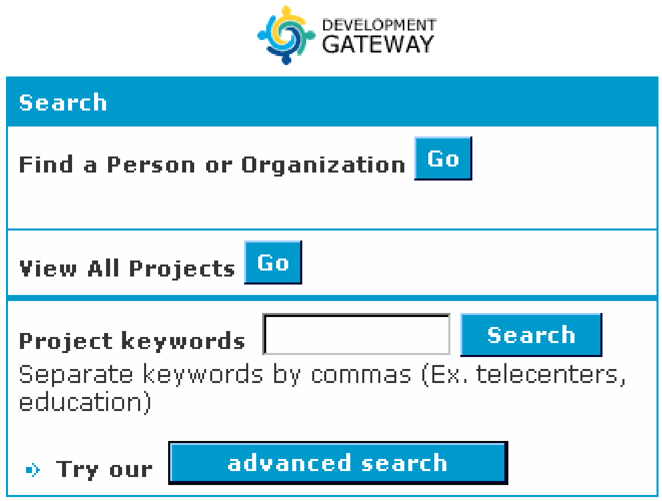
Page 7 of 7-Project Notes



You can use project notes to enter any additional information about the project.

2. Person, Organization, and Project Search Tool (Simple and Advanced Search)

This section explains how to search for a Person, Organization, and Project in the LPD.



a. Find a Person or Organization

To search the LPD for a person or organization click on “Go” next to “Find a Person or Organization”. A page featuring two searches: “Find an Organization” and “Find a Person” is displayed.

To find an organization enter the organization name, select an organization type from the drop-down menu, or enter a keyword to search for an organization code, acronym, address, or description and click on “Search”. A page with “Search Results” is displayed.

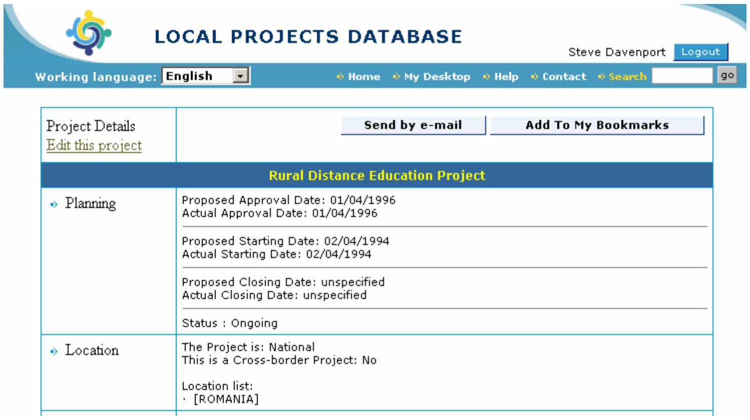
To find a person enter the first or last name of a person, enter a keyword to search for an organization name associated with a person or person’s address and click on “Search”. A page displaying search results is displayed.

b View all projects

Step 1.. Go to the LPD home page and click the “Go” button next to “View all Projects”. A search results screen is displayed with a list of all published projects. The results are displayed sorted by project title (by default) but they can be sorted by country or sector by clicking on the headings.

Step 2. Click on the title of the project you are looking for. The project is displayed with the details. If you have the appropriate rights, you could be able to see an EDIT button – see section XX.

Figure 5 Project Search



c Keyword search

Step 1. Go to the LPD home page and on the "Project keywords" section, enter the keyword or keywords you would like to search for. Click "search". A search results screen is displayed with a list of all published projects that match your criteria (in their titles or in the project's text). The results are displayed sorted by project title (by default) but they can be sorted by country or sector by clicking on the headings.

Step 2. Click on the title of the project you are looking for. The project is displayed with the details. If you have the appropriate rights, you could be able to see an EDIT button.

d Advanced Search

Step 1. From the LPD Home page, click the "Advanced Search" button in the **Search** section. The advanced search tool page is displayed. (You can perform the same action by going to **View All Projects**, and at the bottom of the search results page, click the " Search Again").

Step 2. You can now select the search criteria from a pre-set menu of criteria by clicking on the '**Select**' button next to the criteria or by typing in the Title, Description, or the Keyword. Example: click on **'Select'** next to **'Sector'**; the **Sector Browser** window is displayed; select a sector from the drop-down menu and click on **'Save'**; the selected section appears next to the **'Sector'** field.

Another option is to form your individual grouping of search criteria. In order to define you own group of search criteria click on 'Edit Search Criteria'. **The 'Search Criteria List'** page is displayed. Click on **'Add New Format'**. You can now select the criteria from the left hand side table and transfer them to the right hand side table by clicking on the right hand arrow. If you want to deselect some of the criteria highlight them and click on the left hand arrow. Once you are satisfied with your selection of criteria, type in the name of your grouping in the '**Format Name'** field, and click on '**Submit**'. You can now see your grouping in the Search Criteria List. Click on the '**Project Search'** link to return to the main Search page. Now you can select your grouping from the drop-down menu next to the **'Search Criteria Groupings'** and click on **'Search'**. The search results screen is displayed with a list of all published projects that match your criteria. To view the search results in Excel click on **'Export to Excel'**. To edit your search criteria click on **'Edit Search Criteria'**. To start a new search click on **'Search Again'**.

3. Organization Management

This section explains how to Add an organization, Edit it and finally Delete an organization. You may need to have a special role or permission to conduct these tasks. (See roles and permissions section)

a ADD Organization

Step 1. After logging in to LPD click on "My Desktop" link. "My Desktop" page is displayed. In "My Latest Updated Orgs" section, click the link "Add New Organization". The "Add Organization" page is displayed.

Step 2. Enter the required information. Abbreviation is an acronym of the organization that you are trying to add. If there is no acronym, use a logical abbreviation. AiDA Org ID - Use four-letter organization code, if possible, to promote consistency across sources. See Authority list for standard codes at: http://aida.developmentgateway.org/OrgToolsView.do. If the organization you are trying to add is not on the AiDA list, please submit name of organization with proposed 4-or-more-letter code to AiDA.

After entering the information click the “Save” button. A confirmation page is displayed. Make sure the information you entered is correct. If you would like to edit the information just entered, click the “back” button.

