FORUMCIV.

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 portalsupport@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 app 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).
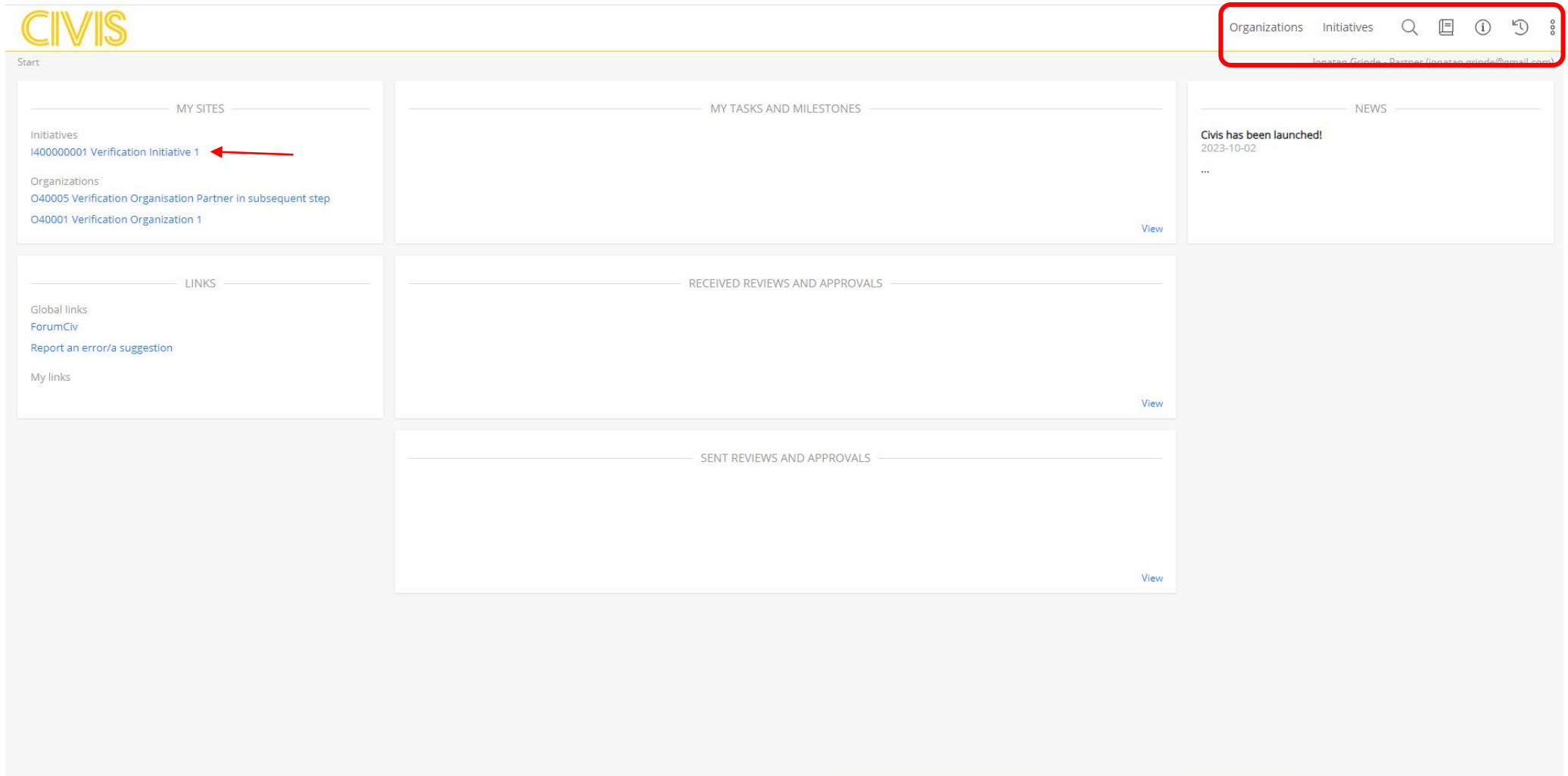8. Welcome to Civis!

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

LINK TO A DETAILED GUIDE OF THE STEPS ABOVE

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   Organizations   Initiatives   🔍 📖 ⓘ 🕒 ⋮

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.

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 will see a table for incoming funding. Here you enter the outcome of your own contribution and any interest used during the reported period, and comment on any deviations from budget.

Below is the table for entering outcomes for the Operational costs and Administration in Sweden, as well as comments on any deviations from budget.

Under the table follows two rows for entering the net Exchange rate gains/losses 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.

Below follows a function for linking documents. This is not applicable at the moment.

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 used, and the principles used for reporting of realized exchange gains and losses and exchange rate effects.

INCOMING FUNDING			SYSTEM CURRENCY (SEK)	
		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	

	FREE TEXT	GEOGRAPHICAL AREA	SYSTEM CURRENCY (SEK)		
			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 & I. <>

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 May 1st as the Approval due date and click "Send for approval" to the right. Your officer will now be notified that the outcome has been reported in Civis.

