INTEGRATED BANK OF PROJECTS (IBP) SYSTEM

GENERAL USER GUIDE

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List of Abbreviations

IBP	Integrated Bank of Projects
PCN	Project Concept Note
PP	Project Profile
PFS	Pre- Feasibility Study
FS	Feasibility Study
IFMS	Integrated Financial Management System
NITAU	National Information Technology Authority- Uganda
DC	Development Committee
PDF	Portable Document Format
NPV	Net Present Value
IRR	Internal Rate of Return
NDP	National Development Plan
O&M	Operation and Maintenance

1.0 Background

The Government of Uganda embarked on the development of Integrated Bank of Project (IBP) an information system designed to assist all stakeholders involved in the Public Investment Management System (PIMS) over the life cycle of investment initiatives. This web-based software also acts as the central depository for all information and documents for Public Investment projects.

It is developed using open source standards which is free of licensing and other recurrent costs. The IBP architectural software is designed to allow integration with the existing government systems for example PBS and IFMS. It is owned by the Ministry of Finance Planning and Economic Development (MFPED) and hosted by the National Information and Technology Authority – Uganda (NITAU)

As such the first phase of the IBP that covers the pre-investment phase which includes concept, profile, pre-feasibility and feasibility stages was launched and has been enrolled for use by the Votes this FY 2019/20.

IBP has the following objectives include:

a. Provide a dynamic information management process of public investment
b. Link institutions and improve institutional coordination
c. Enhanced decision making
d. Promote efficiency and Effectiveness in project development.
e. Provide real time project updates.

In a bid to make the system user-friendly, the IBP user guide has been developed aimed at helping the various stakeholders involved in project development to populate a project in the system in the four stages of the Project Cycle i.e. Project Concept Note (PCN), Project Profile (PP), Pre-Feasibility Study (PFS) and Feasibility Study (FS).

1.1 IBP workflow management

The IBP workflow management consists of four levels as indicated below:

Level 1: Sectoral - Department

a. Projects are first created at the department level (e.g Sanitation department)

b. Next projects are submitted to the department Commissioner for approval

Level II: Sectoral - Planning

c. Approved by Commissioners, projects are submitted to the Department of Planning

d. Approved projects are submitted to the Accounting Officers for approval

e. Approved projects at PCN are submitted to the Sector head for approval.

Level III: Central

f. Approved by Accounting Officers projects are submitted to DC Secretariat (PAP Department at MFPED)

g. Approved by DC projects proceed to the next stage of the Project Development Cycle.

1.2 Benefits of IBP

Improved Institutional Coordination

The system prevents submission of projects with incomplete information for instance, Project Concept Notes with missing SWG Minutes attached by the Sector Head cannot be submitted to DC/MoFPED. It ensures accountability by enforcing flow of the project to the next stage only when all the previous relevant approvals are obtained. IBP also sends notifications to all involved stakeholders every time a decision on the project is taken. The history of decision is also accessible through user friendly interfaces.

Reduced time spent on Projects Preparation and Submission.

IBP allows the user to enter and safely store information in an intuitive way. Based on the information entered, the system automatically generates Gantt chart, Results Matrix, detailed tables with cost estimates and sources of funds, etc. IBP also generates editable (MS Word) and noneditable (PDF) versions of the project submission forms such as PCN, Profile, PFS, and FS. Information that was entered at the previous stage (i.e. PCN) becomes available for editing at the next stage (i.e. Profile). This greatly reduces time and minimizes possibility of information loss as projects move from one stage to another.

Improves Accountability and Transparency

The system ensures effective audit trail and alignment with existing government protocols. Once a project is submitted to the next in tier, the software automatically blocks editing of the project information for the prior stage. Only if “Revise” decision is obtained, project is unlocked for editing. Note that only the user that created the project is allowed to edit it. Any edits to the project documentation restart the approval processes. The system not only stores details of the decisions/actions on the project, but also notifies all stakeholders involved. For example, a DC approval will automatically send a notification email to respective Sector head, Accounting Officer, Commissioner of Planning Department, Commissioner of Department proposing the project and Project Officer. The system records details (Full name, position, time, etc.) of the users that make changes on the project documentation in the timeline. IBP enforces a single point of responsibility. Only projects with approval of Accounting Officers are submitted to Treasury

#	User Role	User Rights	Level of Access	Phase
1.	Department User	Create/Update/Submit	Projects at Department Level	All
2.	Department Head	Approve/Revise/Reject	Projects at Department Level	All
3.	Planning Head	Approve/Revise/Reject	Projects at Vote Level	All
4.	Accounting Officer	Approve/Revise/Reject	Projects at Vote Level	All
5	Sector Head	Approve/Revise/Reject	Projects at Vote Level	PCN
6	Commissioner PAP	Assign/Approve/Revise /Reject	All projects	All
7	PAP head user	Assign/Approve/Revise /Reject	Projects at section level	All
8	PAP standard user	Submit	Project at section level	All
9	DC Member	View	All projects	All
10	Desk Officer	View	All projects	All
11	Donor	View	All projects	All

Ability to generate statistical reports

In addition to other reports, the system generates seven predetermined reports namely;

1. Public Investment Pipeline: This is a list of projects that have successfully undergone through the appraisal processes. The report sorts projects by sector and votes and reports project titles, cost, proposed start date and duration, capital to total expenses ratio.

2. Fiscal Load from Pipeline: This shows the commitment by sectors and votes for the next 5 years period.

3. Cost evolution report: This determines the changes in the cost of project throughout the pre-investment phase (PCN, Profile, PFS, FS, and Proposal)

4. List of Projects in IBP: List of projects that are in IBP sorted by sector, vote, and stage of the pre-investment phase

5. Project ranking report for Investment decision (NPV, IRR ranking of projects)

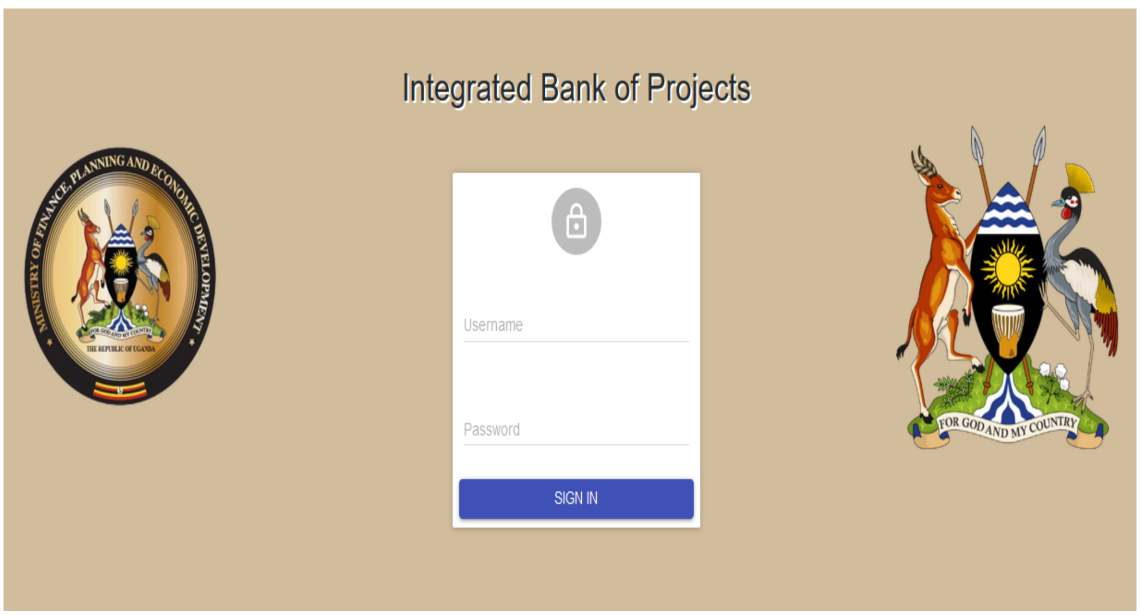
6. Sectoral Funding Recommendation Report: Based on pre-defined criteria, the system can also auto generate recommended funding list of projects.

7. Project Location: This shows the locations of the different projects at the different Pre-Investment Phases.

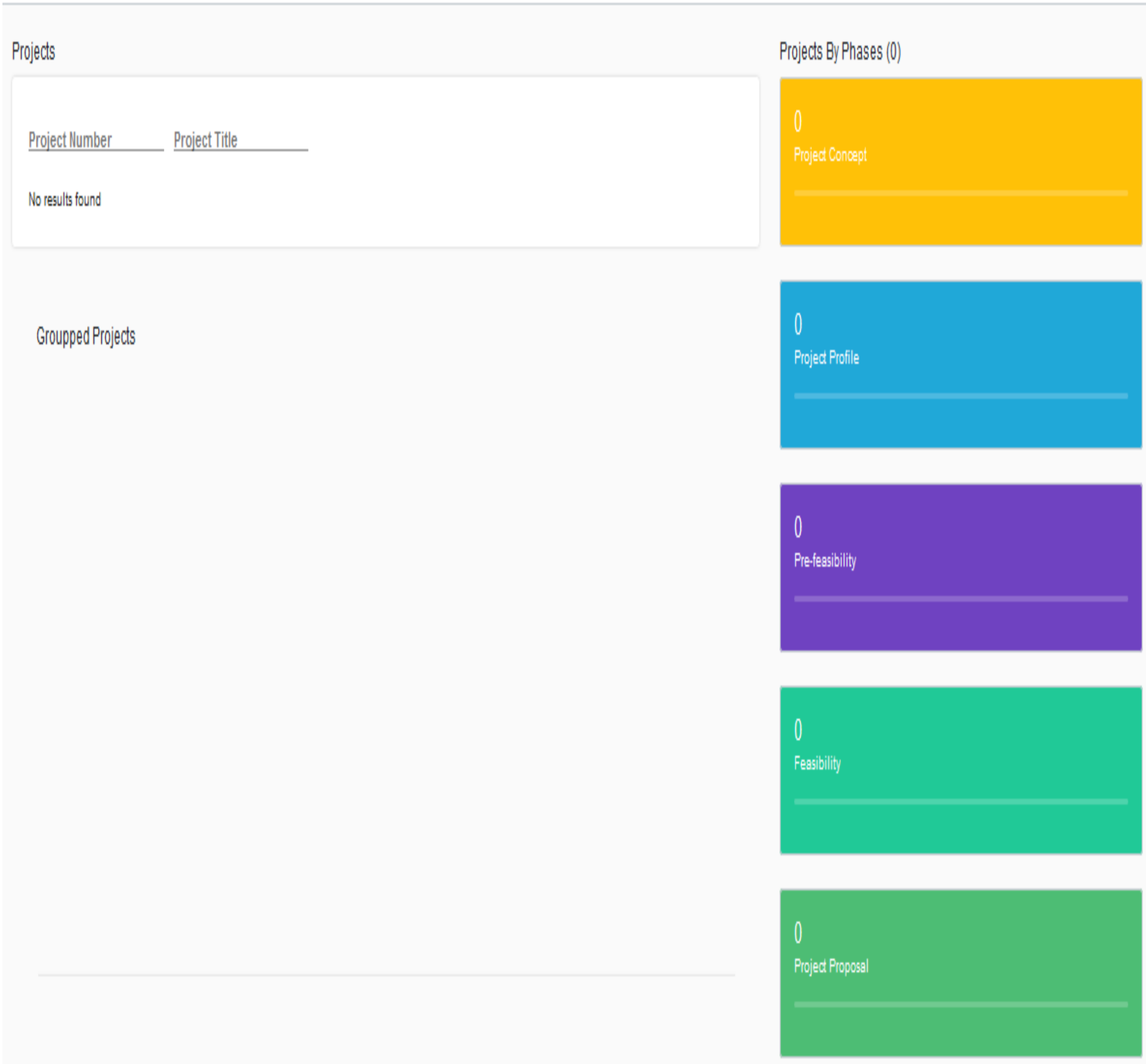
8. Dashboard: This shows the specific user projects awaiting decision.

2.0 Getting Started.

Use the Hyper link http://ibp.finance.go.ug to access the login page of the system. Fill in the Username and password depending on the responsibility of the user and then click SIGN IN.



Dashboard

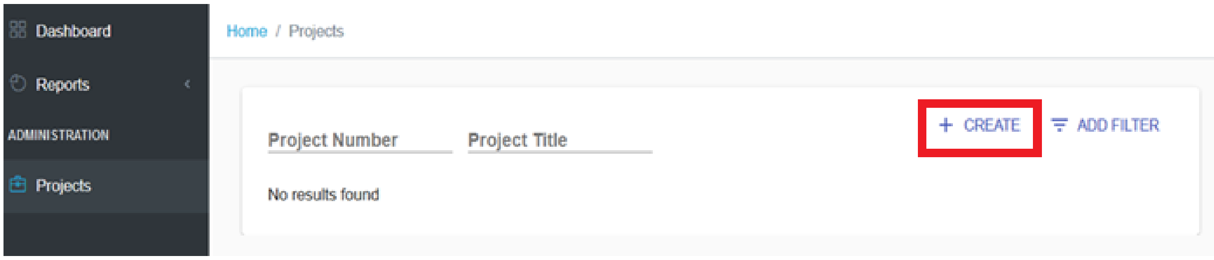


2.1 Projects

2.1.1 Project Concept.

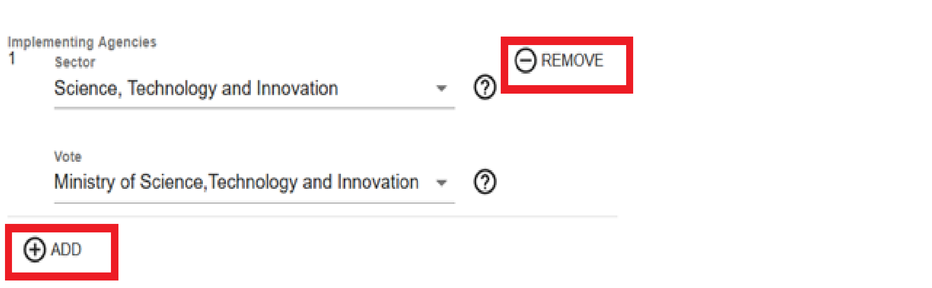
To create a new project, follow the steps;

Step 1: Click the **CREATE** button, shown below depending on your area of responsibility. In the first section **Summary**, the fields **Sector**, **Vote** and **Subprogram** will be automatically selected by the system.



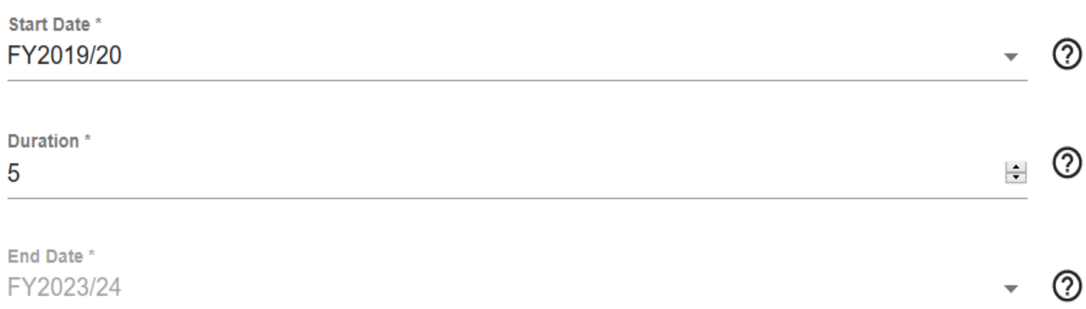
Step 2: Select the Program Outcome from the dropdown.

Step 3: If necessary, add Implementing Agencies by clicking on **ADD** and fill in the Sector and Vote fields from existing ones. To remove Implementing Agencies, click **REMOVE**.

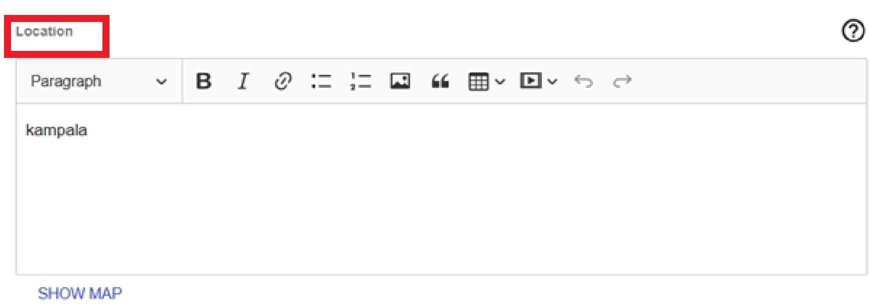


Step 4: **Enter** the name of the project in the **Project Title** field and fill the **Technical Description** field.

Step 5: Select the financial years in which the project will be implemented, specifying the start of the project in the **Start Date** field, the duration of the project in the **Duration** field and the End Date will be auto filled.



Step 6: Enter the project locations in the Location field. You can type in several locations and also there is a possibility of placing markers for the various locations of the project on the map by clicking SHOW MAP.

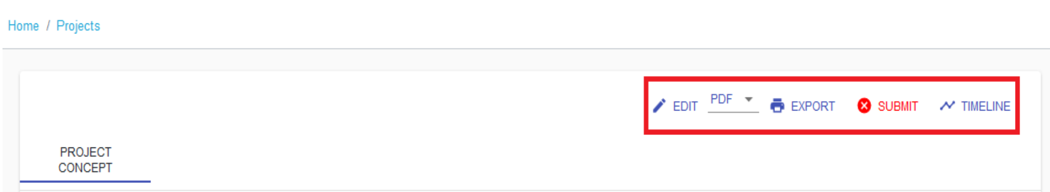


Once all information is filled in correctly a user can click on **CREATE A PROJECT** and the system will create a project and redirect a user to the page where the rest of the information can be filled in.

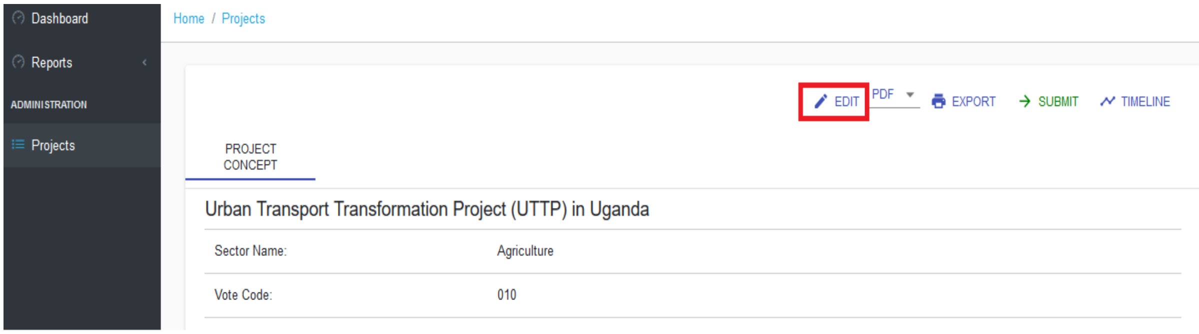
To go to the next step of the first phase of the project, you must fill in all the fields in this section, if the system doesn't allow you to go further, this means that you have forgotten to fill some required fields. The system will highlight the fields in red, make sure that those fields are filled in properly and press the button `CREATE A PROJECT` again.

The system prompts you to review and, if necessary, edit the Summary section. If everything is correct and no editing is required, press the **NEXT** button to continue operation or the **SAVE AND EXIT** button if you want to save the progress and come back to it later. Press BACK to go back to the previous window.

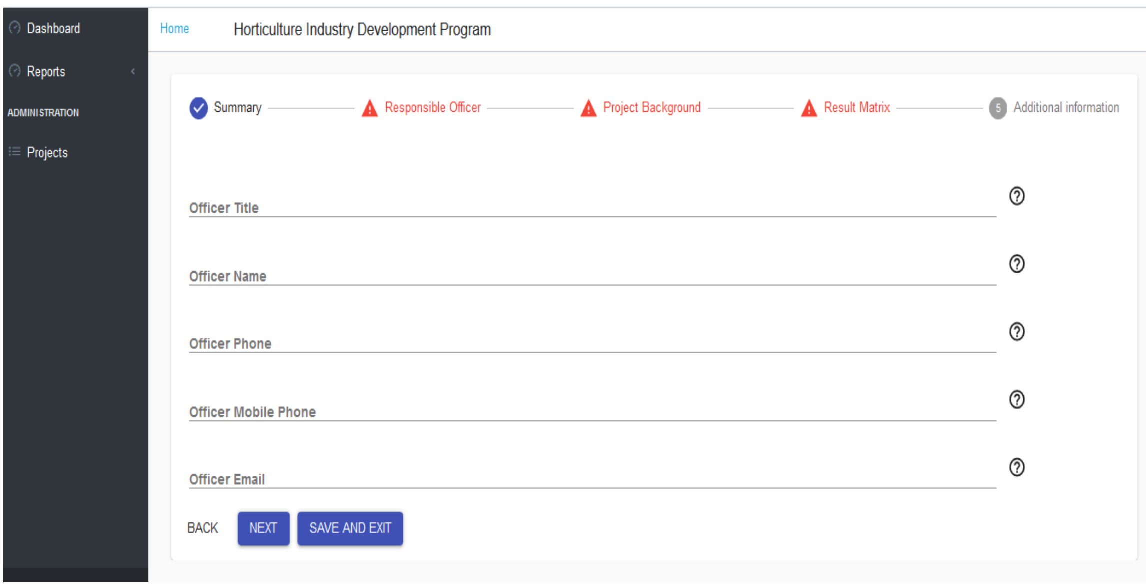
If you press the **SAVE AND EXIT** button, the system will offer you **EDIT, EXPORT, SUBMIT** and **TIMELINE,** in the upper right corner.



To edit the steps of the first phase of the project, click the **EDIT** button and you will be redirected to the form page. After editing, click the **SAVE AND EXIT** button to go to the approval page or **NEXT** and proceed to the next step of the first phase of the project.



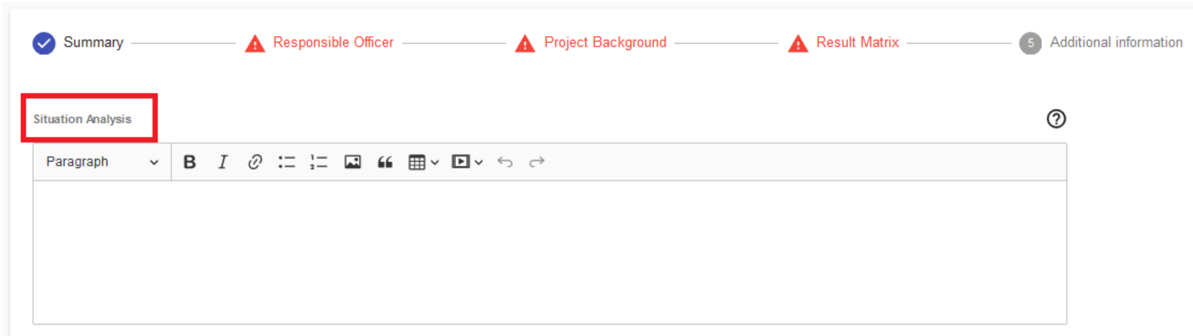
Step 7: At the Responsible Officer stage, fill in the data of the **person responsible** for the project Title, **Name**, Phone, and Email. Click the **NEXT** button to proceed to the next step of the first phase of the project.



The user is able to fill the next step Project Background without completing all the fields in Officer Responsible section. The Officer responsible window will remain highlighted in red until all fields are completed.

