User Manual

Project Connect

Help a Child India



July 2019

- Contents

٨	Nanual Project Connect – Country Offices	3
	1a- How to log into Project Connect?	3
	1b- How to use Project Connect in general?	3
	2- How to enter a project in Project Connect?	5
	3- How to enter a result plan in Project Connect?	7
	4- How to enter a budget in Project Connect?	10
	5- How to attach files (narrative, PMEL, budget file) to the project in Project Connect?	16
	6- How to submit a project in Project Connect?	17
	7- How to review the progress of the project proposal in Project Connect?	17
	8- How to process a revision and/or amendment to the contract in Project Connect?	21
	9- How to enter results in Project Connect?	24
	10- How to enter expenditures in Project Connect?	25
	11- How to submit audited financial statements via Project Connect?	28
	12- How to register a payment receipt in Project Connect?	29

Manual Project Connect – Country Offices

The Project Connect Portal is our primary tool for documentation of planning, budgeting and monitoring the implementation of our projects both for Help a Child Country Offices and our partner organizations. In this manual will be explained how to use the Project Connect portal. In case of any questions, please feel free to send these to projects@redeenkind.nl.

1a- How to log into Project Connect?

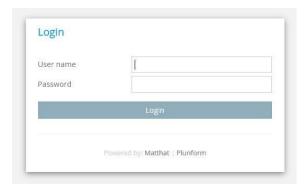
You can login to the projects portal using the following link:

https://projects.redeenkind.nl/login

Please enter in the next screen your user name and password.

Find the user name and password in the accompanied e-mail.

Then click on the 'Login' button



1b- How to use Project Connect in general?

Please find the home screen below:



If you click on the name right above in the screen, the following options appear:

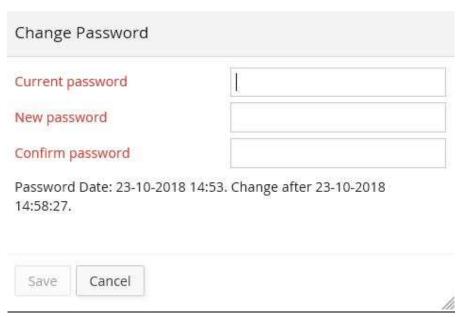
- My profile
- Lock session
- Log out

My profile

Click on my profile. In your profile overview you can change the language (standard language is English) and the password.

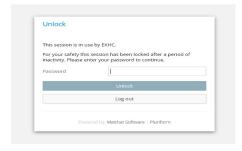


It is preferable to change your password after the first login.



Lock session

When your session is locked, please click on 'Unlock' button. Please enter your password to continue your session.



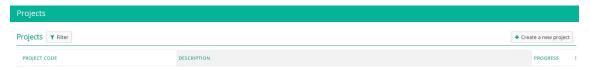
Log out

Click on the 'Log out' button to end your session.

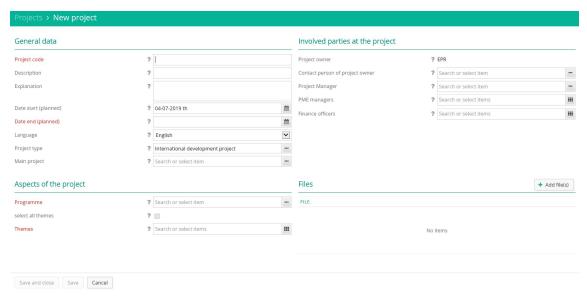
2- How to enter a project in Project Connect?

All projects that are included in the approved plan (including own implementation of Help a Child Country Office) should be entered and monitored through Project Connect.

Click on projects on the left side of your screen. The projects screen appears:



Click on the button 'Create a new project' to create a new project. The following screen will appear:



Fill in all relevant information:

General data:

- Project code/ Project ID (organization name and year; sometimes this field will be filled automatically)
- Description (project name)
- Explanation (not applicable)
- Date start planned (01-01-2019 in case of annual plan; or select start date of project)
- Date end planned (31-12-2019 in case of annual plan; or select end date of project)
- Project type (select what is applicable; in case of CCCD program select 'International development project')
- Main project (only applicable in case of ARC/ DRA projects)

Aspects of the project:

- Programme (please select 'Int prog Integrated CCCD program')
- Themes (please select the themes that are part of the programme. When you select 'select all themes' all themes will be selected automatically. Afterwards you can deselect the themes that are not applicable.)