Step 3. After verifying the information, you may click the “Confirm” button. “My Desktop” is redisplayed and the organization you just entered is saved in “My Latest Updated Orgs” section as a link.

Step 4. To view all organizations you have added to the LPD, click the “Details” link. My Organization page is displayed where you can view the organization name and the date of the last update. To go back to your desktop, click the “Back to My Desktop” link at the bottom of the page.

b EDIT Organization

Step 1. From the LPD home page, go to “My Desktop”.

Step 2. In the “My Latest Updated Orgs” section, click the link to the organization you want to edit. The organization details page is displayed. Note: To view all organizations you have added to the LPD, click the “View all My Organizations” link.

Step 3. Click the “Edit Information” link[9]. The “Add Organization” page is displayed.

Step 4. Make the changes you would like to make. After you have finished, click the “Save” button. A confirmation page is displayed. Make sure the information you entered is correct. If you would like to edit the information just entered, click the “back” button.

Step 5. After verifying the information, you may click the “Confirm” button. The organization details page is redisplayed with the information you just entered.

Step 6. For verification, click “My Desktop” on the menu bar. “My Desktop” page is displayed. Then in the “My Latest Updated Orgs”, click the link to the organization you just made a change to. “Organization details” page is displayed, where you can verify if your changes have been saved.

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[9] If you don’t have the appropriate rights/permission, this link might not be visible to you.

c DELETE Organization

Step 1. Go to "My Desktop". Click on the link to the organization you would like to delete. The Organization detail page is displayed.

Step 2. Click on the link "Edit Information". The "Add organization" page is displayed. To delete this organization, click the "Delete" button at the bottom of the page.

Step 3. A confirmation page is displayed. Click the "Confirm" button. "My Organizations" page is displayed and the organization is now deleted from the table.

4. Person/Contact Management

d ADD Person

Step 1. Click on "My Desktop" at the LPD home page. My Desktop page is displayed. Click "Add New Person" in the "My Latest Updated Persons" section, at the bottom –left of my desktop. The "Person Info Add Form" is displayed.

Step 2. Enter the requested information and click the "Save" button. A confirmation page is displayed with all the information you just entered. Make sure the information is correct.

Step 3. Click the "Confirm" button. My Desktop is redisplayed. Check in "My Latest Updated Person" section. The person you have entered should be listed.

e EDIT Person

Step 1. Click on the link of the person you just added. A "Person Details" page is displayed with information on the person.

Step 2. Click on the "Edit information" link at the bottom of the page. The "Person Info Add Form" is displayed. You may now edit this information. Then click the "Save" button. The "Person Info Add Form" is redisplayed with the change.

Step 3. Click the "Confirm" button. The "People info" page is redisplayed with the new information.

f DELETE Person

Step 1. Go back to "My Desktop". Click on the link to the person you want to delete. The person information page is displayed. Click on the "Edit Information" link. The "Person Info Add Form" is displayed.

Step 2. Click the "Delete" button at the bottom of the form. The confirmation page "Person Info add Form" is displayed. Now you may click the "Confirm". A confirmation page "My Persons" page is displayed. The person is now deleted.

5. Personalization

Allows users a quick view to the organizations, contacts and projects that they have added. It also allows them to bookmark the favorite items.

g ADD a New Project to Bookmarks

Step 1. From the LPD home login and then go to "My Desktop". "My Desktop" page is displayed with information such as Organizations and Persons (that you have added), Approvals (for you to approve), Bookmarks and Projects (that you have added).

Step 2. Click the "Add New Project" link. The "Project Add" page is displayed. Go through the process of adding an project. Save and confirm your add. The Project that you just added will be displayed in My Desktop under the "My Latest Edited Projects" section.

Step 3. Go back to my desktop and click the link to the project you just added. The "Project Details" page is displayed. Click the "Add To My Bookmarks" button. The page is refreshed and the project should be added to your Bookmarks".

Step 4. Go back by clicking on My Desktop. The "My Desktop" page is displayed and a link to the selected project is added to "My Latest Bookmarks" section. Go to "My Latest Bookmarks" section and click on "Show Bookmarks". "My Bookmarks" page is displayed with your Bookmark associated with Name and Date.

h ADD an Existing Project to Bookmarks

Step 1. From the LPD home login and then go to "My Desktop". On the "My Latest Edited Project' section click on the link "Details". "My Projects" page is displayed with ALL the projects you have added..

Step 2. Click on the link to the project you want to add to your bookmarks. "The Project Detail" page is displayed with ALL project information. This page has two buttons on the top-right section: "Send by e-mail" button and "Add To My Bookmarks" button.

Step 3. Click the "Add To My Bookmarks" button. The page is refreshed and the project should be added to your Bookmarks.

Step 4. Click "My Desktop" on the top Navigation Bar. The "My Desktop" page is displayed and the link to the selected project is added in the "My Latest Bookmarks' Section.

Step 5. Go to "My Latest Bookmarks" section and click on "Show Bookmarks". "My Bookmarks" page is displayed with ALL your Bookmarks associated with their Name and Date.

i DELETE Bookmarks

Step 1. Go back to "My Latest Bookmarks" section and click on "Show Bookmarks". "My Bookmarks" page is displayed with ALL your Bookmarks associated with their Name and Date.

Step 2. Select the check-box to the left of the bookmark you want to delete and click the "Delete Selected Bookmarks" button. The page refreshes and the selected bookmarks is no longer displayed.

6. Sending a Project by E-mail

Step 1. Login to LPD. The LPD home page is displayed with all available sections.

Step2. Go to the "Search" section and click the "Go" next to "View all Projects". A "Search Results" page is displayed with all available projects along with project title – Country – Sectors.

Step3. Click on the link to a project you are looking for. The project details page is displayed with “Send by e-mail” and “Add to my Bookmarks” buttons on the top-right section.

