
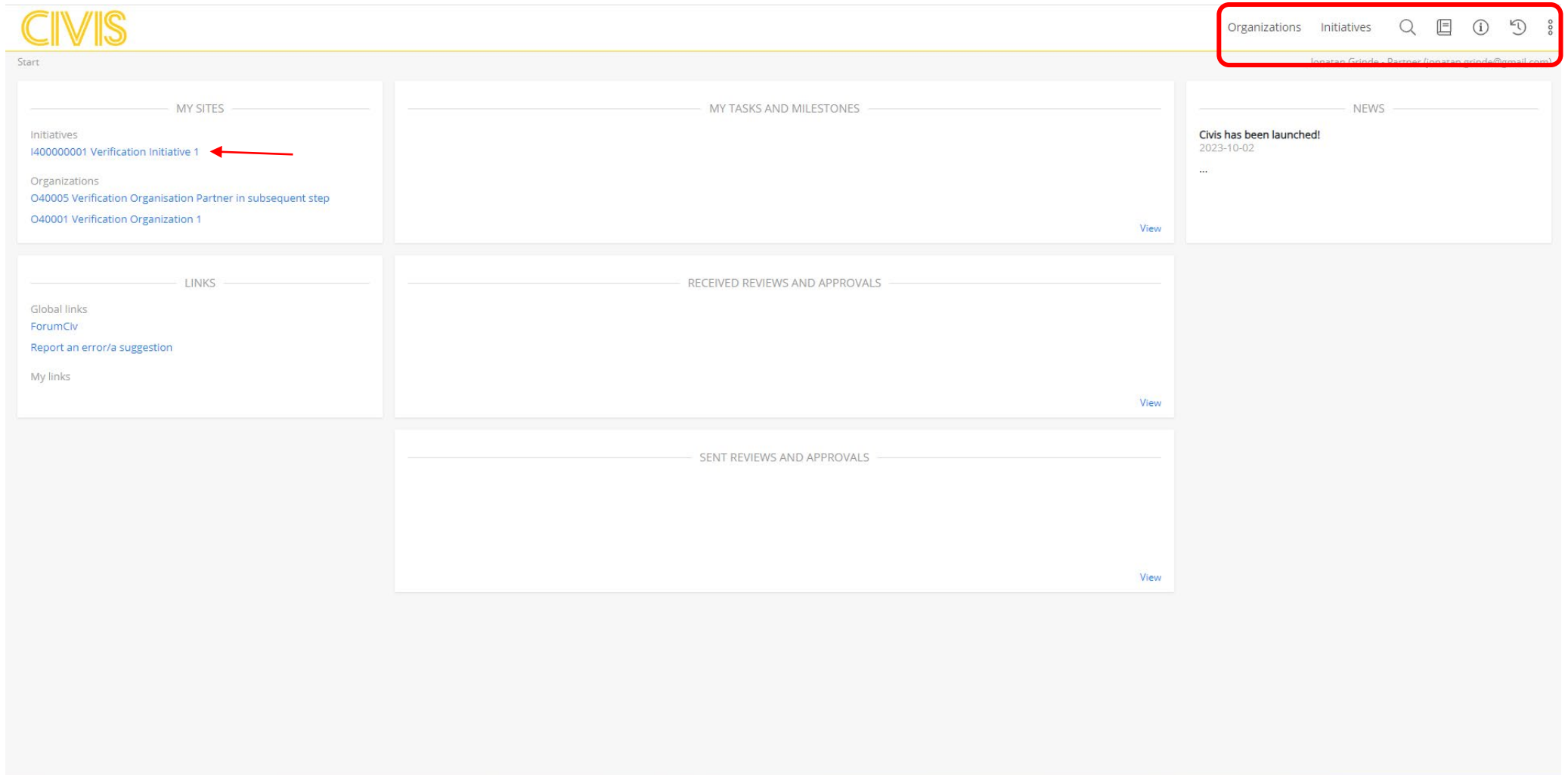


Civis – The landing page

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 interface. At the top left is the 'CIVIS' logo. Below it, the word 'Start' is visible. The top right navigation bar includes 'Organizations', 'Initiatives', a search icon, a document icon, an information icon, a refresh icon, and a settings icon (three dots). The main content area is divided into several sections:

- MY SITES:** Contains 'Initiatives' with a link 'I400000001 Verification Initiative 1' (highlighted with a red arrow) and 'Organizations' with links 'O40005 Verification Organisation Partner in subsequent step' and 'O40001 Verification Organization 1'.
- MY TASKS AND MILESTONES:** A large empty box with a 'View' button at the bottom right.
- LINKS:** Contains 'Global links' with 'ForumCiv' and 'Report an error/a suggestion', and 'My links'.
- RECEIVED REVIEWS AND APPROVALS:** A large empty box with a 'View' button at the bottom right.
- SENT REVIEWS AND APPROVALS:** A large empty box with a 'View' button at the bottom right.
- NEWS:** Contains a news item titled 'Civis has been launched!' dated '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 Organizations Initiatives Search Home Info Refresh Menu

Start / Initiatives / Verification Initiative 1

I400000001 Verification Initiative 1

Overview Documents Tasks Finance Results

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	O40001 Verification Organization 1
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.



1400000001 Verification Initiative 1

Overview Documents Tasks Finance Results

Monitoring Budget Payments Outcome

Year:
 Reporting currency:

	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 important
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

Exchange rate effects

Linked documents

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 x ▾

Approval due date *

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. The PDF must be provided to the auditor y jke j" ku" ugpv" hqt" Hqtwo Ekx)u" crrtqxcn, 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.

I400000001 Verification Initiative 1

Overview Documents Tasks **Finance** Results

Monitoring Budget Payments **Outcome**

Year:
 Reporting currency:

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	

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Expense resp. org.	Activity 1	Barbados	50,000	40,000	-20 %	85,000	Less expensive
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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.



I400000001 Verification Initiative 1

Overview **Documents** Tasks Finance Results

Documents

- 01 Application
- 02 Agreement
- 03.1 Implementation
- 03.2 Annual monitoring reports
- 04 Final report
- 05 Closing

Copy Send with email Search

<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			

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 Civi simply follow the same steps below. There are also separate instructions further down in this guide.