Involved parties at the project:

- Project owner (will be filled in automatically)
- Contact person of project owner (not applicable))
- Project manager (not applicable)
- PME manager (not applicable)
- Finance officers (not applicable)

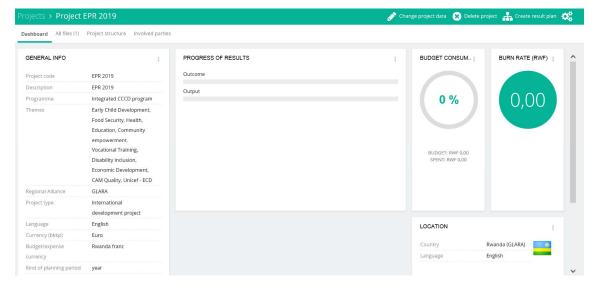
When you click on 'Add file(s)', the following screen will appear:



Please click on 'Select file(s)' to select the files of the approved annual plan (narrative document) and budget (excel sheet). Click on the 'Ok button' to add the files.

Click on the button 'Save' and the button 'Close' to conclude the process of creating a new project.

When you have finalized this step and you select the newly created project, the following screen will appear:



3- How to enter a result plan in Project Connect?

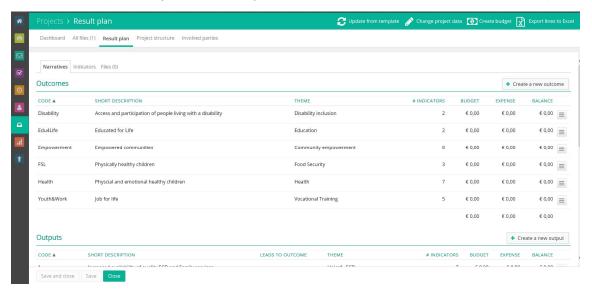
Red een Kind (Help a Child) requests each partner organization to report on their multiannual indicator framework. This multi-annual indicator framework has been developed at the start of your project for multiple years, based on the Theory of Change of the project in your Strategic Programme Plan (SPP) or Multi-Annual Project Plan (MAPP) .

The multi-annual indicator framework consists of output and outcome indicators. Part of these indicators are minimum required indicators, a part is tailor-made to the context and focus of your project. The former part (required indicators) are the indicators that you need to fill in Project Connect, the other indicators are reported by sending the multi-annual indicator framework filled to the projects@redeenkind.nl and by attaching the file to Project Connect.

In this short manual we explain how to feed in the plans and results of the minimum required indicators into Project Connect.

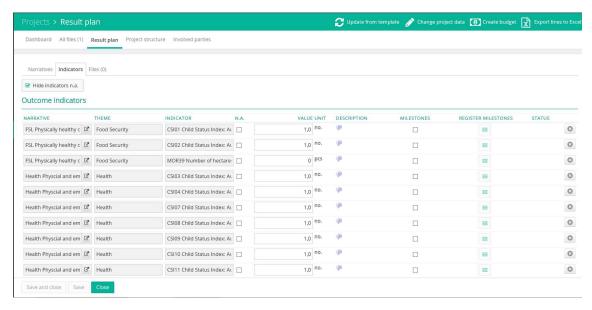
Click on the button 'Create result plan'

You start each project by filling in your annual and/or multi-annual planning per indicator. If you go to the tab 'Result plan' in your project, you can see there are indicators linked to certain themes (Disability, Edu4Life, Empowerment, FSL, ECD, Health and Youth & Work).



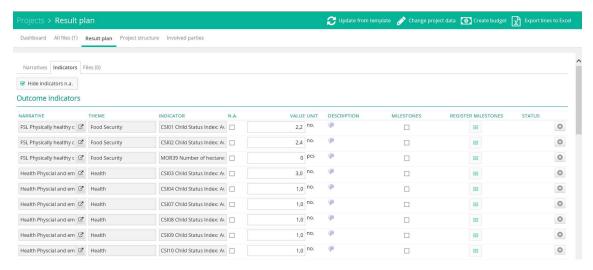
If you click on 'Indicators' (at the right of 'Narratives') you will see the list of indicators that we request you to report on. This list of indicators matches with a part of the indicators in your own multi-annual indicator framework.

When clicking on 'Indicators' you see that the list appears with some columns behind it. If an indicator is not relevant to you (you do not work on a certain theme, or you do not plan to achieve anything on this indicator) please tick the box with n.a. (not applicable).



You need to fill a value for each indicator. You can copy paste this from your multi-annual indicator framework. Please click on the button 'Save' to conclude this step.