In the **Project Background** section, you need to fill in all the fields as shown in the following steps.

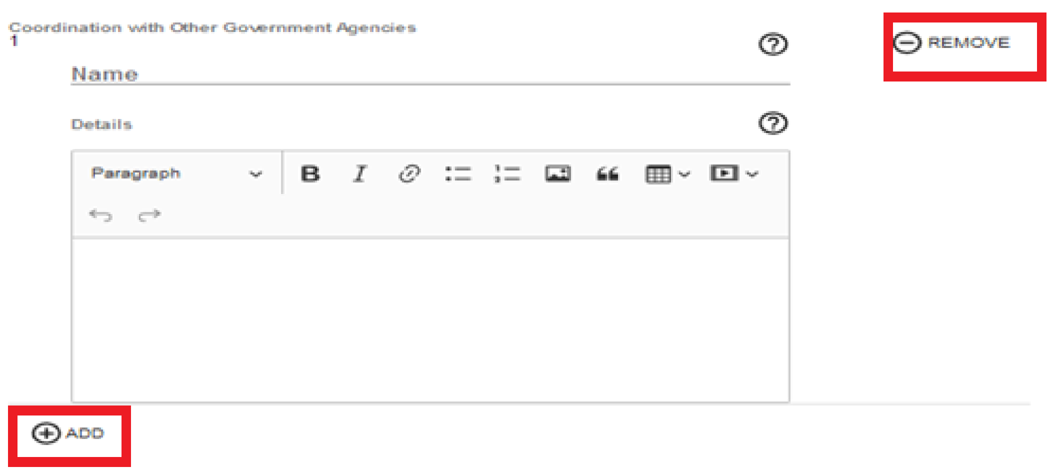
Step 8: Describe the prevailing situational analysis before and after the project in **Situation Analysis** Section.



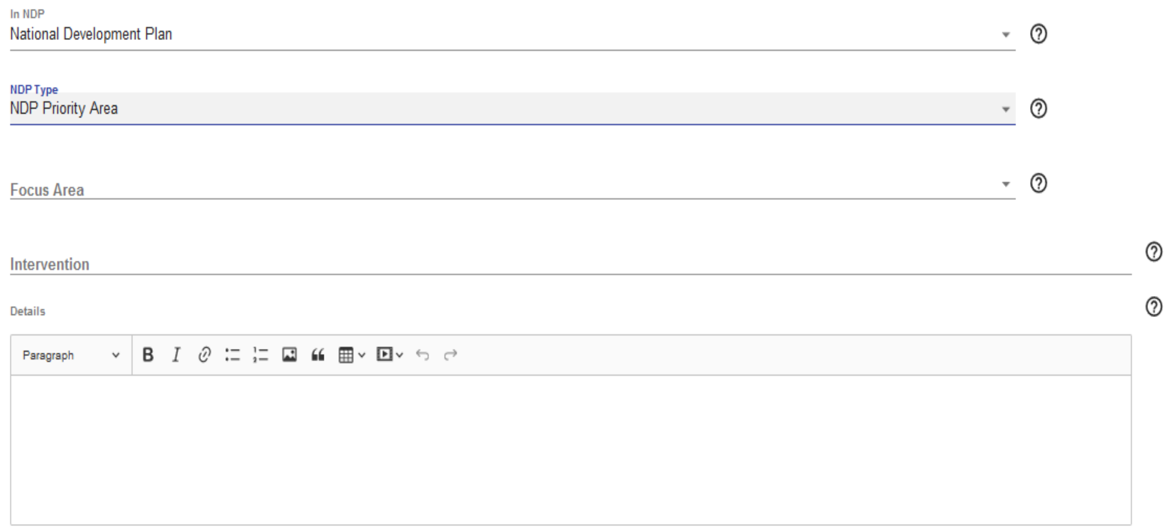
Step 9: Describe the **Problem Statement, Problem Causes and Problem** effects. You need to identify the causes for the given problem that a project has to deal with and the effects.

Step 10: You will as well need to justify the need for the project in the **Justification** section and to describe the **stakeholders** that will be part of the project in Stakeholders section.

Step 11: In **Coordination with Other Government Agencies** section you need to define the different agencies that will be part of the project and describe their role in a project. To remove or add other government agencies click **ADD or REMOVE**.

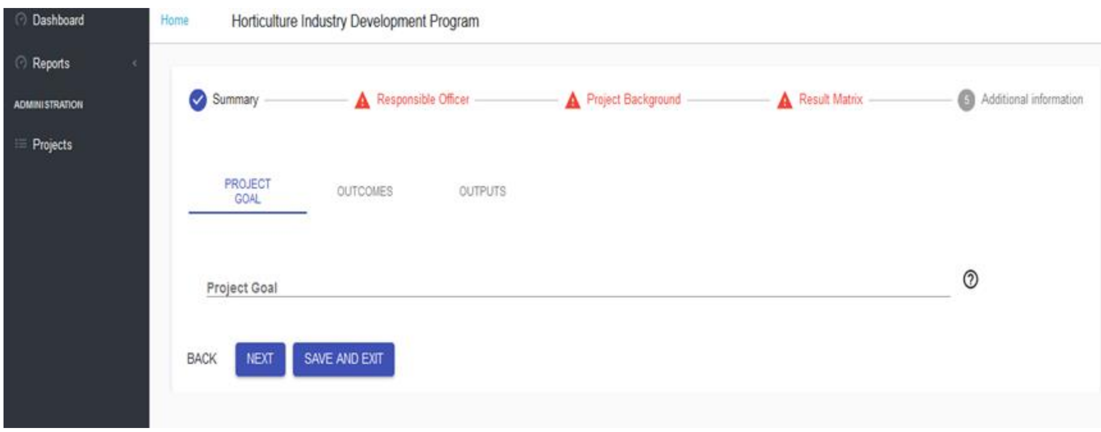


Step 12: A dropdown helps to identify whether a project is in the NDP or Other Strategic Documents. Depending on the compliance of the project with the NDP, select the desired option in the NDP field and the system will give you the necessary parameters to fill in. In case the project is in the NDP use the different drop downs to provide the information in regard to NDP.

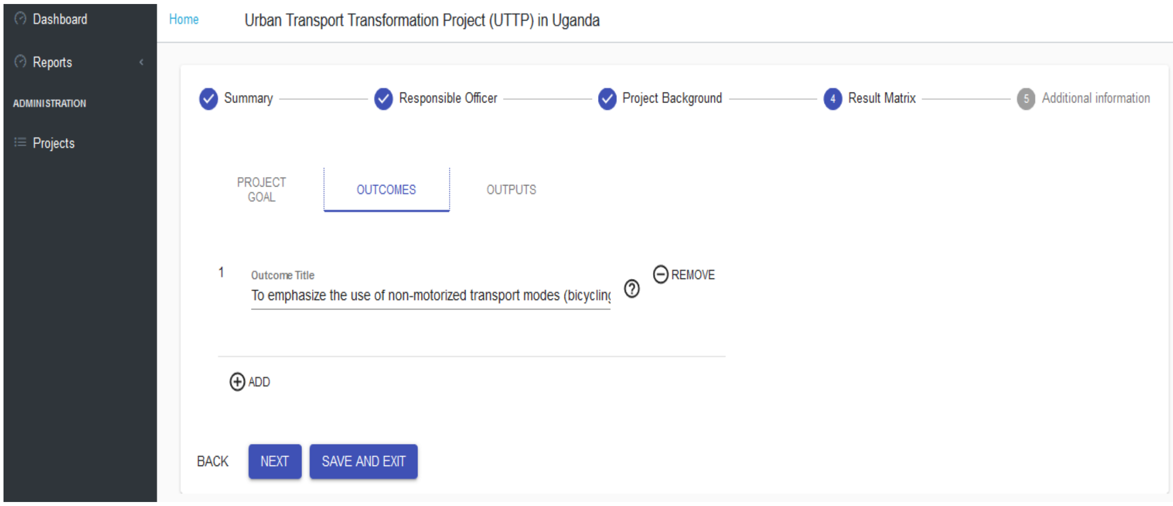


An option of other strategic documents guides to identify the different strategic directives and provision for details about the strategic directive in regard to the project.

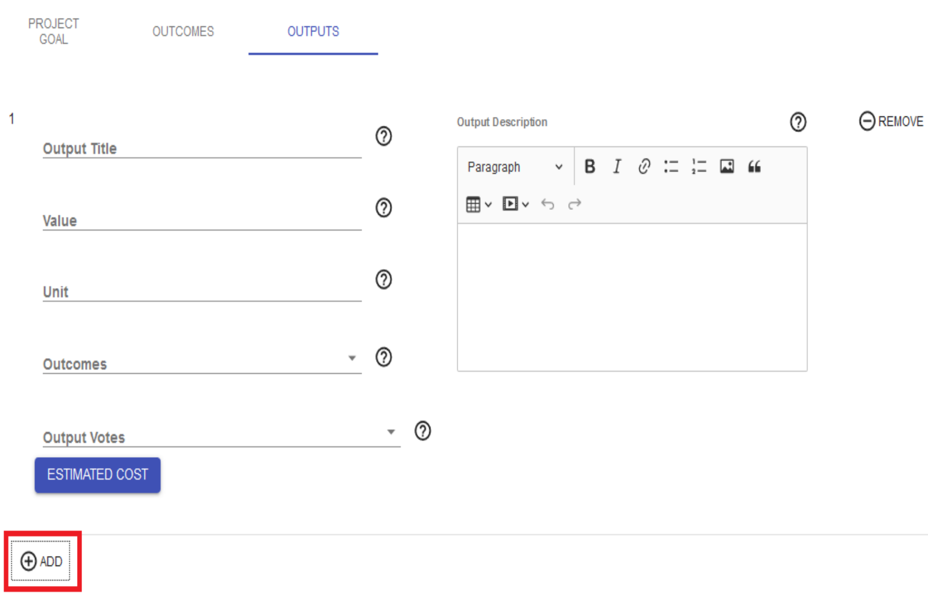
Step 13: In **Result Matrix** section, specify the **project goal** in the Project Goal field.



Step 14: Specify the outcomes in the **Outcome** section, if there are more than one outcome, then add the Outcome field by clicking on **ADD**. To remove Outcome, click on the **REMOVE** button.



Step 15: Next, specify outputs by filling in all the relevant fields, if there are more than one output, then add the number of outputs needed by clicking **ADD**.

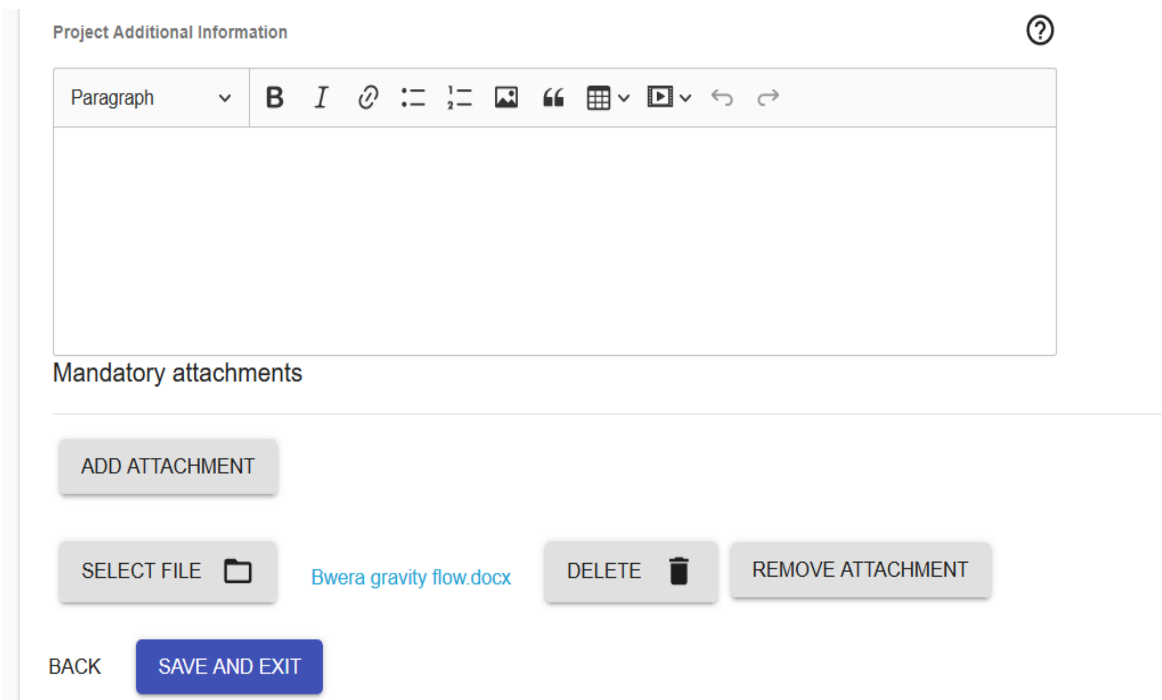


Please note that every project should have at most two Outcomes. Also, one Output should have at most two Outcomes associated with it and every Output should have at least one.

Step 16: Click on the button **ESTIMATED COST** and in the Outputs Investments popup, specify the project budget by breaking it into the financial years previously specified in the project. If you need two or more payments per year you can add by clicking ADD. Once you are done press the

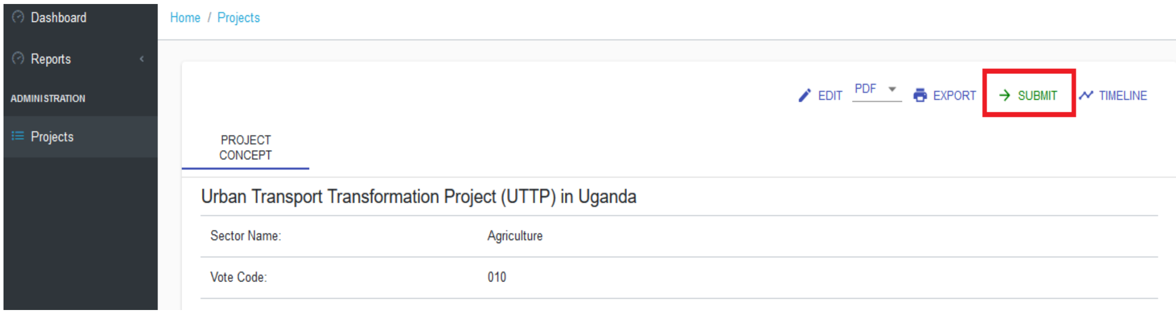
SAVE button and the system will show the Total for years and for the project as a whole. Click the **NEXT** button and proceed to the next step of the first phase of the project.

Step 17: In the Additional information section, in the Project Additional Information field, enter information deemed fit by the sector, attach accompanying files by pressing the **SELECT FILE** to upload file, if you still need to upload files, click on the **ADD ATTACHMENT** button and upload as much as necessary. Then click on the button Next or **SAVE AND EXIT**.

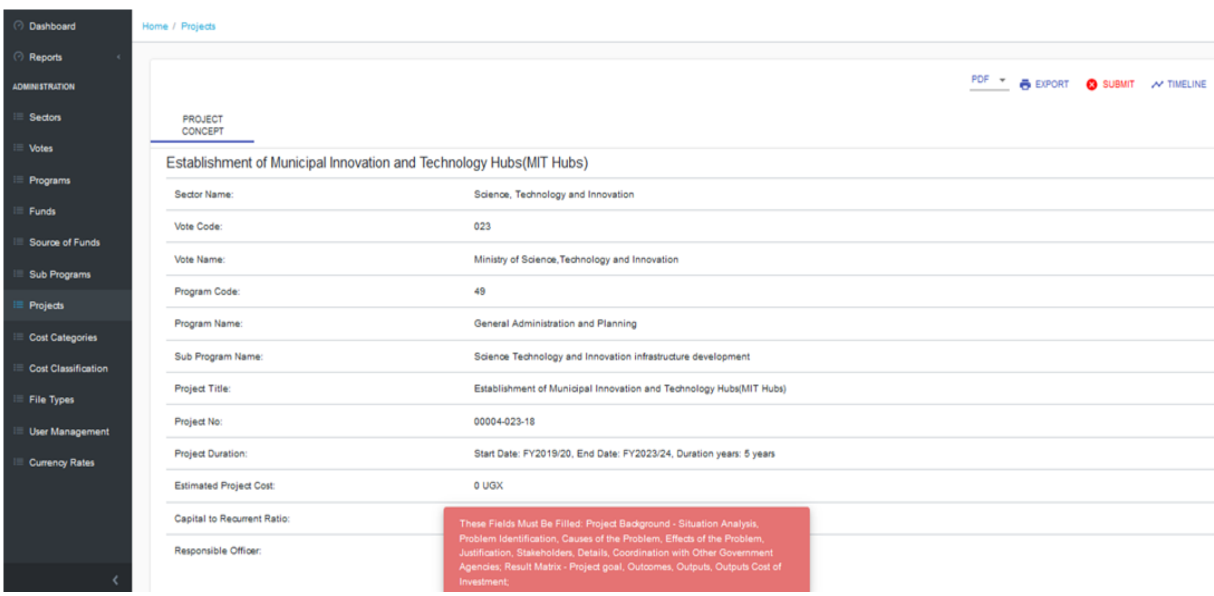


In order to send the project for approval to the department head, click the SUBMIT button, if an error occurs, it means that you haven't filled in and / or filled in the correctly some fields.

The system helps a user to determine whether a project is ready for a submission or not by highlighting Submit button in green and placing corresponding icon next to it.



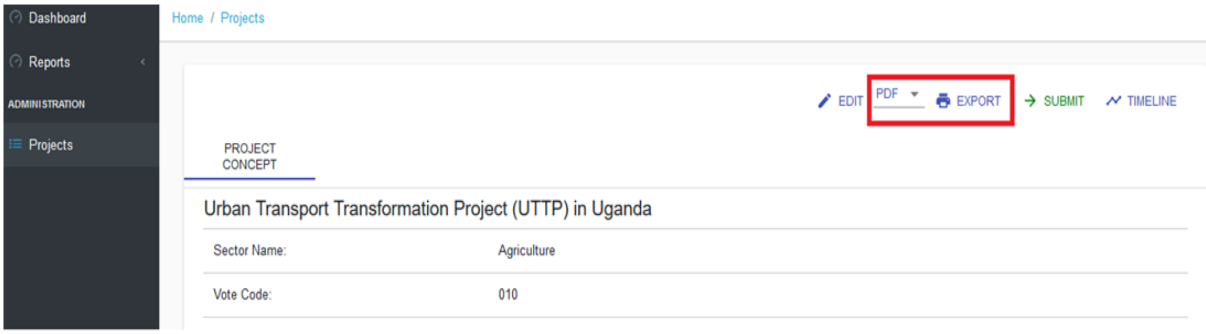
The project cannot be sent for approval to the department head until all steps of the first phase of the project have been completed. If the SUBMIT button is red it means the project is not ready to be submitted and will show error (fields that were left unfiled) in case the user attempts to submit it as shown below.



Once the project is submitted, the system will freeze the project information without letting the user to do any modifications, the user will be able to export data. The status of the project will change to waiting for a decision from the department head. Only the person responsible for the review will have the options of **APPROVE, REJECT, and DIFFER.**

To export the document, follow the following steps

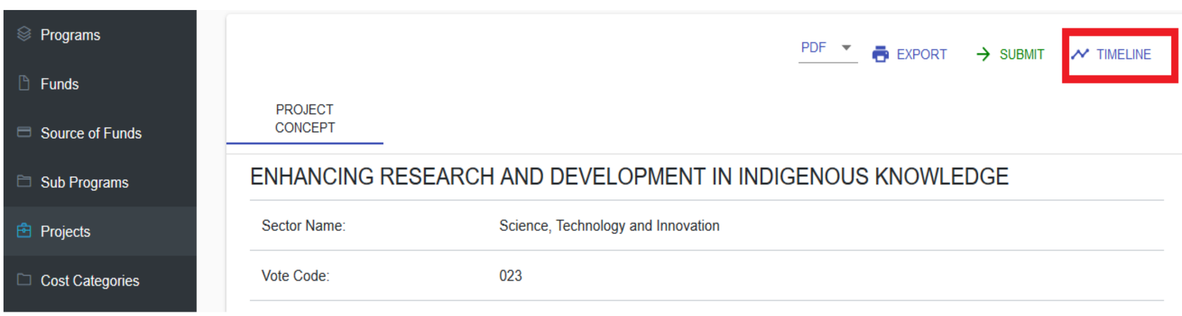
Step 1: click on the **EXPORT** button located in the upper right corner, as shown in the image below. Based on your level of access different formats of the files will be available: PDF format for viewing or Word format for editing.



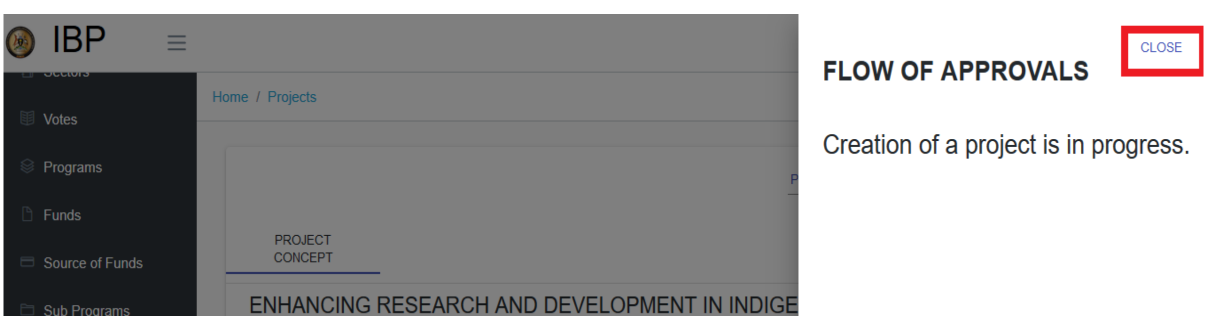
Step 2: The system will provide a file download in word or **PDF** format.

To view the project approval process follow the steps:

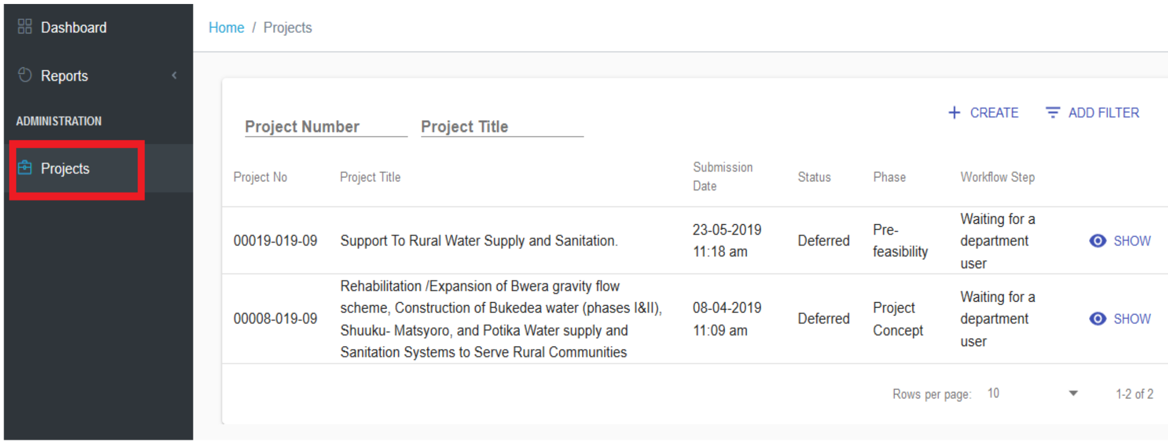
Step 1: Click the **TIMELINE** button. Here you will see all the progress about the project, the comments and attachments to the changes, and the time of sending for revision.