I400000001 Verification Initiative 1

Overview Documents Tasks Finance Results

Documents

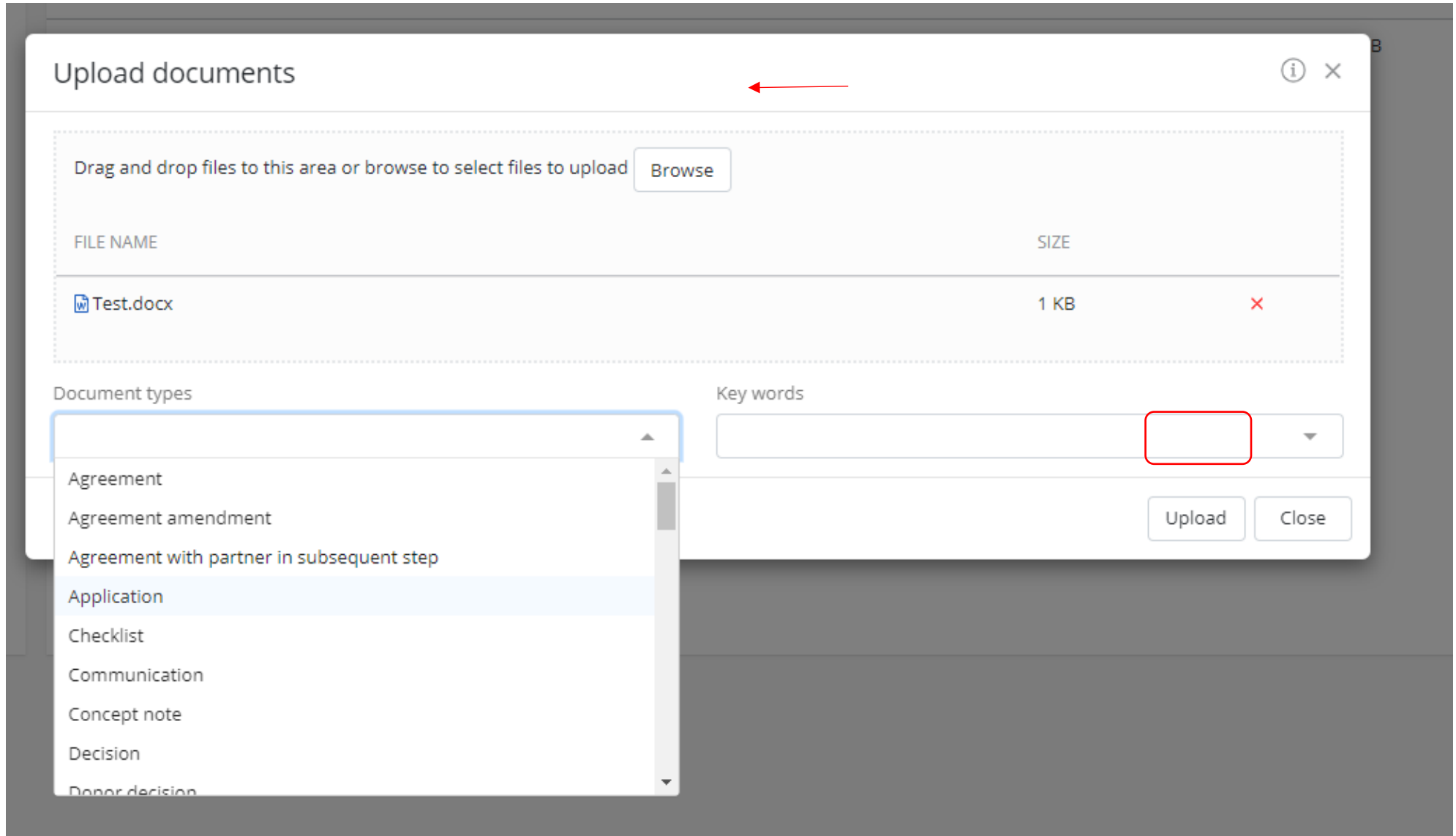
- 01 Application
- 02 Agreement
- 03.1 Implementation
- 03.2 Annual monitoring reports**
- 04 Final report
- 05 Closing

New folder New document **Upload documents** Create link Copy Move Send with email Search

<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".



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

FILE NAME	SIZE
Test.docx	1 KB

Document types

Key words

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.

The screenshot shows the Civis web application interface. At the top left is the Civis logo. The top navigation bar includes 'Organizations' and 'Initiatives' (highlighted in yellow). Below the navigation bar, the breadcrumb trail reads 'Start / Initiatives / Verification Initiative 1 / Tasks'. The main heading is 'I400000001 Verification Initiative 1'. Below this, there are tabs for 'Overview', 'Documents', 'Tasks' (selected), 'Finance', and 'Results'. On the right side, there is a search bar and a status dropdown menu. The main content area displays a table of tasks. A red arrow points to the 'TASK/MILESTONE' column header. The table contains one task: 'SPP I.3 Submit annual monitoring report', assigned to 'Jonatan Grinde - Partner' with a due date of '2024-05-01' and a status of 'Planned'.

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	Template SPP I.3 Submit annual monitoring report
Title SPP I.3 Submit annual monitoring report	Type Milestone
Description  <ol style="list-style-type: none">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:<ol style="list-style-type: none">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:<ol style="list-style-type: none">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.	End date 2024-05-01
Supporting documents from Resource library	Responsible person Jonatan Grinde
Linked documents <input type="button" value="Select document(s)"/>	Status * <input type="button" value="Planned"/>
Comments <input type="text" value=""/> + Add comment	

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