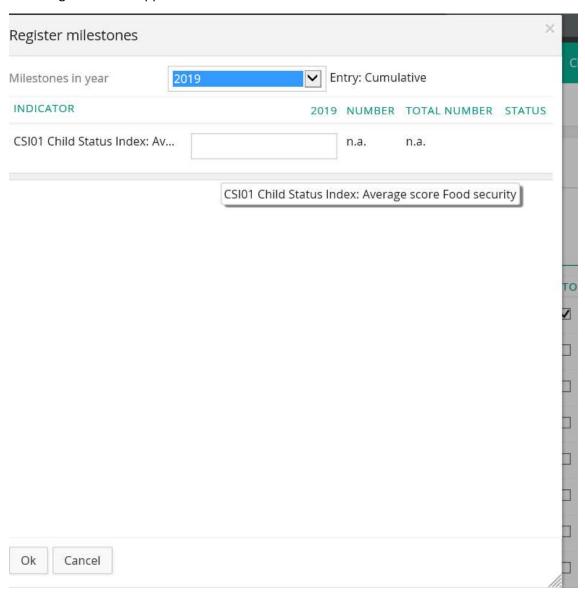
When you enter a score it will look like this (see below):



Milestones are only applicable when you have a multi-annual project entered in Project Connect. The milestones will then be the planned target per year. The value will be the end result.



If you select 'Milestones' (see above) and press on the button 'Register Milestones', the following screen will appear:



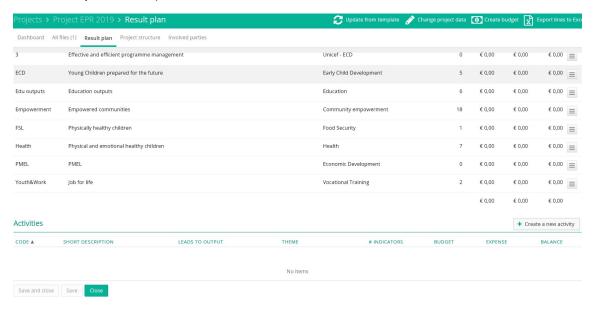
First of all you need to select the year of the milestone. In 2019 you can enter the end target of 2019. In case more years can be selected, please fill in the end target of that specific year. You do not need to fill the 2019.1-2019.11 cells.

Note: In some cases you can only fill one target for the whole year, in that case you just fill that box for every year of your multi-annual plan.

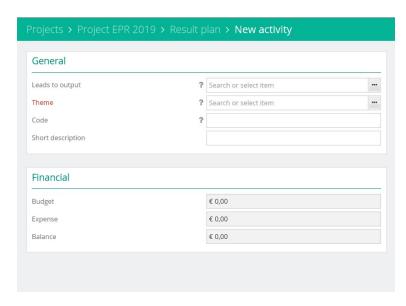
After filling in, you confirm by clicking the 'Ok' button at the bottom of your screen.

4- How to enter a budget in Project Connect?

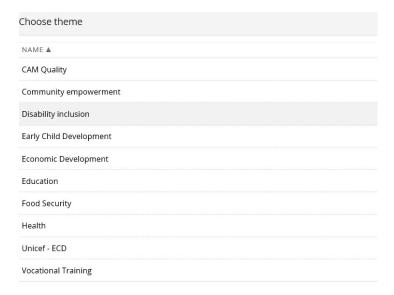
Before you can enter the budget for the direct/ activity costs, first the activity lines need to be entered. Click on the button 'Result plan'. The following screen will appear (scroll down a little bit on your screen):



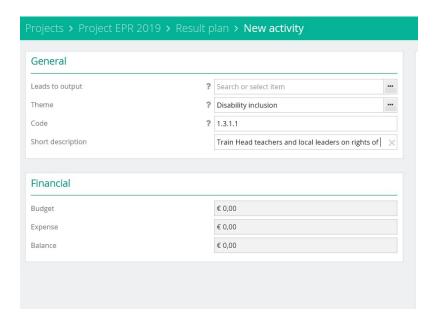
Please go to 'Activities' and click on the button 'Create a new activity'. The following screen will appear:



Click on the box 'Theme' to select the theme related to the specific activity line, you would like to enter:

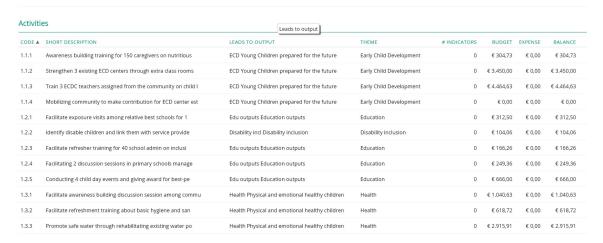


When you have selected the theme, the output will be filled automatically. Fill in the 'Code' and 'Short Description'. For 'Code' please use the same code for this activity as the one in the budget (excel sheet). The 'Short Description' can be copied from the budget (excel sheet). For example:



And press the button 'Save and close'.

