

## How to report in Civis

This guide is a brief introduction to ForumCiv's grants management system Civis, which mainly goes through the parts of the system that are required for submitting a report. Thus, the focus will mainly be on your Initiative's page in Civis, and the functions used for uploading documents and filling in the financial outcome. In the end, you will find a short introduction to your Organization's page where you will upload organizational documents.

If you have any technical issues during any of the steps below, reach out to [civissupport@forumciv.org](mailto:civissupport@forumciv.org) right away.

For any questions regarding the reporting itself, reach out to your Programme Officer.

## How to log in to Civis the first time

You are a few steps away from entering Civis. For security reasons you will need to use multi-factor authentication to log into Civis. This means that you will need an installed on your phone called Microsoft Authenticator.


1. Download the app Microsoft Authenticator from App Store or Google Play on your phone.
2. You should have received an invitation by e-mail from ForumCiv. Press "Accept invitation".
3. You will be asked to log in with a code. Press "Skicka kod".
4. You will now receive a code by e-mail.
5. Enter the code and press "Logga in".
6. Accept the permissions requested by ForumCiv by pressing "Acceptera".
7. You will receive a prompt that says "More information is required". Follow the instructions to complete the configuration of multi-factor authentication (see page 5 in the guide below for detailed instructions).
8. Welcome to Civis!

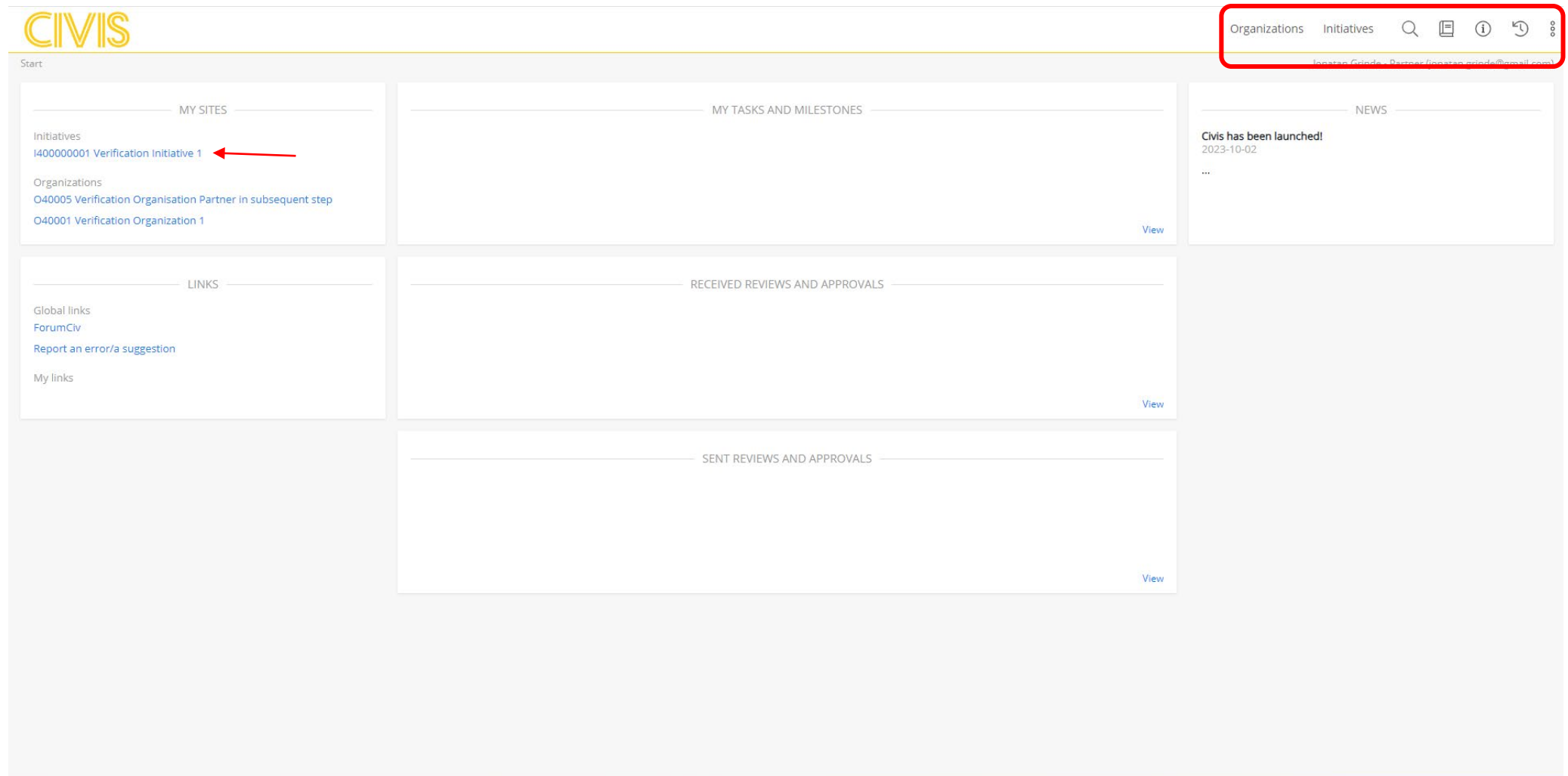
**Note:** If you already have a Microsoft account, you will be redirected directly to step 6 when accepting the invitation received by e-mail.

