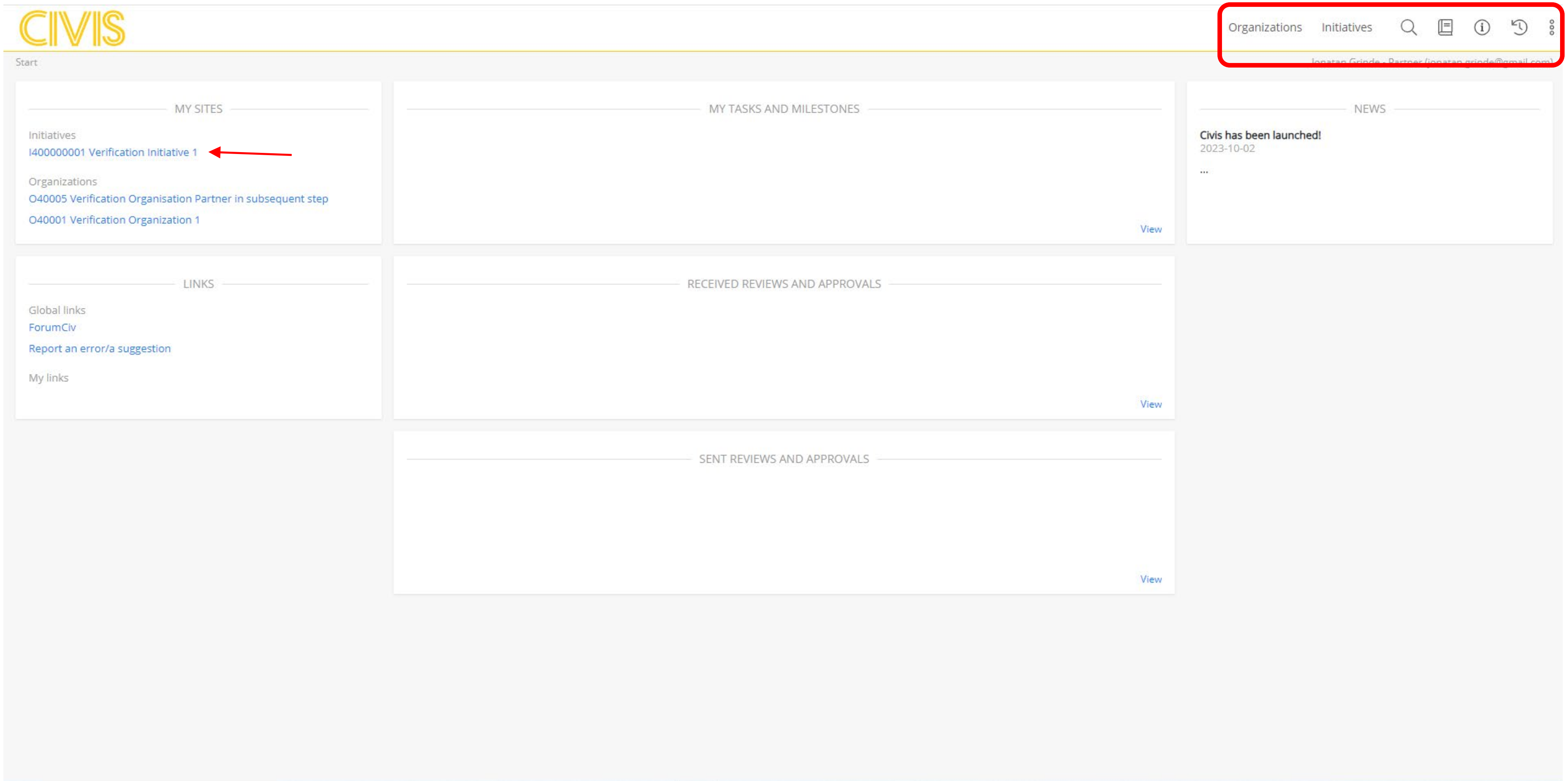
Civis – The landing page

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.