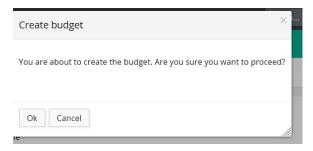
Please continue till all activity lines have been entered (in line with the specification of the budget – excel sheet). It will look like this:



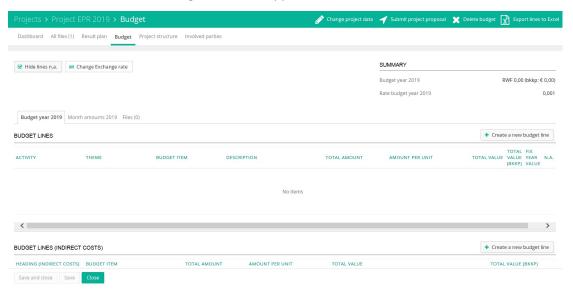
When you have finalized this step, you can enter the budget. Please click on the button 'Create budget' to create a new budget.



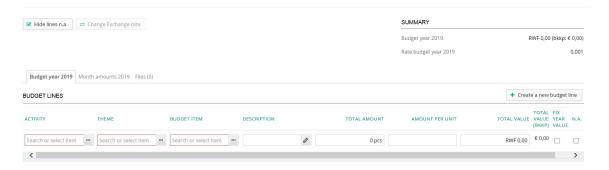
The following screen will appear:



Please click 'Ok'. The following screen will appear:



Click on 'Create a new budget line' to add a new budget line for the direct/ activity costs. The following screen will appear:



Click on the box 'Activity' to select the activity line, for which you would like to enter the budget. The following screen will appear:

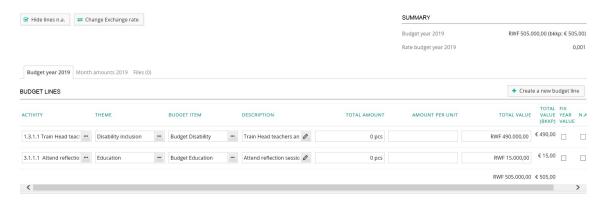
Choose activity				
CODE ▲ INTERVENTION STRATEGY	SHORT DESCRIPTION	THEME		
1a.	Conduct quarterly mentoring and coaching of the existing	Early Child Develo		
1b.	Organise seven exchange visits	Early Child Develo		
1c.	Organize 3 open days during the end of terms targeting 1	Early Child Develo		
1d.	Facilitate monthly meetings to enable interaction betwee	Early Child Develoן		
1e.	Support six CBCC mentors with molbility by procuring 6 b	Early Child Develoן		
1f.	Procure construction materials for two grain banks.	Early Child Develo		
1g.	Procure construction materials for the following CBCCs;	Early Child Develo		
1h.	Organise ECD basic training for 17 people	Early Child Develo		
1i.	Organise Mentor and coaching of the 18 parenting groups	Early Child Develo		
1j.	Orientation of 18 parenting facilitators in HIV and AIDS	Early Child Develo		

When you have selected the activity line, please fill in the other information:

- Theme (will be filled automatically)
- Budget item (select the item applicable)
- Description (complete description of the budget line from excel sheet; you can copy it from the budget)
- Total amount (Quantity/unit of the budget line)
- Amount per unit (unit cost)
- Total value (will be calculated automatically) You can also choose to fill in the column 'Total value' and leave 'Total amount' and 'Amount per unit' blank.

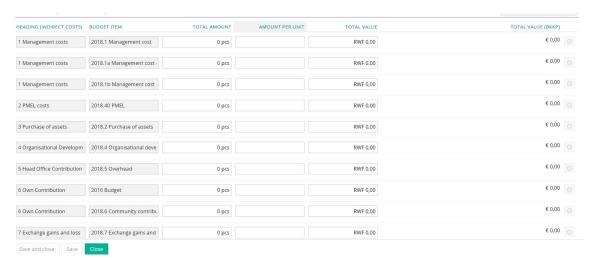
The amount in euro's will be calculated automatically based on the agreed upon budget exchange rate.

See for example the filled in budget lines below:



Please continue till all direct/ activity costs have been filled in.

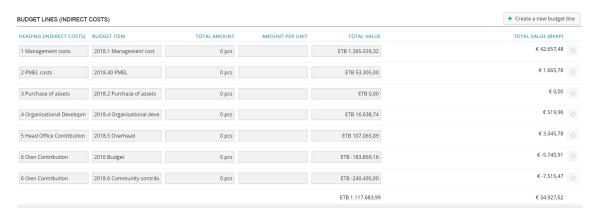
The indirect costs need to be summarized as a total amount per category; see overview below:



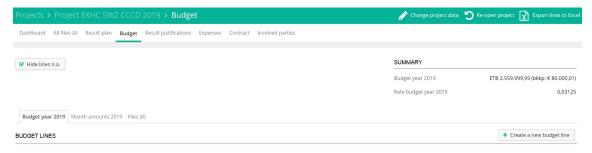
- Management costs (have been divided into staff costs (2018.1a Management costs staff costs and 2018.1b Management costs – other admin costs)
- PMEL costs
- Purchase of assets
- Organizational development
- Head office contribution
- Own contribution (community contribution, please enter as a negative amount)

When you have entered all the data, please click the button 'Save'.