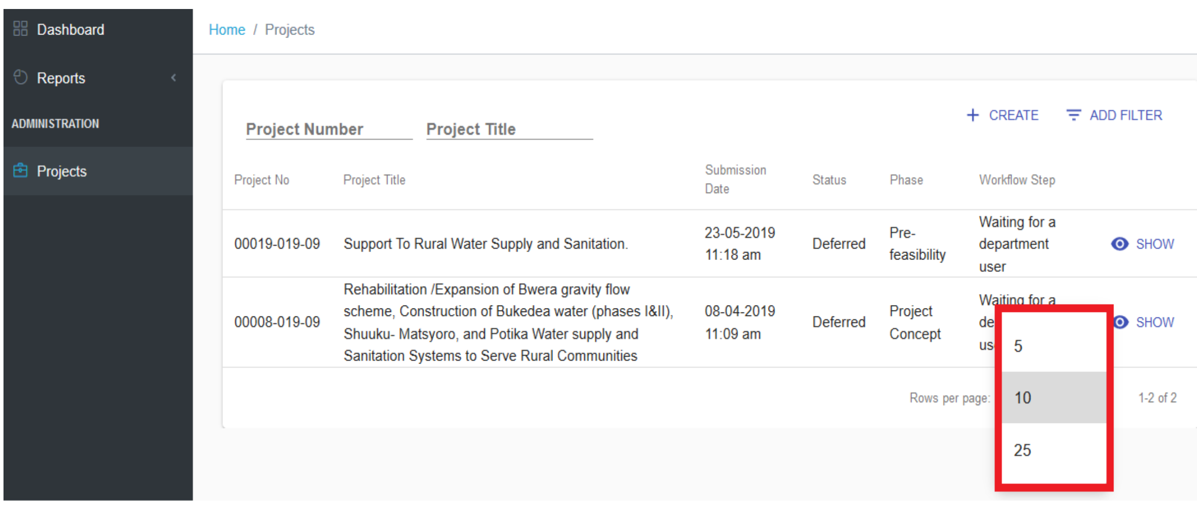
Step 2: After viewing, close the window by pressing the **CLOSE** button. The Project Concept Note timeline may be empty due to the fact that there are no records of the project submission in the system yet.



The system allows you to manage projects in project section. In the Projects section, a user can create and view projects. To view the projects list, in the menu on the left, select Projects and the system will display a paginated list of existing projects corresponding to the logged in user.



The system displays 10 entries on one page by default. You can reduce or increase the number of entries per page from 5 to 25 entries by selecting from the list below.



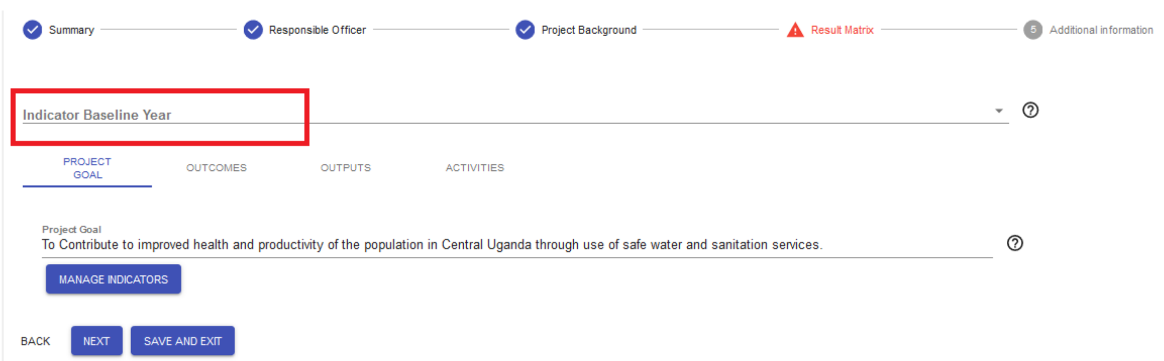
For ease of use, you can sort projects by Project No, Title, Subprogram, Status, and Phase by clicking on the required header, as shown below.

2.1.2 Project Profile

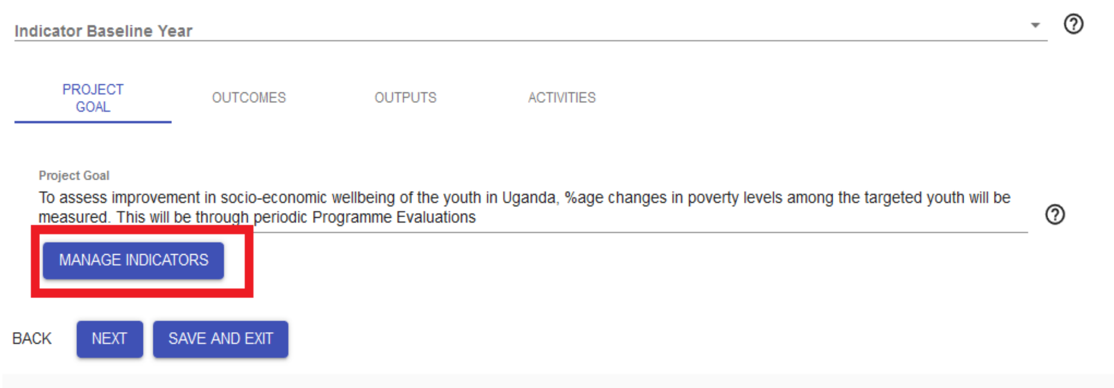
To edit and/or fill in new sections of the second phase of the project, click on the **EDIT** button. After editing, press the **SAVE AND EXIT** button to go to view the project information or **NEXT** to proceed to the next step of the form.

When entering information in this phase the system will offer you to review and edit all sections if necessary. In the sections: Summary, Responsible Officer and Project Background there are no new fields, they can be edited if there are changes in the project. If there are no changes after pressing the **EDIT** button, go straight to the next step of the project form which is the Result Matrix. Follow the following steps to fill the

Step 1: In the Result Matrix section, fill in the Indicator Baseline year using a dropdown.

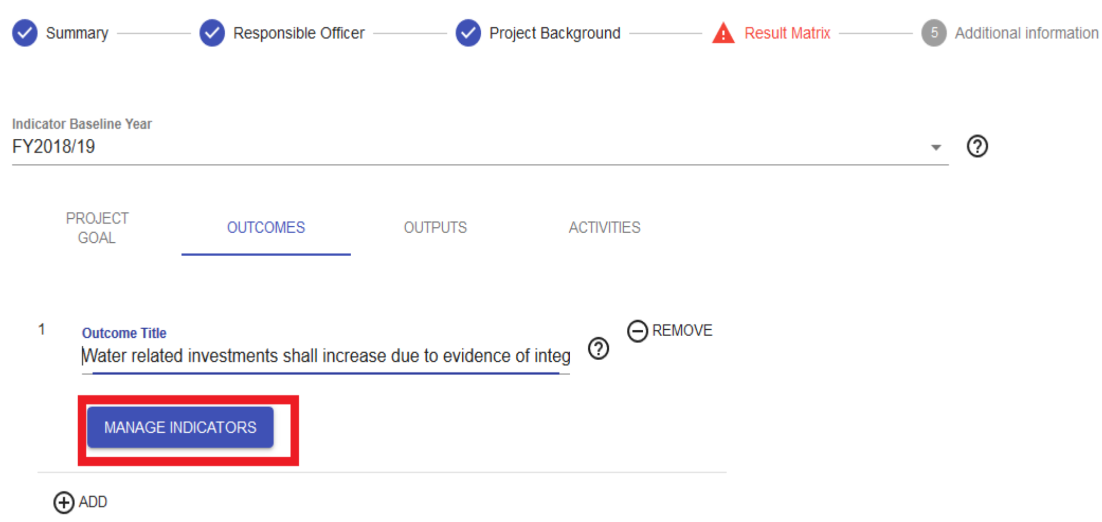


The main differences in Result Matrix from the previous phase are Detailed Outputs, Indicators and Activities. Step 2: Under **PROJECT GOAL**, the Click **on MANAGE INDICATORS.**

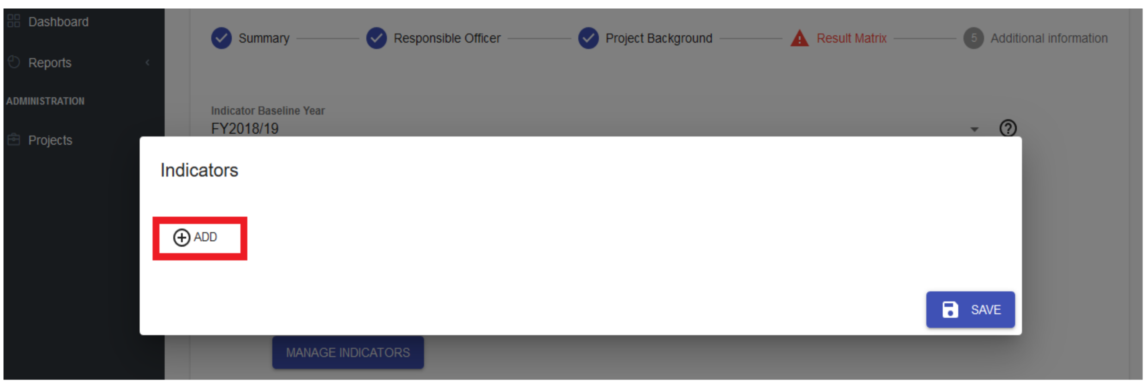


Step 3: In the pop up, in put Performance indicators, Means of Verification, and Assumptions then click **SAVE**. You can **ADD or REMOVE** indicators by clicking **ADD** and R**EMOVE** buttons.

Step 4: Under **OUTCOMES**, click **MANAGE INDICTORS**



Step 5: After clicking **MANAGE INDICATORS**, Click **ADD** to proceed to the next steps.

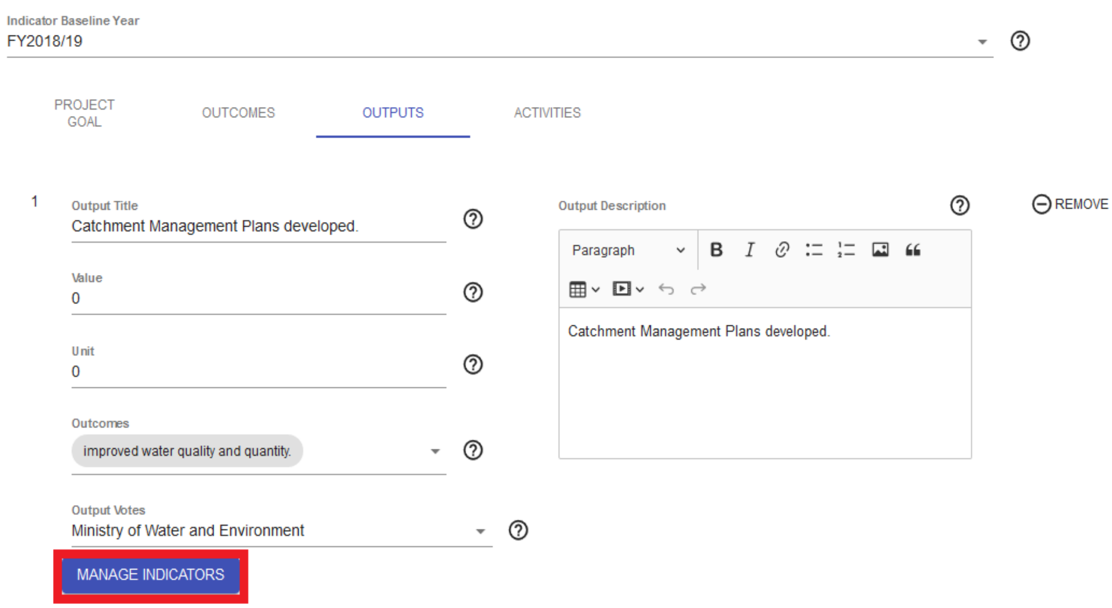


Step 6: After clicking **ADD**, fill in the Performance indicators, Means of Verification, Assumptions and Risk factors then click **SAVE**. **You can ADD or REMOVE** indicators by clicking ADD or **REMOVE** button.

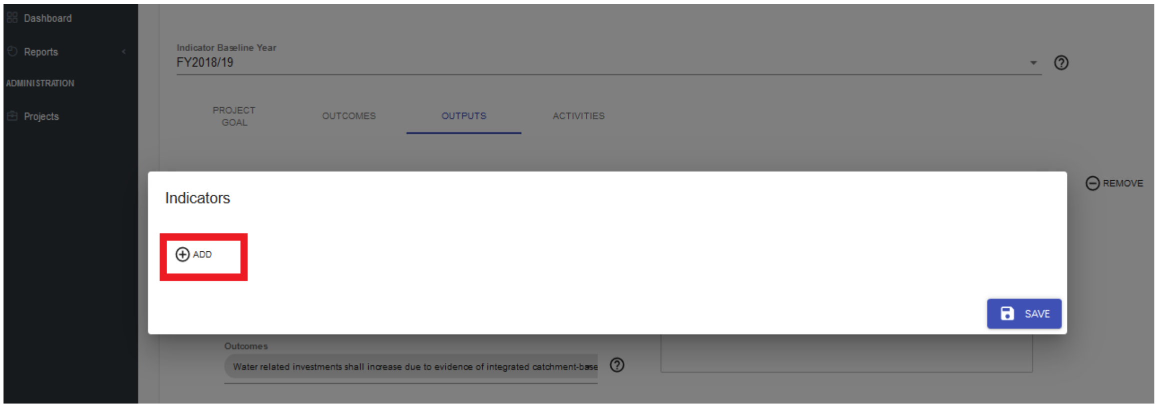
There have to be at least one and at most two `Outcomes` per project.

When filling in OUTPUTS, the list in Output Votes depends on how many votes you add in Implementing Agencies (in the first step, which is Summary) in addition to the Vote which is assigned by default based on your account settings.

Step 7: Click **MANAGE INDICATORS.**

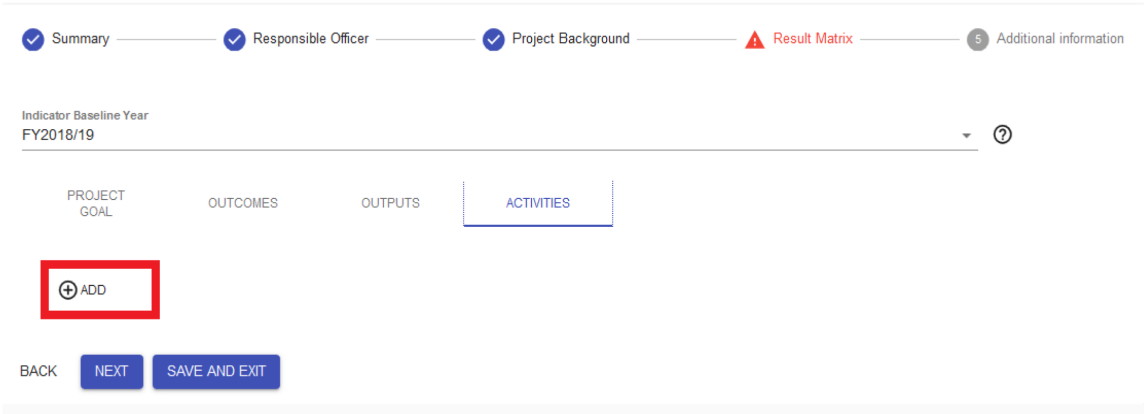


Step 8: After clicking **MANAGE INDICATORS**, Click **ADD** to proceed to the next steps

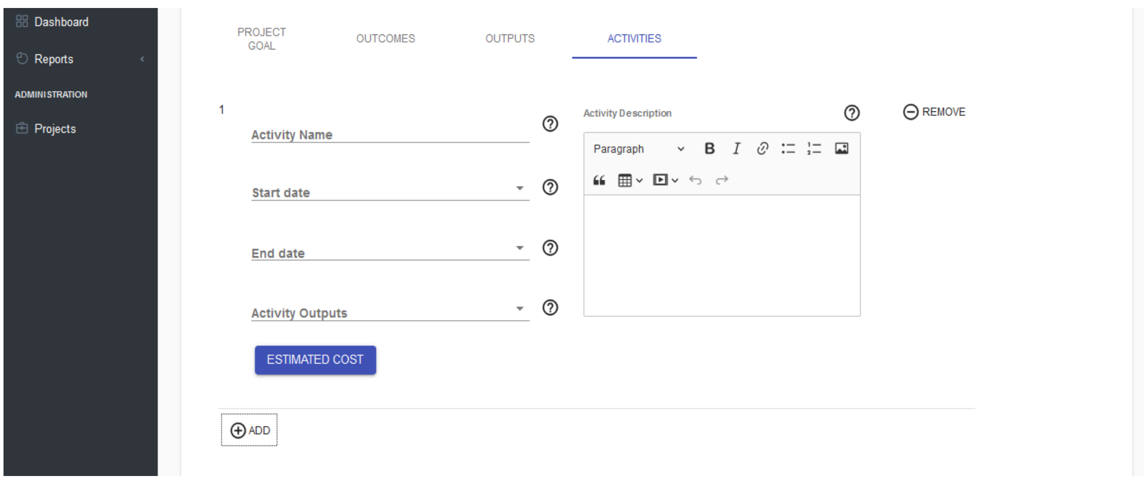


Step 9: After clicking ADD, fill in the Performance indicators, Means of Verification, Assumptions and Risk factors then click SAVE. You can **ADD** or **REMOVE** indicators by clicking **ADD** or **REMOVE** button.

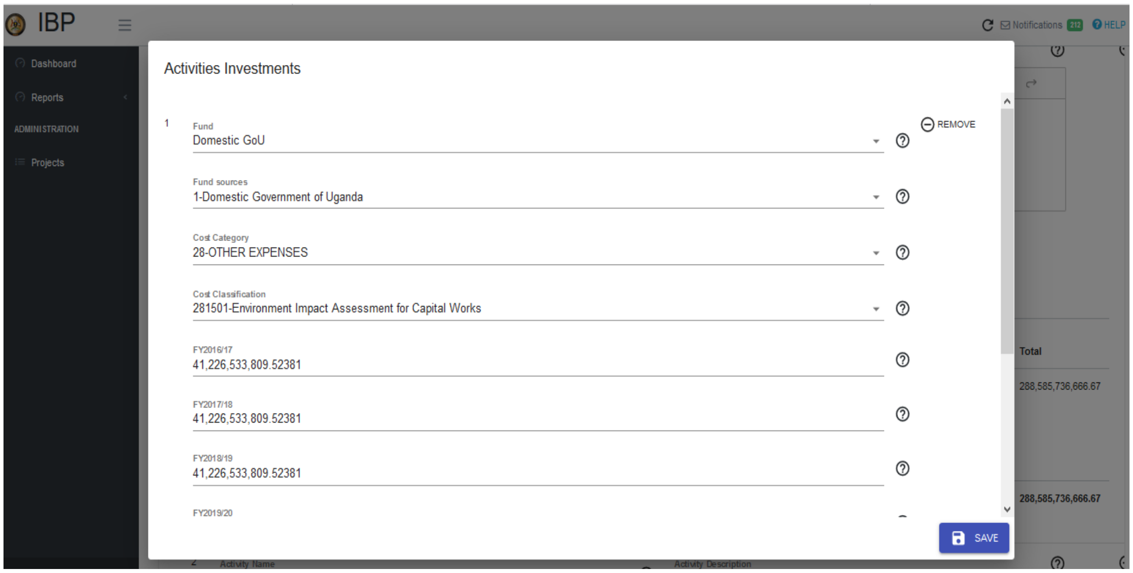
Step 10: In the **ACTIVITIES** tab, click on **ADD** and fill in the fields according to the requirements.



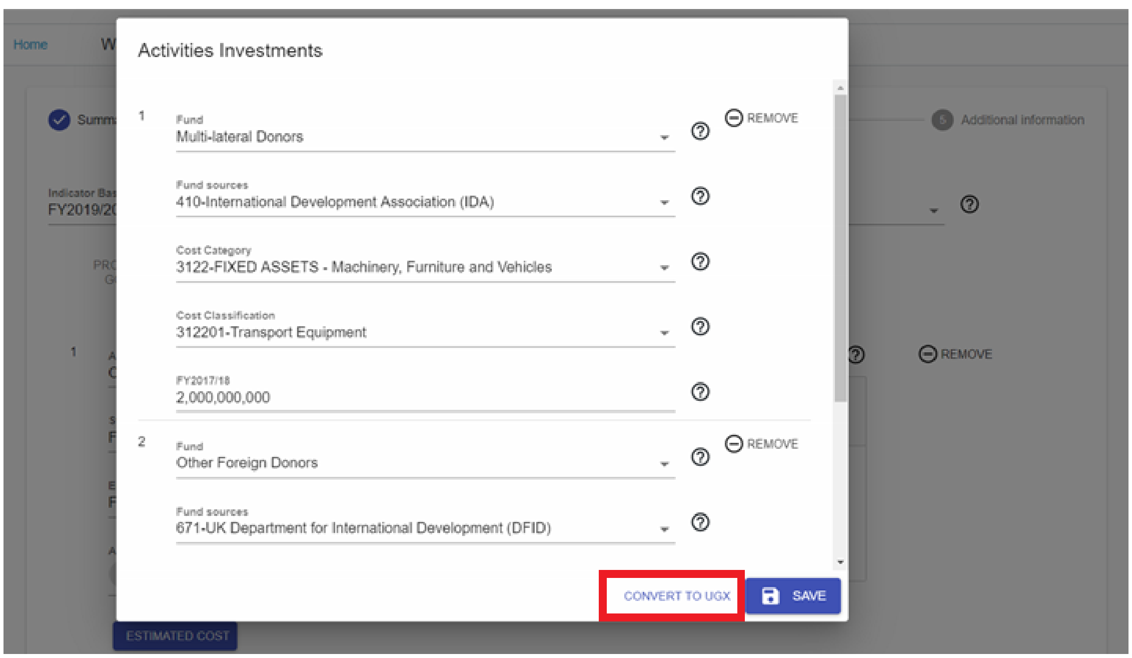
Step 11: Populate activity information in terms of name, start date, end date, description and Activity Outputs. You can add many activities as possible by clicking **ADD** button or remove by clicking **REMOVE** button.