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 preliminary   Cancel

When you have sent the Outcome for approval the pop-up window will close, and you will find yourself on the sub-tab Outcome. Click the "Generate PDF" button at the top to create a PDF of the outcome and the information entered. The PDF should be provided to the auditor. The PDF should be signed and submitted together with the rest of the reporting on May 1st. Note that the Export to Excel function is currently not functioning in full.

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 right now 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 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 make sure that you have uploaded all relevant 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 the button "Upload documents" will open a pop-up window where you can select Document types and key words, this can be ignored for now.
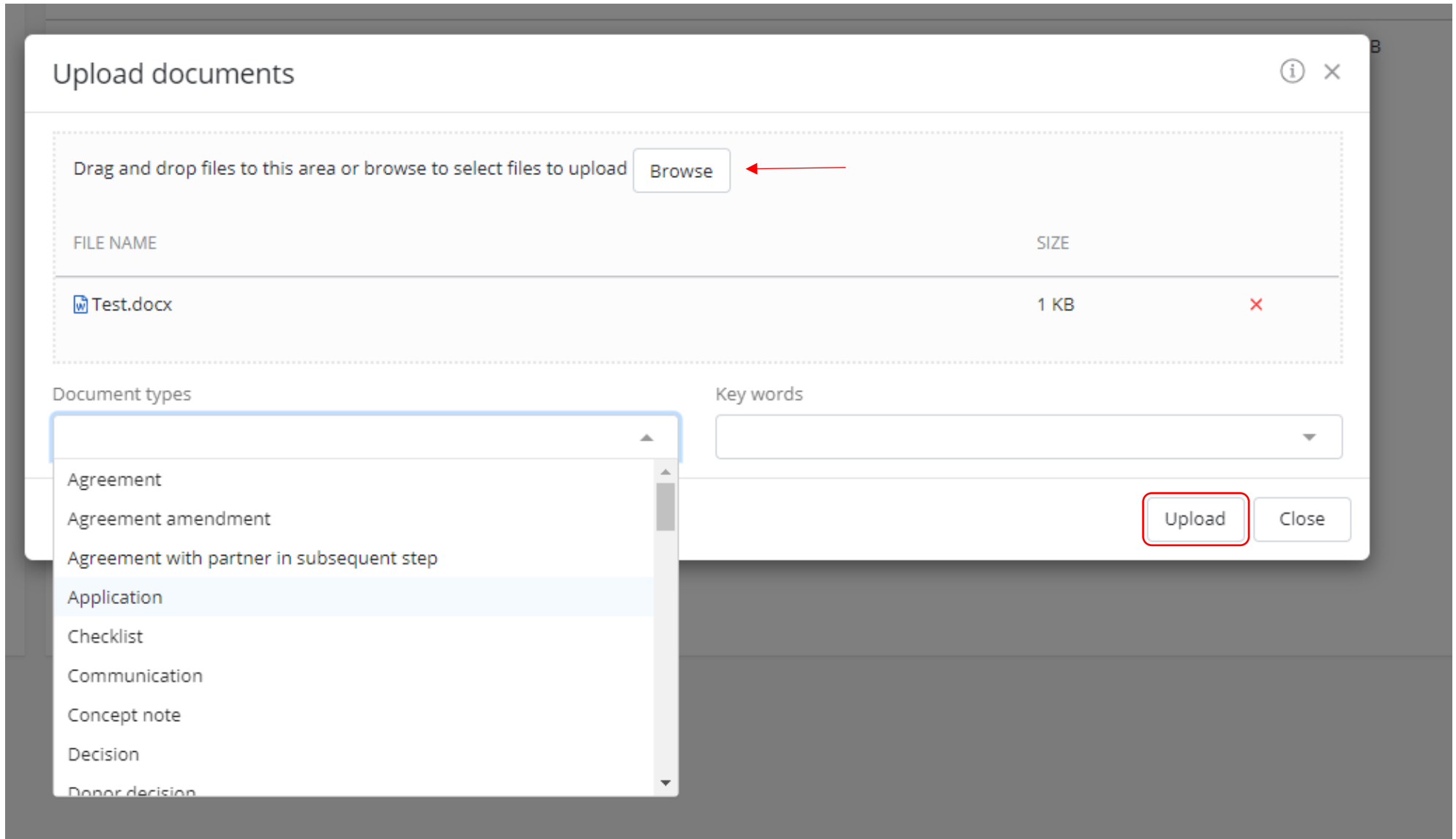
When clicking Upload in the pop-up window, an exclamation mark might appear. This does not mean that the document has not been uploaded. If you close the pop-up window you will find the document uploaded in the folder. In some cases, you may have to go in and out of the folder or refresh the page before this becomes visible.

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 handling officer that you are ready with the report.

Civis – Your Initiative's page – Tasks

Click 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.

When you access Civis, the task "Submit Annual monitoring report" or "Submit Final report" should be visible. If not, 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.

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

OK   Cancel

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.

Connecting all 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 May 1ˢᵗ at the latest or if PPF, your 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:
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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]

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 as well as a function for registering your organization's bank account for the initiative. The initiatives and partner organizations that your organization is connected to are visible here as well.

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.