Please find an example of indirect costs filled in below:



When you have filled in the budget, please check the total amount in the summary to make sure that the total amount in local currency and in euros are in line with your approved budget. See example below:



Please click on the button 'Save and close' to finalize entering the budget.

5- How to attach files (narrative, PMEL, budget file) to the project in Project Connect?

Click on the tab 'All files'.



Select the button 'Add file(s)' to attach the relevant documents: narrative, PMEL database, budget, etc.



When you click on 'Add file(s)', the following screen will appear:



Please click on 'Select file(s)' to select the files concerned (like PMEL reporting format, narrative, and budget (excel sheet)). Click on the button 'Ok' to add the files. Please ensure that you attach all relevant files.

6- How to submit a project in Project Connect?

After all required data is entered and relevant documentation (narratives, etc.) are attached, you are ready for submission. You need to do the following:

Click on the button 'Save' and then click on the button 'Submit project proposal'.



You will be asked to confirm the submission (see below):

Submit project proposal					
Apply at organisation	Help A Child Rwanda	\vee			
You are about to submit the project, the result plan and the budget for authorisation. Are you sure you want to proceed?					
Ok Cancel					

In this case, the project proposal will be submitted to Help a Child Rwanda. In case you are a Help a Child Country Office, the project proposals will be submitted to REK. In all other cases, the project proposals will be submitted to your local Help a Child Country Office or to REK.

7- How to review the progress of the project proposal in Project Connect?

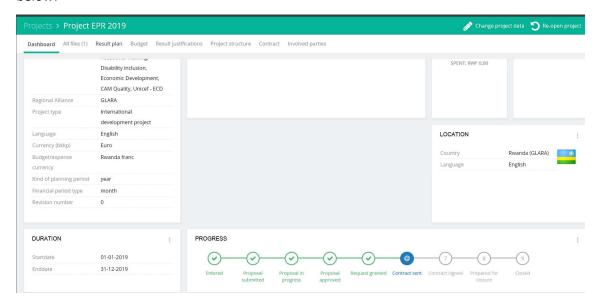
Please check the progress of the submitted project proposal by clicking on the tab 'Dashboard' and scroll down to the bottom of the page.

When the proposal is submitted, the following will be shown on the Dashboard:



If the proposal is approved and/or request is granted, you will receive a contract via Project Connect.

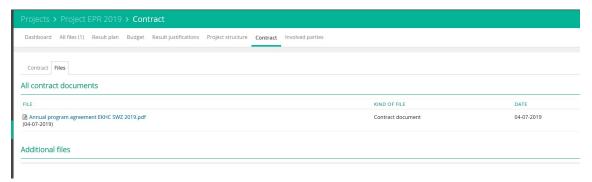
The following information will be shown on your Dashboard – Progress - Contract sent; see below:



Please select the tab 'Contract'. There you will find information about:

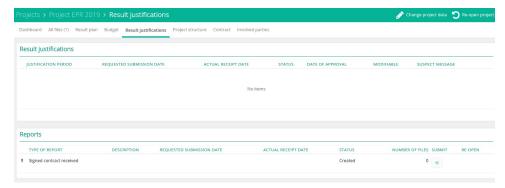
- General information
- Contract amounts
- **Contract conditions**
- Payment lines
- Payment orders

The contract to be signed can be found via the tab 'Files'.

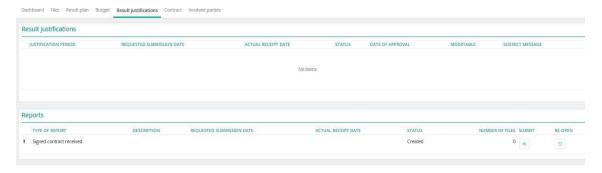


Please open, print and sign the contract document.

The signed contract can be uploaded under the tab 'Result justifications'.



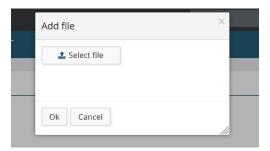
Please open Reports – Signed contract received, by clicking on the line.