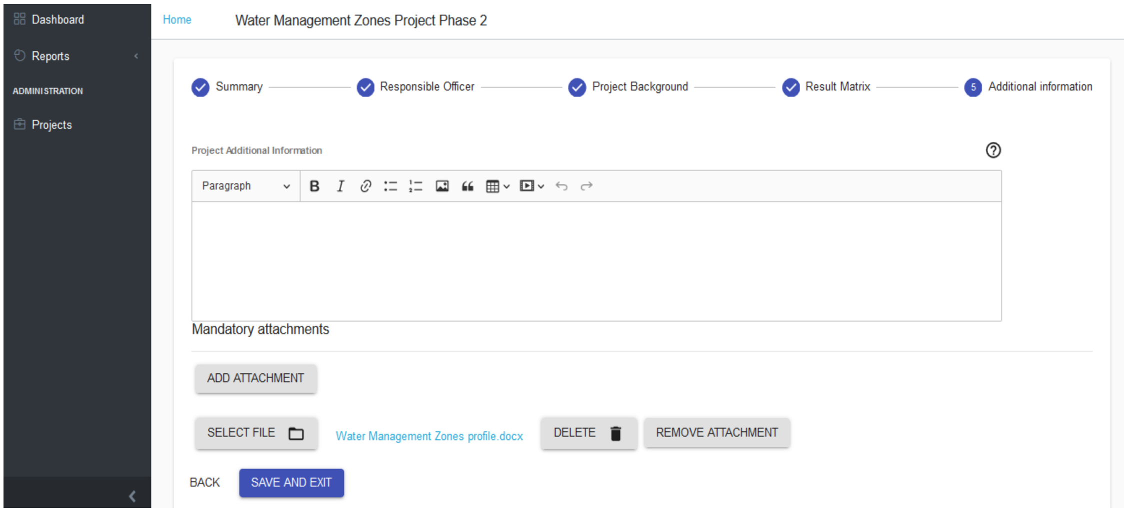
Step 12: Click Estimated Cost to input the activity funding source, cost classification with the help of the dropdowns provided as well as the cost per year to be spent on the activity.



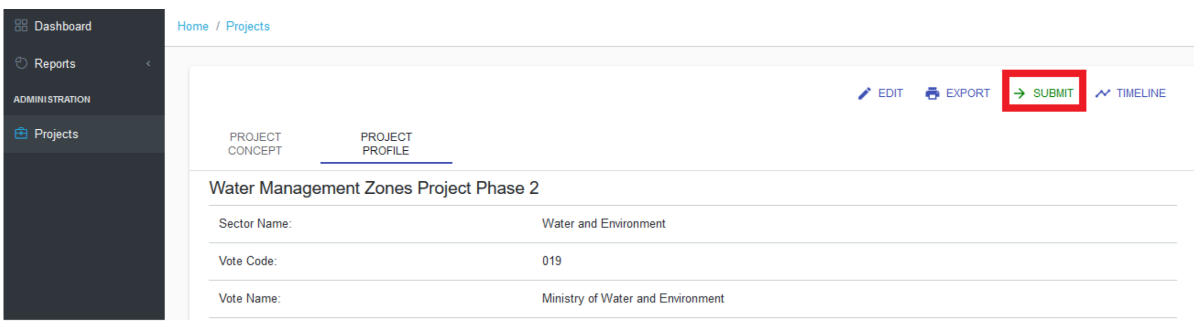
IBP allows you to enter investment cost in USD currency and converts it to UGX when you click on Convert to UGX as shown below. This feature is available in all sections where a user has to enter costing. The exchange rate is identified by Government and admin user has access to change it.



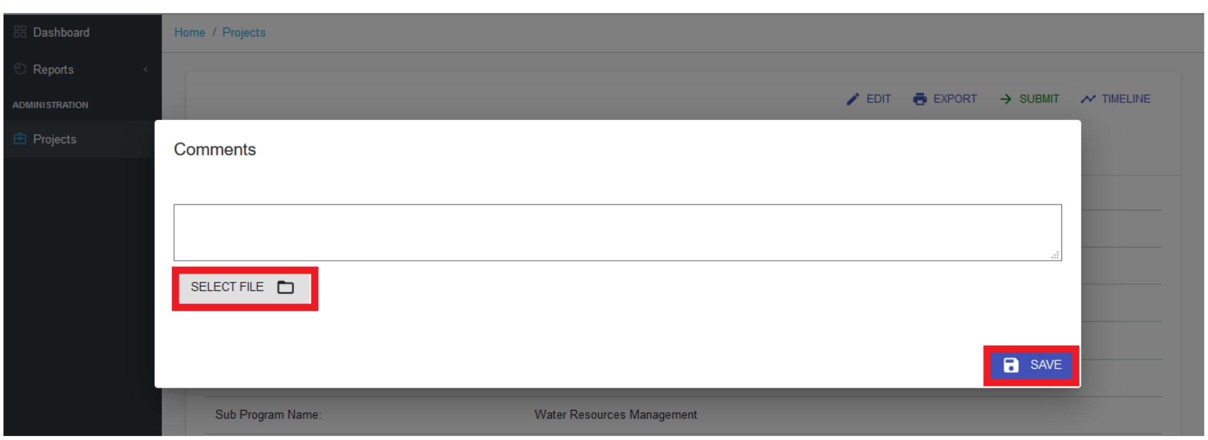
Step 13: In the Additional information section, upload all the relevant files. If there are more than one files, click on **ADD ATTACHMENT**. Next, click the **SAVE AND EXIT** button to go to the project details page.



Step 14: Click **SUBMIT** that would send the project Profile for approval.



Step 15: In the Comments window, make a comment and, if necessary, upload the file, click on the **SAVE** button.



The system will freeze the project information, not allowing any changes to be made, and only the person responsible for reviewing it will have the options of **APPROVE**, **REJECT**, and **REVISE**

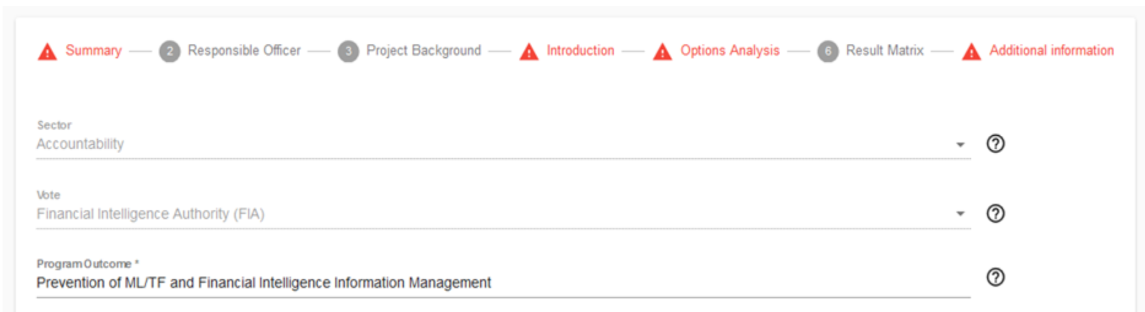
Once the project is passed through all the steps of the workflow and is approved by all required parties the project will be moved to a next stage, which is Pre-Feasibility stage.

At submission of the profile, there will be no requirement of approval from the sector head.

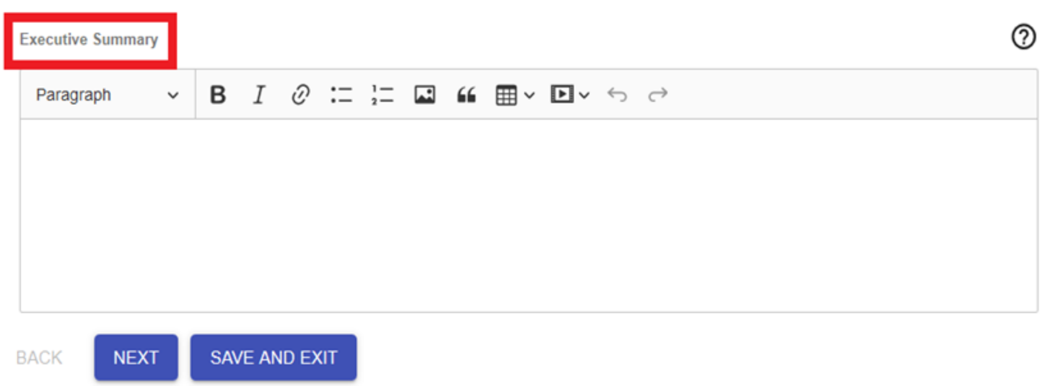
2.1.3 Pre-Feasibility Study

To go through all the steps of the third phase Pre- Feasibility, click the **EDIT** button

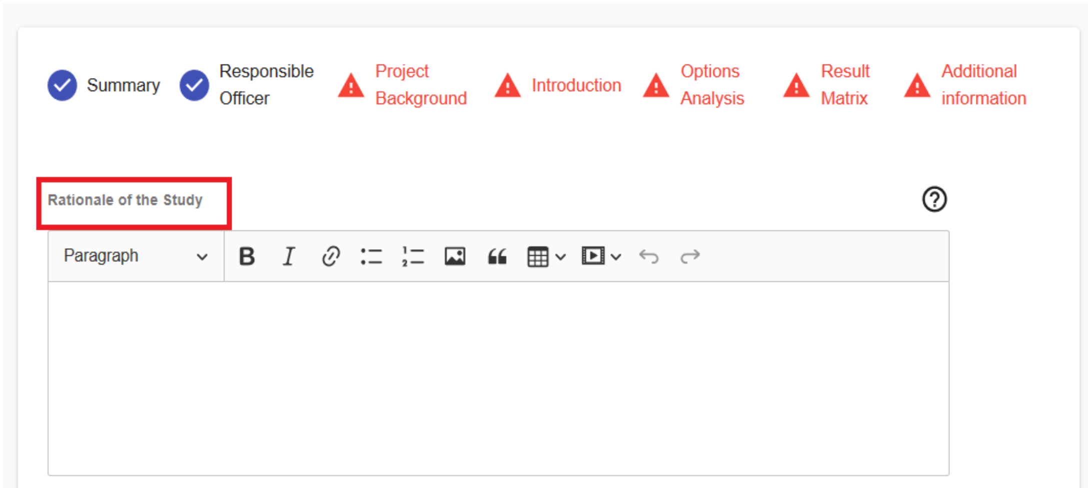
All the information provided in the Project Profile phase is auto-generated in the Pre-Feasibility Study and can be edited in case of any changes.



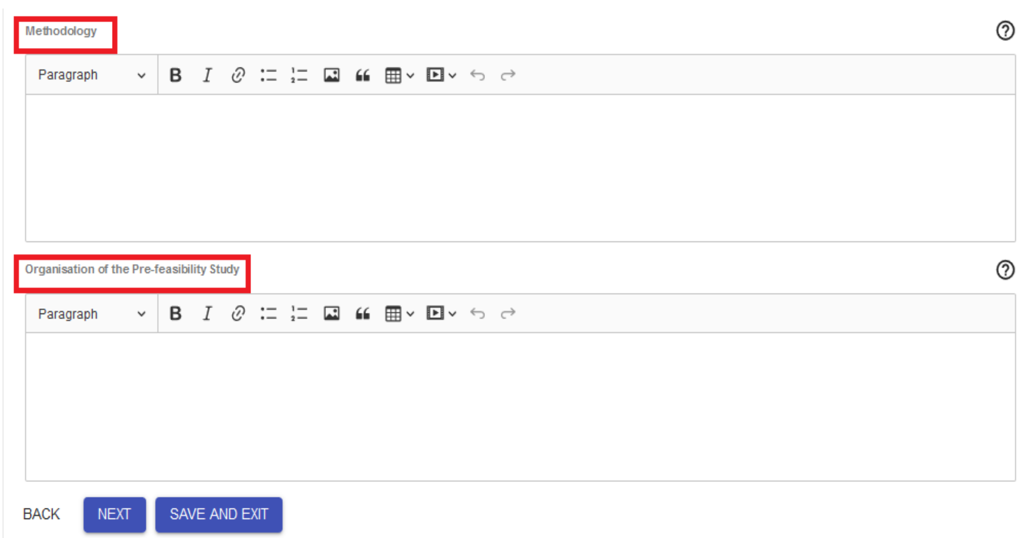
Step 1: In the Summary window, population the Executive Summary section. Click **NEXT** to proceed to the next window.



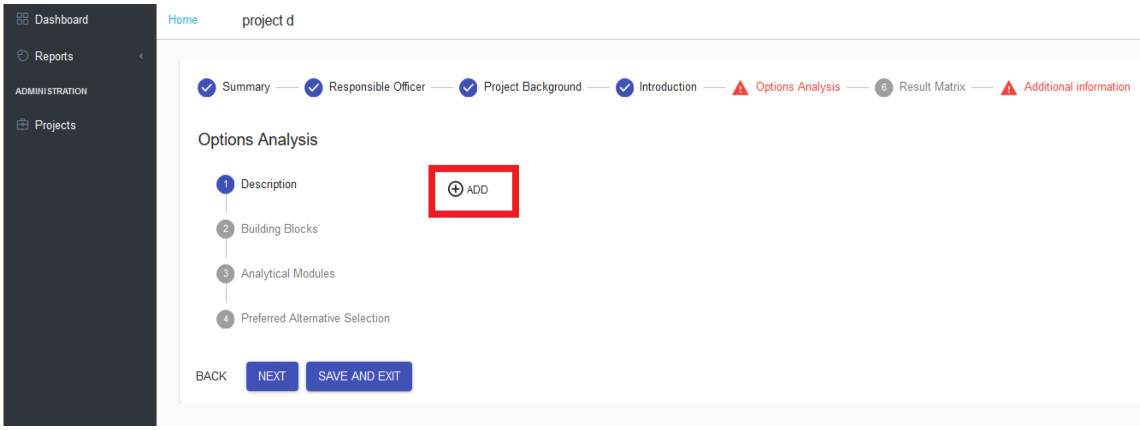
Step 2: In the Introduction window, fill in all the fields Rationale of the study in the field below.



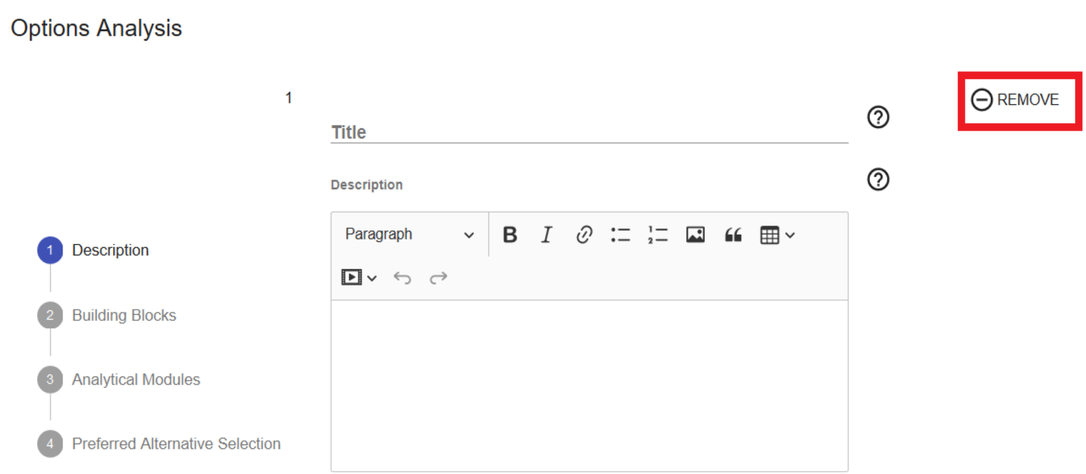
Step 3: Populate the Methodology and Organisation of the Pre- Feasibility Study as required and click NEXT button to proceed to the next step of the third phase of the project.



Step 4: Click **ADD** button to proceed to the next step.

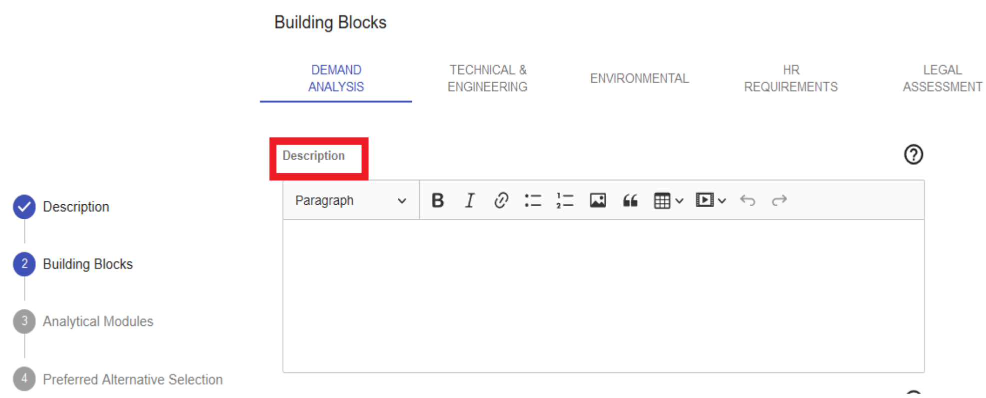


Step 5: Populate the different interventions detailing the title and description. You can remove an intervention by clicking **REMOVE**.

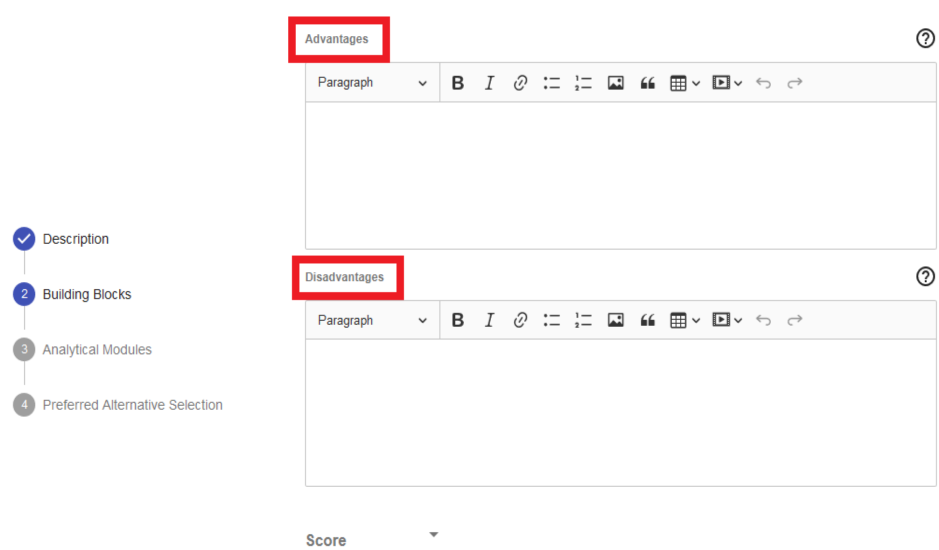


Step 6: Fill in the cost and use the dropdown to identify the preferred implementation modality. The field Total Score will be equal to zero by default, later on when you fill in Building Blocks, Total Score will be automatically calculated based on each block inside the section. You can add an intervention by clicking ADD button.

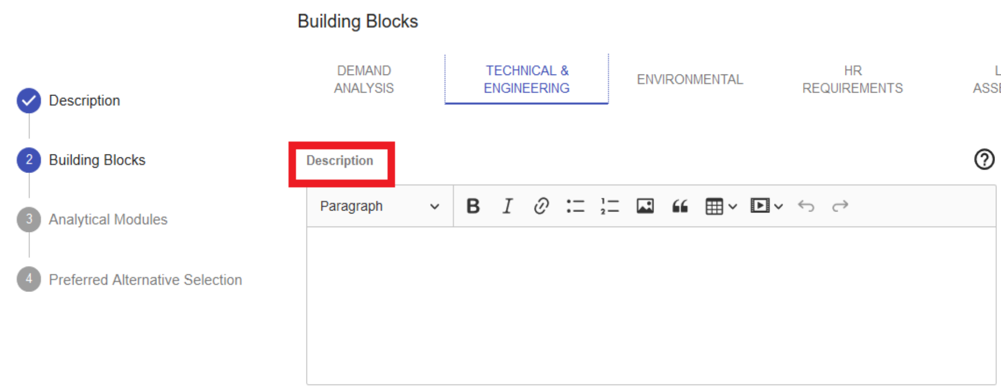
Step 7: Under Building Blocks, describe the demand analysis of the option under the description section.



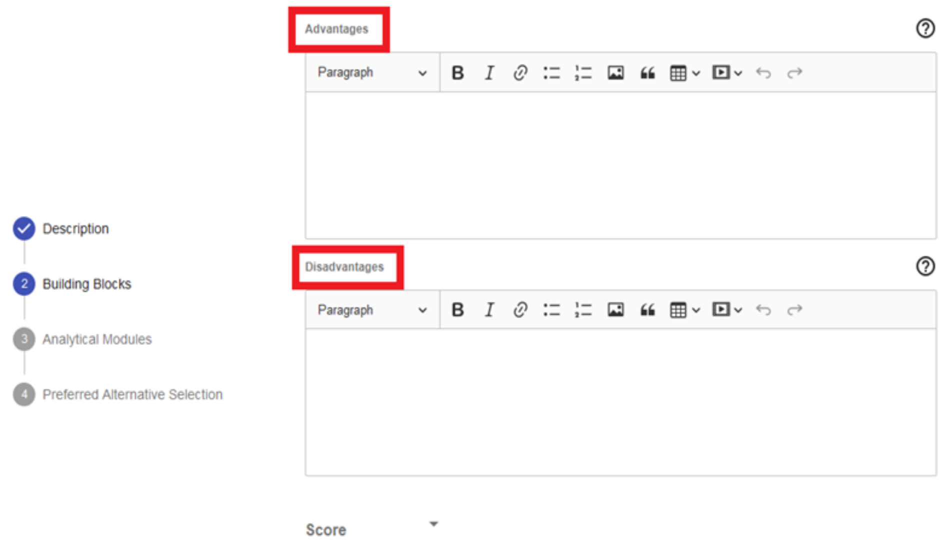
Step 8: Identify the advantages and disadvantages of the option in regard to the demand module. Using the dropdown score the module from 1-5.



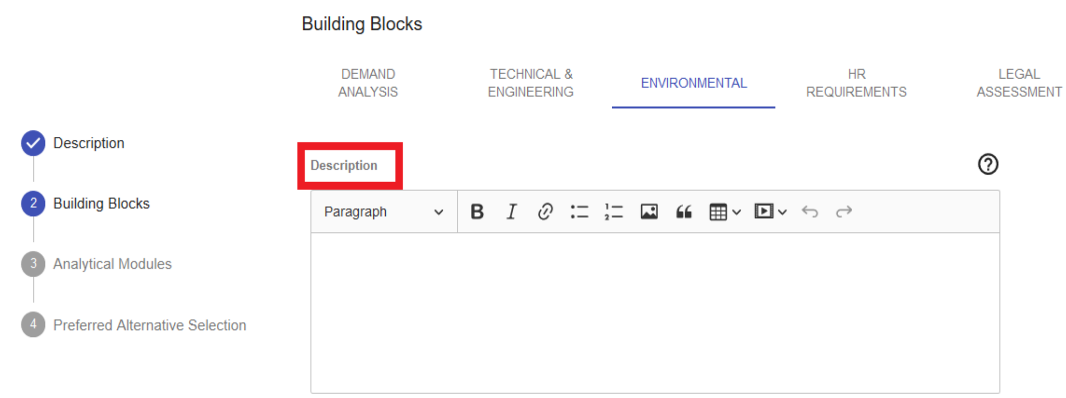
Step 9: Describe the Technical and Engineering aspects of the option in the Description section.



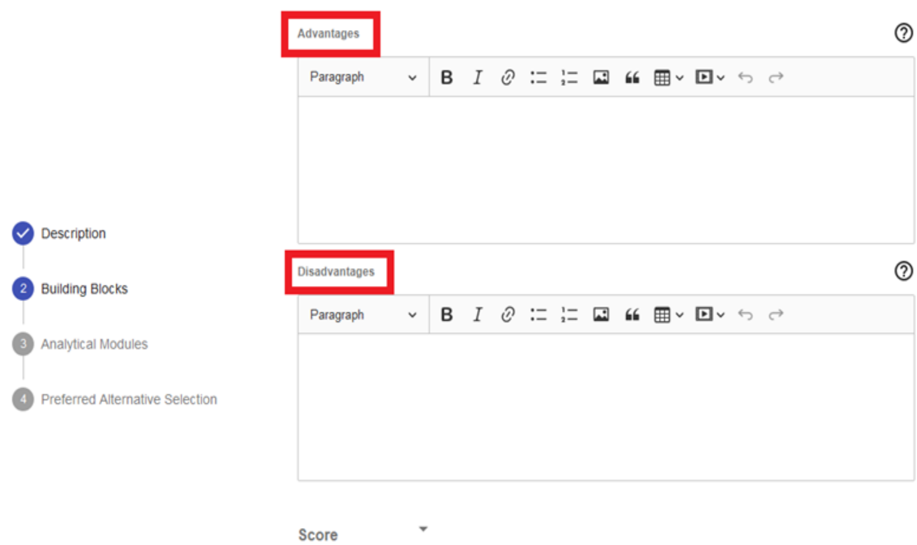
Step 10: Identify the advantages and disadvantages of the option in regard to the Technical and Engineering module. Using the dropdown score the module from 1-5.



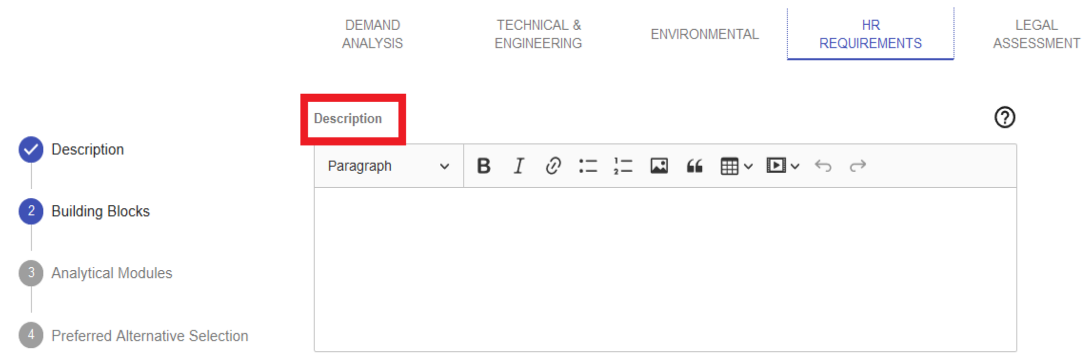
Step 11: In the Environmental module, describe the Environmental impacts regarding the option.



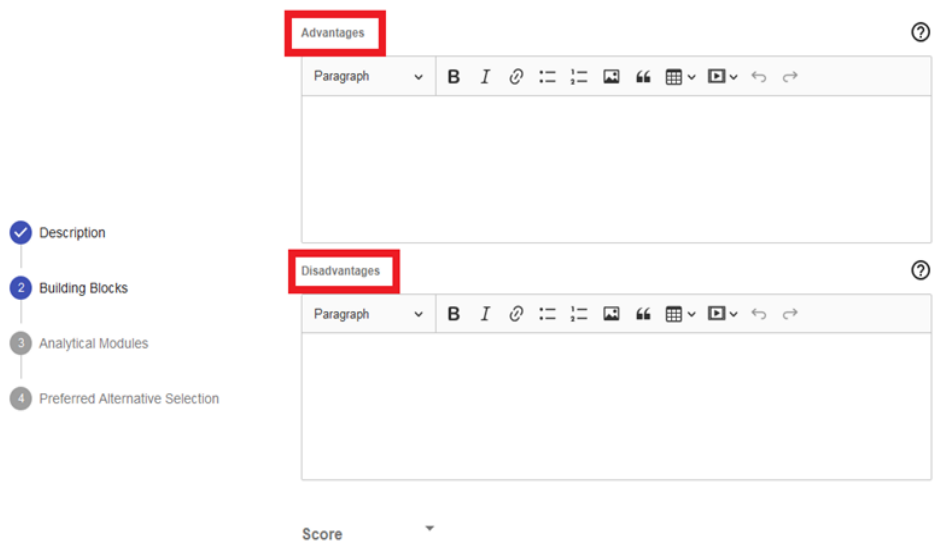
Step 12: Identify the advantages and disadvantages of the option in regard to the Environmental module. Using the dropdown score the module from 1-5.



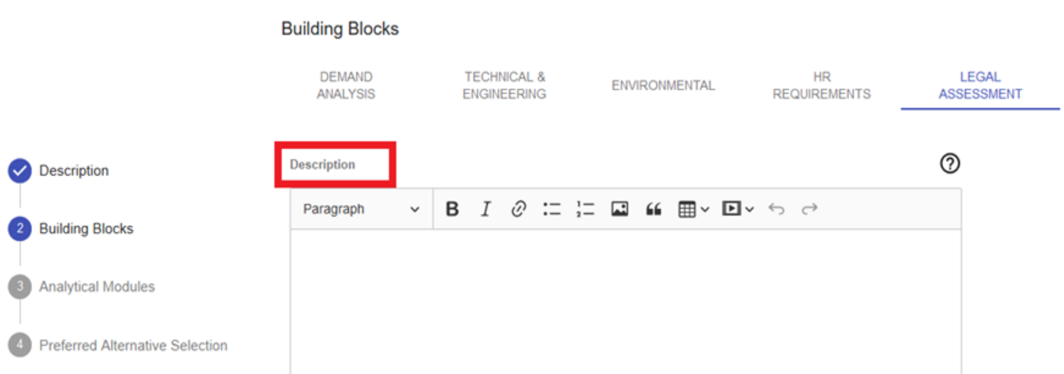
Step 13: Under the HR module, describe the HR requirements of the given option the option.



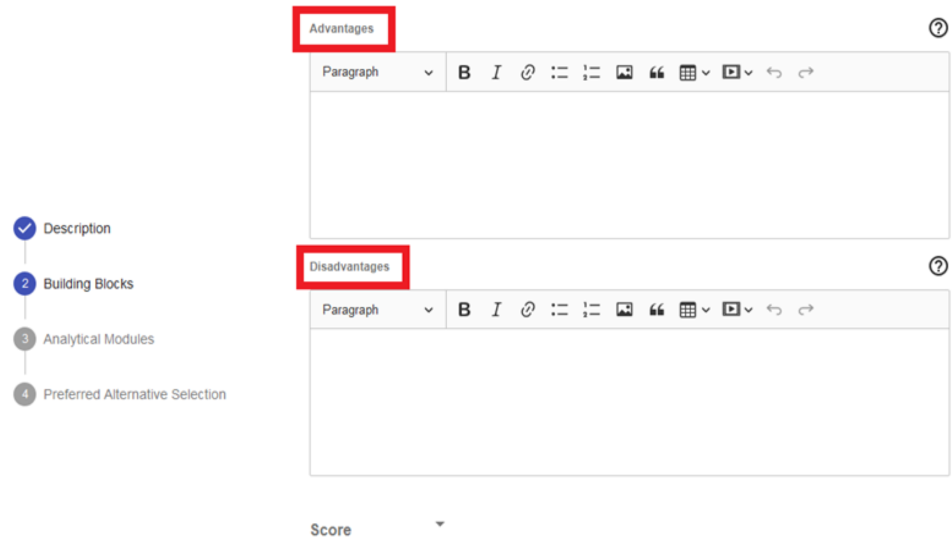
Step 14: Identify the advantages and disadvantages of the option in regard to the HR module. Using the dropdown score the module from 1-5.



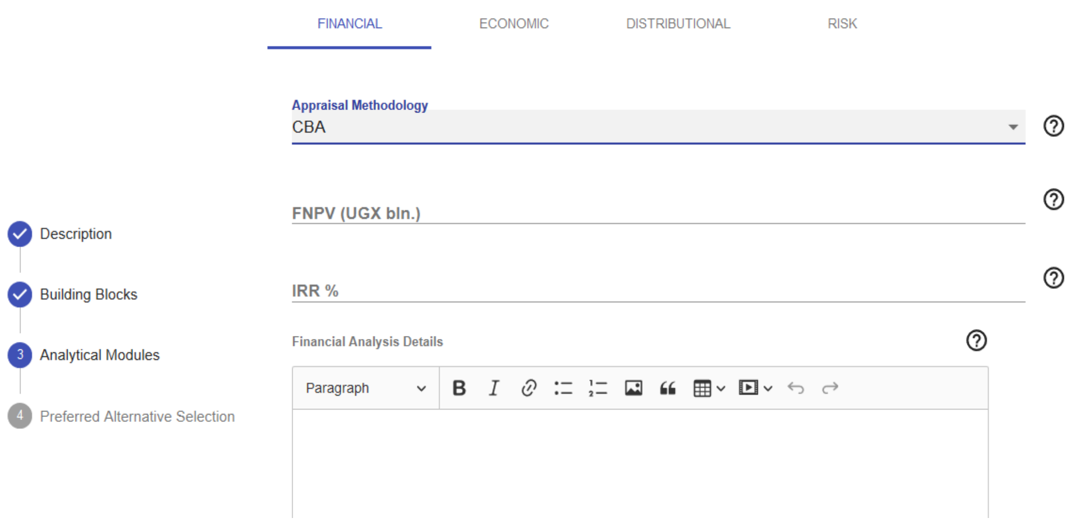
Step 15: Under the legal Assessment module, describe the legal aspects of the given option.



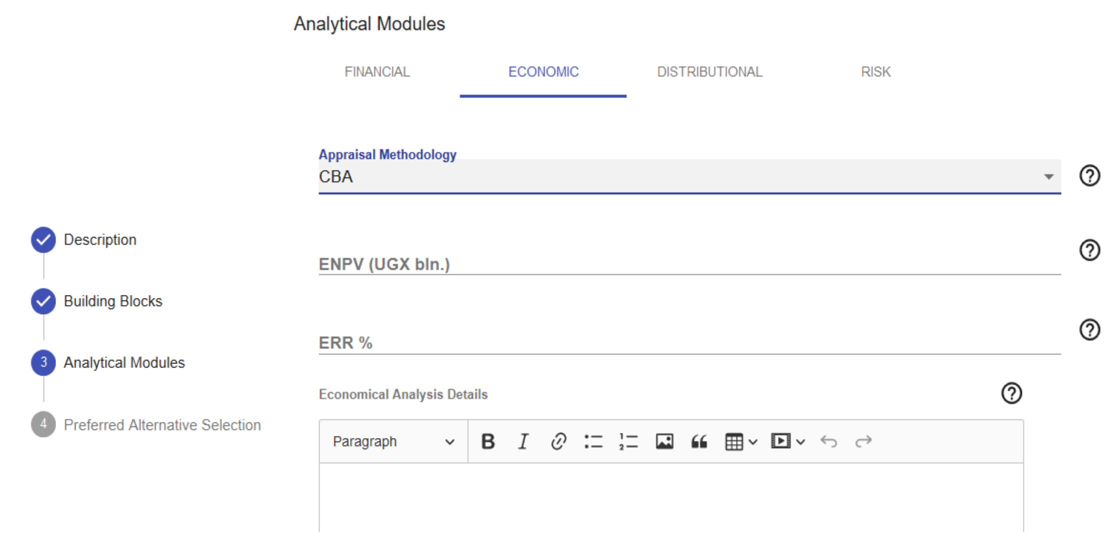
Step 16: Identify the advantages and disadvantages of the option in regard to the HR module. Using the dropdown score the module from 1-5.



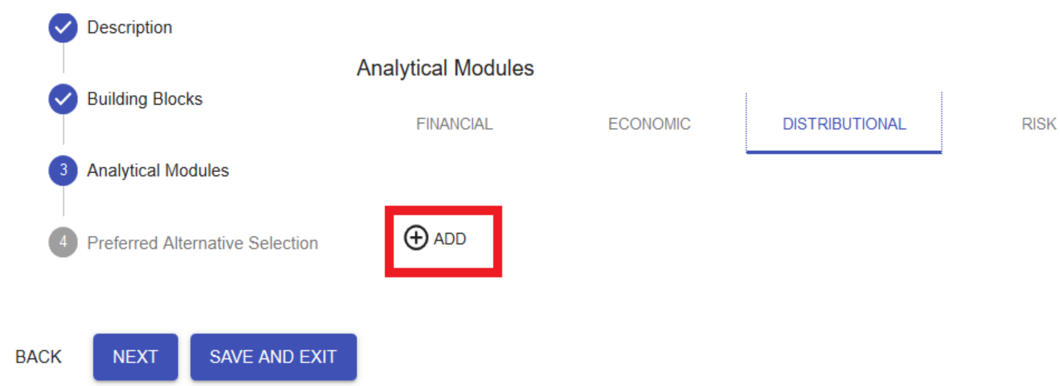
Step 17: Proceed to the Analytical module. Under the Financial module, use the dropdown to identify the Appraisal methodology either CEA or CBA and give details of the financial analysis in regard to the identified intervention in the box below.



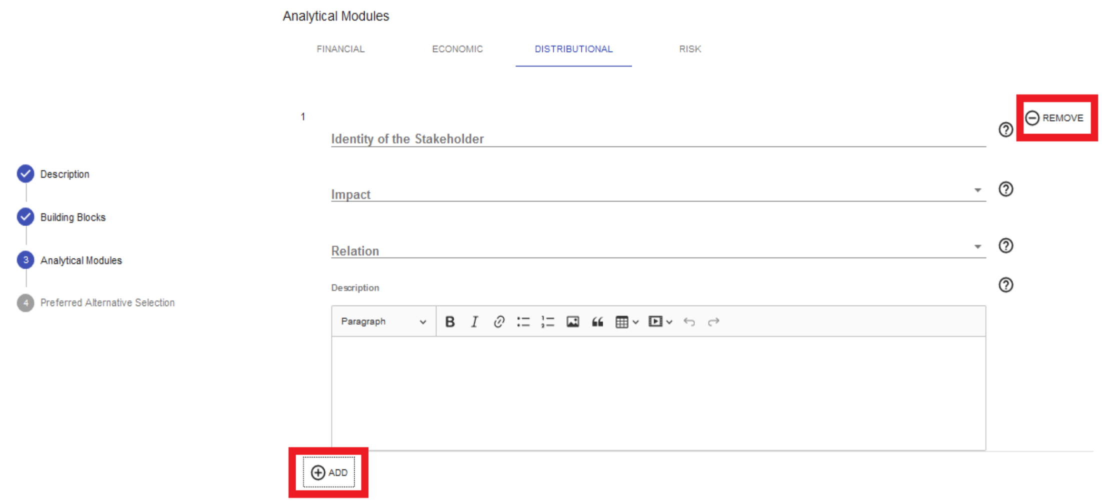
Step 18: In the Economic module, use the dropdown to identify the Appraisal methodology and give details of the results. Populate the Economic Analysis details in the section provided below.



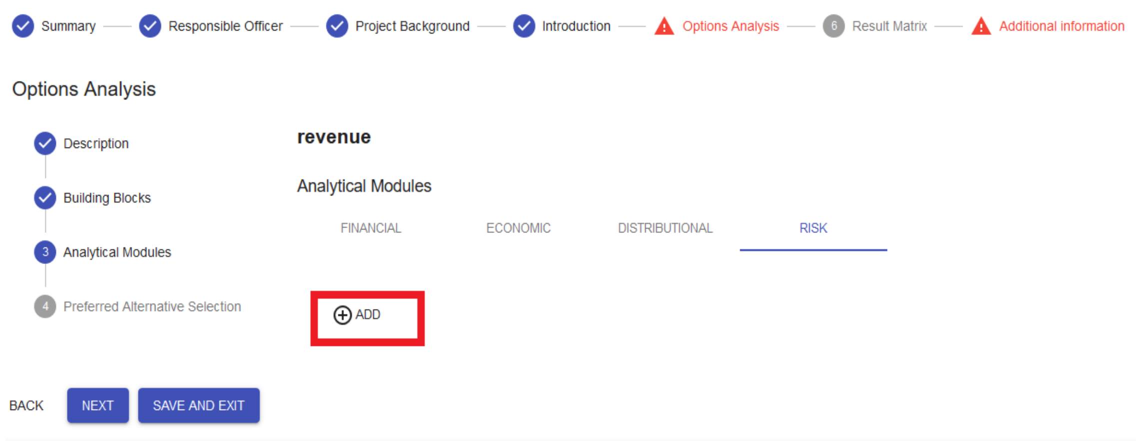
Step 19: Under the Distributional module, click **ADD**



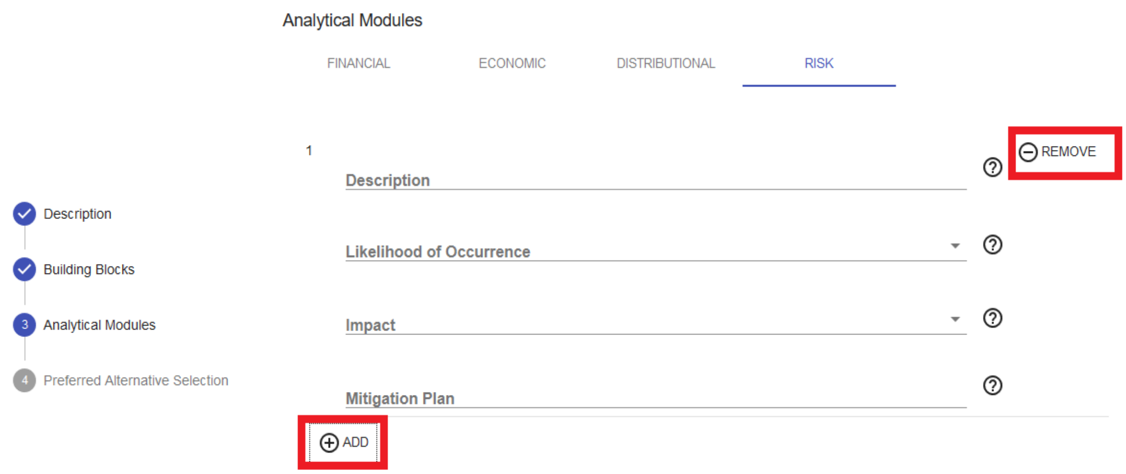
Step 20: Identify the stakeholders that will be affected by the intervention. Use the drop down to identify the impact and relation to the stakeholder. Describe the details of the stakeholder. You can add as many stakeholders as possible by clicking ADD and remove any stakeholder by clicking **REMOVE.**



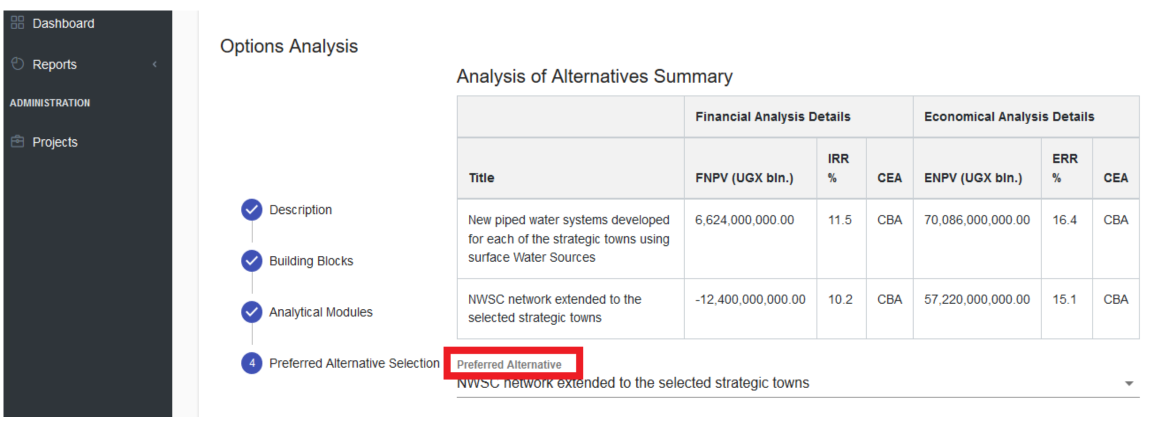
Step 21: Under the Risk Module, Click **ADD** to proceed to the next steps.



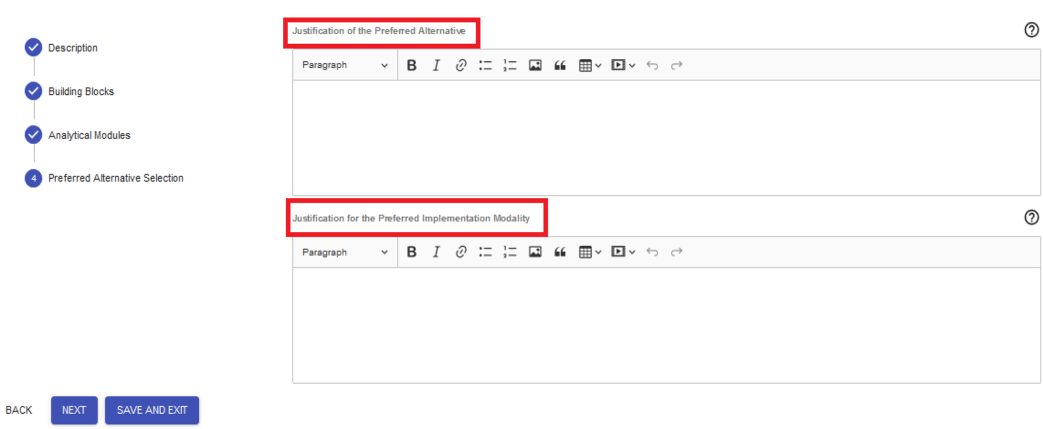
Step 22: Describe the risks that may affect the intervention in the Description section and with the help of dropdowns, identify the likelihood of occurrence and the impact. Describe the Mitigation plan of the given risk. You can add other risks by clicking ADD and remove them by clicking **REMOVE**.



Step 23: Under the Preferred Alternative Selection section, select one of the three options as the best option in the dropdown.

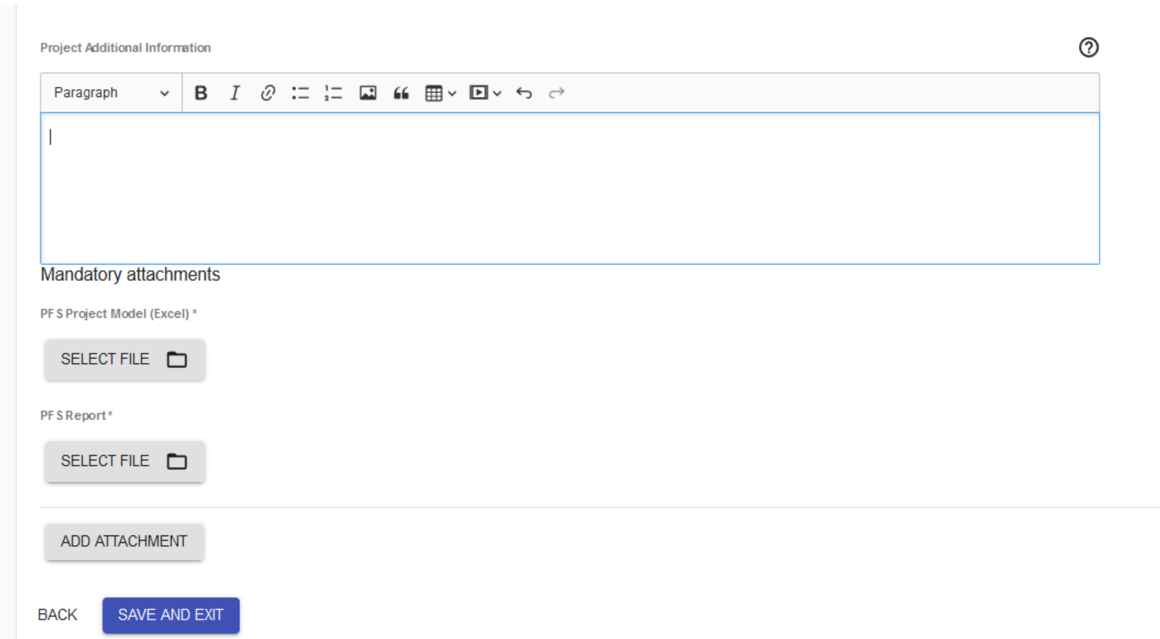


Step 24: Populate the Justification for the best alternative and preferred implementation modality. click the NEXT button and proceed to the next step

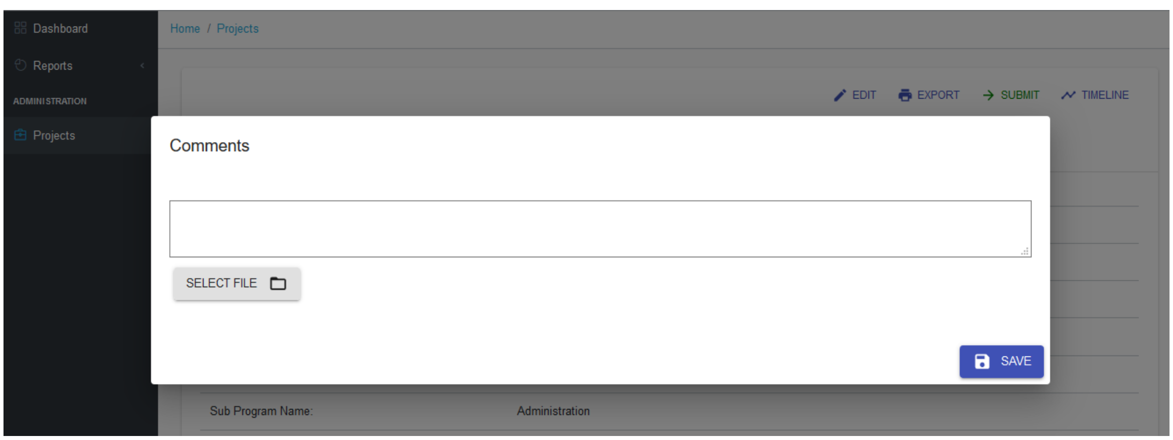


No matter how many options you add, in the `Best Option Selection` there will be only three shortlisted options with the highest `Total Score`.

Step 25: In the Additional Information window, Select file to attach the PFS Project Model (Excel) and PFS report. Add any other attachments by clicking ADD ATTACHMENT then click the SAVEAND EXTI button to go to the project page.



Step 26: After review of information entered, click SUBMIT, that would send the third phase of the project for approval to the Department Head. In the Comments window, make a comment and, if necessary, upload the file, then click on the **SAVE** button.



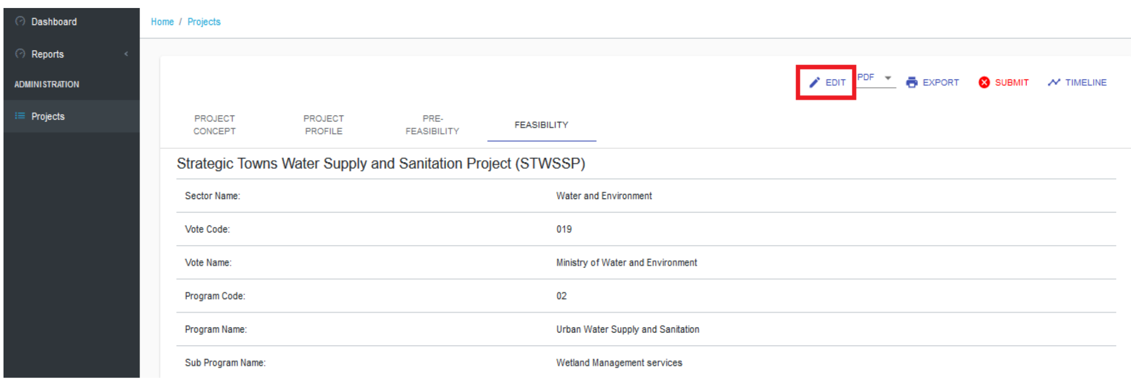
The system will freeze the project information, not allowing any changes to be made, and only the user responsible for reviewing it will have the options of APPROVE, **REJECT**, and **DEFER** options.

Once the project has passed through all the steps of the workflow and is approved by all required parties the project will be moved to the next phase, which is Feasibility phase.

2.1.4 Feasibility Study

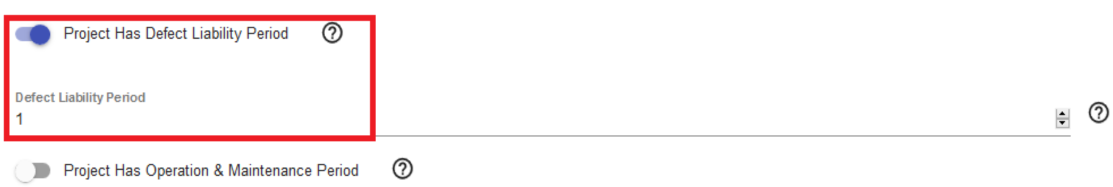
In the **FEASIBILITY** study, all the information from the previous project phase is auto generated and editable at this stage, except: Rationale of the Study, Methodology, Organization which are moved to this stage blank to allow the user to update them.

Step 1: To go through all the steps of the Feasibility Study phase, click the EDIT button.

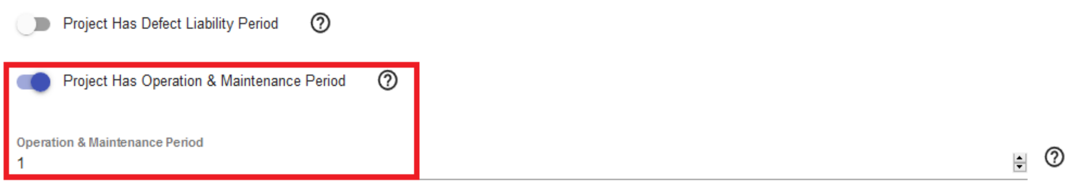


Step 2: In the Summary window, you will notice a new section with toggle buttons.

Identify whether the project will have Defect Liability Period and turn on Project Has a Defect Liability Period toggle button if a warranty period is provided and specify the warranty period, if not, keep the toggle button turned off.



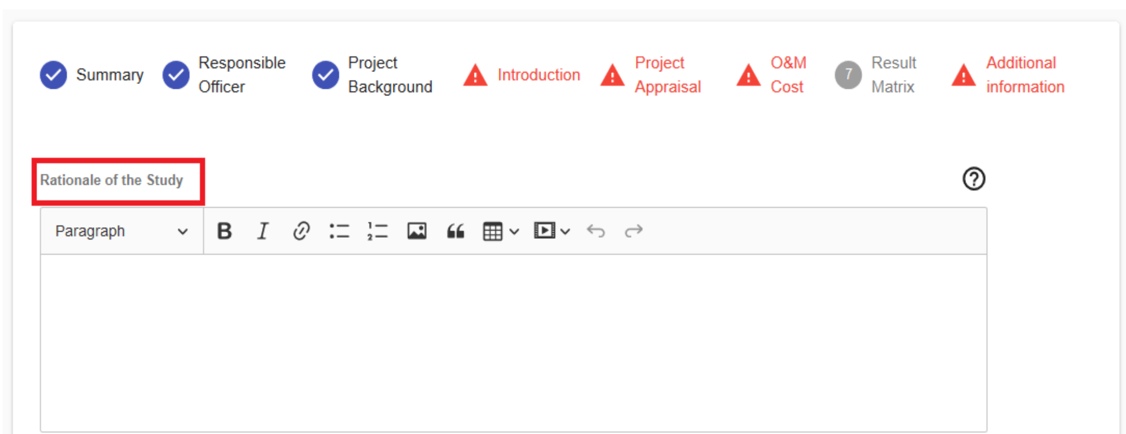
Step 3: There is a toggle button for Project Has Operation & Maintenance Period, if the project needs maintenance after its completion, turn on the toggle button and specify the required maintenance period in years, if not, the toggle button remains off.



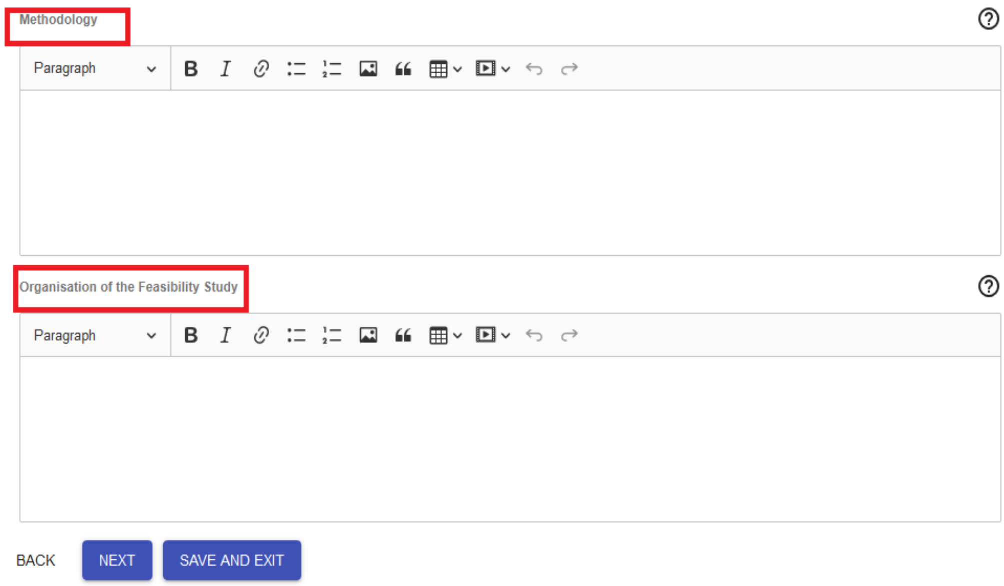
Step 4: Populate the Executive summary section and click NEXT to proceed to the next steps.

If responsible officer and Project background do not contain any new data to be entered, go direct to the Introduction window.

Step 5: In the Introduction window, fill in the Rationale for the Study has shown below.

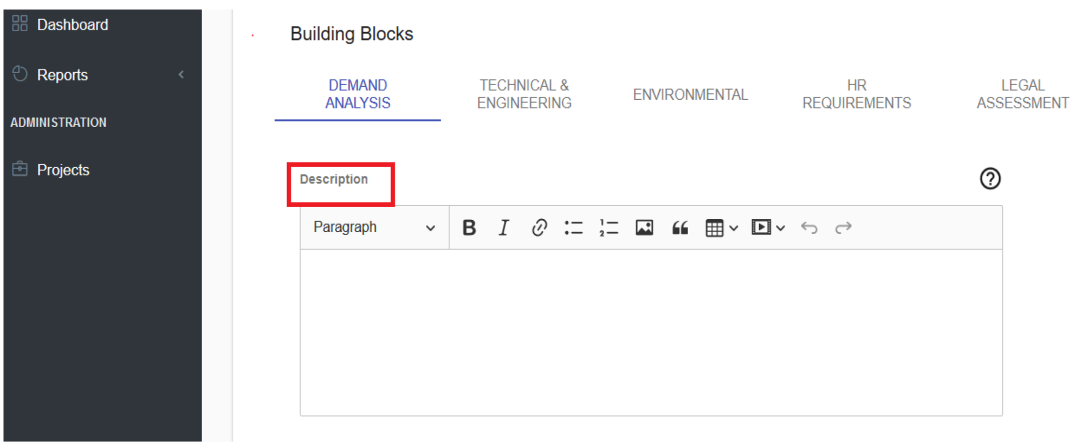


Step 6: Fill in the Methodology and Organisation of the Study sections then click NEXT to proceed to the next sections

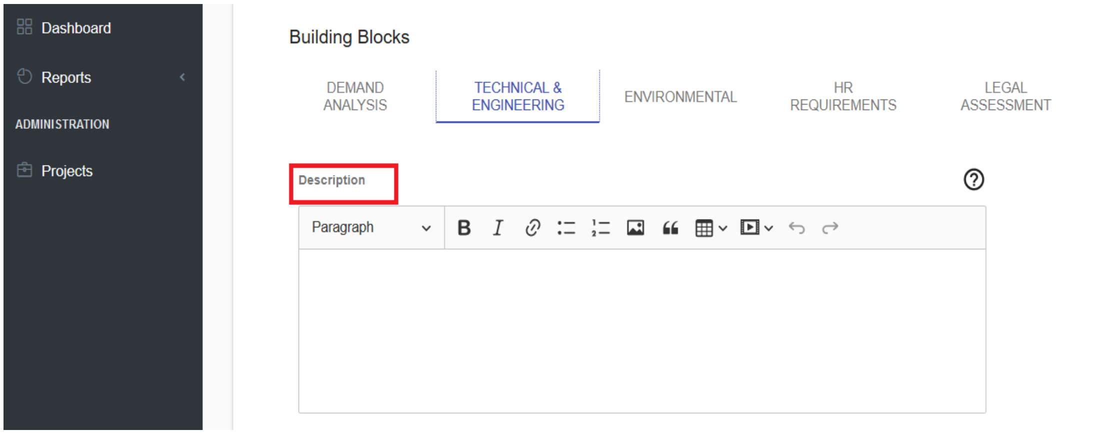


Under the Project Appraisal window, click NEXT to proceed to the next section or SAVE AND EXIT to come back to the document later.

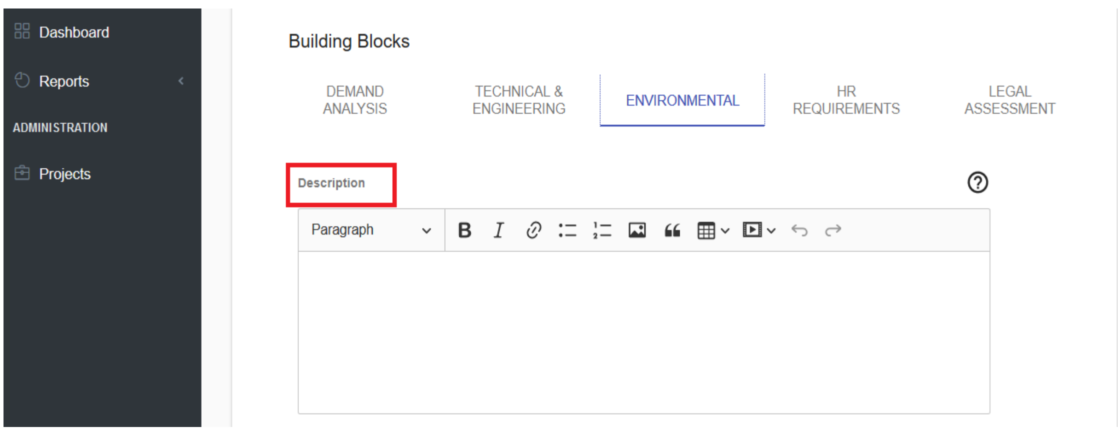
Step 7: Describe the Demand Analysis for the preferred option.



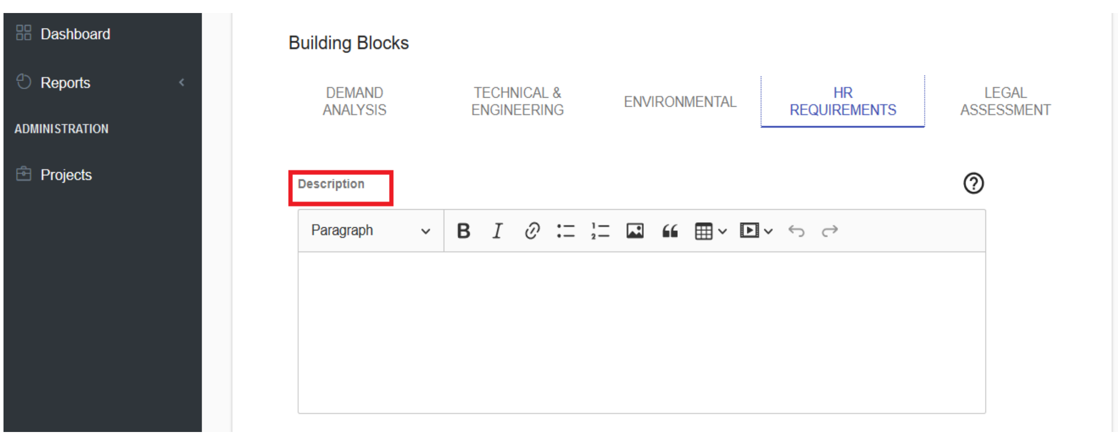
Step 8: Describe the Technical & Engineering aspects of the preferred option



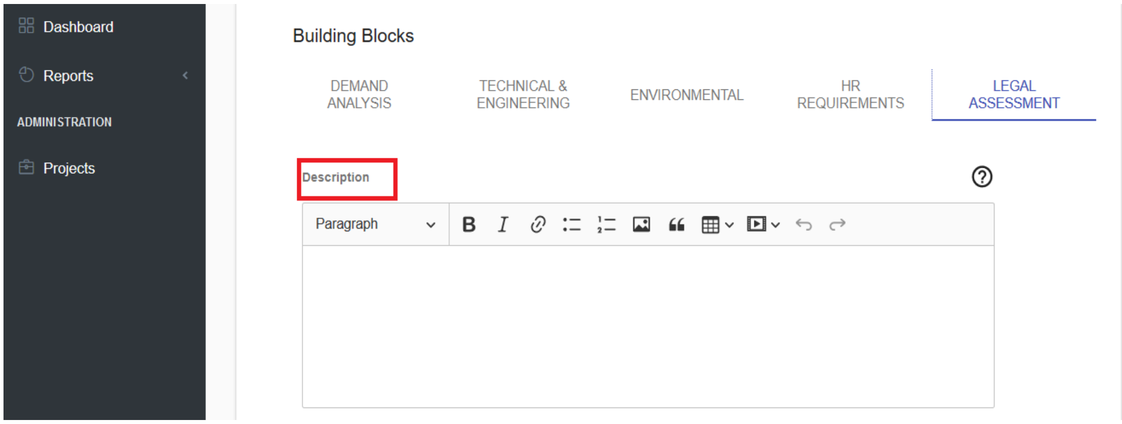
Step 9: Under the Environmental module, describe the environmental aspects of the best option.



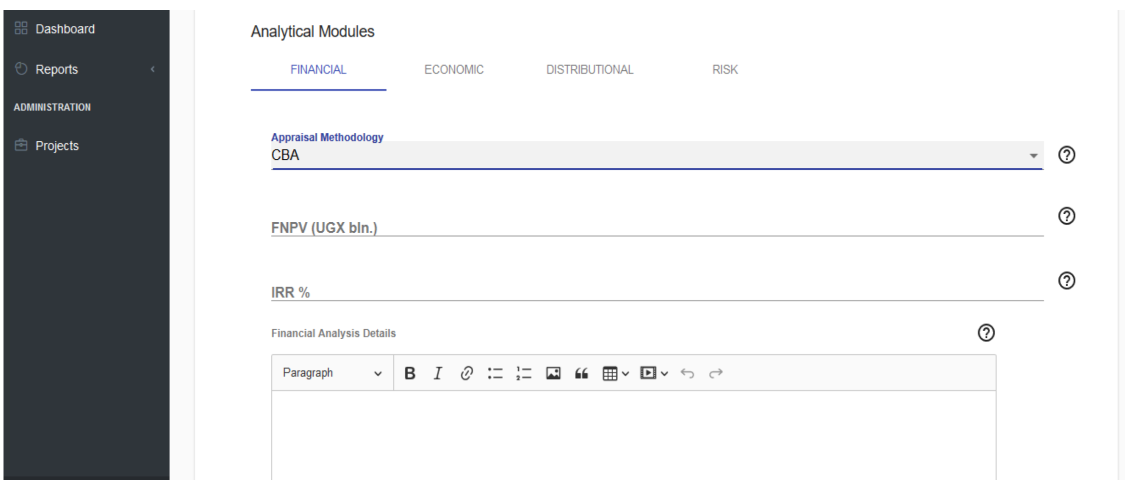
Step 10: Under the HR Requirement module, describe the Human resources that will be needed in the best option.



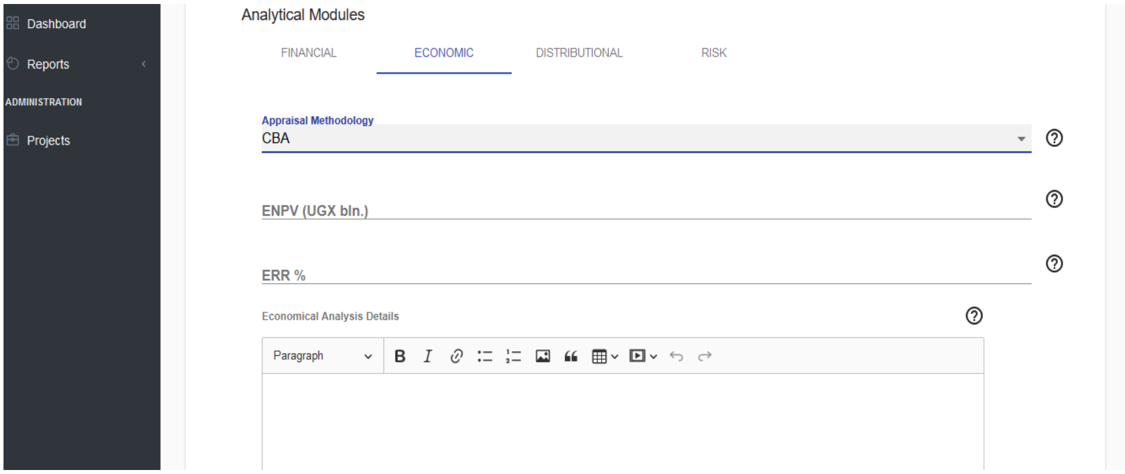
Step 11: Under the Legal Assessment module, describe the legal aspects in regard to the best option.



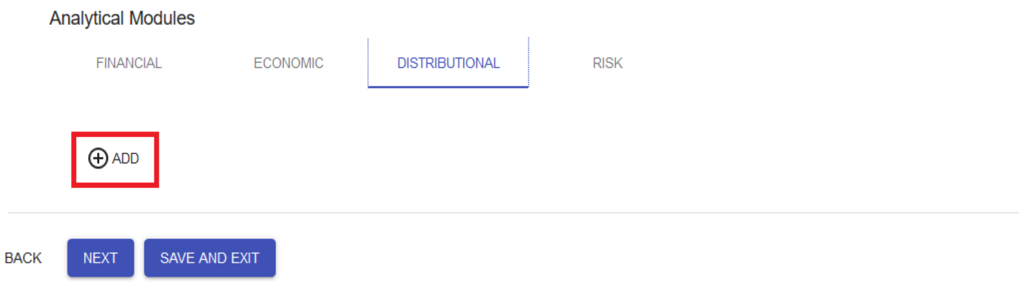
Step 12: Under the Analytical module, in the financial module, use the dropdown to identify the Appraisal methodology either CEA or CBA and give details of the financial analysis of the best option.