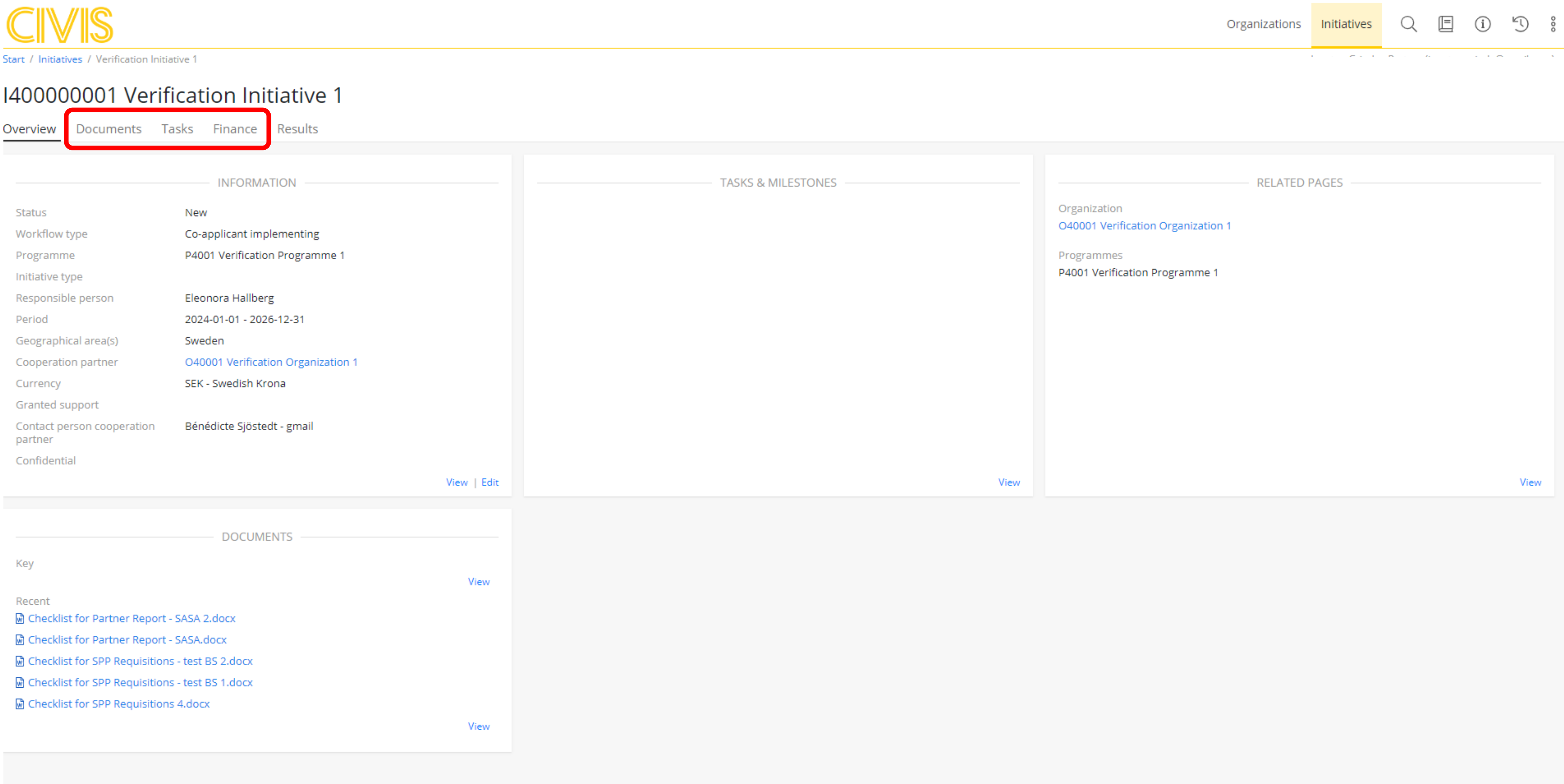
At the top you have a navigation bar from which you can access your organizations and initiatives with search and filter functions. You might see this icon ☰ instead of Organization and Initiatives if your web browser window is zoomed in, or not in full screen mode. On the right, you have symbols for 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.