On ForumCiv's website: <https://forumciv.org/int/project-funding/templates> you can find a detailed guide "How to access Civis".

## Civis – The landing page

When entering Civis for the first time you will be directed to the start page. The start page will provide you with quick access to the Initiative and Organizations you are connected to (the box My Sites in the top left corner), your ongoing tasks and milestones, and whether you or ForumCiv is waiting for one another's review or approval (the three boxes in the middle). The start page also has one box for quick links and one for news.

At the top you have a navigation bar from which you can access your organizations and initiatives with search and filter functions. You might see this icon  instead of Organization and Initiatives if your web browser window is zoomed in, or not in full screen mode. On the right, you have symbols for a quick search function, resource library, support manual and quick access to the twenty most recent pages you visited in Civis. The three dots to the most right is the settings function and will provide different alternatives depending on where you are in Civis. The Civis logo to the left takes you back to the start page.



The screenshot displays the Civis landing page. At the top left is the 'CIVIS' logo. To its right is a navigation bar containing 'Organizations', 'Initiatives', a search icon, a document icon, an information icon, a refresh icon, and a settings icon (three dots). Below the navigation bar is a 'Start' section. The main content area is divided into several sections: 'MY SITES' (containing 'Initiatives' and 'Organizations' lists), 'MY TASKS AND MILESTONES', 'LINKS' (containing 'Global links', 'ForumCiv', 'Report an error/a suggestion', and 'My links'), 'RECEIVED REVIEWS AND APPROVALS', and 'SENT REVIEWS AND APPROVALS'. A red arrow points to the 'Initiatives' list item 'I400000001 Verification Initiative 1'. A red box highlights the navigation bar. A news section on the right shows 'Civis has been launched!' with the date '2023-10-02'.

**CIVIS**

Start

Organizations Initiatives

MY SITES

Initiatives

I400000001 Verification Initiative 1

Organizations

O40005 Verification Organisation Partner in subsequent step

O40001 Verification Organization 1

MY TASKS AND MILESTONES

View

LINKS

Global links

ForumCiv

Report an error/a suggestion

My links

RECEIVED REVIEWS AND APPROVALS

View

SENT REVIEWS AND APPROVALS

View

NEWS

Civis has been launched!

2023-10-02

...

# Civis – Your Initiative’s page

From the start page you can access your initiative’s page quickly via the top left box My Sites.

On your Initiative’s page you will see boxes with quick access to recent Documents, overview of tasks and milestones, and pages in Civis that are related to your Initiative (for example your Organization’s page and the programme page of the Swedish Partnership Programme). In the top left you have the Information box which contains the basic info about the initiative, some of it is possible for you to edit. Above the Information box you have four tabs. We will focus on three of these which are required for submitting your report: Documents, Tasks, and Finance.