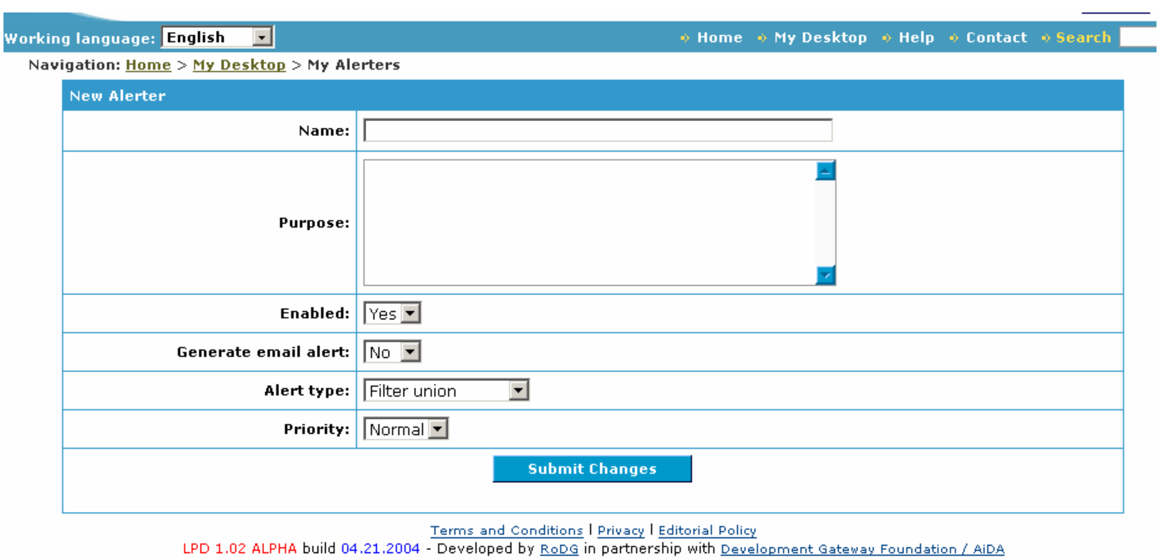
Step4. Click the “Send by email” button. The system will prompt you to enter the email address and your comment in the text boxes. Enter the email address and your comment (optional) and click the “Send” button. The confirmation page is displayed and the email sent.

7. Alerts

This section give a brief overview of how to setup alerts, add filters and receive alerts. From the **Home** page, you will need to click on the **My Desktop** link at the top of the page. The **Alerts** Section is visible on the right hand side of the **My Desktop** page.

a Adding an Alert

Step 1. Click on the **Edit My Alerts Button**, you will see the **Alerts List** page. Click on



the **Add New Alert Button** and **the New Alert** page will be displayed.

Step 2. Complete the Name and Purpose Text sections.

Step 3. The **Enabled** dropdown allows you to select to have the alert turned on or off. If you select **yes**, the alert is enabled. If you wish to save the alert, but not enable it, you can select **no.**

Step 4. The **Generate Email Alert** dropdown allows you to select to have the alert emailed to you. If you select **yes**, the email is sent to your email address and you will be alerted in the **Un-read Alerts** Section. If you select **no**, the email will not be sent, but you will be notified on the **Un-read Alerts** Section on the **Desktop**.

Step 5. The **Alert Type** has two options. An **Intersection** will trigger the system to send an alert when all filter parameters are met. An **Union** will trigger the system to send an alerts when only one of the parameters is met.

Step 6. You can now set the priority that you wish the alert to have.

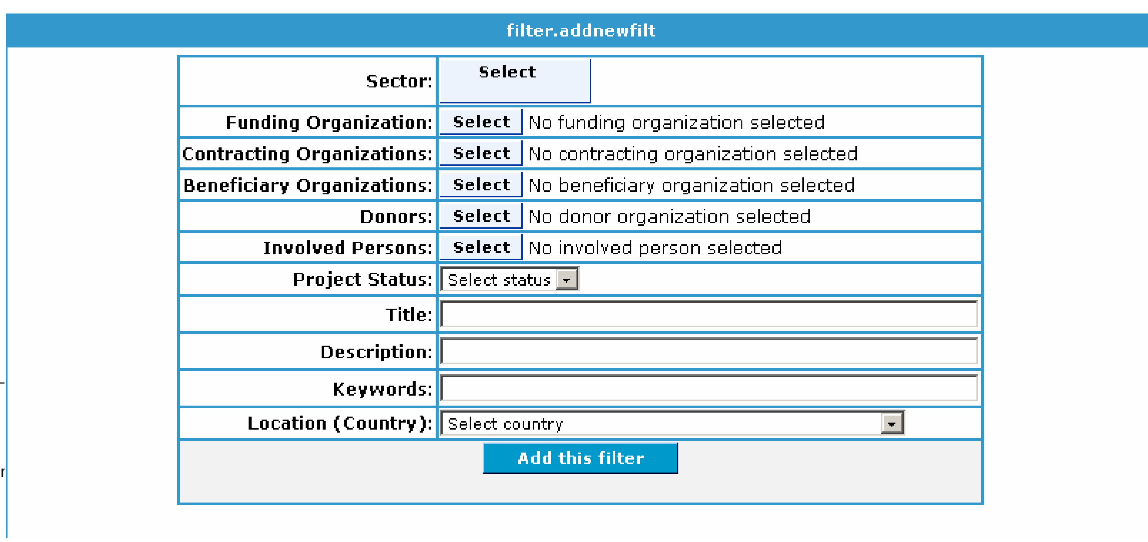
Step 7. Click on the **Submit Changes** button to save your alert. You alert will be saved in the **Alerters List**.

b Adding a filter to an Alert

Step 1. Click on the Alert that you wish to add a filter to from the **Alerters List**. The **Alert View** window will be displayed.

Step 2. Click on the **Assign Filters** Link in the **Alert View** window the **Filters List** window will open . Click on the **Add New Filter Button** and the **Filters for Alert** window will be displayed

Step 3. Select the items which you wish to trigger an Alert. The options are by Sector,



filter.addnewfilt

Sector:	Select
Funding Organization:	Select No funding organization selected
Contracting Organizations:	Select No contracting organization selected
Beneficiary Organizations:	Select No beneficiary organization selected
Donors:	Select No donor organization selected
Involved Persons:	Select No involved person selected
Project Status:	Select status
Title:	
Description:	
Keywords:	
Location (Country):	Select country

Add this filter

Funding Organization, Contracting Organization, Beneficiary, Donors, Involved Persons, Project Status, Title, Description, Keyword or Location.