Civis – Your Initiative’s page

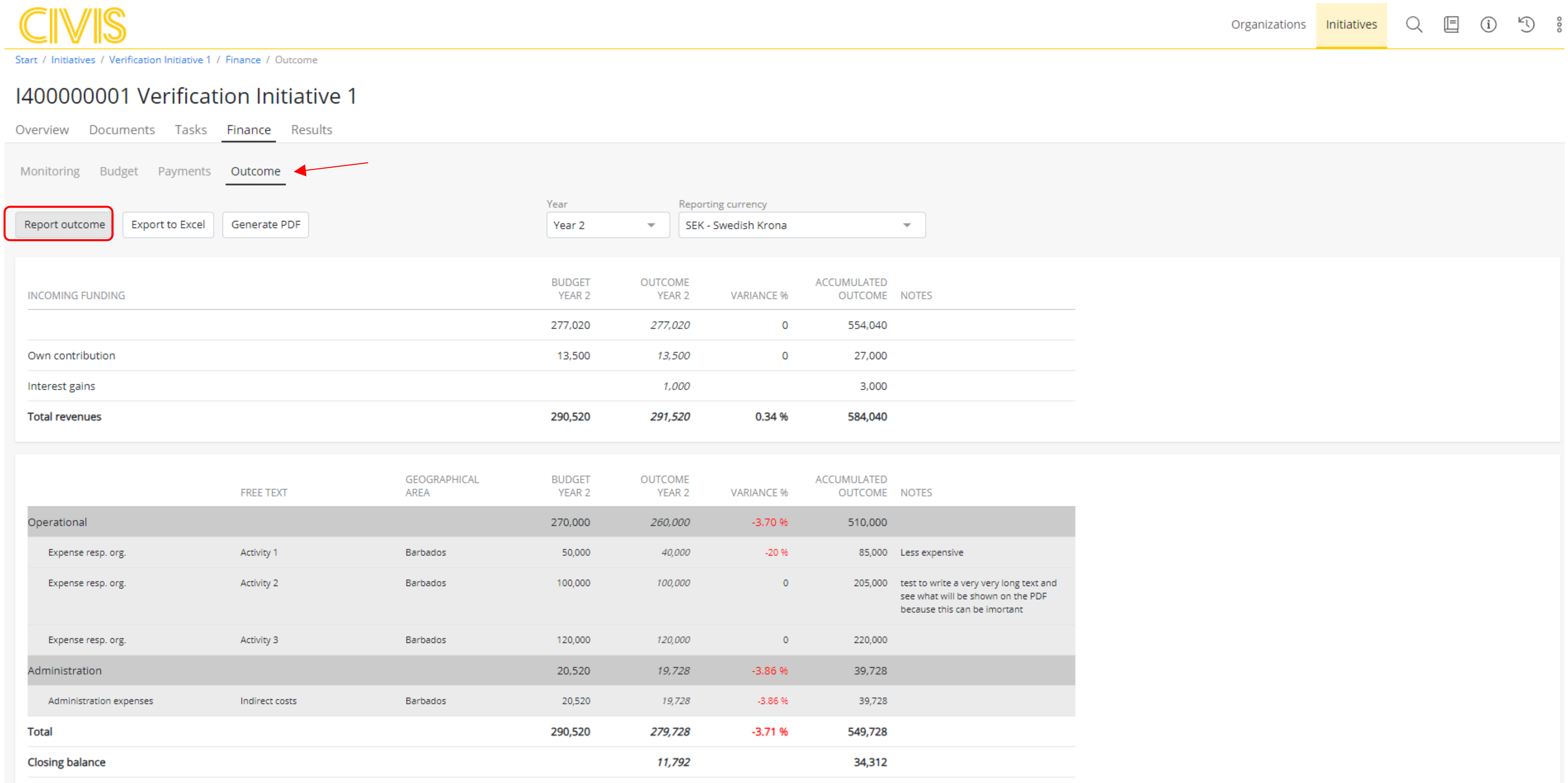
From the start page you can access your initiative’s page quickly via the top left box My Sites.

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 – 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.



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	
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
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Total			290,520	279,728	

Exchange rates gains and losses balance	-4,733
Exchange rate effects	3,000

Linked documents

Select document(s)