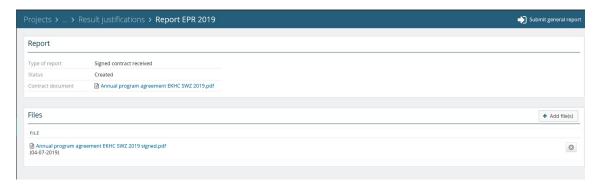
Please upload the signed contract by using the button' Add file(s)'



The following screen will appear:

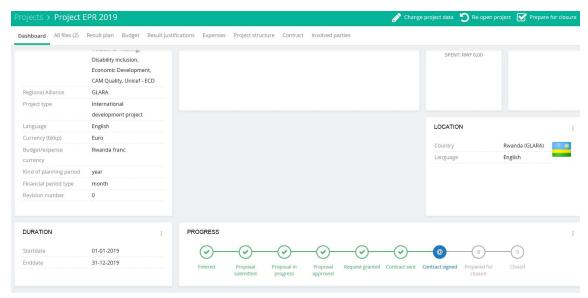


When you click on 'Select file' you can browse on your computer and select the file(s) concerned. By clicking 'Ok' the file(s) will be uploaded.



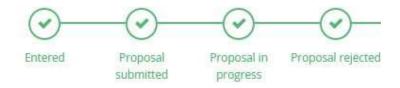
By selecting the button 'Submit general report' the signed contract will be submitted to the Help a Child Country Office or REK. You can 'Close' the project.

When Help a Child Country Office or REK has finalized the contract, the following information will be shown on the Dashboard - Progress - Contract signed, see below:



If the project proposal is rejected, you will see the following on the Dashboard:

PROGRESS



Under the tab 'Files' you will find the assessment form containing the comments on the project proposal.



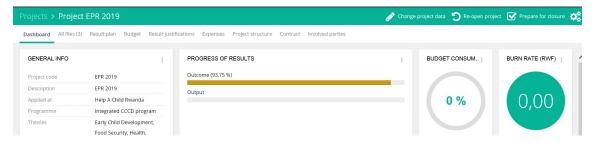
Please revise the relevant items and submit the project proposal again.

8- How to process a revision and/or amendment to the contract in Project Connect?

In case the signed contract will have to be amended, this will be done in close consultation with Help a Child Country Office.

The partner organization makes a revision in the result plan or budget (e.g. because of change in activities or additional budget has become available).

To revise your result plan or budget, please click on the button 'Re-open project'.



You can revise the result plan and the budget (see chapter 3 'How to enter a result plan in Project Connect?' and chapter 4 'How to enter a budget in Project Connect?').

You can also change the project data, by clicking on the button Change project data.



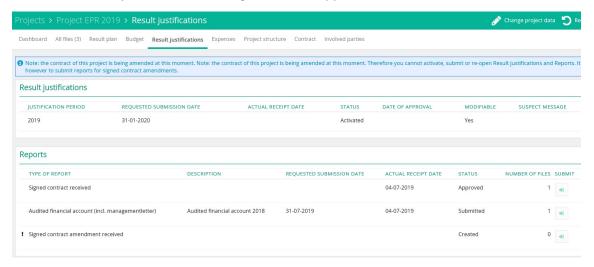
You can change the data as mentioned in chapter 2 'How to enter a project in Project Connect?'. Besides you can change the following items:



When you have finalized the revision, please submit the project proposal (see chapter 6 'How to submit a project in Project Connect?').

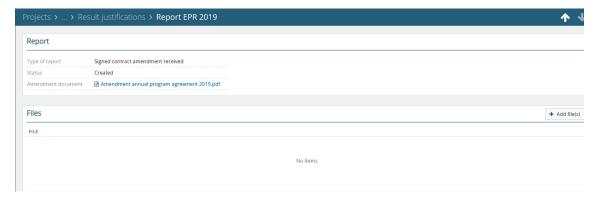
Help a Child Country Office will assess the revision and will submit an amendment to the contract (see chapter 7 'How to review the progress of the project proposal in Project Connect?').

Any amendments made by the Help a Child County Office will be shown on the tab 'Result Justifications – Reports'. The following screen will appear:



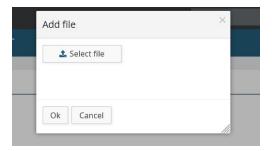
Please click on the line 'Signed contract amendment received'.

The following screen will appear:



Please open, print and sign the amendment to the contract. You can add the signed amendment by clicking on 'Add file(s)'.

The following screen will appear:



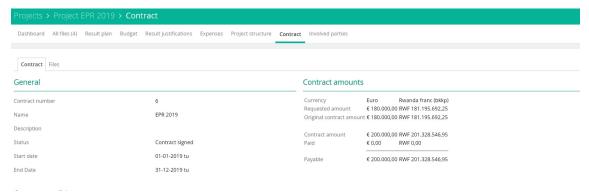
When you click on 'Select file' you can browse on your computer and select the file(s) concerned. By clicking 'Ok' the file will be uploaded.