Step 4. Click **Add this Filter** button. The system will link the filter to the alert.
Note: A filter can only be linked to one alert.

Step 5. An Alert can have many filters, if you wish to add more filters to the alert, click on the **Add New Filter** button. The system will display a new filter page that will allow you to select different parameters.

c Editing an Alert

Step 1. Click on the **Edit My Alerts** link the **Alerts** section on the **Desktop**.

Step 2. From the **Alerts** List, click on the alert that you wish to edit.

Step 3. In the **Alerts View** list, click on the **Edit this alert** link. Make any changes necessary and then click on the **Submit Changes** button. You changes will be saved.

d Deleting an Alert

Step 1. Click on the **Edit My Alerts** link the **Alerts** section on the **Desktop**.

Step 2. From the **Alerts** List, check the box next to the Alert that you wish to delete. Click on the **Delete Selected** button and the selected Alert will be deleted from the list.

Note: You can also Delete alerts following the steps above from the **Alert View** Section.

e View an Alert

Step 1. Click on the **View Alerts** link the Alerts section on the Desktop. A list of all alerts will be displayed.

Step 2. To see a the details of the alert click on the **alert name.** You will be able to see the Name, Priority, Date Sent, Date Viewed, and the Project Name.
Step 3. **To view the project details, double click on the** Project Name**.**

8. Reports

This section allows you view quick snapshots of the activities by sector, country and status.

f Reports by Sector

The sector statistic displays the top 5 sectors.

Step 1. At the LPD home page go to "Sector Search Reports" section at the bottom-left . Note the number of projects for each sector listed. Click on the sector link. A page is displayed with ALL projects that are assigned to the selected sector as one of the sectors. Each project has project title, country and sector. And the number of projects displayed should be the same as the total number mentioned at the home page in the sector statistics section.

Step 2. Click on the project of your choice. The project detail page is displayed. Make sure that the sector you have chosen is listed as one of the sectors.

Step 3. Go back to the home page. Click the "Details" links at the bottom of the "Sector Statistics" section. The Sector Statistics list is displayed with the respective project count.

Step 4. Go back to the home page. If you wish to see the chart, you may now click the "Pie Chart" link at the bottom of the "Sector Statistics" section. A pie chart is displayed with the sector distribution.

g Reports by Country

This section allows you to conduct project statistics by country.

Step 1. Go to the home page. On the "Country Search Reports" section, note the number of projects for the each country listed. Click on the link to the country of your choice. A search results page is displayed with ALL projects that have your selected country as location. For each project you can see the title, the country and the sector.

The number of projects displayed should be the same as the total number mentioned at the home page in the country statistics section.

Step 2. Click on the project of your choice. The project details page is displayed. Make sure the location is your selected country location.

Step 3. To view details, go back to the home page and click the link “Details” at the bottom of the “Country Statistics” section. The “country statistics” page is displayed with country name and projects count.

h Reports by Project Status

This section allows you to view the statistics by projects status.

Step 1. Go to the home page. On the “Status Reports” section, note the link of status and the projects count for each one of them. Click on the link of the status of your choice. A search results page is displayed with ALL projects that have your selected status as their status. The number of projects displayed should be the same as the total number mentioned at the home page in the “Status Reports” section.

Step 2. Click on the link of the project of your choice. The project details page is displayed showing the status.

Step 3. To view details, go back to the home page and click the link “Details at the bottom of the “Status Reports” section. A list of all the status with the respective project count is displayed.

9. Registration, Login and Preferences Management.

Allows the user to register, log in and change password

i Password Change

Step 1. Go to the “Login” section at the LPD home page. Type your username and password in the window provided. Once you are logged in, you access the edit function of the LPD.

Step 2. Click “My Account” in the Editor Login section. Administration Tools/Users Module page is displayed. You may now type in your new password in the “Password” section and confirm it.

Step 3. Click the save button. A confirmation page will display before you. Verify your login information. You can edit you information by clicking the “Back to Editor” button if you wish. Otherwise proceed and click the “Confirm Save” button. The LPD home page will redisplay. Your password have been successfully changed.

j Password Recovery

This implies that you have forgotten your password. The system allows you to recover.

Step 1. In the “Login” section, go to the bottom and click the link “here” next to the question **“Forgot your password?”**. The system will display a screen where you can enter your email address so your password can be sent to you.

Step 2. Enter your email address, then click the “Recover Password” button. A confirmation page will be displayed. Your password will be sent to you by email.

Step 3. Click the “OK” button. The home page is displayed. You may now go to your email account. You should have an email from the LPD with a new password. Go to the LPD home page, log with your user ID and your new password. You should be able to enter the system.

Admin Quick Guide

Click on “Admin Area” on the LPD homepage. “Administrative Tools. LPD Administrator” page is displayed.

1. Groups and Roles Management

The following are the different roles available in the LPD:

Guest - Anonymous user. This user can search for projects but cannot add, edit or use the personalization features of the LPD.

Registered User - Registered user can view his or her Desktop but cannot add, or edit a project.

Editor - Editors can add & edit projects. They also have access to personalization features.

Approver - Approve submitted projects in the LPD project moderation process. They receive approval items from groups of editors.

System Administrators - System administrators are super users of the LPD. They can perform all functions including administrative tasks.

The following table illustrates what each role can and can’t do:

	Guest	Registered	Editor	Approver	Admin
Search Projects	X	X	X	X	X
View Projects	X	X	X	X	X
Add Projects			X	X	X
Edit Projects			X	X	X

	Guest	Registered	Editor	Approver	Admin
Approve/Reject Projects				X	X
Add Org			X	X	X
Edit Org			X	X	X
Delete Org			X	X	X
Add Person			X	X	X
Edit Person			X	X	X
Delete Person			X	X	X
Admin Tools					X
Add/Edit Sectors					X
Add/Edit Components					X
Manage Bookmarks		X	X	X	X
Send Projects by email		X	X	X	X
View Stats	X	X	X	X	X
Change/Recover Password		X	X	X	X

Permissions are assigned by groups, so all users with the same level of permission will be part of one group.

k ADD a Group

Step 1. From the Welcome to LPD page, Go to the "**Login"** section. A log-in screen is displayed.