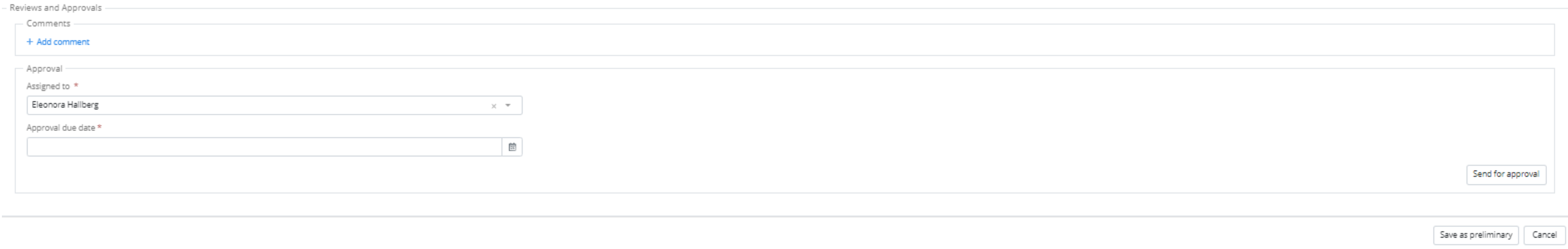
Notes to financial report

B I U

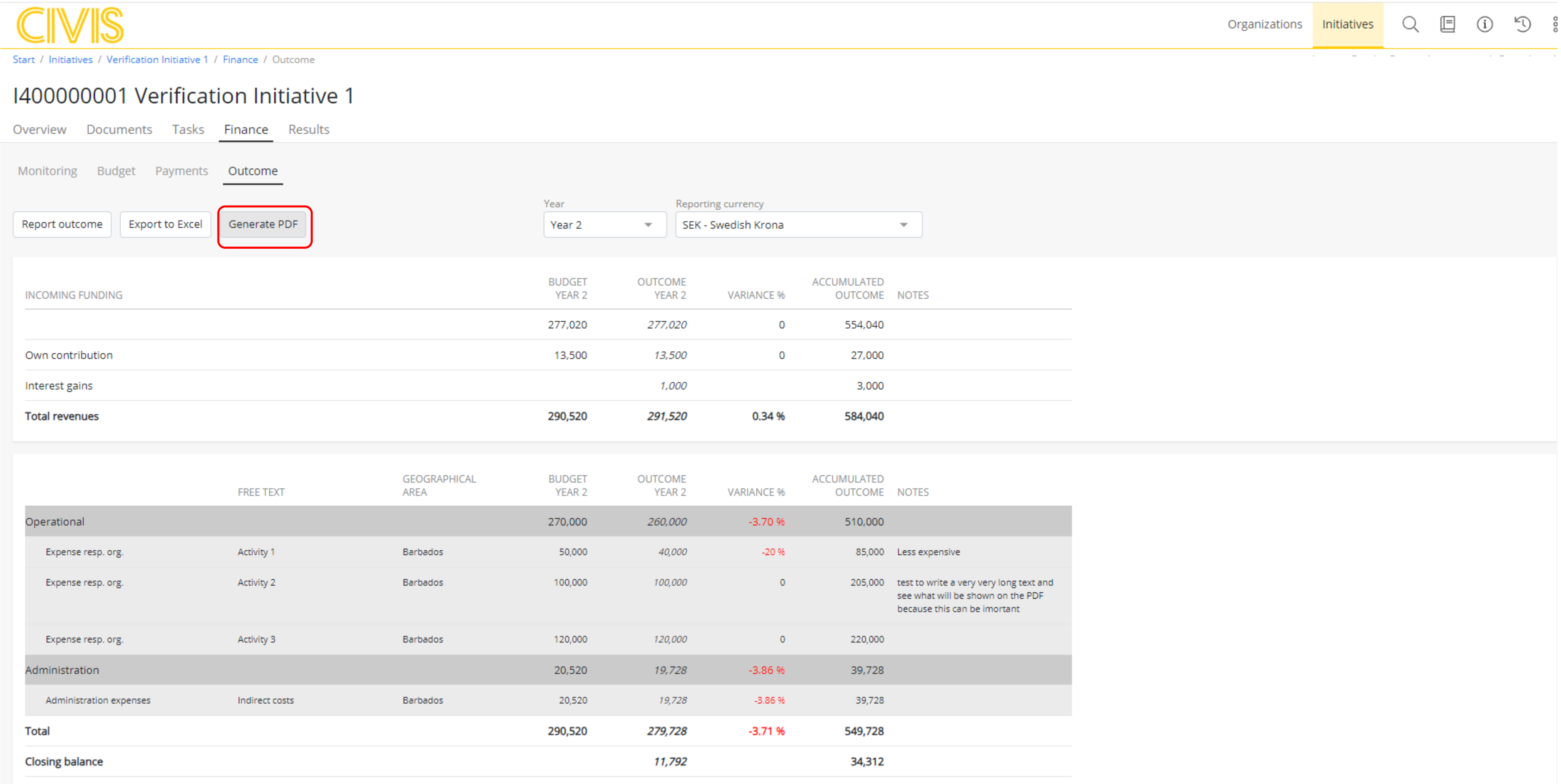
Rate etc etc.

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.



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.