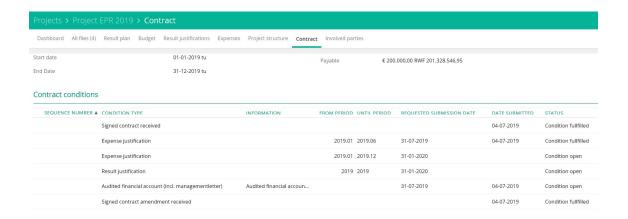
You will then have to submit the amendment by clicking on the button 'Submit general report'.



And 'Close'.

When Help a Child Country Office has processed the amendment, the changes will be shown under 'Contract'. In this example, the contract amount has been increased by € 20.000.





9- How to enter results in Project Connect?

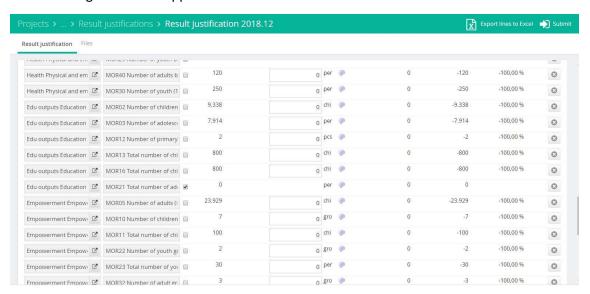
Reporting on monitoring results is done annually. Normally you fill in the results justification in January of each year, reporting on the year that has closed. So in January 2020 you will report results of 2019.

If you want to report on results, you go to the tab 'Result Justifications' and click on the justification period, for the specific period. The result justification will be opened.

Before you can enter any data, please activate the result justification.



The following screen will appear:



For each indicator, the planned result is shown in the column 'Total target'. You enter the result achieved in the column 'Value unit'. You can fill in the list based on your multi-annual indicator framework. After filling all results for both outcomes and outputs you click on 'Save'.

Please make sure you always attach your fully filled in multi-annual framework as a document to the result justifications. You click on the tab 'Files' and click on 'Add file(s)'.



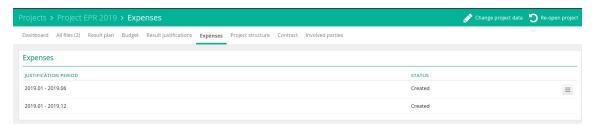
Attach your multi-annual indicator framework and if possible also the databases with specific information per type of indicator, for example a database with all results of the empowerment score, an education scorecard or the Child Status Index.

If you have also attached these files, you can submit your justification.



10- How to enter expenditures in Project Connect?

Click on the tab 'Expenses', see below:

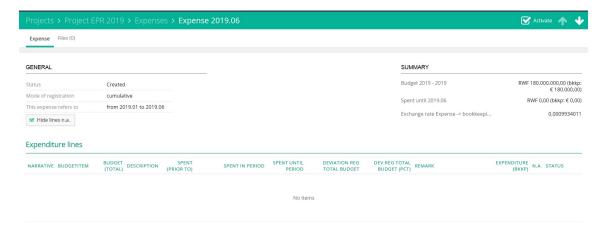


The justification periods are available as agreed in the contract.

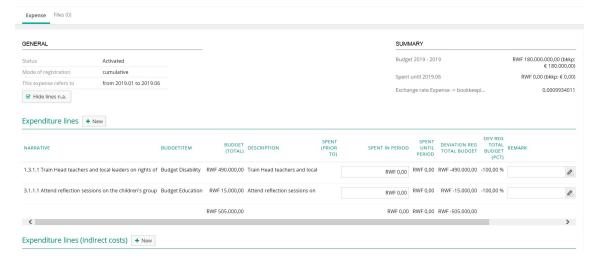
Click on the justification period, for the specific period you want to report. The expense sheet will be opened.

Before you can enter any data, please activate the expense sheet, by clicking on 'Activate'





The following screen will appear:



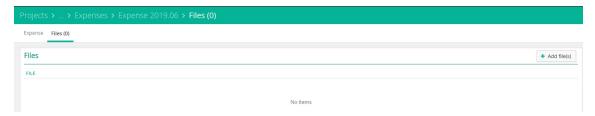
For filling in the expenditure lines of direct/ activity costs, please fill in the (cumulative) expenses in the column 'Spent in period'. Please explain the under- or over-expenditure in the column 'Remark'.

For filling in the indirect costs, please click on the budget line, you would like to fill in. Please explain the under- or over expenditure in the column 'Remark'.



It is always possible to save the expenditures by clicking the 'Save' button at the bottom of your screen.

Please click on the tab 'Files' to attach the narrative and the financial report.