Step 2. In the **Login Name** field, enter your login name.

Step 3. In the **Password** field, enter your password and Click on "Login". The **LPD Home Page** is displayed.

Step 4. Click on the link "**Admin Area"** in the "**Editor Login"** section. The "**Administration Tools"** box is displayed.

Step 5. Click on the link "**Groups and Roles Management"**. The **Group List** table is displayed.

Step 6. Click on the link "**Add New Group"** at the bottom of the table. The "**Add a Group"** page is displayed.

Step 7. Enter the requested information in the "**Add a Group"** page and click on the "**Add New Group"** button.

Step 8. A confirmation page is displayed. Your Group is added.

l EDIT a Group

Step 1. Login to the LPD as an Administrator.

Step 2. Click on the link "**Admin Area"** in the "**Login"** section. "**The Administration Tools"** box is displayed.

Step 3. Click on the link "**Groups and Roles Management".** The "**Group List"** table is displayed.

Step 4. Identify the Group you want to edit in the list and Click the "**Edit"** link in the Edit section. The "**Editing Group"** section page is displayed.

Step 5. Proceed to your change and click on the "**Update Name, Role, and Description"** button next to the role drop-down menu. The updated confirmation page is displayed.

m DELETE a Group

Step 1. Login to LPD as an Administrator.

Step 2. Click on the Link "**Admin Area"** in the **Login** section. The Administration Tools box is displayed.

Step 3. Click on the link "**Group and Roles Management"**. The **Group List** table is displayed.

Step 4. Identify the Group you want to delete in the list and click on the "**Delete"** button next to it. A warning message is displayed.

Step 5. Click the "**OK"** button to confirm the deletion. The Group List page is redisplayed. The Group is deleted.

2. Categories

n ADD Categories

Step 1. Login to the LPD as an Administrator.

Step 2. Click the link "**Admin Area"** in the "**Login"** section. The "**Administration Tools"** box is displayed.

Step 3. Click on the link "**Categories"**. The "**Categories"** list is displayed.

Step 4. Click on the link "**Add New Category"**. The "**Category Name"** field is displayed.

Step 5. Enter the category name in the field **"Category Name**" and click on the "**Add"** button.

Step 6. Click on the "**Categories List"** link. The "**Categories List"** page is displayed. The Category you have added should be on the list.

o EDIT Categories

Step 1. Login to LPD as an Administrator.

Step 2. Click on the link "**Admin Area"** in the "**Login"** section. The "**Administration Tools"** box is displayed.

Step 3. Click on the link "**Categories"**. The "**Categories List"** is displayed.

Step 4. Identify the Category you want to edit and Click on it.

Step 5. The category update page is displayed with your selected category in the field .

Step 6. Make the change and click on the "**Update"** button next to the field.

Step 7. Click on the "**Categories List"** link. The "**Categories List"** page is displayed. The change should be made to the Category.

p DELETE Categories

Step 1. Click on the link "**Admin Area"** in the **"Login"** section. The "**Administration Tools"** box is displayed.

Step 2. Click on the link "**Categories"**. The "**Categories List"** is displayed.

Step 3. Identify the Category/Categories you want to delete.

Step 4. Check the box next to the Category/Categories you want to delete and click on the "**Delete Selected"** button at the bottom of the list.

Step 5. The **Categories List** page is redisplayed and the selected Category/Categories is deleted.

3. Sectors

q ADD Main Sector

Step 1. Login to LPD as an Administrator.

Step 2. Click on the "**Admin Area"** in the "**Login"** section. The "**Administration Page"** is displayed.

Step 3. Click on the link "**Sector Manager"**. The "**Sectors Manager"** page is displayed.

Step 4. Go to the bottom - left of the "**Sectors Manager"** page and click on the link "**ADD main sector"**. The "**Sector Editor"** page is displayed.

Step 5. File in the information on the "**Sector Editor"** page**.**

Step 6. Click on the "**Save"** button**.** The "**Sector Manager"** page is redisplayed. Refresh the screen. The Main Sector you have just entered should be added.

NOTE: the purpose of the **DAC5 Code** and **CRS Code** fields is to map your LPD sectors to AiDA sectors which will facilitate the information exchange. Before adding a sector, please go to the "Development Gateways Sector Codes List" (http://aida.developmentgateway.org/SectorCodeList.do) and find the equivalent DAC/CRS code for each of your sectors and sub-sectors and enter this information in the LPD.

r ADD Sub-Sector

Step 1. Login to LPD as an Administrator.

Step 2. Click the "**Admin Area"** in the "**Login"** section. The "**Administration Page"** is displayed.

Step 3. Click on the link "**Sector Manager"**. The "**Sector Manager"** page is displayed.

Step 4. Click on **[ADD]** next to the main sector. The "**Sector Editor"** page is displayed.

Step 5. Fill in the information on the "**Sector Editor"** page.

Step 6. Click on the "**Save"** button. The "**Sector Manager"** page is redisplayed. Refresh the screen. The sub-sector should be added.

s EDIT Sector or Sub-Sector

Step 1. Login to LPD as an Administrator.

Step 2. Click on the link "**Admin Area"** in the "**Login"** section. The "**Administration Page"** is displayed.

Step 3. Click on the link "**Sector Manager"**. The "**Sector Manager"** page is displayed.

Step 4. Locate the sector or sub-sector you would like to edit and click on **[E]** next to it. The "**Sector Editor"** page is displayed.

Step 5. Make the change(s) you would like and click on the "**Save"** button. The "**Sector Manager"** page is redisplayed. Refresh the screen. The page is redisplayed with the change (s).

t DELETE Sector or Sub-Sector

NOTE: The main sector cannot be deleted without deleting the sub-sector.

Step 1. Login to LPD as an Administrator.

Step 2. Click on the link "**Admin Area"** in the "**Login"** section. The "**Administration Page"** is displayed.

Step 3. Click on the link "**Sector Manager"** . The "**Sector Manager"** page is displayed.

Step 4. Locate the sector or sub-sector you would like to delete and click on the **[X]** next to it. The "**Sector Editor"** page is displayed.

Step 5. Click on the "**Delete"** button. The "**Sector Manager"** page is redisplayed. Refresh the screen. The sector or sub-sector selected should be deleted.

4. Status

a EDIT Status

Step 1. Login to LPD as an Administrator.

Step 2. Click the **Admin Area** in the **Editor Login** section. The **Administration Page** is displayed.

Step 3. Click the link **Status Manager**. The **Status Manager** page is displayed.

Step 4. Change the names in boxes to the status name desired, keeping the same concept (i.e. a status code 1 planned should only be substituted by words with similar meaning as planning because this affects the information exchange with AiDA)

Step 5. Click on **Update** to save the changes.

Step 6. Click on **Back to admin page** to go back to the **Administrator** page.

5. Location Editor

a ADD New Location

Step 1. Login to LPD as an **Administrator**.

Step 2. Go to the **Editor Login** section and Click on **Admin Area**. The **Administration Tools** page is displayed.

Step 3. Click on **Location Editor**. The **Location Manager** window is displayed.

Step 4. Click on **Add a world region** to add a world region. The **Location Manager** window is displayed.

Step 5. Enter the Name, Code, Parent Region, Geo Code, Latitude and Longitude of the regions and click on **Save**.

Note: to add countries, regions, counties, town and villages, within a world region, follow the same procedures as above after selecting the parent location.

b EDIT location

Step 1. Login to LPD as an **Administrator**.

Step 2. Go to the **Editor Login** section and Click on **Admin Area**. The **Administration Tools** page is displayed.

Step 3. Click on **Location Editor**. The **Location Manager** window is displayed.

Step 4. Select a world region, a country, a region, a county, a town or a village you want to edit and click on "**Edit this [world region, country, region, county, town or village"** to edit the location. The **Location Manager** window will display.

Step 5. Change the name of the location and click on **Save**. You will return to the **Location Manager** page.

c DELETE location

Step 1. Login to LPD as an **Administrator**.

Step 2. Go to the **Editor Login** section and Click on **Admin Area**. The **Administration Tools** page is displayed.

Step 3. Click on **Location Editor**. The **Location Manager** window is displayed.

Step 4. Select a world region, a country, a region, a county, a town or a village you want to delete and click on "**Delete this [world region, country, region, county, town or village"** to delete the location. The **Location Manager** window will display.

Please note that only those locations with no locations in lower levels (for example, a world region without countries) will be able to be deleted.

6. System Properties

a SET Properties

Step 1. Login to LPD as an **Administrator**.

Step 2. Go to **Editor Login** section and Click **Admin Area**. The **Administration Tools** box is displayed.

Step 3. Click the link **System Properties**. The **System Properties** page is displayed.

Step 4. Select the **Default Group** = default group of regional editors.

Step 5. Select **Session Timeout** = minutes to time out the LPD session.

Step 6. Select the **Mail Server Address** = SMTP mail server address (for email that LPD sends out).

Step 7. Select the **Reply To/From User@host** = the address the mail goes out to.

Step 8. Type the **Result per Page** = the amount of search results per page.

Step 9. Type the **Default Navigation Language**.

Step 10. Tick on the box after **Autologin Users After Registration** to allow users to log in automatically.

Step 11. Funding, Implementing and Executing Agency role are set to values 1, 2 and 3, respectively. Change the titles to assign different roles.

Step 12. Click the **Update** button. The page refresh and the **Administration Tools** box is redisplayed.

7. Users Module

a ADD New Users

Step 1. Login to LPD as an Administrator.

Step 2. Click the **Admin Area** in the **Editor Login** section. The **Administration Tools** box is displayed.

Step 3. Click the link **Users Module**. The **Administration Tools: Users Module** table is displayed.

Step 4. Click the link **New User** at the bottom-right of the table. The **Users Module** page is redisplayed.

Step 5. Enter the requested information in the **Users Module** field table and click the **Save** button at the bottom-left of the table. The **Confirmation Page** is displayed.

Step 6. Click the **Confirm Save** button. The **Administration Tools: Users Module** table is redisplayed. The New User should be added.

b EDIT Users

Step 1. Login to LPD as an **Administrator.**

Step 2. Click the link **Admin Area** in the **Editor Login** section. The Administration Tools box is displayed.

Step 3. Click the link **Users Module**. The **Administration Tools: Users Module** is displayed.

Step 4. Identify the User and Click the **[Edit]** link in the **Options** section. The **Editor: Users Module** is displayed.

Step 5. Make the change and Click the **Save** button. The Confirmation Page is displayed.

Step 6. Click the **Confirm Save** button. The **Administration Tools: Users Module** is displayed. The change should be made.

c DELETE Users

Step 1. Login to LPD as an **Administrator.**

Step 2. Click the link **Admin Area** in the **Editor Login** section. The **Administration Tools** box is displayed.

Step 3. Click the link **Users Module**. The **Users Module** table is displayed.

Step 4. Identify the User and Click **[Delete]** link in the **Options** section. The **Editor: Users Module confirmation page** is displayed.

Click the **Confirm Delete** button. The **Users Module** table is redisplayed and the User is delete.

8. Login Error Messages

Step 1. Login to LPD as an **Administrator.**

Step 2. Click the link **Admin Area** in the **Editor Login** section. The Administration Tools box is displayed.

Step 3. Click the link **Login Problems Messages**. The **Login Related Messages LPD Administrator** page will display.

Step 4. Click on **[E]** to edit and customize the text of each message. The **Translation Item Editor** page will display. Enter the text you want to include at the **Text** box in the target section (right column)

Step 5. Click on **Save** to save the changes. The **Login Related Messages LPD Administrator** page will display.

9. Error messages in project form

Step 1. Login to LPD as an **Administrator.**

Step 2. Click the link **Admin Area** in the **Editor Login** section. The Administration Tools box is displayed.

Step 3. Click the link **Error messages in project form**. The **Error messages in project form LPD Administrator** page will display.

Step 4. Click on **[E]** to edit and customize the text of each message. The **Translation Item Editor** page will display. Enter the text you want to include at the **Text** box in the target section (right column)

Step 5. Click on **Save** to save the changes. The **Error messages in project form LPD Administrator** page will display.

10. Email and confirmation message

Step 1. Login to LPD as an **Administrator.**

Step 2. Click the link **Admin Area** in the **Editor Login** section. The Administration Tools box is displayed.

Step 3. Click the link **Email and confirmation messages**. The **Email and confirmation messages LPD Administrator** page will display.

Step 4. Click on **[E]** to edit and customize the text of each message. The **Translation Item Editor** page will display. Enter the text you want to include at the **Text** box in the target section (right column)

Step 5. Click on **Save** to save the changes. The **Email and confirmation messages LPD Administrator** page will display.

11. Translate user interface

Step 1. Login to LPD as an **Administrator**.

Step 2. Go to **Editor Login** section and Click on Admin Area. The **Administration Tools** box is displayed.

Step 3. Click on **Show Edit Links**. The page refreshes with the **Translation Tag [E]** next to each admin item.

Step 4. Identify the Item you want to apply the translator to and Click on the **[E]**. The **Translator Item Editor** page is displayed.

Step 5. You may now make your changes by entering or selecting items from the **Translator Item Editor**.

Step 6. After your selection, Click the **Save** button. The change is made and the **Administration Tools** page is redisplayed.

Step 7. Click on **Show Edit Links** again. The **Administration Tools** page is redisplayed without the **Translation Tag**.

12. Create New Project

a ADD-EDIT-PUBLISH

Please Refer to Local Project Database User Guide in Add Project – Edit Project – Publish Project Sections.

13. Project Form Configuration

a Enable Objects

Step 1. Login to LPD as an **Administrator**.

Step 2. Go to **Editor Login** section and Click the link **Admin Area**. The **Administration Tools** box is displayed.

Step 3. Click the link **Project Form Configuration.** The **Project Form Objects Configurator** page is displayed.

Step 4. Identify Object/Objects in the **Project Form Objects Configurator** field.

Step 5. Check the **Box** next to the Object in the **Enabled** section.

Step 6. Click the **Save** button at the bottom of the page. The Object is enabled. The **Administration Tools** page is redisplayed.

b Disable Objects

Step 1. Login to LPD as an **Administrator**.

Step 2. Go to **Editor Login** section and Click the link **Admin Area**. The **Administration Tools** box is displayed.

Step 3. Click the link **Project Form Configuration.** The **Project Form Objects Configurator** page is displayed.

Step 4. Identify Object/Objects in the **Project Form Objects Configurator** field.

Step 5. Uncheck the **Box** next to the Object in the **Enabled** section.

Step 6. Click the **Save** button at the bottom of the page. The Object is disabled. The **Administration Tools** page is redisplayed.

c Make Objects Mandatory

Step 1. Login to LPD as an **Administrator**.

Step 2. Go to **Editor Login** section and Click the link **Admin Area**. The **Administration Tools** box is displayed.

Step 3. Click the link **Project Form Configurator.** The **Project Form Objects Configurator** page is displayed.

Step 4. Identify Object/Objects in the **Project Form Objects Configurator** field.

Step 5. Check the **Box** in the **Mandatory** section.

Step 6. Click the **Save** button at the bottom of the page. The Object is made mandatory. The **Administration Tools** page is redisplayed.

Step 7. To make the Object **Non – Mandatory**, follow the same process, but now **Uncheck** the Box in the **Mandatory** section.

14. List and Export Organizations, Projects and Users

Step 1. Login to LPD as an **Administrator**.

Step 2. Go to **Editor Login** section and Click **Admin Area**. The **Administration Tools** box is displayed.

Step 3. Click on the **List/Export Organization Objects**. A **Global Organization List** page is displayed.

Step 4. Go to the bottom of the page. Select a **Country** from the dropdown and Click the **Filter** button. The **Global Organization List** page refreshes and displays all **Organizations data** of the selected country.

Step 5. To export the data, Click the **Export to CVS** button. The data can be exported.

Follow the same process for **List/Export Project Objects** and for **List/Export User Objects**.

15. Organization Quick-Add Manager

Step 1. Login to the LPD as an Administrator

Step 2. Go to "**Admin Area**"

Step 3. Click on "Organization "**Quick-Add Manager**"

Step 4. A page is displayed with a list of temporary organizations added for review

Step 5. Click on the name of the organization you are reviewing

Step 6. Information on this organization is displayed: name, temporary code, comments, date modified

Step 7. Two options are displayed: "**Search for Organization**" and "**Edit Temporary Organization"**

a Search for Organization

Step 1. To verify whether a temporarily added organization is in the LPD system already, click on **"Search for Organization**"

Step 2. Type in the name of the organization you are trying to add and click on "**Search**".

Step 3. If you find an organization matching your search criteria as a result of the search and you want to relate it to the organization that you are currently reviewing, check the box next to the name of the organization and click on '**Sav**e'. (You also have the option of deleting the selection by checking the box next to the name of the organization and clicking on "**Clear List**".)

Step 4. A page with the information on the selected organization is displayed.

Step 5. Click on **"Link Organizations**" to relate the two organizations. All references to the temporary organization will be redirected to the organization located in the database.

Step 6. A page with a list of all temporary organizations is displayed again.

b Edit Temporary Organization

Step 1. To edit the temporary organization click on "**Edit Temporary Organization**" on the temporary organization display page

Step 2. A page that allows to edit information on the temporary organization is displayed: name, abbreviation, description, address, country, type, contact information, organization URL, and organization code. You also have an option of adding a person associated with this organization.

Step 3. To save the entered information click on "**Save**". To delete the information on the organization click on "**Delete**".

Step 4. Once saved a summary of the organization information is displayed

Step 5. Click on "**Save**" to confirm the information, click on "**Back**" to go back and edit the information.

Step 6. When you click on "**Save**" a confirmation page is displayed.

16. Beneficiaries

a ADD Beneficiaries

Step 1. Login to LPD as an Administrator.

Step 2. Click the link **Admin Area** in the **Editor Login** section. The **Administration Tools** box is displayed.

Step 3. Click on the link **Beneficiaries Editor**. The **Beneficiaries** list is displayed.