INCOMING FUNDING	BUDGET YEAR 2	OUTCOME YEAR 2	VARIANCE %	ACCUMULATED OUTCOME	NOTES
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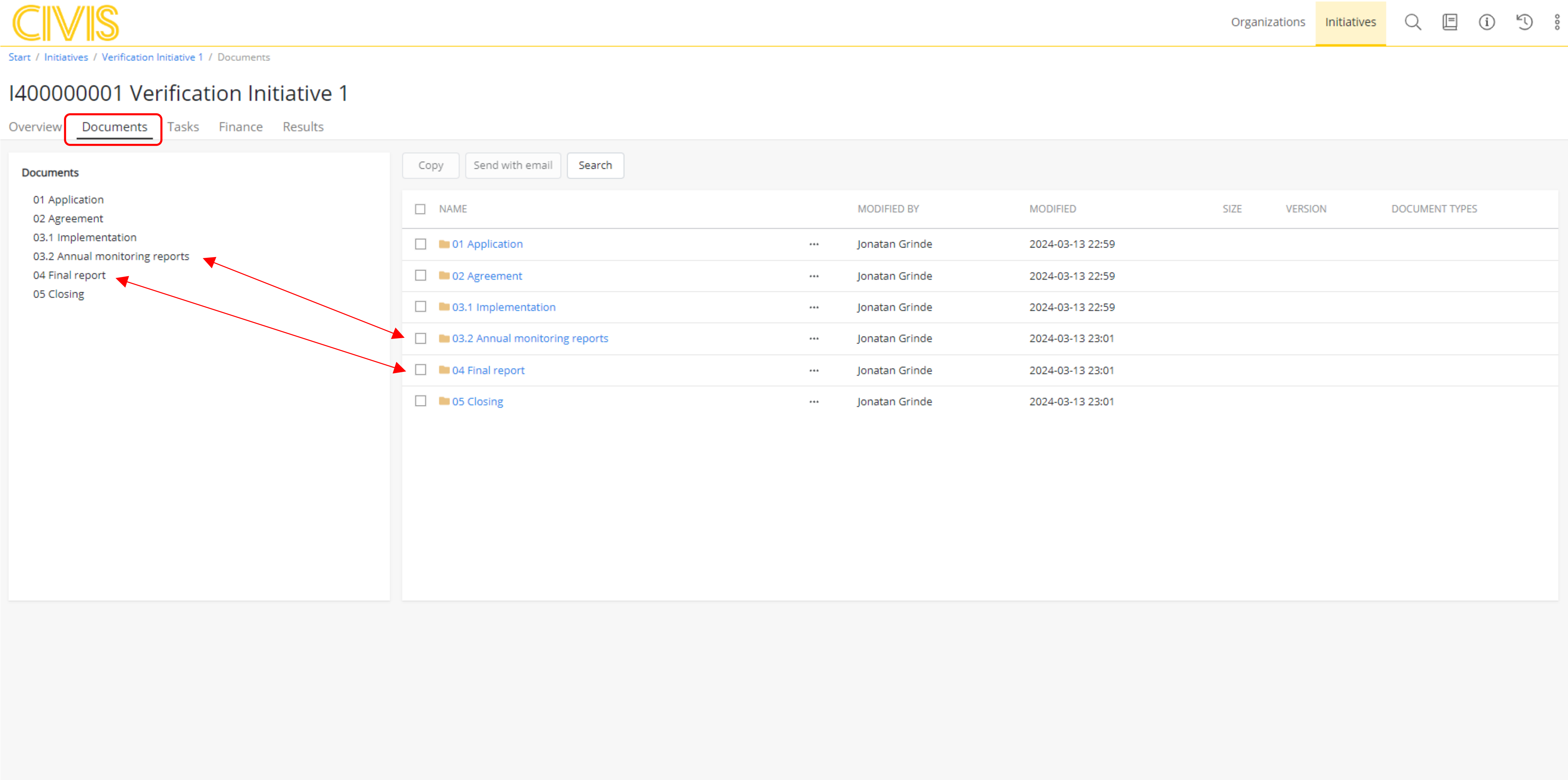
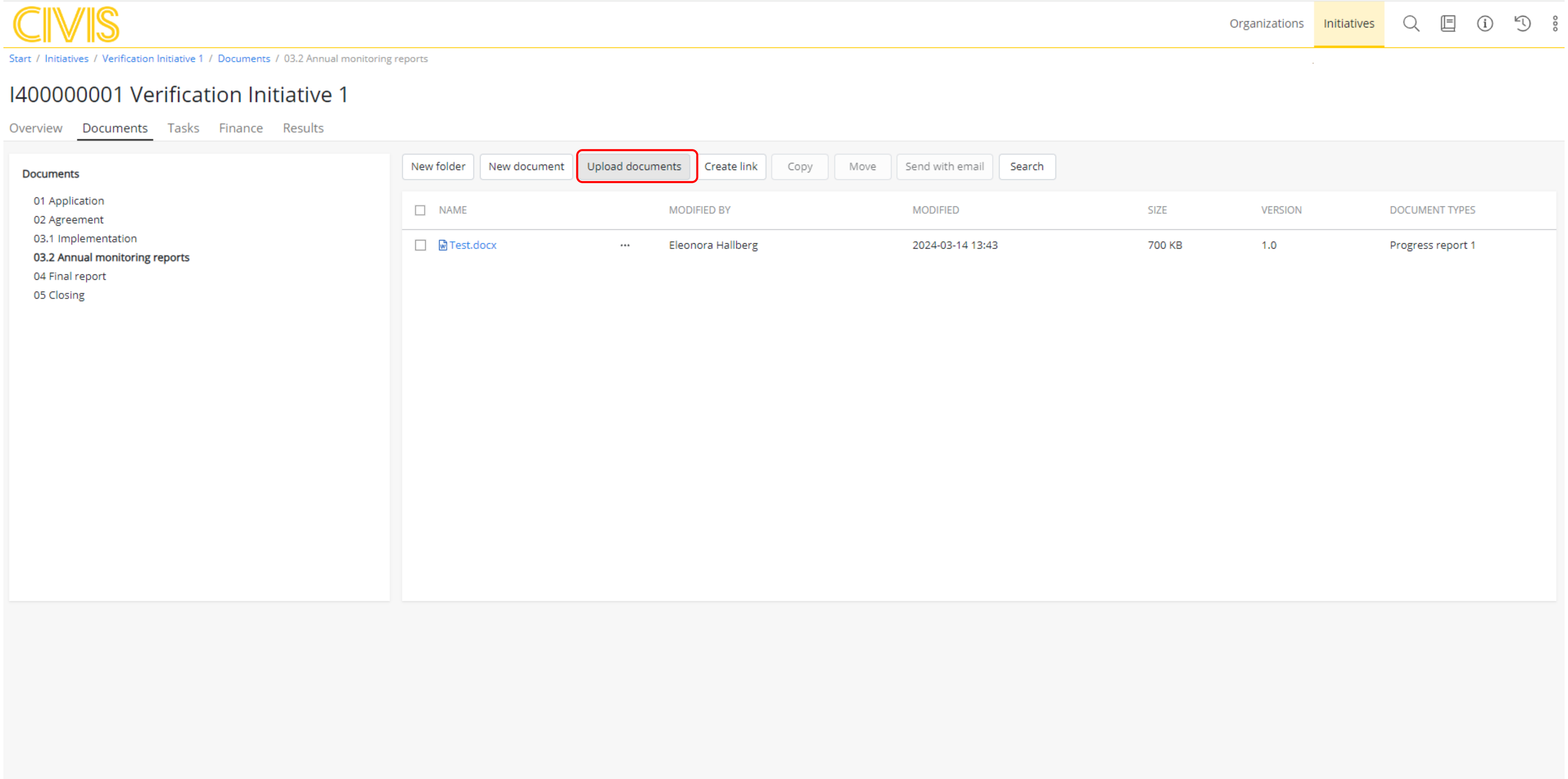
Total			**290,520**	**279,728**	**-3.71 %**	**549,728**	
Closing balance				**11,792**		**34,312**	

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.

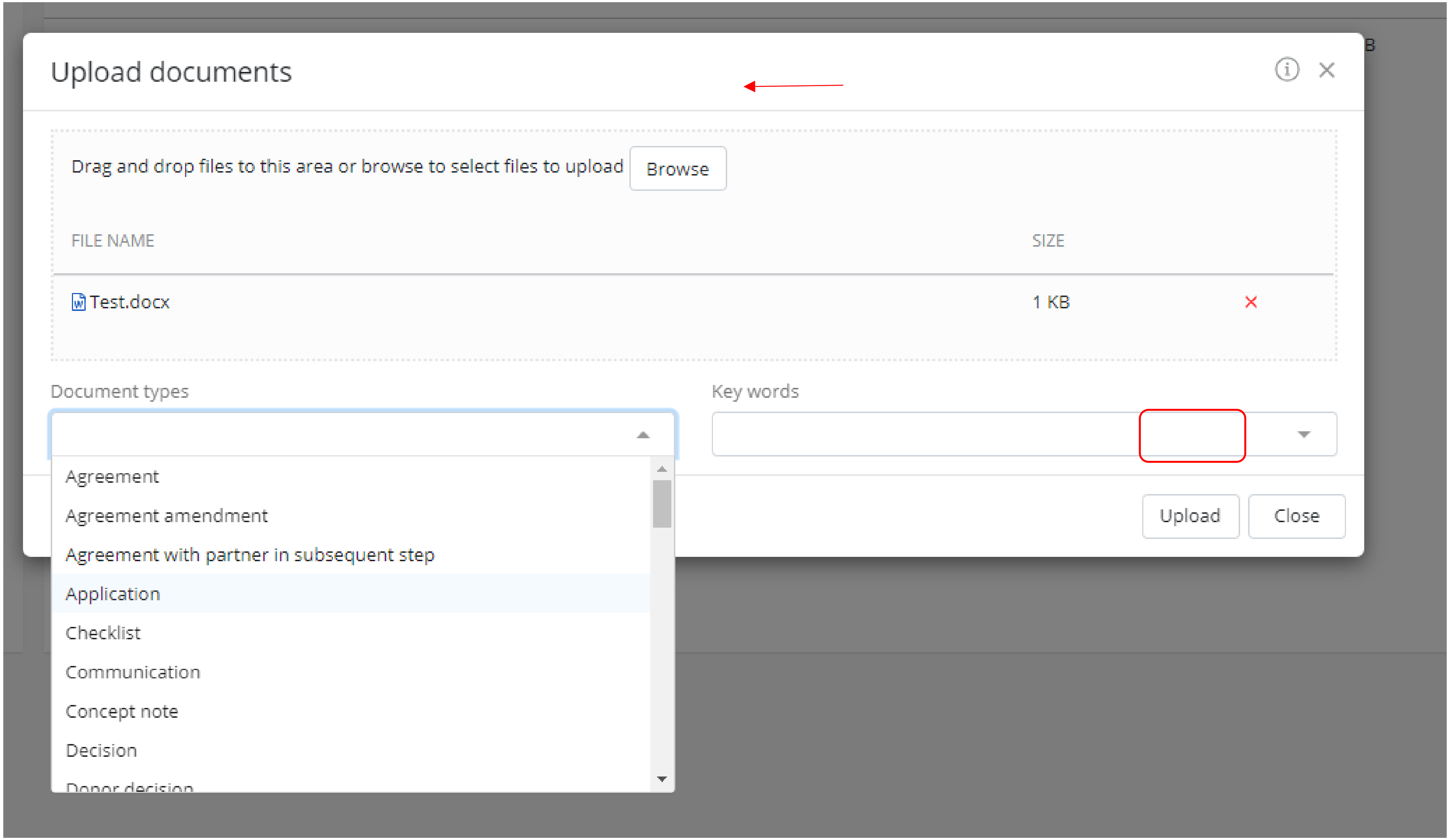


Once inside of a folder, you will be able to upload documents, either by clicking the button "Upload documents" or drag-and-drop to the box in the middle. Make sure that you read the instructions in the applicable reporting template to ensure that you have uploaded all the required documents. For the 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.

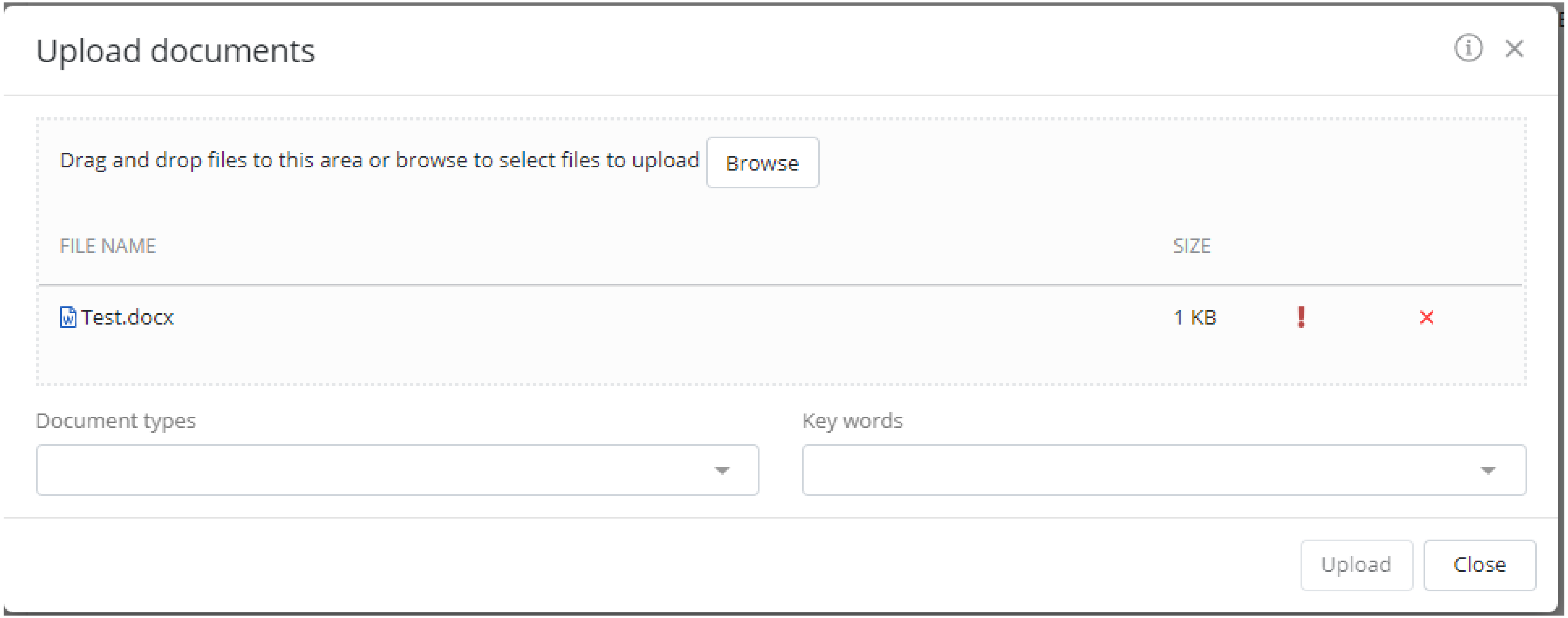


Uploading documents by clicking on the button “Upload documents” will open a pop-up window where you can select the applicable Document types (for example Progress report 1,2,3 etc. or Final report). The function Key words is not used.

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".



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.

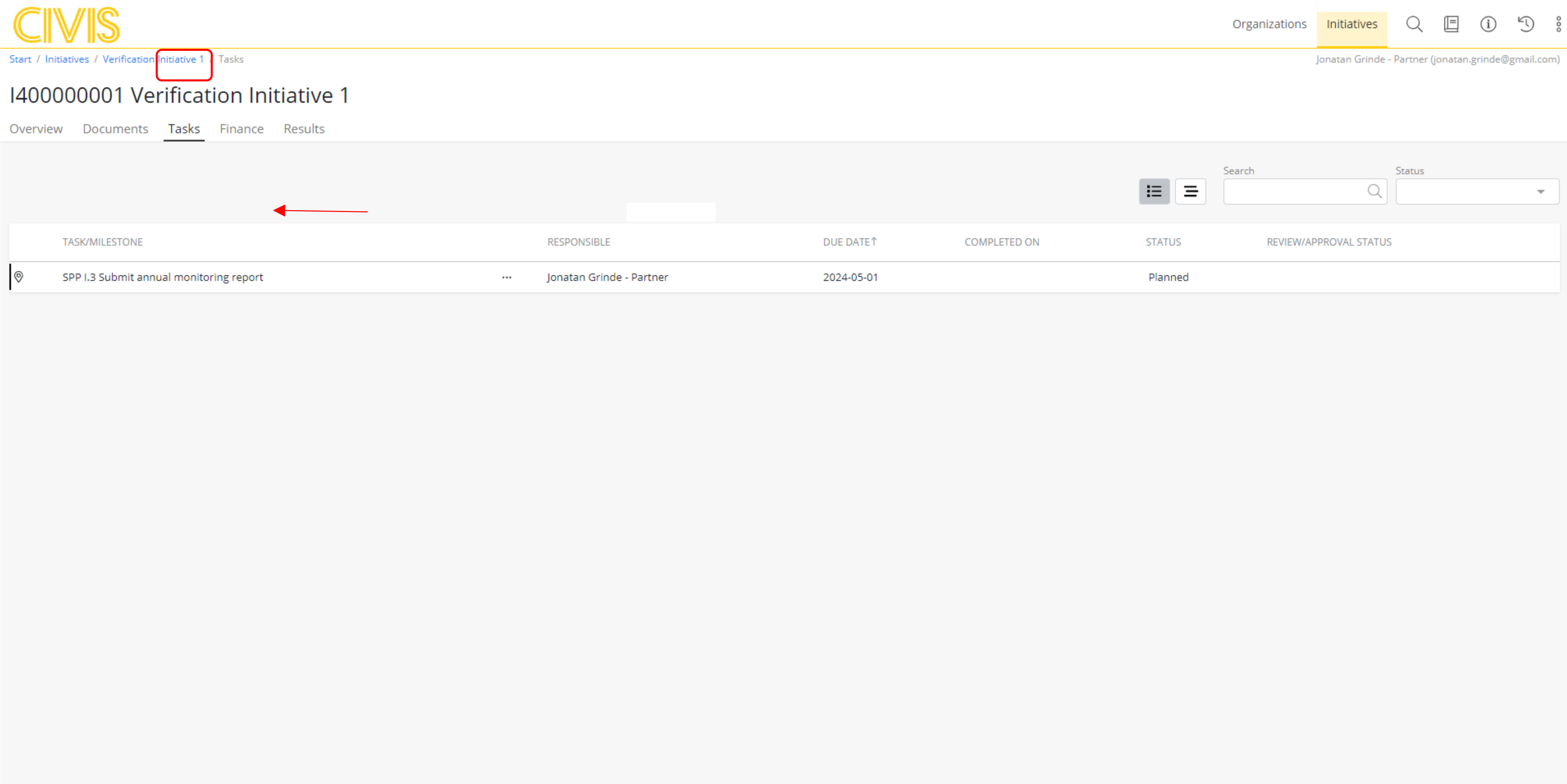


Double-check the instructions in the reporting template to make sure that you have uploaded everything. The next step is using the Tasks function to notify your Programme Officer that you are ready with the report and have submitted it.

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.



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.