CIVIS

OrganizationsInitiatives

Start / Initiatives / Verification Initiative 1

I400000001 Verification Initiative 1

OverviewDocumentsTasksFinanceResults

INFORMATION

Status	New
Workflow type	Co-applicant implementing
Programme	P4001 Verification Programme 1
Initiative type	
Responsible person	Eleonora Hallberg
Period	2024-01-01 - 2026-12-31
Geographical area(s)	Sweden
Cooperation partner	<a href="#">O40001 Verification Organization 1</a>
Currency	SEK - Swedish Krona
Granted support	
Contact person cooperation partner	Bénédicte Sjöstedt - gmail
Confidential	

View | Edit

TASKS & MILESTONES

View

RELATED PAGES

Organization

[O40001 Verification Organization 1](#)

Programmes

[P4001 Verification Programme 1](#)

View

DOCUMENTS

Key

View

Recent

[Checklist for Partner Report - SASA 2.docx](#)

[Checklist for Partner Report - SASA.docx](#)

[Checklist for SPP Requisitions - test BS 2.docx](#)

[Checklist for SPP Requisitions - test BS 1.docx](#)

[Checklist for SPP Requisitions 4.docx](#)

View

# Civis – Your Initiative’s page – Finance

To report your outcome, open the Finance tab, then the sub-tab Outcome. Clicking the button “Report outcome” will open a pop-up window where you can enter the information required. Note that every box where to enter information corresponds to an agreement condition. This is why reporting the outcome via Civis is mandatory.

CIVIS

OrganizationsInitiatives

Start / Initiatives / Verification Initiative 1 / Finance / Outcome

I400000001 Verification Initiative 1

OverviewDocumentsTasksFinanceResults

MonitoringBudgetPaymentsOutcome

Report outcome

Export to Excel

Generate PDF

YearYear 2

Reporting currencySEK - Swedish Krona

			BUDGET YEAR 2	OUTCOME YEAR 2	VARIANCE %	ACCUMULATED OUTCOME	NOTES
INCOMING FUNDING			277,020	277,020	0	554,040	
Own contribution			13,500	13,500	0	27,000	
Interest gains				1,000		3,000	
Total revenues			290,520	291,520	0.34 %	584,040	

	FREE TEXT	GEOGRAPHICAL AREA	BUDGET YEAR 2	OUTCOME YEAR 2	VARIANCE %	ACCUMULATED OUTCOME	NOTES
Operational			270,000	260,000	-3.70 %	510,000	
Expense resp. org.	Activity 1	Barbados	50,000	40,000	-20 %	85,000	Less expensive
Expense resp. org.	Activity 2	Barbados	100,000	100,000	0	205,000	test to write a very very long text and see what will be shown on the PDF because this can be imortant
Expense resp. org.	Activity 3	Barbados	120,000	120,000	0	220,000	
Administration			20,520	19,728	-3.86 %	39,728	
Administration expenses	Indirect costs	Barbados	20,520	19,728	-3.86 %	39,728	
Total			290,520	279,728	-3.71 %	549,728	
Closing balance				11,792		34,312	

At the top of the Report outcome pop-up window, you have a table for Incoming funding. Here you enter the outcome of your own contribution and any interest you have gained during the reported period, and comment on any deviations from budget. Note that interest gained at the local partner(s) which has not been repaid to the Swedish organization should not be reported to the outcome in Civis.

Then follows the table for entering outcomes for the Operational costs and Administration in Sweden, as well as comments on any deviations from budget. At the bottom of the table there are two rows for entering the Exchange rate gains/losses balance and the Exchange rate effects for the reported period. ForumCiv strongly recommends you to read through the [Guidelines for exchange rate management](#) for clarification on the difference between these two. Write (-) if the amount is negative.

Below follows a function for linking documents. No documents should be linked to the outcome.

In the text box with the heading Notes to financial report you should enter explanatory notes necessary for transparent financial reporting. This includes but is not limited to the accounting principles applied for the financial report, and the principle applied for managing currency exchanges.

SYSTEM CURRENCY (SEK)			
INCOMING FUNDING	BUDGET YEAR 2	OUTCOME YEAR 2	COMMENT
	277,020	277,020	
Own contribution	13,500	13,500	
Interest gains		1,000	
Total revenues	290,520	291,520	

SYSTEM CURRENCY (SEK)					
	FREE TEXT	GEOGRAPHICAL AREA	BUDGET YEAR 2	OUTCOME YEAR 2	COMMENT
Operational			270,000	260,000	
Expense resp. org.	Activity 1	Barbados	50,000	40,000	Less expensive
Expense resp. org.	Activity 2	Barbados	100,000	100,000	test to write a ve
Expense resp. org.	Activity 3	Barbados	120,000	120,000	
Administration			20,520	19,728	
Administration expenses	Indirect costs	Barbados	20,520	19,728	
Total			290,520	279,728	

Exchange rates gains and losses balance

-4,733
--------

Exchange rate effects

3,000
-------

Linked documents

Select document(s)

Notes to financial report

B I U   

Rate etc etc.

Under the text box you should see the name of your handling Programme Officer and a box for entering an Approval due date. If you have entered all of the required information and you are sure of this, set 1 May as the Approval due date and click “Send for approval” to the right. Your Programme Officer will now be notified that the outcome has been reported in Civis. The outcome must be sent for approval by 1 May the latest. When you have sent the outcome for approval the pop-up window will close.

If you need to take a pause when entering the outcome, click “Save as preliminary” instead. Note that clicking “Cancel” will close the window without saving any changes.

Reviews and Approvals

Comments

+ Add comment

Approval

Assigned to \*

Eleonora Hallberg

Approval due date \*

Send for approval

Save as preliminaryCancel

To create a PDF of the outcome, click on the “Generate PDF” button above the outcome table. The PDF must be provided to the auditor. Note that you can generate the PDF after saving the outcome as preliminary, but keep in mind that it must be the same version of the outcome provided to the auditor which is sent for ForumCiv's approval, and submitted as PDF. The PDF must be signed by two authorized signatories and submitted together with the rest of the reporting on 1 May.

CIVIS

OrganizationsInitiatives

Start / Initiatives / Verification Initiative 1 / Finance / Outcome

I400000001 Verification Initiative 1

OverviewDocumentsTasksFinanceResults

MonitoringBudgetPaymentsOutcome

Report outcomeExport to ExcelGenerate PDF

YearYear 2Reporting currencySEK - Swedish Krona

INCOMING FUNDING			BUDGET YEAR 2	OUTCOME YEAR 2	VARIANCE %	ACCUMULATED OUTCOME	NOTES
			277,020	277,020	0	554,040	
Own contribution			13,500	13,500	0	27,000	
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Total revenues			290,520	291,520	0.34 %	584,040	

	FREE TEXT	GEOGRAPHICAL AREA	BUDGET YEAR 2	OUTCOME YEAR 2	VARIANCE %	ACCUMULATED OUTCOME	NOTES
Operational			270,000	260,000	-3.70 %	510,000	
Expense resp. org.	Activity 1	Barbados	50,000	40,000	-20 %	85,000	Less expensive
Expense resp. org.	Activity 2	Barbados	100,000	100,000	0	205,000	test to write a very very long text and see what will be shown on the PDF because this can be important
Expense resp. org.	Activity 3	Barbados	120,000	120,000	0	220,000	
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Total			290,520	279,728	-3.71 %	549,728	
Closing balance				11,792		34,312	

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# Civis – Your Initiative’s page – Documents

To upload documents on your initiative’s page, open the Documents tab. There is folders for each phase of the Initiative. Relevant for reporting is to upload documents under the Annual monitoring reports folder or the Final report folder depending on your initiative. Folders can be opened both in the box to the left and the box in the middle.