Step 4. Click on the link **New**. The **Beneficiary Name** field is displayed.

Step 5. Enter the **Beneficiary Name** in the field and Click the **Add** button.

Step 6. Click the **Beneficiaries List** link. **Beneficiaries List** page is displayed. The Category you added should be in the list.

b EDIT Beneficiaries

Step 1. Login to LPD as an Administrator.

Step 2. Click the link **Admin Area** in the **Editor Login** section. The **Administration Tools** box is displayed.

Step 3. Click on the link **Beneficiaries Editor**. The **Beneficiaries List** is displayed.

Step 4. Identify the Category you want to edit and Click on it.

Step 5. The **Beneficiaries Name** update page is displayed with your selected category in the field .

Step 6. Make the change and click the **Update** button next to the field.

Step 7. Click the **Beneficiaries List** link. **Beneficiaries List** page is displayed. The change should be made to the Category.

c DELETE Beneficiaries

Step 1. Click the link **Admin Area** in the Editor Login section. The **Administration Tools** box is displayed.

Step 2. Click on the link **Beneficiaries**. The **Beneficiaries List** is displayed.

Step 3. Identify the Beneficiary/Beneficiaries you want to delete.

Step 4. Select the **Check Box** next to the Beneficiary/Beneficiaries and Click the **Delete Selected Beneficiaries** button at the bottom of the list.

The **Beneficiaries List** page is redisplayed and the selected Beneficiary/Beneficiaries is deleted.

17. Type of Assistance Editor

a ADD Type of Assistance

Step 1. Click the link **Admin Area** in the Editor Login section. The **Administration Tools** box is displayed.

Step 2. Click on the link **Types of Assistance Editor (Funding Category)**. The **Types of Assistance** page is displayed.

Step 3. Click on **New** button to add a new type of assistance. The **Types of Assistance** page will display. Write a name on the text box and click on **Save**.

b DELETE Type of Assistance

Step 1. Click the link **Admin Area** in the Editor Login section. The **Administration Tools** box is displayed.

Step 2. Click on the link **Types of Assistance Editor (Funding Category)**. The **Types of Assistance** page is displayed.

Step 3. Select the types of assistance to delete and click on the **Delete** button

Note: the **Terms of Assistance Editor** works the same way.

18. Funding Status

a. ADD Funding Status

Step 1. **Click the link** Admin Area **in the Login section. The** Administration Tools **box is displayed.**

Step 2. Click on the link **Funding Status.** The **Funding Status List** page is displayed.

Step 3. Click on **New** button to add a new funding status. The **Funding Status** page is displayed. Write a name in the text box and click on **Save**.

b. DELETE Organization Type

Step 1. Click the link **Admin Area** in the Editor Login section. The **Administration Tools** box is displayed.

Step 2. Click on the link **Funding Status**. The **Funding Status List** page is displayed.

Step 3. Select the funding status to be deleted and click on the **Delete** button

19. Organization Type Manager

a. ADD Organization Type

Step 1. Click the link **Admin Area** in the **Login** section**.** The Administration Tools box is displayed**.**

Step 2. Click on the link **Organization Type Manager**. The **Organization Type List** page is displayed**.**

Step 3. Click on **Add New** button to add a new organization type**.** The **Add New** page is displayed. Write a name in the text box and click on **Add.**

b. DELETE Organization Type

Step 1. Click the link **Admin Area** in the **Editor Login** section. The **Administration Tools** box is displayed.

Step 2. Click on the link **Organization Type Manager.** The **Organization Type List** page is displayed.

Step 3. Select the organization types to be deleted and click on the **Delete** button.

20. Approve or Reject Projects

Step 1. Login to the LPD as an Administrator

Step 2. Go to “My Desktop”

Step 3. On the “My Unread Approvals” section, click on “Details”

Step 4. The list of projects to be approved, approved and rejected is displayed

Step 5. Select the project you would like to approve or reject

Step 6. The Project Approval page is displayed

Step 7. Select the action you would like to take (approve or reject), enter a reason and click OK.

Step 8. A confirmation screen is displayed. If the project was approved, it should now appear on project searches performed by any user.

Annex A – Glossary

Abbreviation (in Organization's section)

Acronym of the organization that you are trying to add. If there is no acronym, use a logical abbreviation.

AiDA Org ID (in Organization's section)

Use four letter organization code, if possible, to promote consistency across sources. See Authority list for standard codes at: http://aida.developmentgateway.org/OrgToolsView.do. If the organization you are trying to add is not on the AiDA list, please submit name of organization with proposed 4 letter code to AiDA.

Beneficiaries

Group or community that is receiving or benefiting from the services provided through the grant or loan.

Category

The category indicates the type of organization that is implementing the project. For example: non-profit, government and for- profit organizations.

Component

A Project may have several components/parts. For example, some components of the project could be related to an environmental assessment, another to the technical assistance, etc. These components could have different financing sources and different locations and schedules.

Executing Organization

Organization which is a direct recipient of funds provided by a funding agency

Funding Organizations

Organizations that provide the money for the project. For example, a funding organization could be any of the multilateral institution or other major donors.

Implementing Organizations

Name of organizations that directly implements a particular project/activity.

International Project

Project carried out in more than one country. For example, regional projects with more than one country or cross-border projects are considered International Projects.

National Project

Project carried out in one country only. It can include more than one region within a country.

Project ID

Project identification number or record number. Label, e.g. file number, used by the funding organization to identify the development activity or the record number of the development activity in the source database. Its purpose is to reconcile with other information about same activity found in other AIDA sources and identification of genuine duplicate records.

Published Project

A project that has been approved by the "approver".

Sector

Indicates which part of the economy is affected by the activity. It does not refer to the type of goods or services provided by the donor. A mapping with CRS Purpose Codes (http://www1.oecd.org/dac/pdf/CRSann5.pdf) and the sectors used in every LPD should be provided. This will allow for a consistent sector taxonomy that will enable search and navigation by sector. AiDA has adopted the CRS Purpose Code as the reference taxonomy.

Organization List

For a list of Organizations in AiDA, please go to the following URL:

http://aida.developmentgateway.org/Tools.do