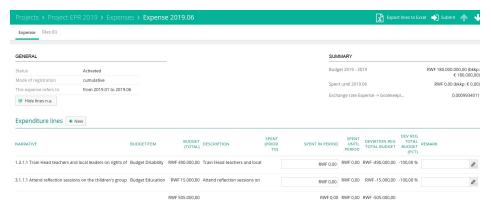


When you click on 'Add file(s)', the following screen will appear:



Please click on 'Select file(s)' to select the narrative plus annexes and the financial report. Click on the button 'Ok' to add the files. Please ensure that you attach all relevant files.

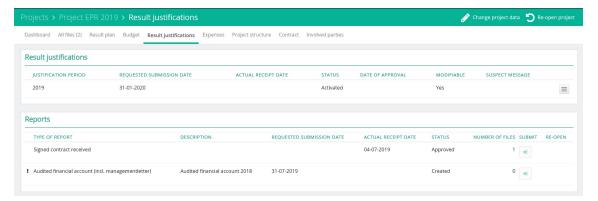
When all expenditures have been filled in, please submit the expenditures by clicking the button 'Submit'.



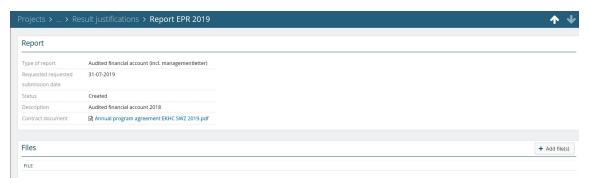
It is possible to export the budget or expenditures to excel. Click on the button 'Export lines to Excel'.

11- How to submit audited financial statements via Project Connect?

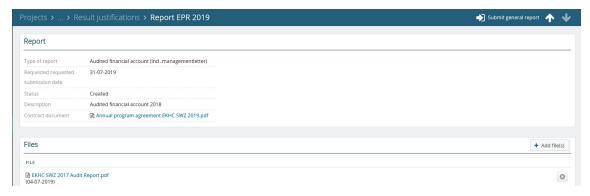
The audited financial statements and management letter must be submitted via 'Result justifications - Audited financial account (incl managementletter)'



Please click on the line 'Audited financial account incl. managementletter'. The following screen will appear:

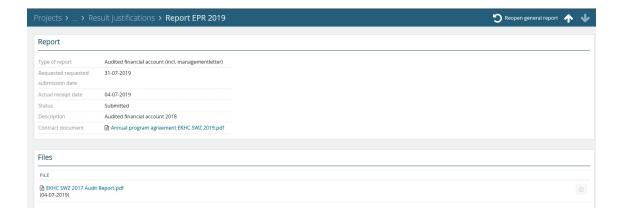


Via 'Add file(s)' the relevant documents can be uploaded.



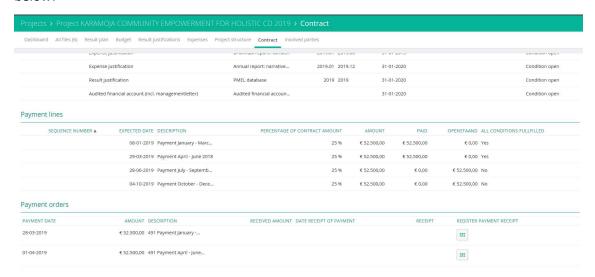
When you click on the button 'Submit general report' the audited financial statements will be submitted.

You have always the possibility to 'Reopen general report' and add more documents. Please note that you have to submit again.

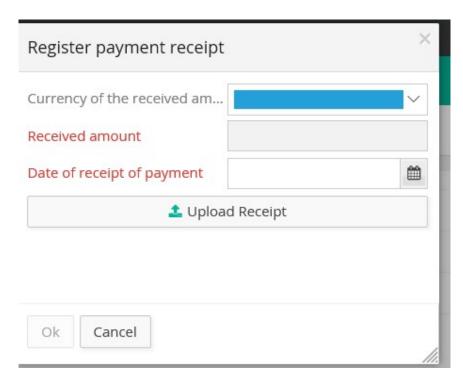


12- How to register a payment receipt in Project Connect?

When Help a Child Country Office releases a payment line in order to make a transfer of funds to the partner organization, it will be shown under 'Contract - Payment orders', see below:



You are requested to provide information about the currency, amount received and the date. When you click on 'Register payment receipt' of the payment order concerned, the following screen will appear:



Please fill in:

- Currency of the amount received (please select the correct currency)
- Received amount (please fill in the amount received)
- Date of payment receipt (select the date)

You can also upload the receipt, by clicking on 'Upload receipt'.

And click on the 'Ok' button.

When you have entered all data, the following will be shown:

