



Amhara National Regional State Bureau of Finance and Economic Cooperation

Donor Resource Tracking and Monitoring System (DRTMS)

User Categories: For Focal Person of Implementing Organization

User Manual

August, 2020

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1 INTRODUCTION

This user manual guides user to use Donor Resource Tracking and Monitoring System (**DRTMS**) software application. This manual includes a description of the system functions and capabilities, and step-by-step procedures for system access and use.

1.1 Purpose and Scope

CSO/Bilateral/Multilateral organization are required to submit appraisal request, annual plan, and quarter report to Bureau of finance and economic cooperation. These communication have been done using printed copy. From now onwards, organization shall communicate BOFEC using DRTMS. This user manual shows a step by step procedures for appraisal preparation and submission, annual plan preparation and submission, quarter report preparation and submission, and finally project status/event/history preparation and submission to focal person of an implementing organization.

1.2 System address

Address of DRTMS is amharabofecdrtps.gov.et

2 SYSTEM CAPABILITIES

DRTMS is used to track and monitor donor resource so that it enables the BOFEC to manage the bilateral, multilateral, CSOs resource effectively and efficiently. It allows users to generate reports desegregated by budget year, project type(Development, Relief and Rehabilitation), organization type(CSO/NGO, Bilateral and Multilateral) , fund flow arrangements of organization(channel 1, channel 2, channel3 and etc.), beneficiary types , geographic location (by region, zone , woreda, city), sector (such as health, education, Agriculture, etc), sector (such as health, education, Agriculture, etc.)

3 HELP FACILITIES

System users should use the link (URL link) below for any assistance.

<http://amharabofecdrtps.gov.et/web/bofecdrtps/contats>

System users are expected to identify help desk personnel based on their role and use means of communication (email, mobile phone, office phone) described in the page.

4 Primary Business Functions

Basic functions focal person of implementing organization are project proposal document preparation, annual plan preparation, event/history/ project status preparation and quarter plan preparation

5 Project Proposal preparation and submission

Preconditions Project Proposal preparation and submission

Prior to project information encoding, user should make sure that the following complementary information are encoded in DRTMS database by communicate with BOFEC DRTMS system administrator.

- a) user account for focal person
- b) sector/ thematic Area
- c) subsector
- d) component
- e) beneficiary categories
- f) donor, coordinating, implementing partner and implementing Agency organization
- g) focal person should be assigned as focal person for implementing Agency organization

Steps required to prepare and submit Project Proposal

Step1: login into system

- ☞ Type DRTMS system address amharbofecdrtms.gov.et on textbox pointed by arrow number 1 of figure 1
- ☞ Click Sign in link pointed by arrow number 2. User interface show in figure 2, is displayed as result of clicking Sign in link.

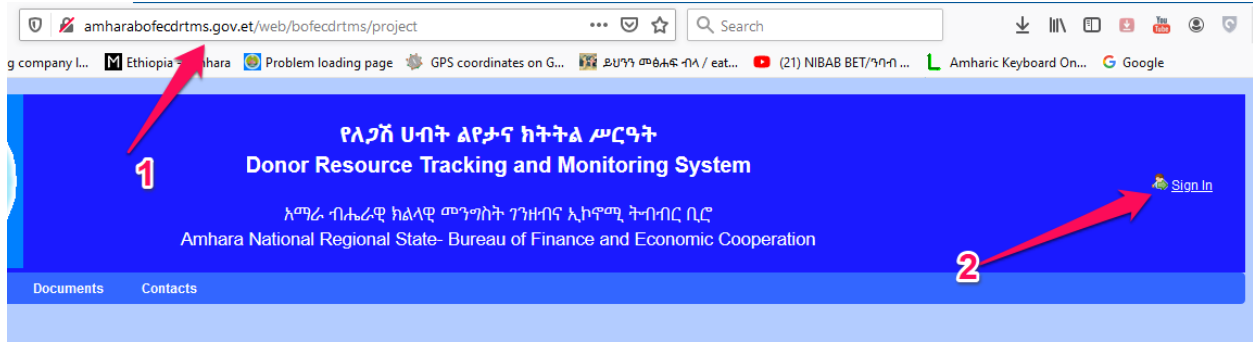


Figure 1. Login user interface

- Type username and password in the text box pointed by arrow 1 and 2 of figure 2 respectively.
- Click Sign in button pointed by arrow number 3 of figure 2.

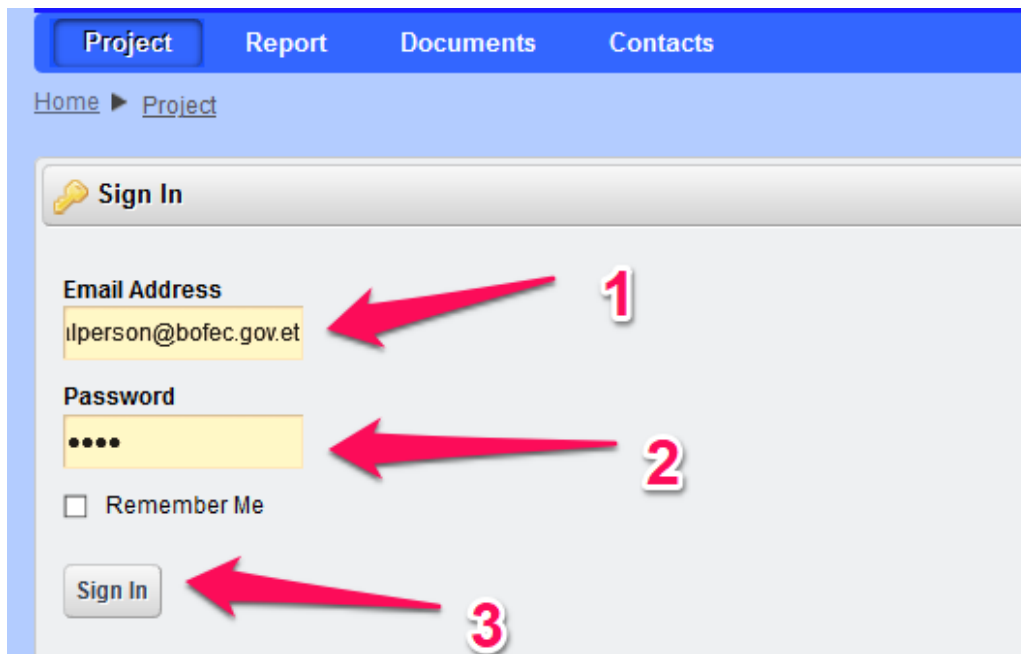


Figure 2. Sign in User Interface

Step2: open **Appraisal Request** page that is used to prepare project proposal

- Click **Project Appraisal** shown by arrow number 1 then click **Appraisal Request** shown by arrow number 2 of figure 3

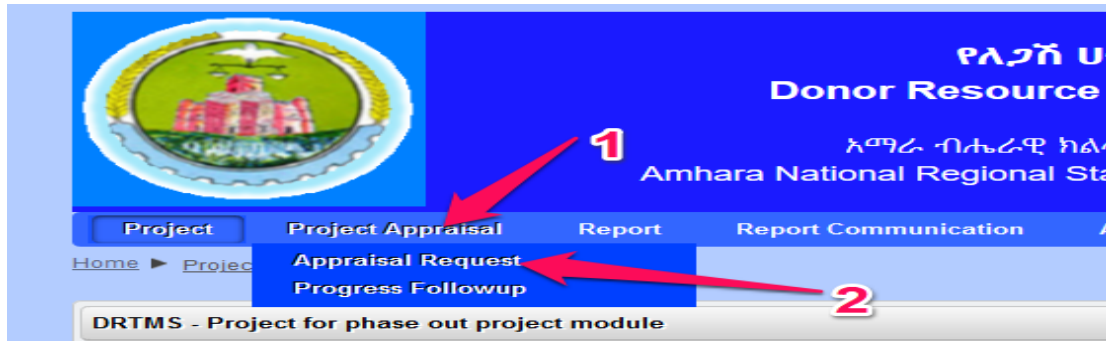


Figure 3. Project Appraisal Page

Step3:

- ☞ To create new project profile, click a link pointed by arrow number 1 of figure 4. **As a result of that,** user interface indicated by figure 5 and 6 is displayed.
- ☞ To generate project information in pdf ,
 - Select the project by clicking check box indicated by arrow number 2 of figure 4 and then
 - Click a link indicated by arrow number 6 of figure 4.
- ☞ To delete project information,
 - Select the project by clicking check box indicated by arrow number 2 and then
 - Click a link indicated by arrow number 7 of figure 4
- ☞ To edit project information, click the icon indicated by arrow number 4 of figure 4. **As a result of that,** user interface indicated by figure 5 and 6 is displayed
- ☞ To encode budget breakdown,
 - Select the project by clicking check box indicated by arrow number 2 and then
 - Click the link indicated by arrow number 5 of figure 4. **As a result of that,** user interface indicated by figure 9 is displayed
- ☞ To submit project proposal to BOFEC for approval,
 - Select the project by clicking check box indicated by arrow number 2 and then
 - Click the button indicated by arrow number 3 of figure 4.

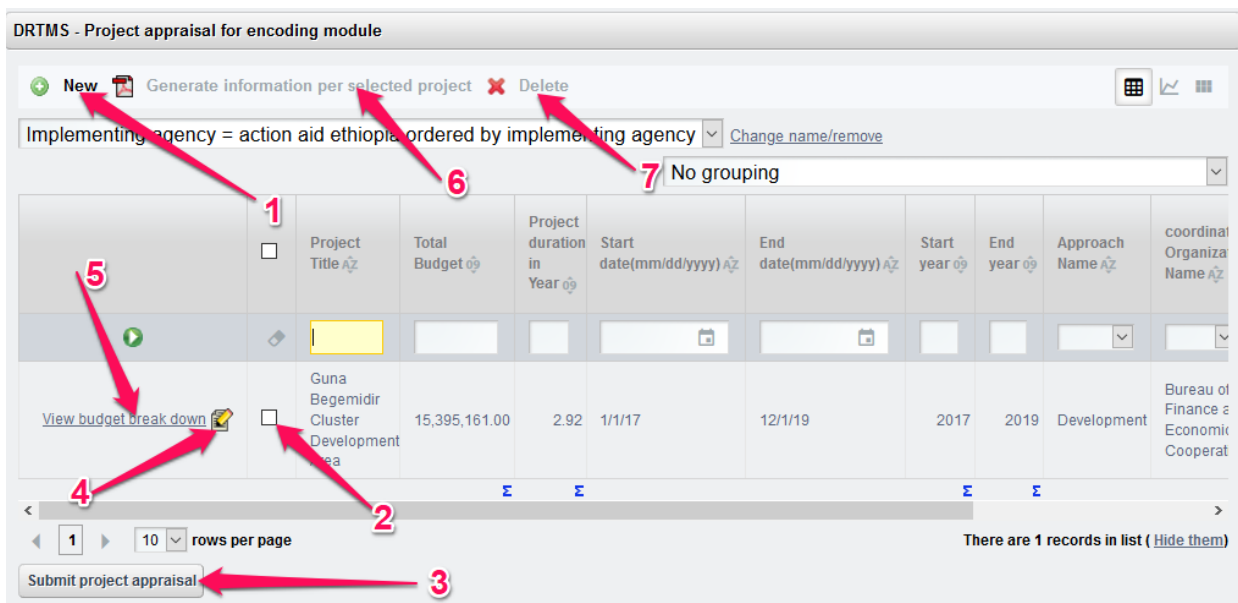


Figure 4. Project Information Management User Interface

Figure 5 shows user interface used for editing project information. Type or select appropriate information at text boxes or combo boxes indicated from arrow number 1 to arrow number 13 and arrow number 13 and 14 of figure 5.

To attach narrative/descriptive project proposal document and project survey document, click the icon indicated by arrow number 14 and 15 of figure 5 respectively. As the result of that, user interface indicated by figure 7 is displayed.

To select implementing agency, click the link indicated by arrow number 10 of figure 5. As the result of that, user interface indicated by figure 8 is displayed.

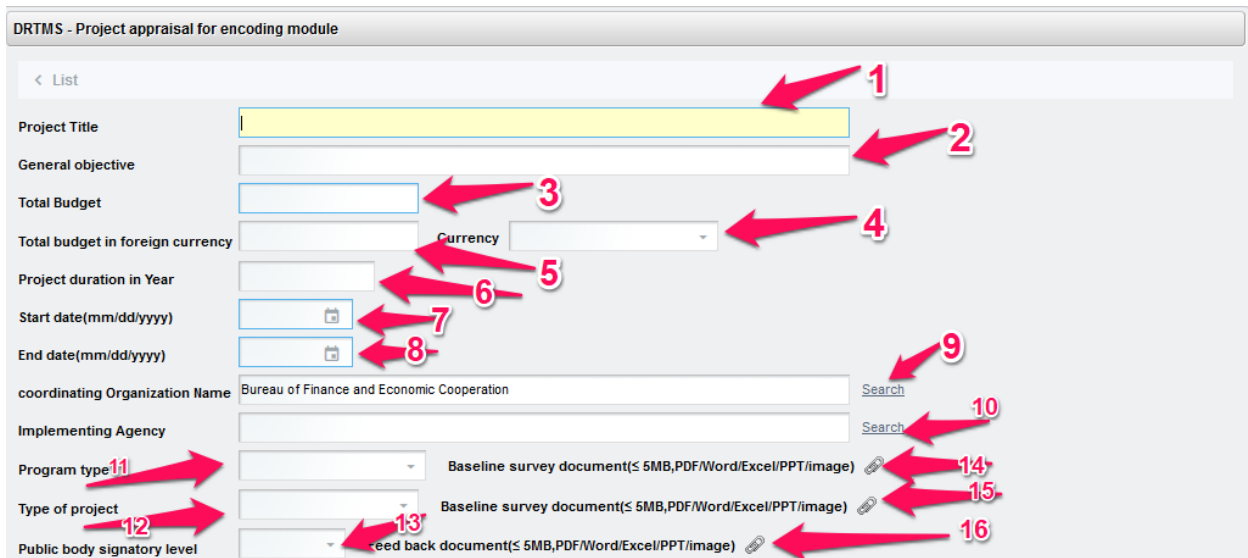


Figure 5. User Interface for Editing Project Information Part 1

A Project is associated with one or more than 1 partner organizations, donor organizations, project area (zone and woreda), component, project phase, sector, subsector, budget breakdown, beneficiaries, project staff and KPI. The association is done using arrow number 1 to 12 of figure 6. The selected section is highlighted. As can be seen in figure 6, the active section is partner organization

To associate project with partner organizations, click the link indicated by arrow number 9 of figure 6. As the result of that, user interface indicated by figure 10 is displayed. In similar fashion, associate project with other relevant information.

Once we have completed typing project information, in order to persist the information in database, click the button indicated by arrow number 13.

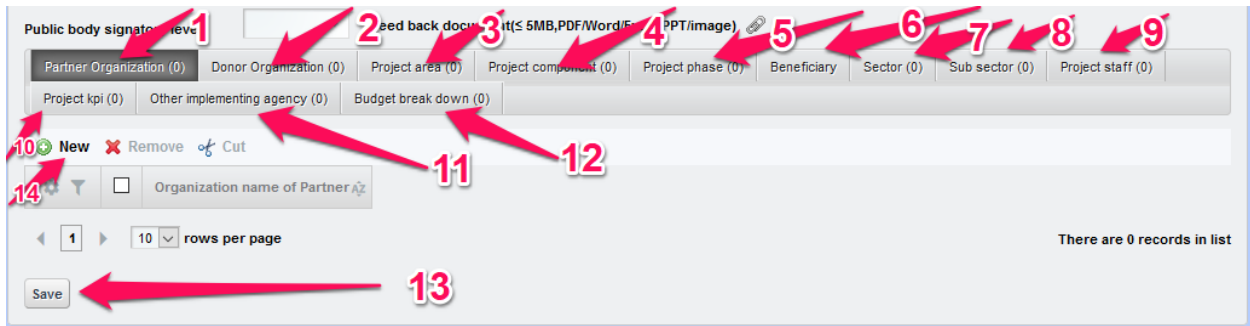


Figure 6. User Interface for Editing Project Information Part 2

Users can upload a maximum of ten different files such as excel, MS word, pdf files and etc. to upload a file click the button indicated by arrow number 1 of figure 7 and explore the file to be uploaded ; click open button and finally click the button indicated by arrow number 2 of figure 7 .

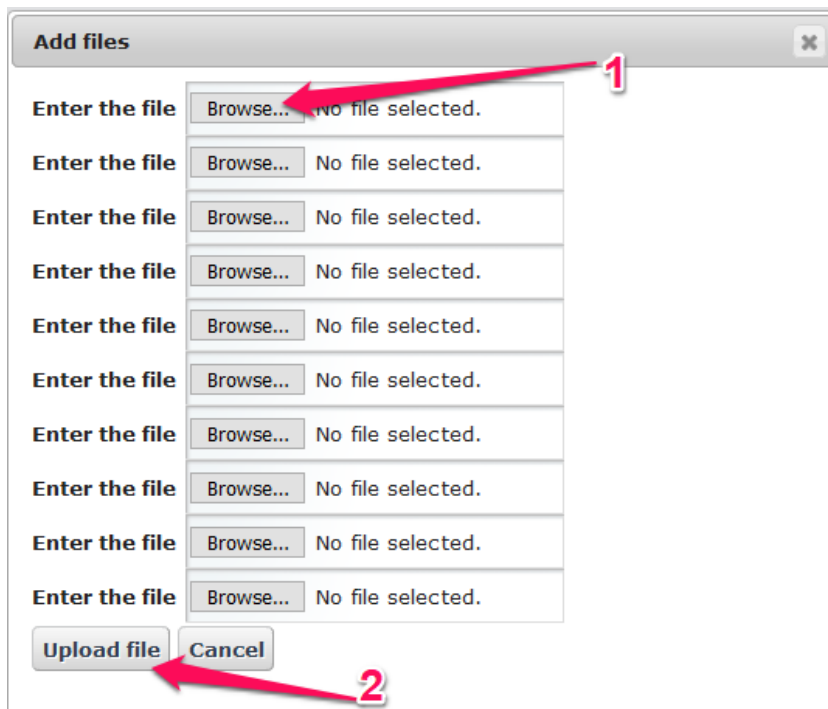


Figure 7. File Browsing User Interface for File Uploading

User interface indicated in figure 8 is used to display list of implementing organization on which the signed in user is a focal person to them. To associate implementing organization with project,

- ☞ select organization by clicking radio button indicated by arrow number 1 of figure 8
- ☞ click choose button indicated by arrow number 2 of figure 8

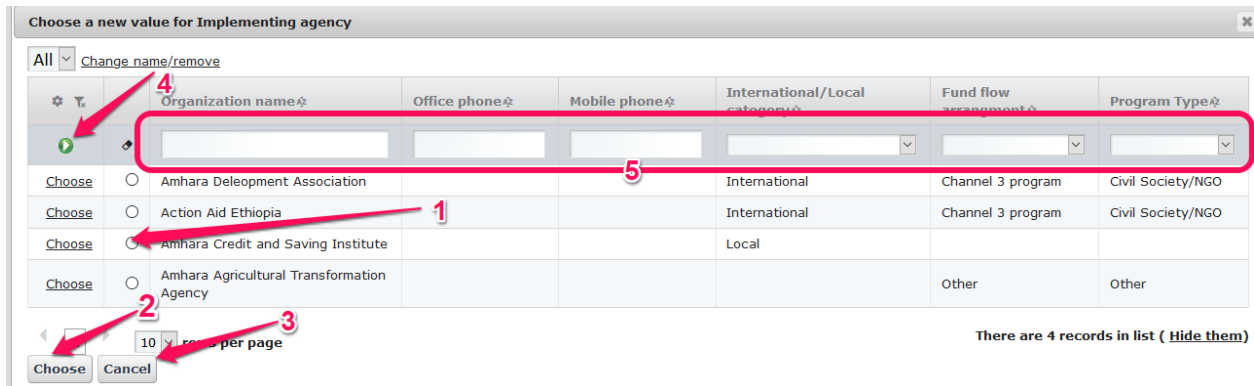


Figure 8. User Interface for Choosing Implementing Organization

Yearly budget breakdown is encoded using user interface indicated in figure 9.

- ☞ To add new budget breakdown, click the link indicated by arrow number 2 of figure 9; type appropriate information on text boxes and finally save button.
- ☞ To edit existing budget breakdown, click the icon indicated by arrow number 1 of figure 9; modify appropriate information on text boxes and finally save button.
- ☞ To return back to project proposal user interface(figure 5 and 6), click the button indicated by arrow number 4

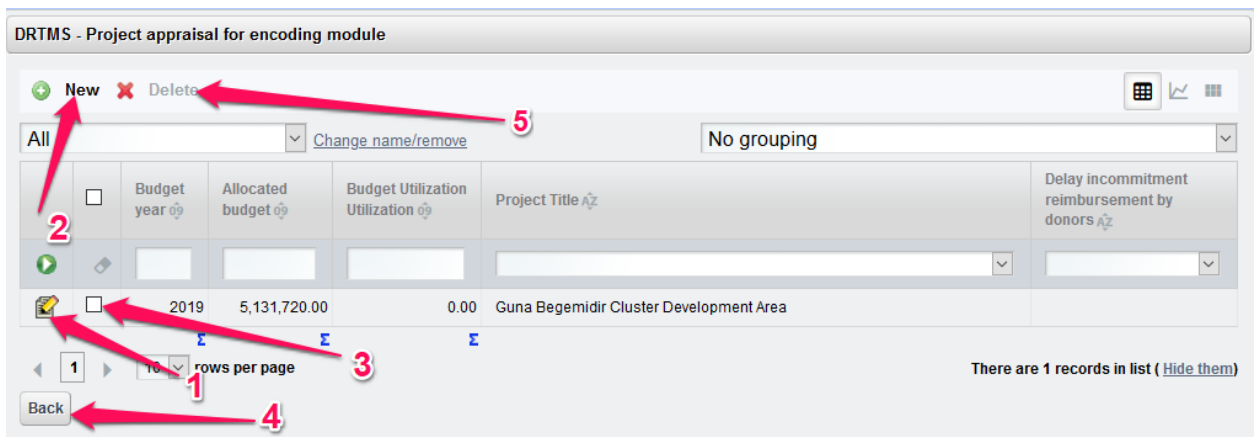


Figure 9. Budget Breakdown User Interface

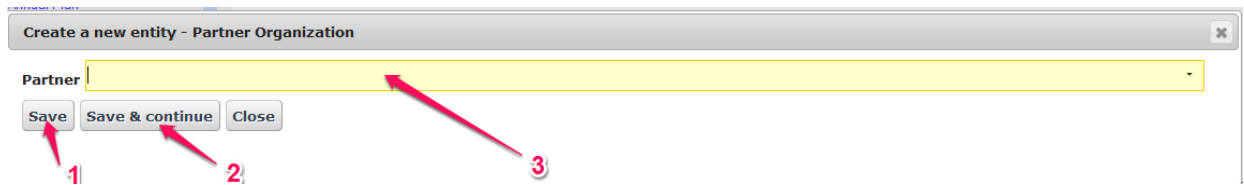


Figure 10. User Interface for Associating Project with Partner Organization

6 Annual plan preparation and submission

Precondition

- ☞ Planning user should be signed in
- ☞ Profile of implementing organization should be encoded in DRTMS database
- ☞ There should be at least one project, encoded in DRTMS database and implemented by the implementing organization.
- ☞ Planning user should be assigned as a focal person of an implementing organization

Steps:

- ☞ Open planning page: click [Annual Plan](#) and then [Annual Planning \(Focal Person\)](#). As the result, the user interface indicated by figure 11 is displayed.
- ☞ To get user interface used to prepare annual plan,
 - Select an implementing organization by click check box indicated by arrow number 1 of figure 11
 - Click the link indicated by arrow number 2 of figure 11. As the result of this, user interface indicated at figure 12 is shown.
 - Note: annual plan records are created automatically and hence users are allowed to edit existing records
- ☞ To generate pdf file
 - To generate list of implementing organization projects ready for evaluation: Select an implementing organization by click check box indicated by arrow

number 1 of figure 11 and then Click the link indicated by arrow number 3 to generate list of implementing organization projects ready for evaluation

- To generate project cards of selected implementing organization: Select an implementing organization by click check box indicated by arrow number 1 of figure 11 and then Click the link indicated by arrow number 4
- To generate annual plans of implementing organization: Select an implementing organization by click check box indicated by arrow number 1 of figure 11 and then Click the link indicated by arrow number 5

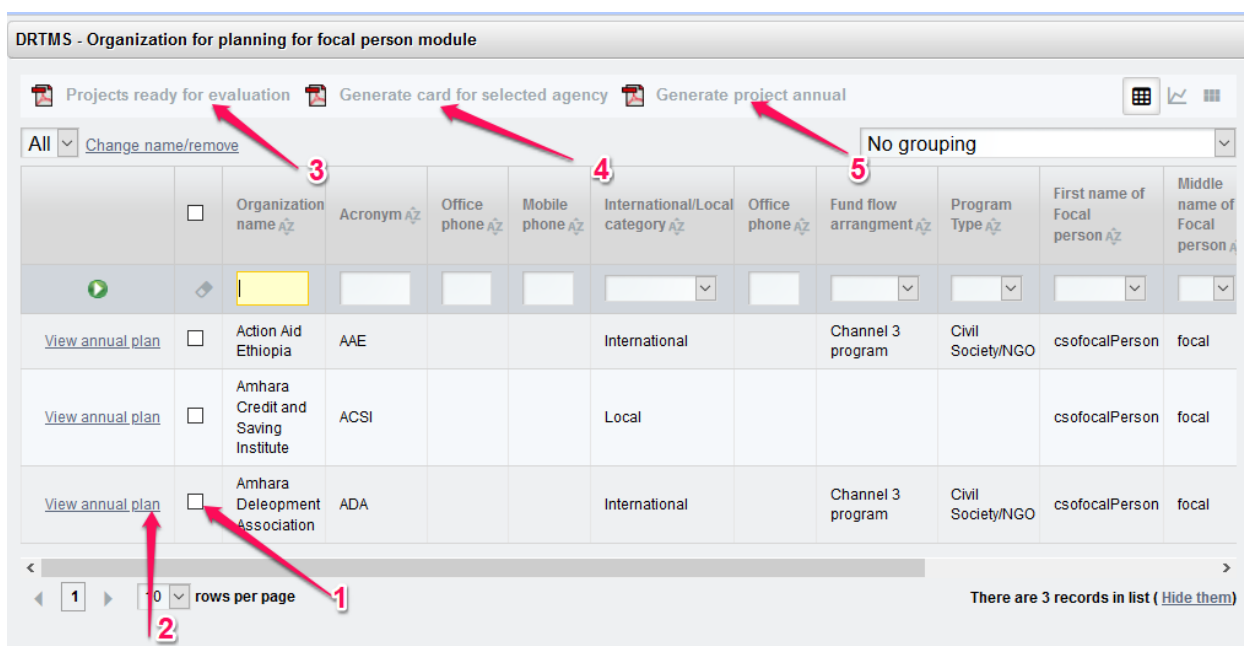


Figure 11. Annual Plan Starting Page

User interface indicated in figure 12 allows focal person to upload narrative annual plan documents, quarter budget breakdowns.

- ☞ To upload narrative annual plan documents: click edit icon indicated by arrow number 3 of figure 12. as the result of this, user interface indicated by figure 3 is displayed
- ☞ To generate pdf file

- To generate annual plans of implementing organization: Select an implementing organization by click check box indicated by arrow number 1 of figure 12 and then Click the link indicated by arrow number 4
- To generate project performance evaluation: Select an implementing organization by click check box indicated by arrow number 1 of figure 12 and then Click the link indicated by arrow number 5 to generate list of implementing organization projects ready for evaluation
- ☞ To prepare annual plan's quarter breakdown: click the icon indicated by arrow number 2 of figure 12. As the result, user interface indicated in figure 14 is shown.
- ☞ To submit project annual plan: Once preparing annual plan is completed, one can submit annual plan to BOFEC for approval or acceptance by
 - Selecting annual plan by clicking check box indicated by arrow number 2 of figure 12
 - Clicking button indicated by arrow number 6 of figure 12
- ☞ To return to previous user interface indicated by figure 11: Click button indicated by arrow number 7 of figure 12

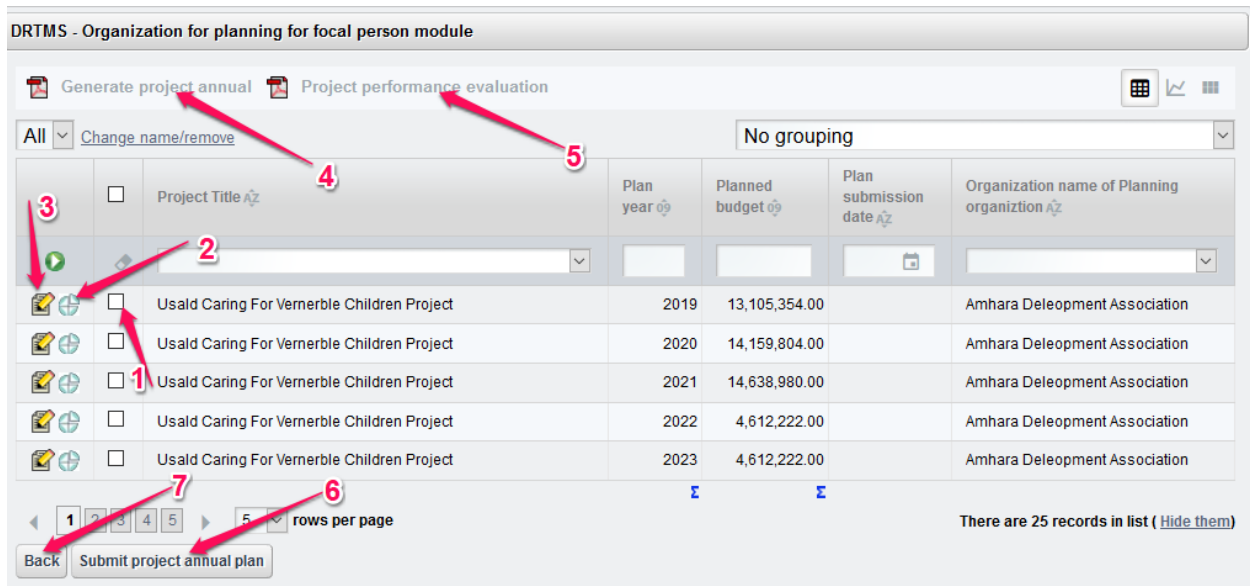


Figure 12. Annual Plan Second Page

User interface indicated in figure 13 is used to upload narrative annual plan of an organization. Type total annual budget in the text box indicated by arrow number 2 of figure 13. Click the file icon indicated by arrow 2 of figure 13 to upload narrative annual plan.

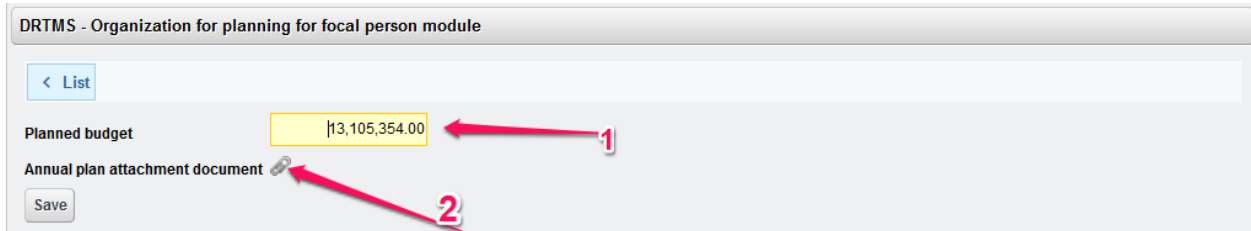


Figure 13. Annual Plan Narrative Document Attachment User Interface

User interface indicated in figure 14 is used to prepare quarter breakdown of annual plan of an organization.

- ☞ To edit quarter based plan: click the edit icon indicated by arrow 1 of figure 14. As the result, user interface indicated by figure 15 is shown.
- ☞ To go back to previous page (user interface indicated by figure 12): click the button indicated by arrow number 2 of figure 14.

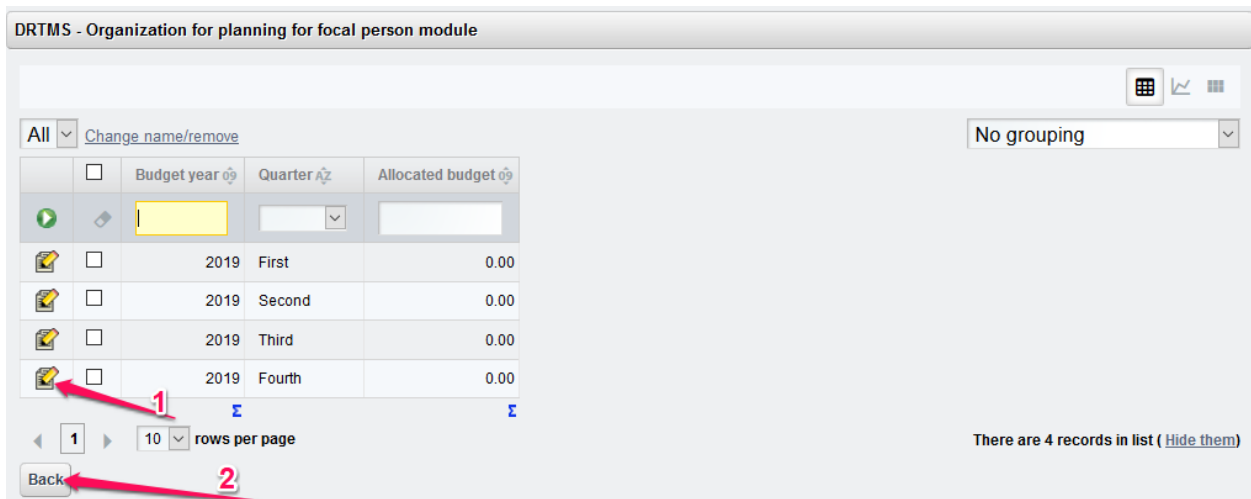


Figure 14. Quarter Based Planning User Interface

User interface indicated by figure 15 is used to prepare quarter based plan.

☞ To return to previous page: click the link indicated by arrow number 9

☞ To fill quarter based information:

- Select quarter from combo box indicated by arrow number 1 of figure 15
- Type total quarter budget in the text box indicated by arrow 2 of figure 15
- To add budget breakdown per area: click the section indicated by arrow number 4 of figure of 15 ; click the link indicated by arrow number 7 of figure 15 and then user interface indicated by figure 16 is shown
- To add budget breakdown per sector: click the section indicated by arrow number 5 of figure of 15 ; click the link indicated by arrow number 1 of figure 17 and then type appropriate information and click either save button or save and continue button. As the result, user interface indicated by figure 18 is shown.
- To add Key performance indicator (KPI): click the section indicated by arrow number 6 of figure of 15 ; click the link name “**New**” and then type appropriate information and click either save button or save and continue button. As the result, user interface indicated by figure 19 is shown.

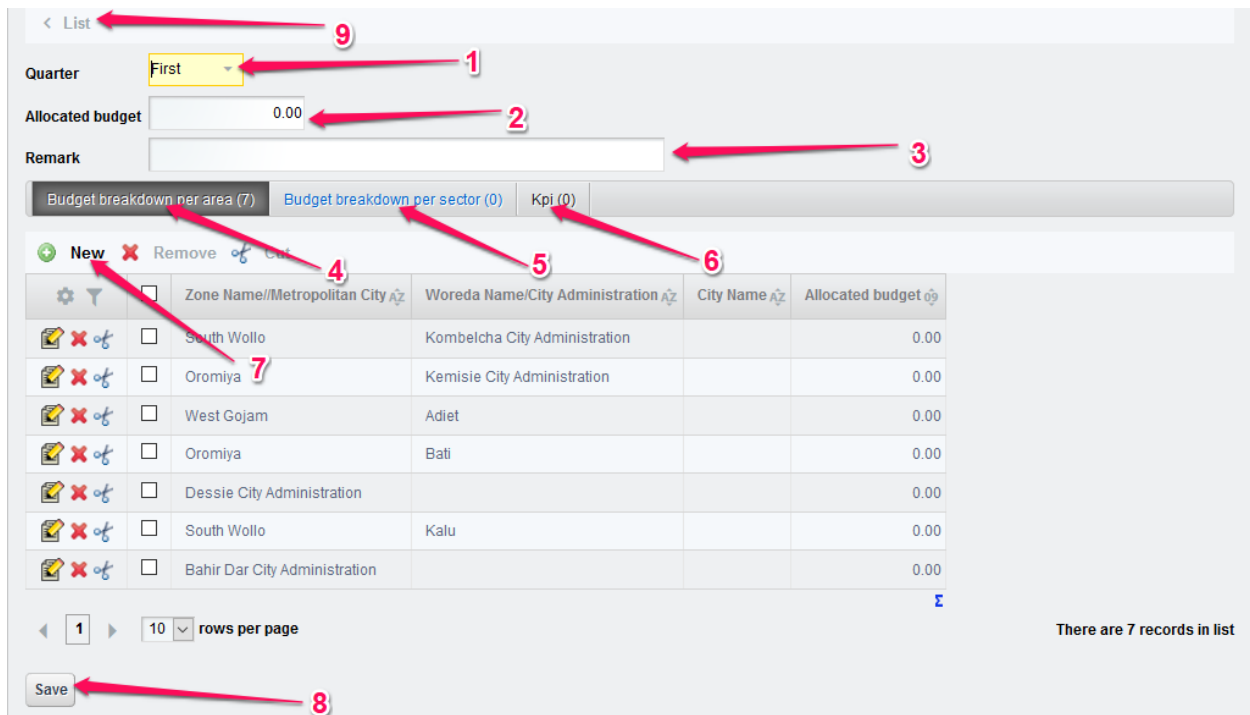


Figure 15. User Interface for Modifying Quarter Based Plan

User interface shown in figure 16 is used to add project area. Zone can't be empty. However, woreda, city and kebele are optional. Total budget allocated for the selected project area is put at text box indicated by arrow number 5 of figure 16. Fill appropriate information in user interface indicated by 16 and finally click the button indicated by arrow number 6.

Edit - budget breakdown per area ✕

Zone **1** → South Wollo

Woreda **2** → Kombelcha City Administration

City **3** →

Kebele **4** →

Allocated budget **5** → 0.00

6 → Save Remove Close

Figure 16. User Interface for Project Area Encoding

Quarter **First**

Allocated budget 0.00

Remark

Budget breakdown per area (7) **Budget breakdown per sector (0)** Kpi (0)

+ New **✕** Remove **✂** Cut

1 → **1**

10 rows per page

Save

Figure 17. Budget Breakdown per Sector Section

User interface indicated in figure 18 is used to encode sector based budget breakdown. Select sector from combo box indicated by arrow number 1 of figure 18. Type total budget allocated for the selected sector in the text box indicated by arrow number 2 of figure 18. Finally, click the button indicated by arrow number 4 of figure 18.

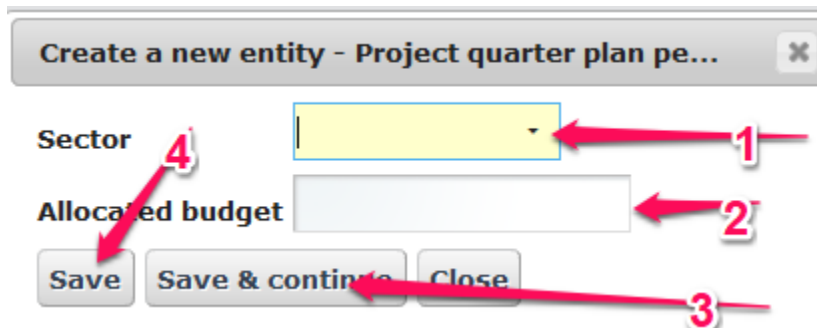


Figure 18. User Interface for Budget Breakdown Per Sector Encoding

User interface indicated in figure 19 is used to encode key performance indicator (KPI) of the project.

Steps:

- ☞ Select sector from combo box indicated by arrow number 1 of figure 19
- ☞ Select KPI from combo box indicated by arrow number 3 of figure 19; if the KPI you want encode is not available in the combo box list, add your own KPI by click the icon indicated by arrow number 2 of figure 19
- ☞ Select **unit of measure** from combo box indicated by arrow number 6 of figure 19; if the **unit of measure** you want encode is not available in the combo box list, add your own **unit of measure** by click the icon indicated by arrow number 4 of figure 19
- ☞ Type target value in the text box indicated by arrow number 5 of figure 19. Finally, click the **Save button** of figure 18.

Figure 19. User Interface for KPI Encoding

7 Quarter Report preparation and submission

Preconditions: to prepare a quarter report, a focal person should fulfil the following preconditions.

- ☞ Implementing organization should have annual plan which has detail quarter breakdown
- ☞ Focal person has user account to login in DRTMS system

Step1: open the page that is used to prepare quarter report

- ☞ Click **Quarter Report** page and then click **Quarter Report (Focal Person)** page. As the result the user interface shown in figure 20 is displayed. List of implementing organization, whose focal person is currently login user, is shown

Step 2: Start preparing quarter report

- ☞ To start preparing quarter report:
 - Select implementing organization by clicking check box indicated by arrow number1 of figure 20

- Click the link indicated by arrow number 2 of figure 20. As the result of this, user interface indicated by figure 21 is displayed.

☞ To view annual plan

- Select implementing organization by clicking check box indicated by arrow number1 of figure 20
- Click the link indicated by arrow number 3 of figure 20. As the result of this, users see user interface that is used to show annual plan and let user generate annual plan in pdf format

☞ To generate project cards of selected implementing organization:

- Select an implementing organization by click check box indicated by arrow number 1 of figure 20 and then
- Click the link indicated by arrow number 4 of figure 20

☞ To generate annual plan of current budget year

- Select an implementing organization by click check box indicated by arrow number 1 of figure 20 and then
- Click the link indicated by arrow number 5 of figure 20

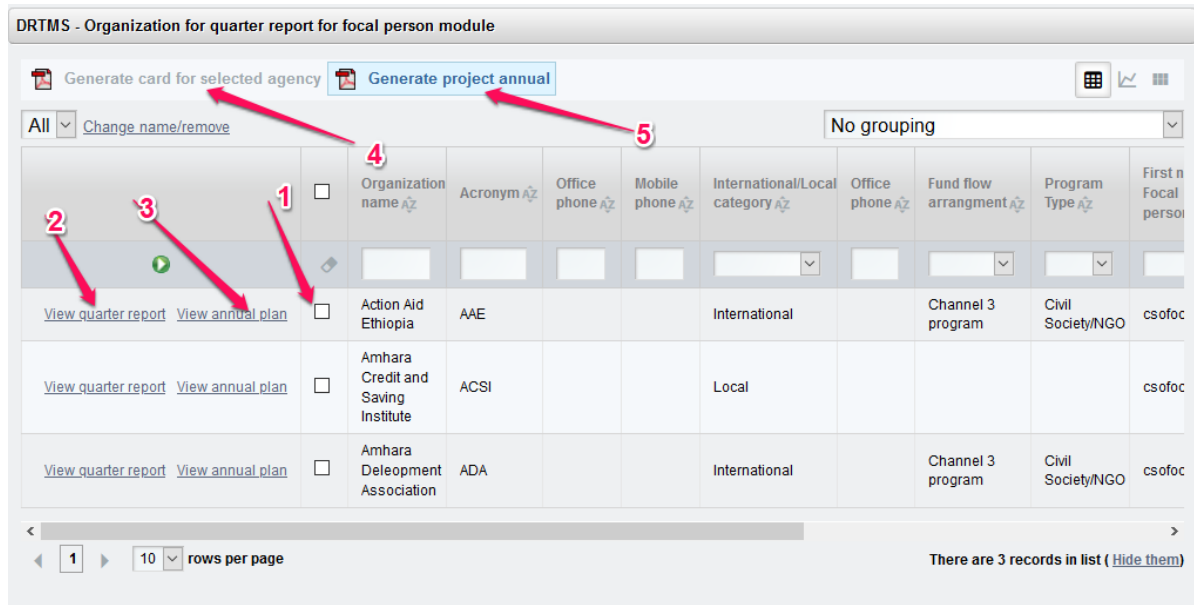


Figure 20. Quarter Report Preparation Starting Page

User interface indicated in figure 21 is allows user to prepare and submit quarter report. Records are automatically created for users and users are only allowed to edit existing records.

- ☞ To edit quarter report: click the edit icon indicated by arrow number 2 of figure 21. As the result of this, user interface shown in figure 2 is displayed.
- ☞ To submit quarter report: click the button indicated by arrow 2 of figure 21 once user completed quarter report so that BOFEC will see the report for approval/acceptance
- ☞ To go back to previous user interface: click the button indicated by arrow number 3 of figure 21.

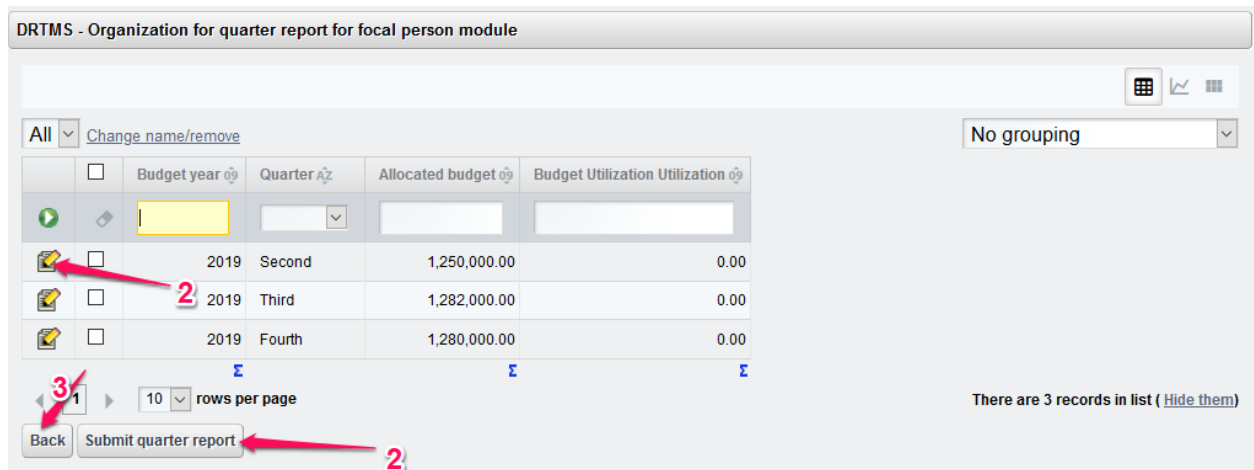


Figure 21. Quarter Report Preparation Second Page

User interface indicated by figure 22 allows user to encode/type quarter report information. Steps:

- ☞ Type total utilized budget of the selected quarter in the text box indicated by arrow number 1 of figure 22.
- ☞ Upload narrative quarter report by click the file icon indicated by arrow number 1 of figure 22.
- ☞ To encode strengths of quarter performance:
 - Click the section indicated by arrow number 4 of figure 22
 - Type strengths in and past in text box indicated by arrow number 12 of figure 21 or
 - Copy content from MS word and past in text box indicated by arrow number 12 of figure 21
- ☞ Encode weakness, opportunities, challenges and lessons learned by clicking arrow number 5 to 8 of figure 22 and type or copy/past corresponding values in *similar fashion*, as values for strengths are encoded/typed/copy-pasted.
- ☞ To encode budget breakdown per area:
 - Click the section indicated by arrow number 10 of figure 22. As the result of this, user interface indicated in figure 23 is displayed. All project areas included in the select quarter of annual plan are shown in the figure 23

- Click edit icon indicated by arrow number 14 of figure 23. Because of this, user interface indicated by figure 24 is displayed.
 - Type total utilized budget per project area in the textbox indicated by arrow number 1 of figure 24
 - Click the button indicated by arrow number 2 of figure 24.
- ☞ Encode budget breakdown per sector and KPI in similar way, as budget breakdown per area is encoded

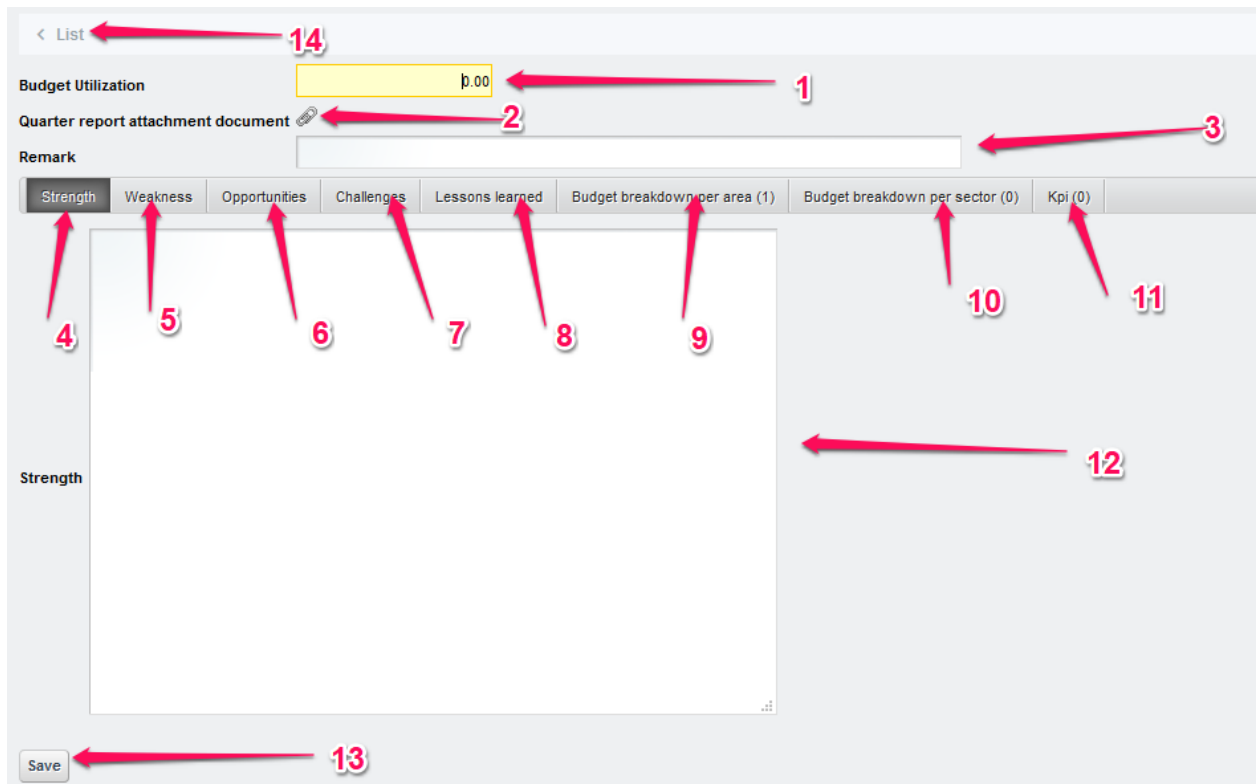


Figure 22. Detail Quarter Based Report

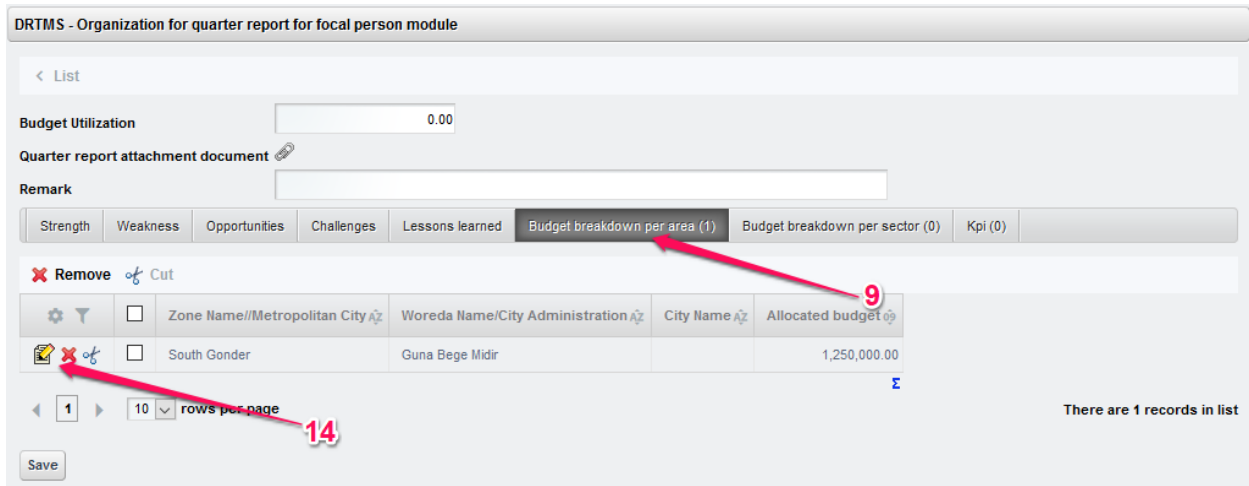


Figure 23. Budget Breakdown per Sector User Interface

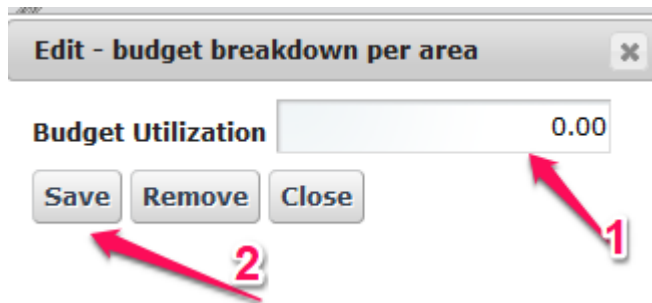


Figure 24. User Interface Encoding Budget Utilization per Quarter per Sector

8 Project Event or Status report preparation and submission

Preconditions: to prepare and submit event/status report, a focal person should fulfil the following preconditions.

- ☞ Focal person has user account to login in DRTMS system and he/she is assigned as focal person for implementing organization

Step1: open the page that is used to prepare and submit event/status report

- ☞ Click [Progress Followup \(FocalPerson\)](#) page. As the result, the user interface shown in figure 25 is displayed. List of implementing organization, whose focal person is currently login user, is shown

Step 2: Start preparing and submitting status/event report

- ☞ To start preparing event/status report:
 - Select implementing organization by clicking check box indicated by arrow number 1 of figure 25
 - Click the link indicated by arrow number 3 of figure 25. As the result of this, user interface indicated by figure 26 is displayed.
- ☞ To view annual plan
 - Select implementing organization by clicking check box indicated by arrow number 1 of figure 25
 - Click the link indicated by arrow number 3 of figure 25. As the result of this, users see user interface that is used to show annual plan and let user generate annual plan in pdf format
- ☞ To view quarter reports
 - Select implementing organization by clicking check box indicated by arrow number 1 of figure 25
 - Click the link indicated by arrow number 4 of figure 25. As the result of this, users see user interface that is used to show quarter report and let user generate annual plan in pdf format
- ☞ To generate project cards of selected implementing organization:
 - Select an implementing organization by click check box indicated by arrow number 1 of figure 25 and then
 - Click the link indicated by arrow number 6 of figure 25
- ☞ To generate annual plan of current budget year
 - Select an implementing organization by click check box indicated by arrow number 1 of figure 25 and then

- Click the link indicated by arrow number 7 of figure 20
- ☞ To generate projects ready for evaluation
 - Select an implementing organization by click check box indicated by arrow number 1 of figure 25 and then
 - Click the link indicated by arrow number 5 of figure 25

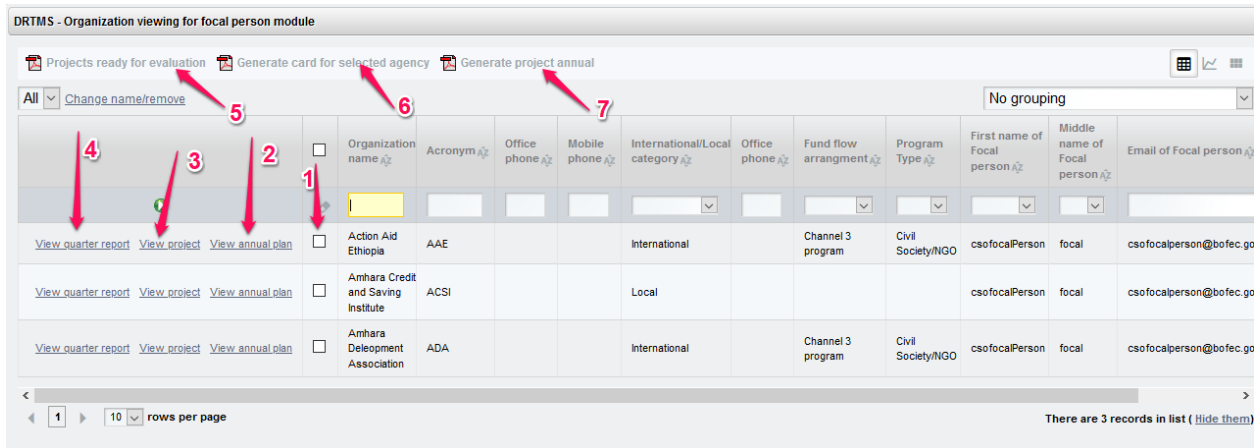


Figure 25. Project Follow up Page

User interface shown in figure 26 allows user to prepare project status report, view budget breakdown and evaluations, and generate different type of reports indicated by arrow numbers 6 to 8.

- ☞ To go to user interface used to prepare project status/event report
 - Select project by clicking check box indicated by arrow number 1 of figure 26
 - Click the button indicated by arrow number 3 of figure 26. As the result of this, users see user interface, shown in figure 28, is used to prepare project status report
- ☞ To view budget breakdown
 - Select project by clicking check box indicated by arrow number 1 of figure 26

- Click the link indicated by arrow number 5 of figure 26. As the result of this, users see user interface ,that is used to show budget breakdown, is displayed

☞ To view project evaluations

- Select project by clicking check box indicated by arrow number 1 of figure 26
- Click the link indicated by arrow number 2 of figure 26. As the result of this, users see user interface (figure 27), that is used to show project evaluations, is displayed.

☞ To return back to user interface(figure 25), click the button indicated by arrow number 4 of figure 26

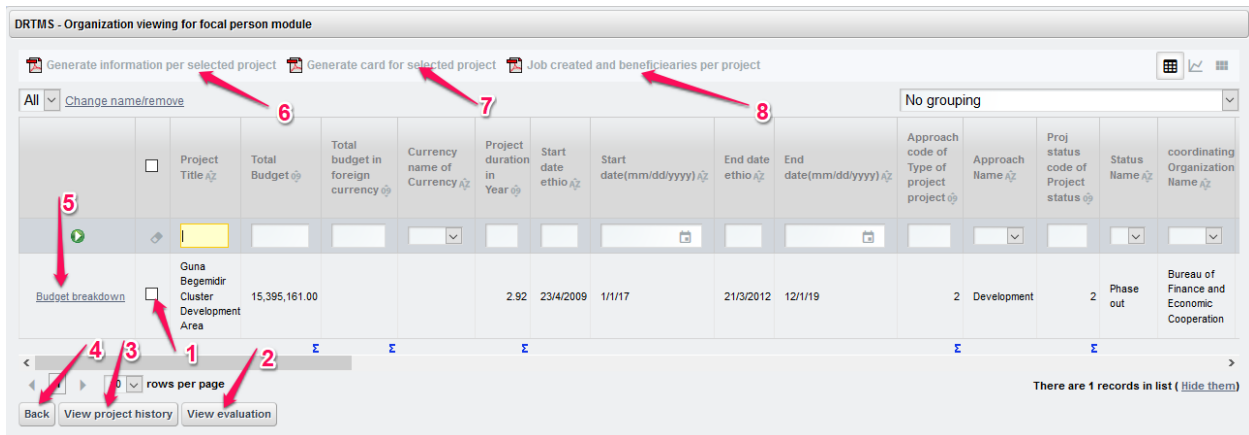


Figure 26. Project Status/History Report Preparation First Page

☞ To view project evaluations

- Select project evaluation by clicking check box indicated by arrow number 1 of figure 27
- Click the link indicated by arrow number 2 of figure 27. As the result of this, users see user interface, that is used to show project evaluation details, is displayed.

☞ To return back to user interface(figure 26), click the button indicated by arrow number 3 of figure 27

DRTMS - Organization viewing for focal person module

All [Change name/remove](#) No grouping

	Project Title ^{AZ}	Year of Evaluation Evaluation ^{OP}	Performance evaluation result ^{AZ}	Status Name ^{AZ}	Accomplishment In Percent Percent ^{OP}	Budget Utilization Utilization ^{OP}	Budget Utilization In Percent Percent ^{OP}	Compliance of legal procedures ^{AZ}	Evaluation type ^{AZ}	Performance evaluation result ^{AZ}	Decision of Decision byapprover ^{AZ}	Approver date ^{AZ}	Remarks ^{AZ}
View result	Guna Begemdir Cluster Development Area	2020			0.00	0.00	0.00		Mid term		Waiting for approval		
View result	Guna Begemdir Cluster Development Area	2020			0.00	0.00	0.00		Terminal		Waiting for approval		

1 2 3

10 rows per page There are 2 records in list ([Hide them](#))

Back

Figure 27. Project Evaluation User Interface

User interface shown in figure 28 allows user to prepare project status report.

- ☞ To prepare project status/event report
 - Click the link indicated by arrow number 3 of figure 28. As the result of this, users see user interface, shown in figure 29, is used to type and save project status report
- ☞ To return back to user interface(figure 26), click the button indicated by arrow number 6 of figure 28
- ☞ To edit project status/event report
 - Click the edit icon indicated by arrow number 2 of figure 28. As the result of this, users see user interface, shown in figure 29, is used to edit and save project status report
- ☞ To return back to user interface(figure 26), click the button indicated by arrow number 5 of figure 28

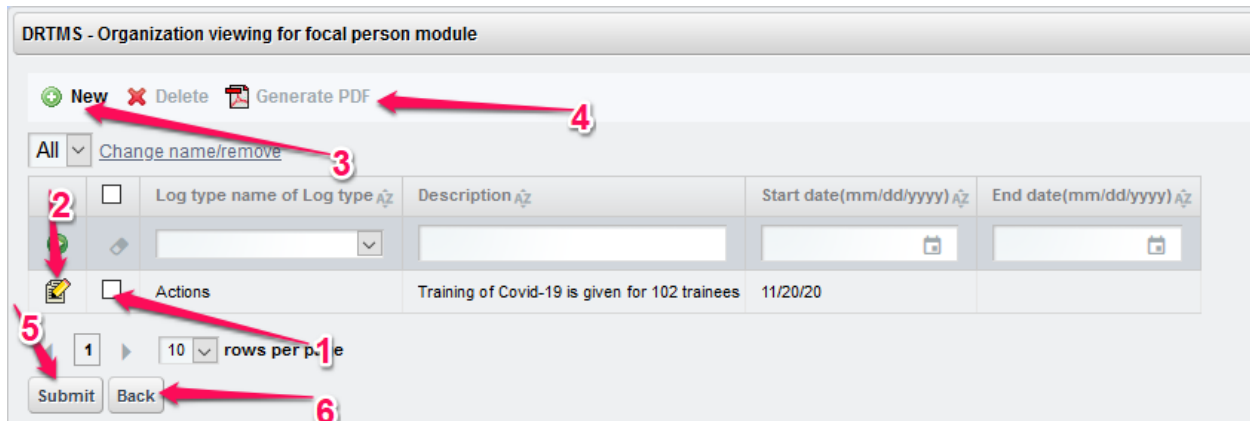


Figure 28. Project History Information Management User Interface

User interface shown in figure 29 allows user to edit and save project status report. Select log type clicking com box indicated by arrow number 2 of figure 29. If the log type you are looking for is not available in the combo box, click the icon indicated by arrow number 2 of figure 29. Type the description of the log on the text box indicated by arrow number 4 of figure 29. Fill appropriate information and click save button indicated by arrow number of 5 of figure 29.

To return back to user interface (figure 28), click the link indicated by arrow number 6 of figure 29.

DRTMS - Organization viewing for focal person module

< List **6**

Project: Guna Begemidir Cluster Development Area **1**

Log type: Actions **3**

Description: Training of Covid-19 is given for 102 trainees **4**

Start date(mm/dd/yyyy): 11/20/20

Start time: 4:00

End date(mm/dd/yyyy):

End time:

Remark:

Save **5**

Figure 29. User Interface for Project History Encoding