CIVIS

OrganizationsInitiatives

SearchIconInfoRefreshMore

Start / Initiatives / Verification Initiative 1 / Documents

I400000001 Verification Initiative 1

OverviewDocumentsTasksFinanceResults

Documents

01 Application

02 Agreement

03.1 Implementation

03.2 Annual monitoring reports

04 Final report

05 Closing

CopySend with emailSearch

<input type="checkbox"/>	NAME		MODIFIED BY	MODIFIED	SIZE	VERSION	DOCUMENT TYPES
<input type="checkbox"/>	01 Application	...	Jonatan Grinde	2024-03-13 22:59			
<input type="checkbox"/>	02 Agreement	...	Jonatan Grinde	2024-03-13 22:59			
<input type="checkbox"/>	03.1 Implementation	...	Jonatan Grinde	2024-03-13 22:59			
<input type="checkbox"/>	03.2 Annual monitoring reports	...	Jonatan Grinde	2024-03-13 23:01			
<input type="checkbox"/>	04 Final report	...	Jonatan Grinde	2024-03-13 23:01			
<input type="checkbox"/>	05 Closing	...	Jonatan Grinde	2024-03-13 23:01			

03.2 Annual monitoring reports

04 Final report

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Once inside of a folder, you will be able to upload documents, either by clicking the button “Upload documents” or drag-and-drop to the box in the middle. Make sure that you read the instructions in the applicable reporting template to ensure that you have uploaded all the required documents. For the documents to be uploaded on your Organization’s page in Civis simply follow the same steps below. There are also separate instructions further down in this guide.

CIVIS

OrganizationsInitiatives

Start / Initiatives / Verification Initiative 1 / Documents / 03.2 Annual monitoring reports

I400000001 Verification Initiative 1

OverviewDocumentsTasksFinanceResults

Documents

01 Application

02 Agreement


03.1 Implementation

03.2 Annual monitoring reports

04 Final report

05 Closing

New folderNew documentUpload documentsCreate linkCopyMoveSend with emailSearch

<input type="checkbox"/>	NAME		MODIFIED BY	MODIFIED	SIZE	VERSION	DOCUMENT TYPES
<input type="checkbox"/>	 Test.docx	...	Eleonora Hallberg	2024-03-14 13:43	700 KB	1.0	Progress report 1

Uploading documents by clicking on the button “Upload documents” will open a pop-up window where you can select the applicable Document types (for example Progress report 1,2,3 etc. or Final report). The function Key words is not used.

ForumCiv has a document structure to make it easy for all users to find documents in the folders. Before uploading documents to the applicable folder, please name it according to the following principle : "Title\_Date\_Initiative no.". For example: "Annex to report - Partners in subsequent step\_2025-05-01\_300040000".

Upload documents

Drag and drop files to this area or browse to select files to upload [Browse](#)

FILE NAME	SIZE
Test.docx	1 KB

Document types

- Agreement
- Agreement amendment
- Agreement with partner in subsequent step
- Application
- Checklist
- Communication
- Concept note
- Decision
- Donor decision


Key words

When clicking Upload in the pop-up window, an exclamation mark might appear. This does not mean that the document has not been uploaded. If you close the pop-up window you will find the document uploaded in the folder. In some cases, you may have to go in and out of the folder or refresh the page before the document appears.

Upload documents

Drag and drop files to this area or browse to select files to upload

Browse

FILE NAME	SIZE		
 Test.docx	1 KB	!	×

Document types

Key words

Upload

Close

Double-check the instructions in the reporting template to make sure that you have uploaded everything. The next step is using the Tasks function to notify your Programme Officer that you are ready with the report and have submitted it.

# Civis – Your Initiative’s page – Tasks

Click on the Tasks tab to access the tasks on your Initiative. Here you will find your to-dos during the implementation of the initiative. Tasks are generated by the Initiative’s workflow cycle and automatically assigned to you or your Programme Officer depending on the task. Tasks can also be created manually by your Programme Officer depending on the need.

If you are the main contact person of the Initiative, your user has the role Initiative Partner Responsible. Then you have been assigned the task “Submit Annual monitoring report” or “Submit Final report” and it should be visible on the Tasks tab. If it does not appear, or if the task should be assigned to another user, contact your Programme Officer.

CIVIS

OrganizationsInitiatives

Start / Initiatives / VerificationInitiative 1Tasks

Jonatan Grinde - Partner (jonatan.grinde@gmail.com)

I400000001 Verification Initiative 1

OverviewDocumentsTasksFinanceResults

SearchStatus

TASK/MILESTONE	RESPONSIBLE	DUE DATE ↑	COMPLETED ON	STATUS	REVIEW/APPROVAL STATUS
SPP I.3 Submit annual monitoring report	... Jonatan Grinde - Partner	2024-05-01		Planned	

When clicking on the task a pop-up window will open with instructions on what to do in order to complete the task, which deadline that applies (End date), that you are responsible, and which status the task is in. Most important right now is using the function for linking documents in order to connect the required reporting documents to the task.

Edit task/milestone

Entity:  
Initiative/I400000001 Verification Initiative 1

Title  
SPP I.3 Submit annual monitoring report

Description  
1. Read the [Annual monitoring template](#) for details on what information you need to provide.  
2. Under the Documents tab, upload the annual monitoring report documents in the folder 03.2 Annual monitoring report:  
a. Written report with results summary and narrative financial report.  
b. Audit of the Swedish organization, signed by the auditor (ISA 805 report, ISRS 4400 report and Management Letter if applicable).  
c. Management Response that answers to the issues raised in the Management Letter, signed by two authorised signatories.  
d. Operational plan. Note that you are not required to report on the Operational plan but you can if you wish.  
3. Under Outcome under the Finance tab:  
a. Click Report expenditure and fill in the outcome. Send to your Programme officer for approval with due date the next day.  
b. Generate a pdf, get it signed by two authorised signatories and upload it to the folder 03.2 Annual monitoring report.  
4. Click Select documents and attach the required annual monitoring report documents to this task.  
5. On your Organization page, under the Documents tab, verify that your latest Organizational documents are uploaded in the folder 01 Organizational documents.  
6. Mark this task as Completed when ready, by the deadline at the latest.

Supporting documents from Resource library

Linked documents  
Select document(s)

Comments  
+ Add comment

Template  
SPP I.3 Submit annual monitoring report

Type  
Milestone

End date  
2024-05-01

Responsible person  
Jonatan Grinde

Status \*  
Planned

Created 2024-03-14 by Jonatan Grinde  
Modified 2024-03-14 by Jonatan Grinde

OKCancel

Clicking “Select document(s)” will open a separate window where you will see the folders under the Document tab. To access the documents, open the folder by selecting it from the left column with the heading FOLDERS. Note that if you instead click on a folder in the right column with the heading DOCUMENTS, you will instead connect the whole folder to the task instead of opening it. You can keep track of what you have connected in the space below the folders to make sure that only documents and no folder are selected. If you have selected a folder by mistake, simply click the red cross to remove it from the task. When you have selected all required reporting documents, click OK.

## Document picker

Entity

Initiative

Page

I400000001 Verification Initiative 1

FOLDERS

Documents

01 Application


02 Agreement

03.1 Implementation

03.2 Annual monitoring reports

04 Final report

05 Closing



DOCUMENTS

01 Application

02 Agreement

03.1 Implementation


03.2 Annual monitoring reports

04 Final report

05 Closing

03.2 Annual monitoring reports

✕

 Test 2.docx

✕

OK

Cancel

Connecting all the required reporting documents to the task requires you to have reported the outcome under the Finance tab on the Initiative. If you have completed the steps in the task description, the last step in submitting the report is to mark the task as Completed. You must mark the task as Completed by 1 May at the latest to submit the report. (Note for PPF, you might have a specific final report deadline.)

Edit task/milestone

Entity:  
Initiative/I400000001 Verification Initiative 1

Title  
SPP I.3 Submit annual monitoring report

Description  

1. Read the [Annual monitoring template](#) for details on what information you need to provide.

2. Under the Documents tab, upload the annual monitoring report documents in the folder 03.2 Annual monitoring report:

a. Written report with results summary and narrative financial report.

b. Audit of the Swedish organization, signed by the auditor (ISA 805 report, ISRS 4400 report and Management Letter if applicable).

c. Management Response that answers to the issues raised in the Management Letter, signed by two authorised signatories.

d. Operational plan. Note that you are not required to report on the Operational plan but you can if you wish.

3. Under Outcome under the Finance tab:

a. Click Report expenditure and fill in the outcome. Send to your Programme officer for approval with due date the next day.

b. Generate a pdf, get it signed by two authorised signatories and upload it to the folder 03.2 Annual monitoring report.

4. Click Select documents and attach the required annual monitoring report documents to this task.

5. On your Organization page, under the Documents tab, verify that your latest Organizational documents are uploaded in the folder 01 Organizational documents.

6. Mark this task as Completed when ready, by the deadline at the latest.

Supporting documents from Resource library

Linked documents

Test 2.docx

Select document(s)

Comments

+ Add comment

Template  
SPP I.3 Submit annual monitoring report

Type  
Milestone

End date  
2024-05-01

Responsible person  
Jonatan Grinde

Status \*

Planned

Planned

In progress

Completed

Not applicable

Created 2024-03-14 by Jonatan Grinde  
Modified 2024-03-14 by Jonatan Grinde

OK

Cancel

15/17

# Civis – Your Organizations’s page

Your organization page in Civis look much like the Initiative page but with some differences. Here you will be able to edit and update information on your organization, including uploading documents and adding and managing contact persons. There might also be tasks that are connected to your organization. The initiatives and partner organizations that your organization is connected to are visible here as well.

On the tab Bank accounts your bank account used for receiving payments from ForumCiv is registered. Please ask your Programme Officer for support if you need to update your bank account.

CIVIS

OrganizationsInitiatives

Start / Organizations / Verification Organization 1Jonatan Grinde - Partner (jonatan.grinde@gmail.com)

O40001 Verification Organization 1

OverviewDocumentsContactsTasksBank accounts

INFORMATION

StatusActive

English official name

Abbreviation

Workflow typePartner based in Sweden

Organization type

Registration number

Year of establishment

Country based inSweden

City

Confidential

Responsible ForumCivSteve Biko

View | Edit

TASKS & MILESTONES

View

DESCRIPTION

ALL RELATED INITIATIVES

INITIATIVE	INITIATIVE TYPE	PERIOD	STATUS	RATING
<a href="#">I400000001 Verification Initiative 1</a>		2024-01-01 - 2026-12-31	New	<div>Green</div>

View

RELATED PAGES

Initiatives

[I400000001 Verification Initiative 1](#)

Organization

[O40005 Verification Organisation Partner in subsequent step](#)

View

DOCUMENTS

Key

Recent

View

View



# Civis – Your Organizations’s page - Documents

Most important at this phase is to ensure that your latest organizational documents are uploaded. To check this, open the Documents tab and select the folder Organizational documents. If you have submitted your latest organizational documents to ForumCiv earlier you should be able to see them here. Note that outdated Organizational documents should be in the sub-folder Older.

If you need to upload your latest Organizational documents, make sure you are in the Organizational documents folder, and simply click the “Upload documents” button or drag-and-drop them to the box in the middle.

CIVIS

OrganizationsInitiatives

Start / Organizations / Verification Organization 1 / Documents / 01 Organizational documents

O40001 Verification Organization 1

OverviewDocumentsContactsTasksBank accounts

Documents

- 01 Organizational documents
  - Older
    - 02 Membership & Eligibility
    - 03 Communication

New folderNew documentUpload documentsCreate linkCopyMoveSend with emailSearch

	NAME	MODIFIED BY	MODIFIED	SIZE	VERSION	DOCUMENT TYPES
<input type="checkbox"/>	Older	...	SharePoint App		2023-11-24 14:45	