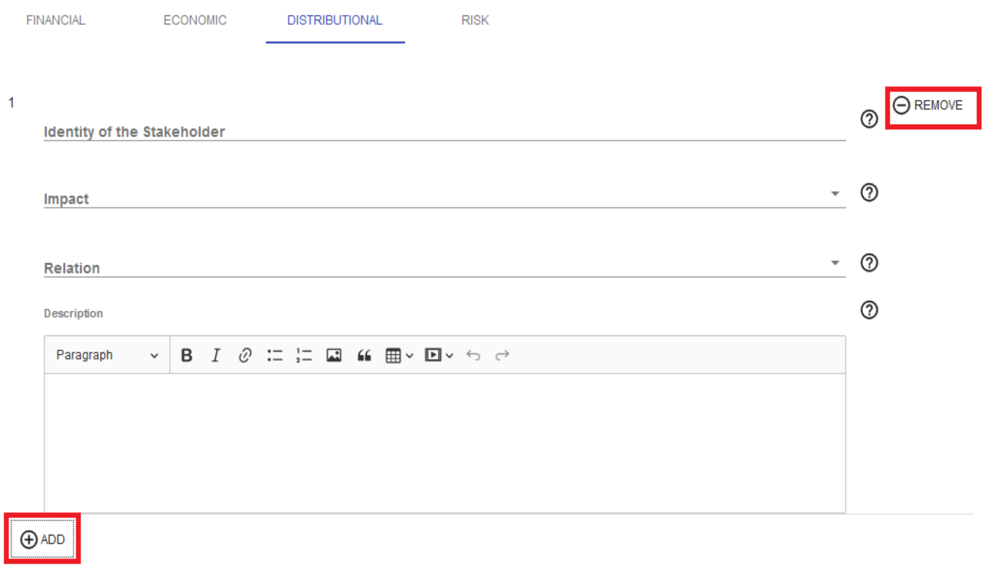
Step 13: In the Economic module, use the dropdown to identify the Appraisal methodology either CEA or CBA and give details of the Economic analysis of the best option.



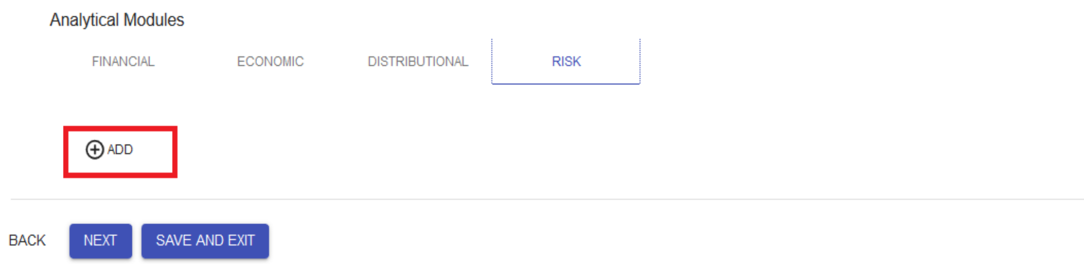
Step 14: Under the Distributional module, click **ADD**



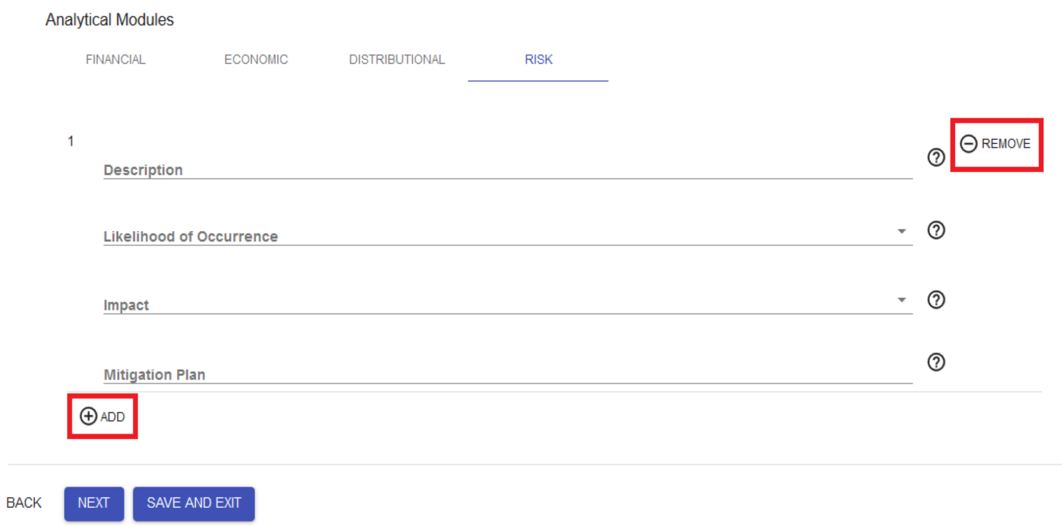
Step 15: Identify the stakeholders that will be affected by the intervention. Use the drop down to identify the impact and relation to the stakeholder. Describe the details of the stakeholder. You can add as many stakeholders as possible by clicking **ADD** and remove any stakeholder by clicking **REMOVE.**



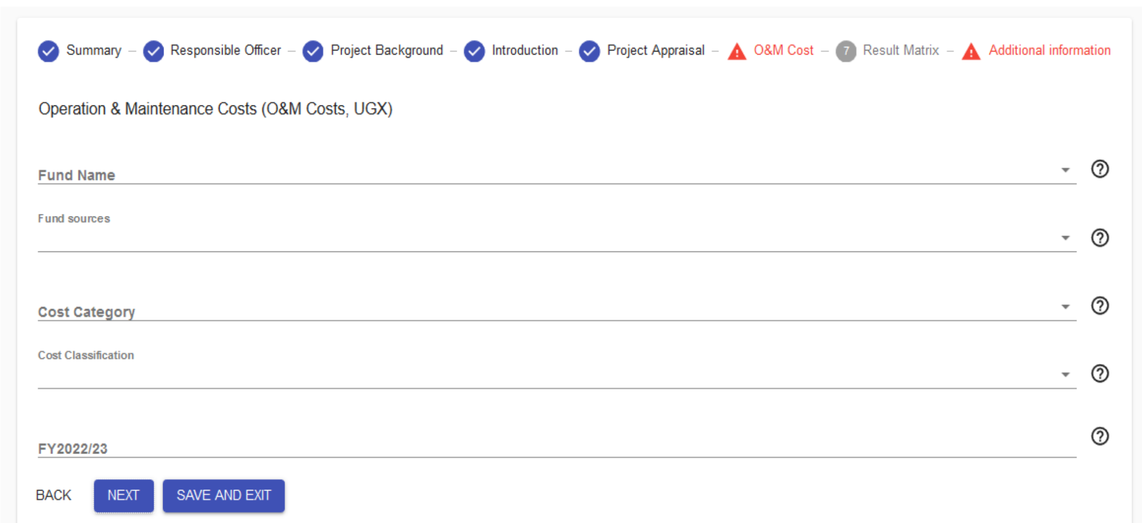
Step 16: Under the Risk module, click ADD



Step 17: Describe the risks that may affect the intervention in the Description section and with the help of dropdowns, identify the likelihood of occurrence and the impact. Describe the Mitigation plan of the given risk. You can add other risks by clicking ADD and remove them by clicking **REMOVE.**

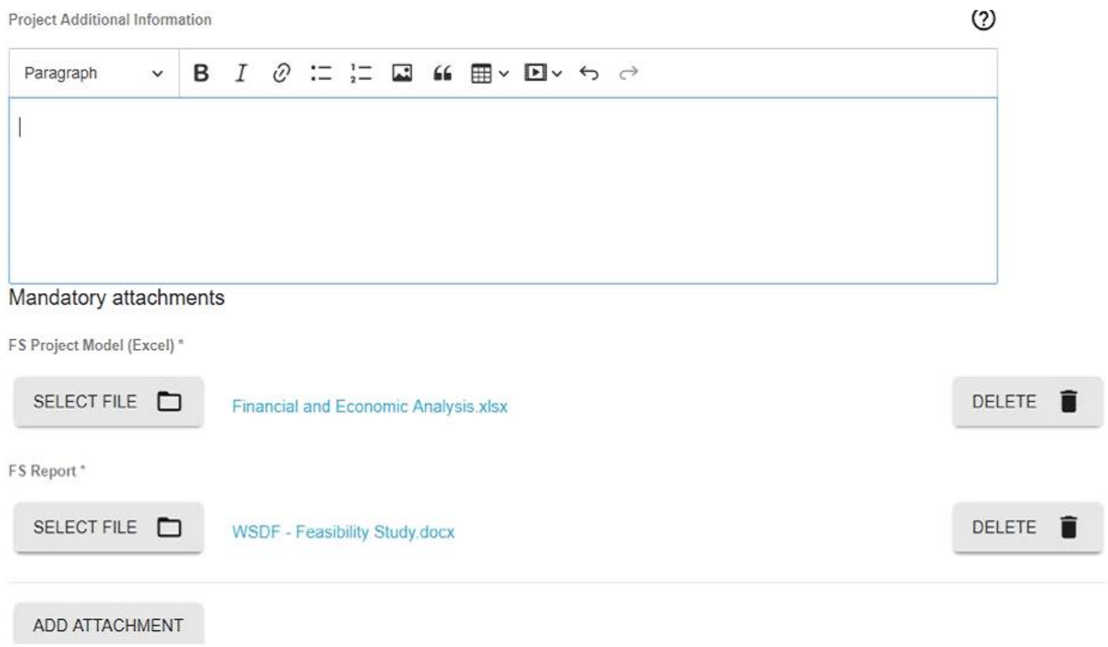


Step 18: **O&M** Cost depends on what you choose in the first step of the project: Project Has Operation & Maintenance Period , if maintenance is necessary and the relative toggle button is turned on, you will need to fill in operating and maintenance cost Fund name, Fund source, cost category, and cost classification using the drop downs provided. Click **NEXT** to proceed to the next step.

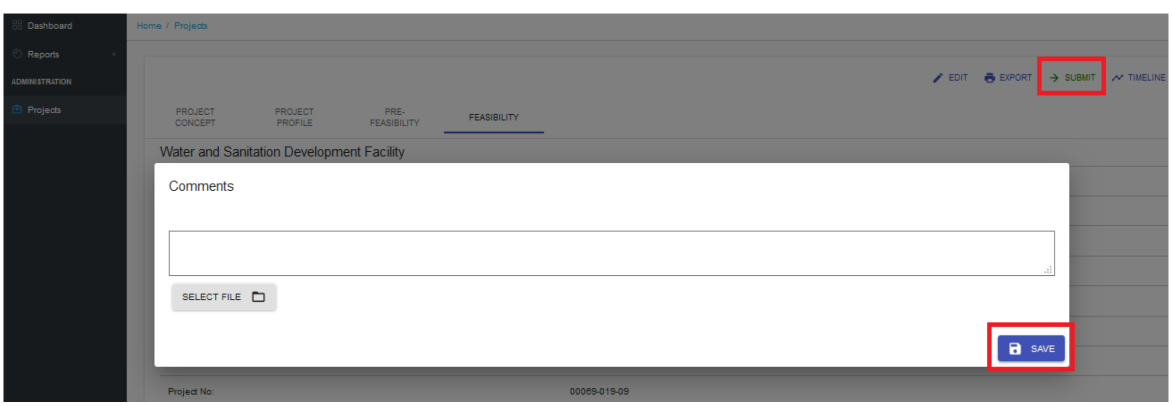


Number of years (duration) in `O&M cost` section depends on the number of years entered when enabling `Project Has Operation & Maintenance Period` in the first step. Note that O&M period starts after the warranty period if applicable, otherwise right after project completion.

Step 19: In the Additional Information window, Select file to attach the FS Project Model (Excel) and FS report. Add any other attachments by clicking **ADD ATTACHMENT** then click the **SAVE AND EXT** button to go to the project page.



Step 20: After you review information entered, click **SUBMIT**, that would send the fourth phase of the project for approval to the Department head. In the Comments window, make a comment and, if necessary, upload the file, click on the **SAVE** button.



Then the system will freeze the project information, not allowing any changes to be made, and only the person responsible for reviewing it will have the options of **APPROVE**, **REJECT**, and **REVISE**

Once the project has passed through all the steps of the workflow and is approved by all required parties the project will be moved to a next phase, which is Project Proposal phase.

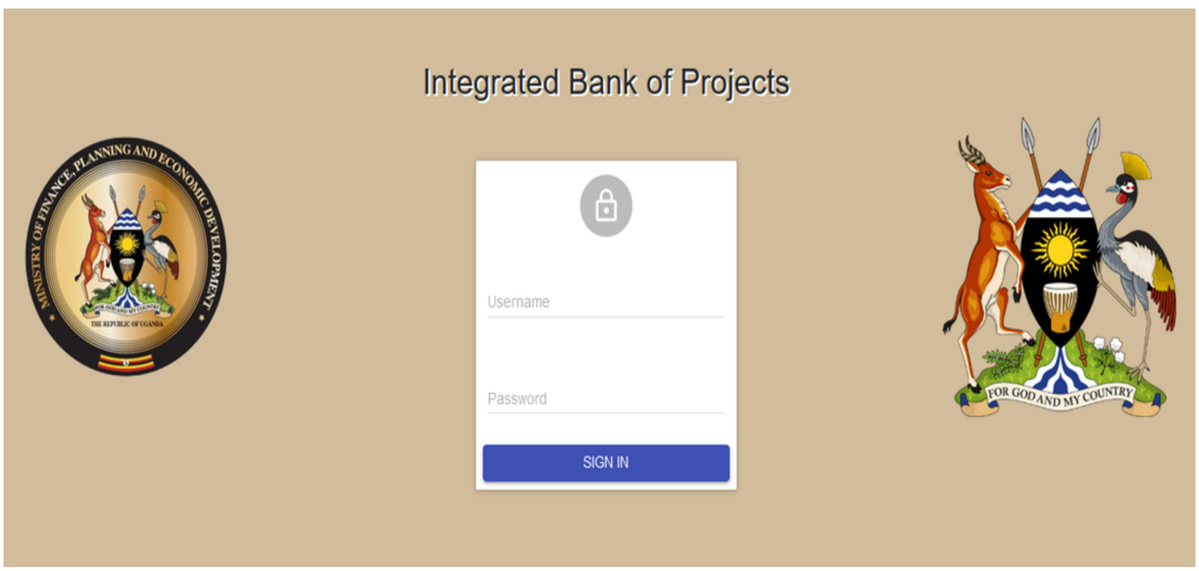
At a Project Proposal phase there will not be any new information and all the information saved in previous phase will be moved to the Project Proposal phase. Click **SUBMIT** button to submit the final phase of the project.

After all the approvals, the project status will show **COMPLETED.**

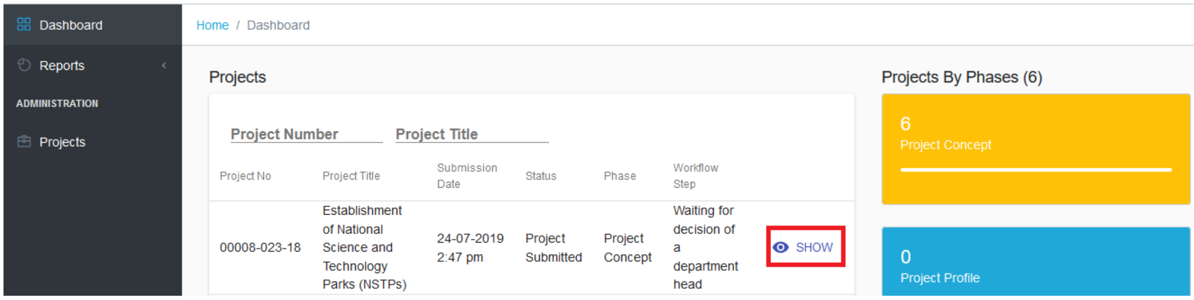
3.0 Role of Department Head, Planning Head, Planning Head, Accounting Officer and Sector Head.

Step 1: To access the login page of the system by the users go to http://ibp.finance.go.ug

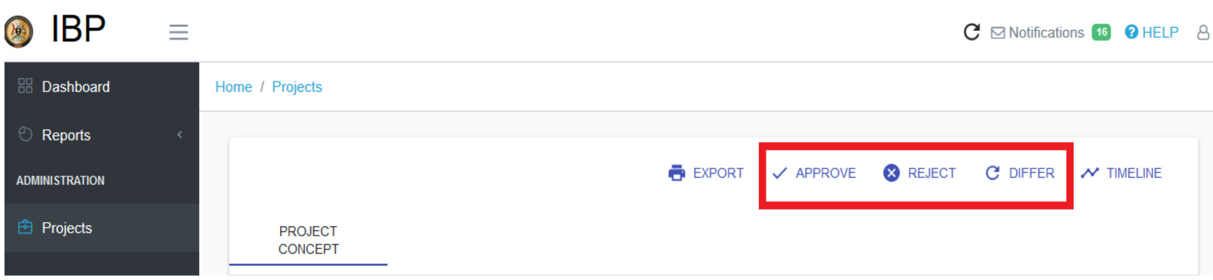
Step 2: Fill in the Username and password the click **SIGN IN**



Step 3: The user will have all the projects awaiting his decision in the dashboard. Click **SHOW** on the project to be reviewed and the **APPROVE**, **REJECT** and **DEFER** buttons will be displayed.

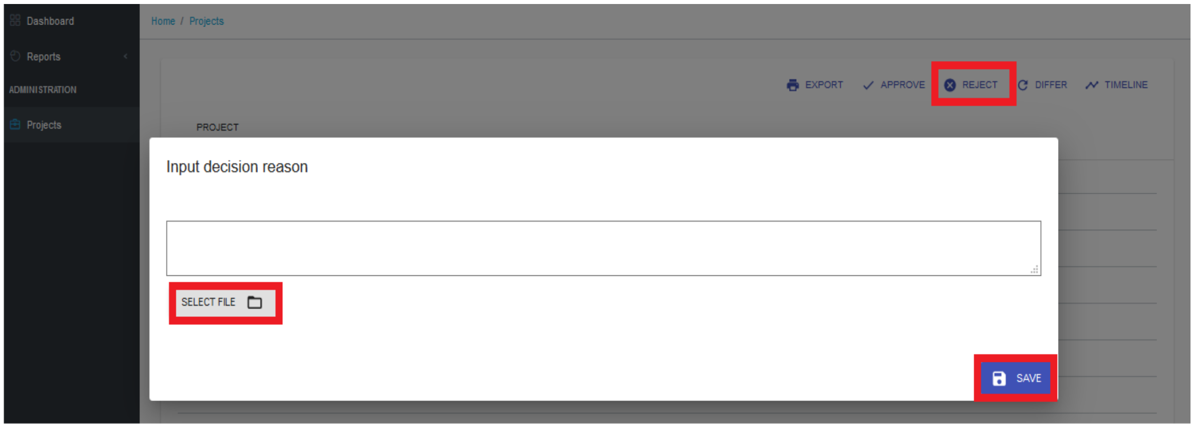


Step 4: APPROVE, REJECT and DEFER buttons will be displayed.



i. To reject the project, click the **REJECT** button, the reason for rejecting the project must be indicated in the Input decision reason popup and attach the accompanying file if needed. Next, click the button **SAVE**.

Please note that once you reject the project you will no longer be able to put it back into the workflow. This action is non-revertible and means that the project doesn't meet the criterions and the work on planning the project should be stopped. If the project has been rejected by mistake, please contact system administrator to revert the project, but the log that this project has been rejected once will be still stored in a timeline for audit trails.



For the Planning Head, after clicking **REJECT** button, indicate the decision in the Input decision reason pop up and attach the PPC minutes and SWC minutes showing the decision taken. Then click **SAVE**

ii. If the project is not suitable for approval to the next level, then you can send the project for revision by pressing the Differ button. Be sure to leave a comment in the Input decision reason popup with explanation to the responsible person and therefore informing all project participants, since all participants will receive a notification when a project status is changed. Next, click the button SAVE. Once the project has been sent for revision the officer responsible for the project will get the project back to him and will be able to enter changes requested into the project and re-submit it.

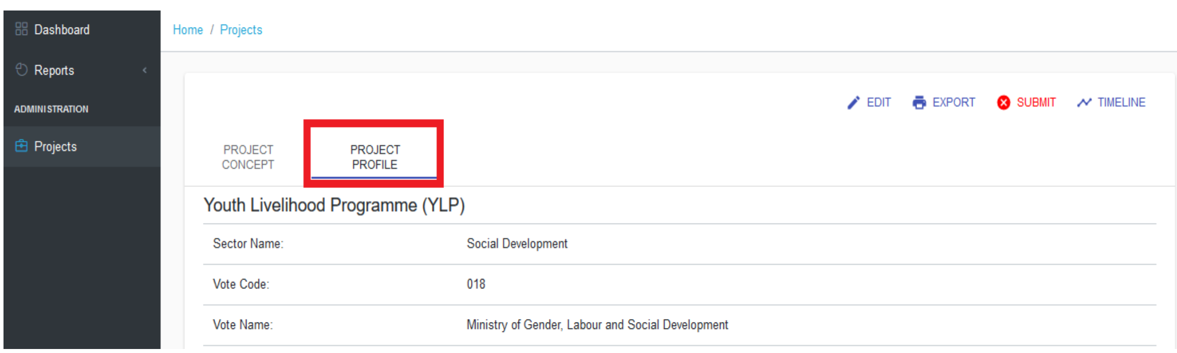
For the Planning Head, after clicking DIFFER button, indicate the decision in the Input decision reason pop up and attach the PPC minutes and SWC minutes showing the decision taken. Then click **SAVE**

iii. After successful completion of the review, click on the **APPROVE** button. Enter a comment in the Input decision reason field and press the **SAVE** button.

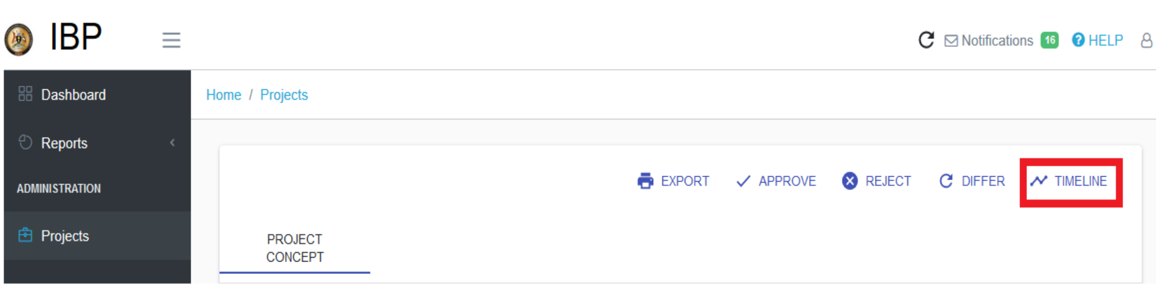
For the Planning Head, after clicking APPROVE button, indicate the decision in the Input decision reason pop up and attach the PPC minutes and SWC minutes showing the decision taken. Then click **SAVE**

After the project has been approved by the department head, Planning Head, Accounting Officer and Sector Head, the project work flow will change to waiting for DC decision in the work flow status.

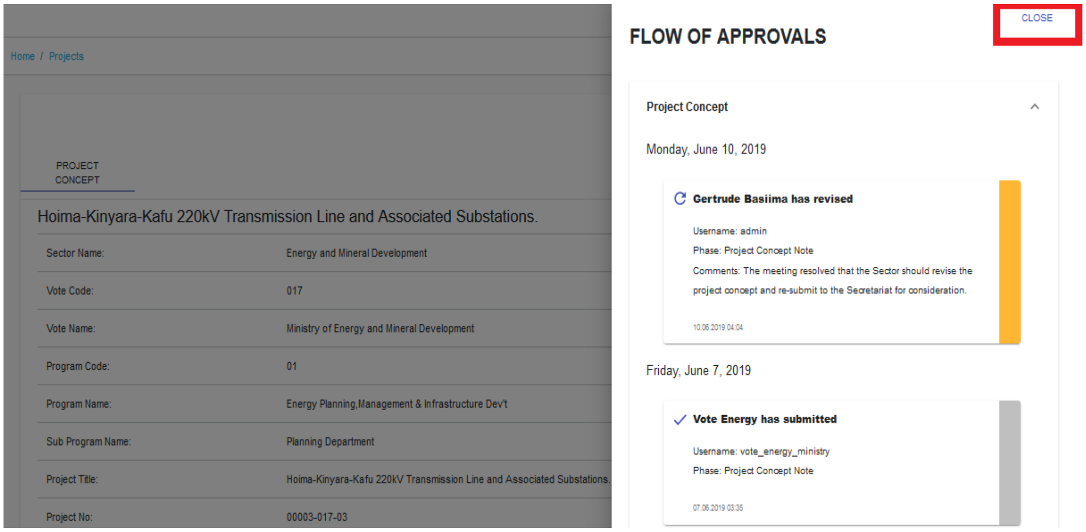
After the project has been approved by the Development Committee, the project will then be moved to the next stage. The department user will be able to view the next phase Profile in his dashboard and edit. All the information from the previous stage will be moved to the next one and the previous will be frozen implying that no information can't be changed/edited after.



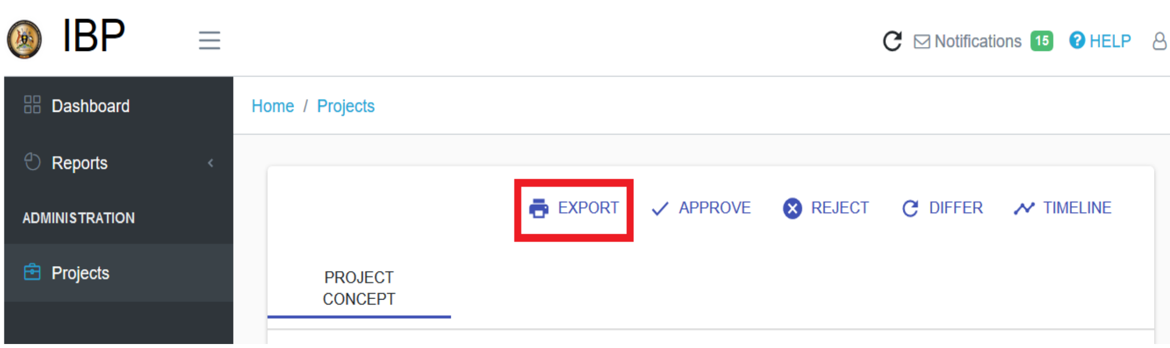
Step 4: To view the project approval flow process, click **TIMELINE** button shown below.



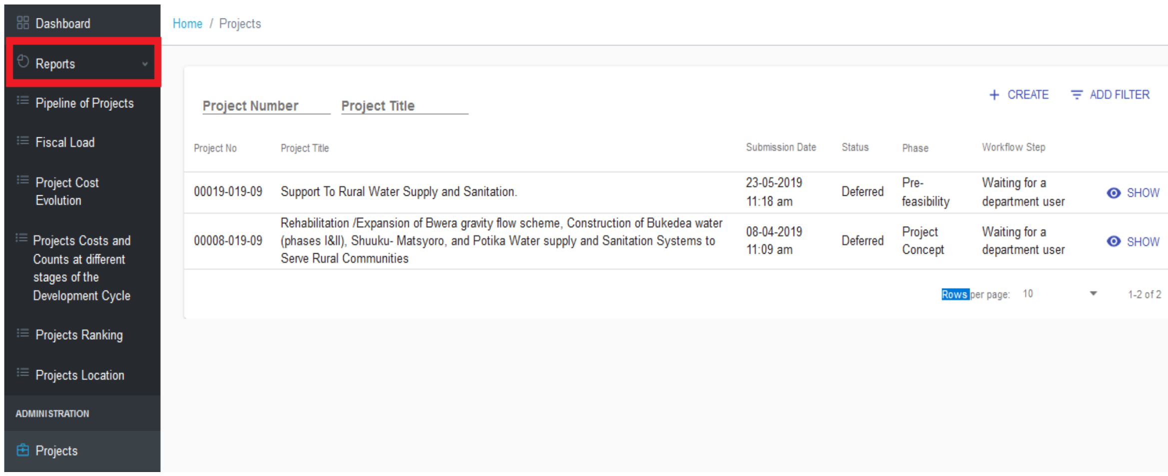
Step 5: The user will be able to view who and to whom the project has been sent for revision or approval, what were the comments, attachments, and the time of sending for revision. After viewing, close the window by pressing the **CLOSE** button.



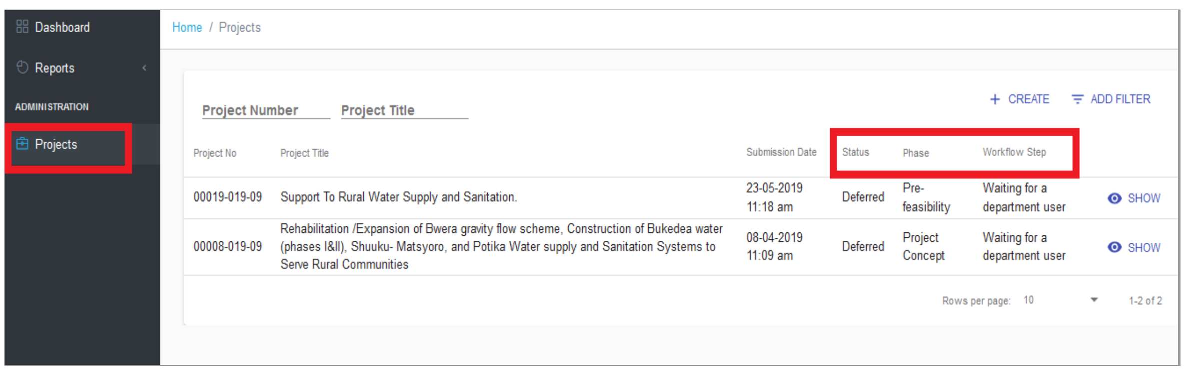
Step 6: To export the document click **EXPORT** button to download.



Step 7: The users can be able to view the different reports generated by the system depending on the information in the system by clicking on the Reports dropdown.



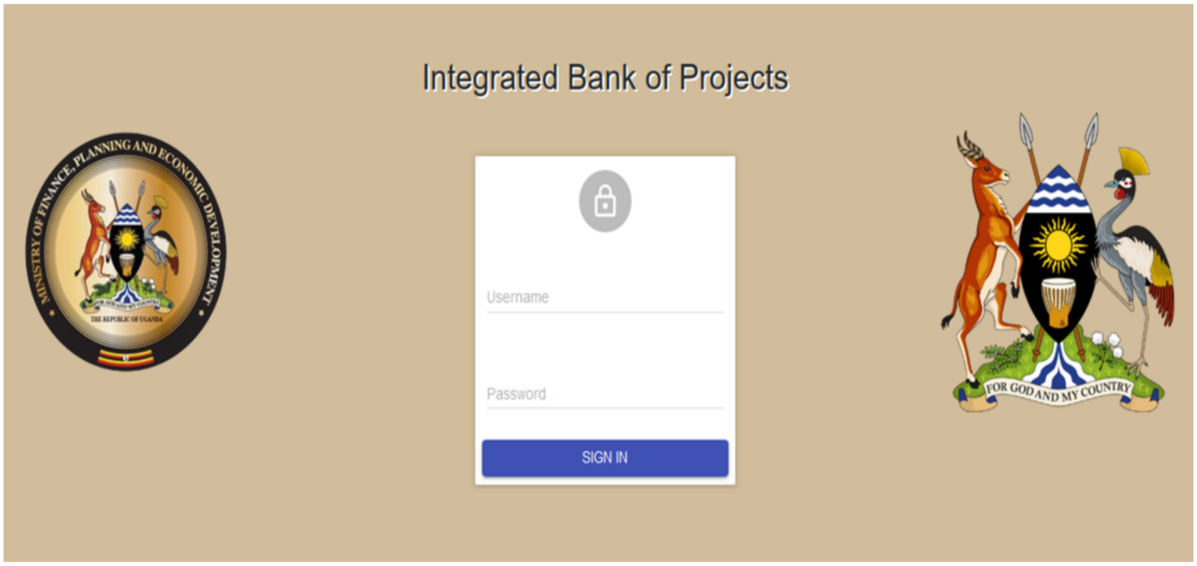
Step 8: Click Projects to view projects status phase and workflow steps of the different projects under your responsibility.



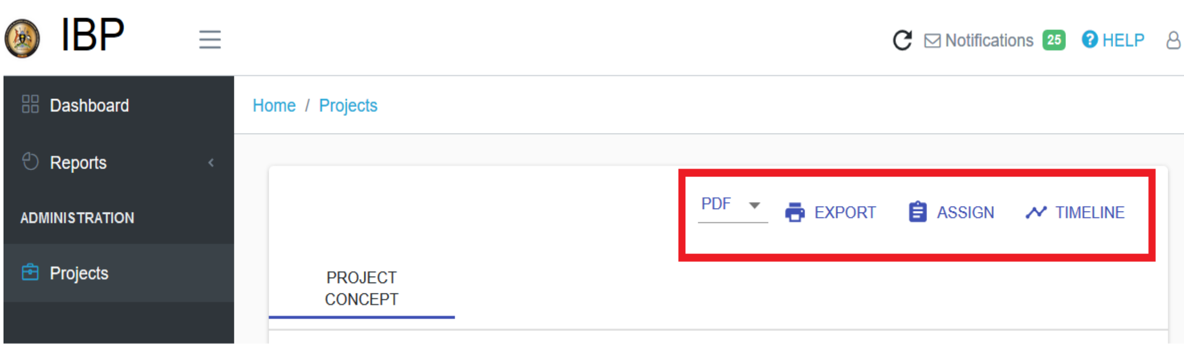
4.0 Role of DC Secretariat.

Step 1: To access the login page of the system by the users use http://ibp.finance.go.ug

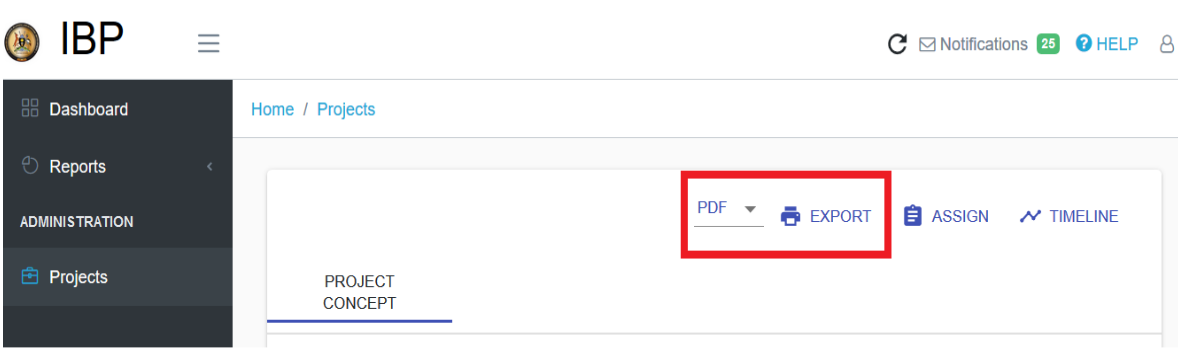
Step 2: Fill in the Username and password the click **SIGN IN**



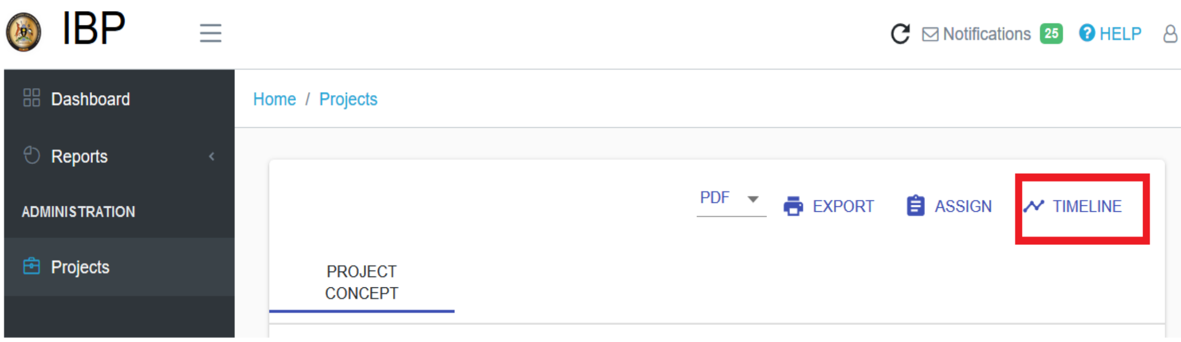
Logging in as Commissioner PAP, the user will have all the projects awaiting his decision in the dashboard. Click **SHOW** on the project to be reviewed. The user will have **PDF**, **EXPORT**, **ASSIGN**, **TIMELINE.**



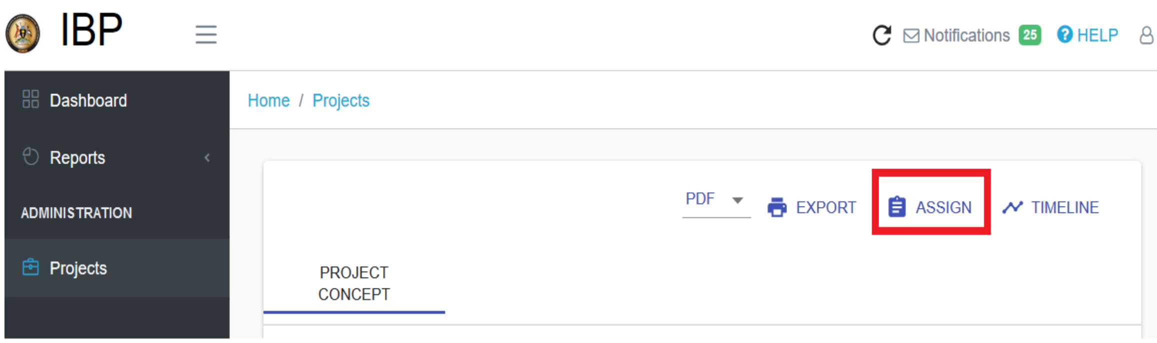
To export the document, click **EXPORT**. The document can be exported in either **PDF** format or **WORD** format.



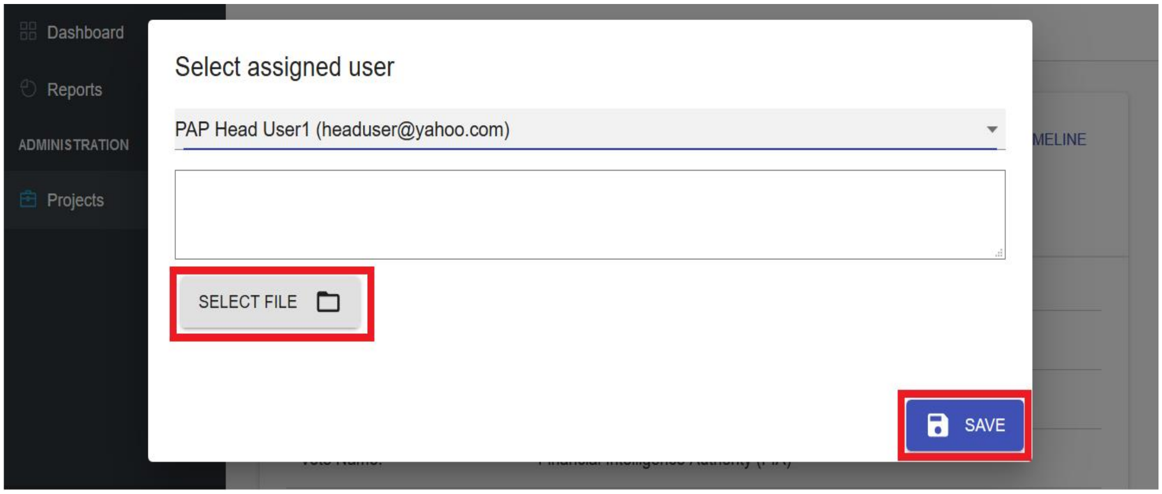
To view the project approval flow process, click **TIMELINE** button shown below. The user will be able to view who and to whom the project has been sent for revision or approval, what were the comments, attachments, and the time of sending for revision. After viewing, close the window by pressing the **CLOSE** button.



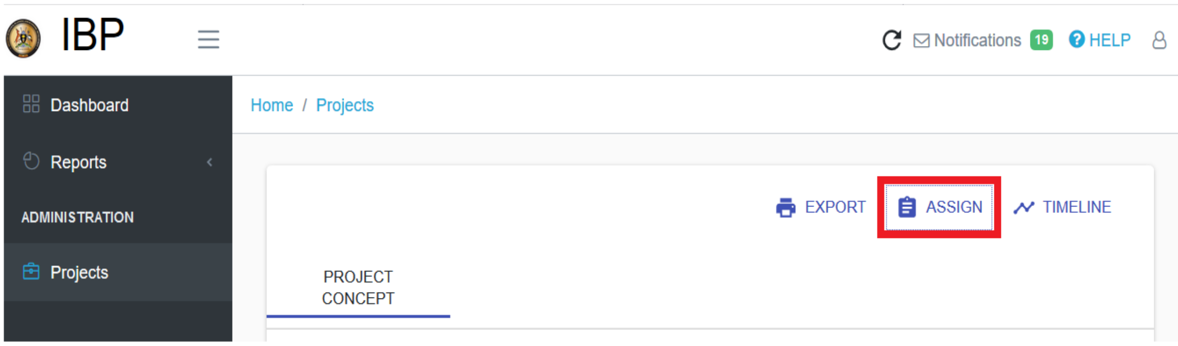
The Commissioner PAP clicks **ASSIGN** button to assign the project to the next user for analysis.



In the Select assigned user pop up, use the dropdown to select the PAP HEAD USER to assign a given project and any instructions regarding the project. CLICK **SELECT FILE** to attach a document if any then Click **SAVE**

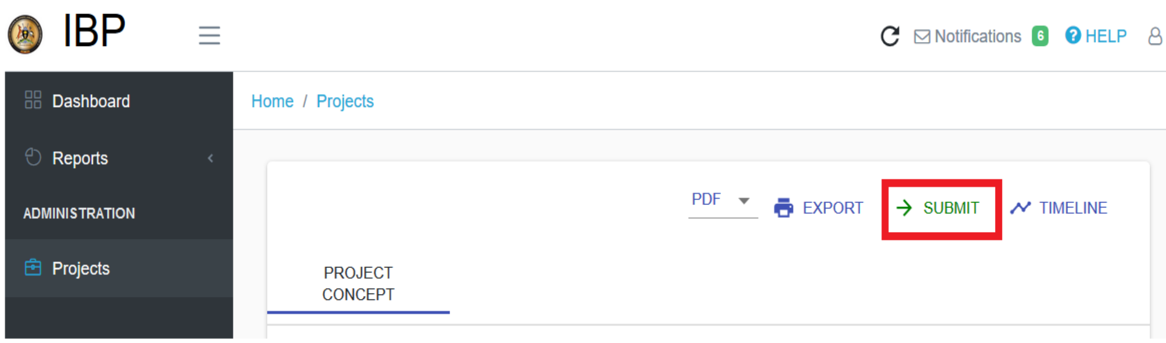


When the PAP HEAD user logs into the system, in dashboard he/she will be able to view the project and click ASSIGN button to assign the project to the **PAP STANDARD USER** to do analysis.

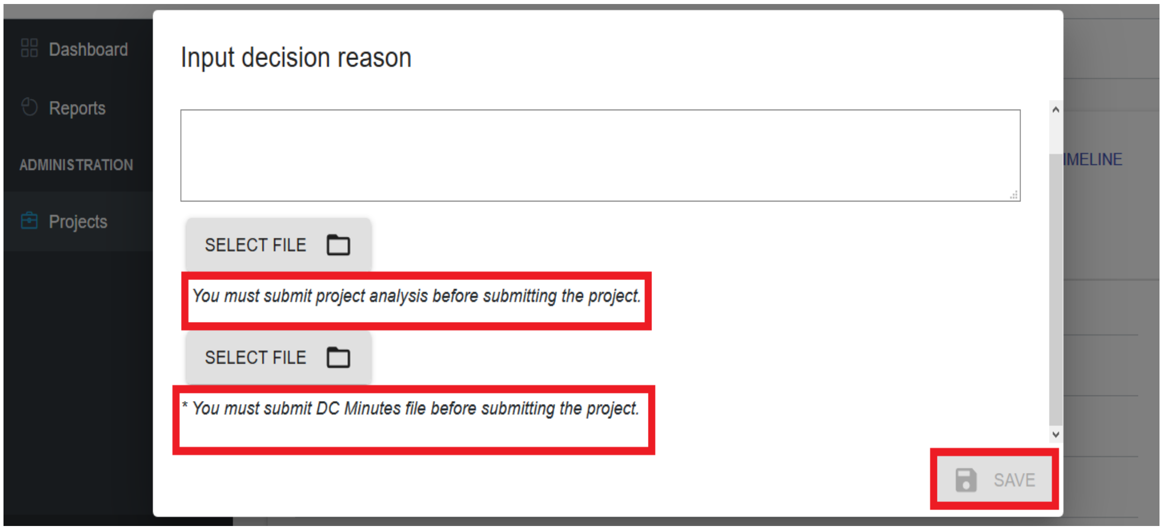


In the Select assigned user pop up, use the dropdown to select the PAP STANDARD USER to assign a given project for analysis and any instructions regarding the project. CLICK SELECT FILE to attach a document if any then Click **SAVE**

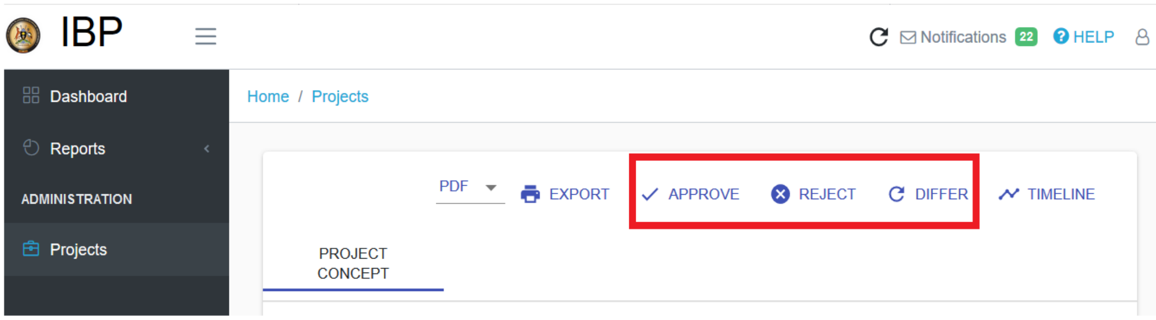
When the PAP **STANDARD USER** logs into the system, he/she will be able to view the project in the dashboard. Click **SHOW** on the project and the user will have active **SUBMIT** button shown below.



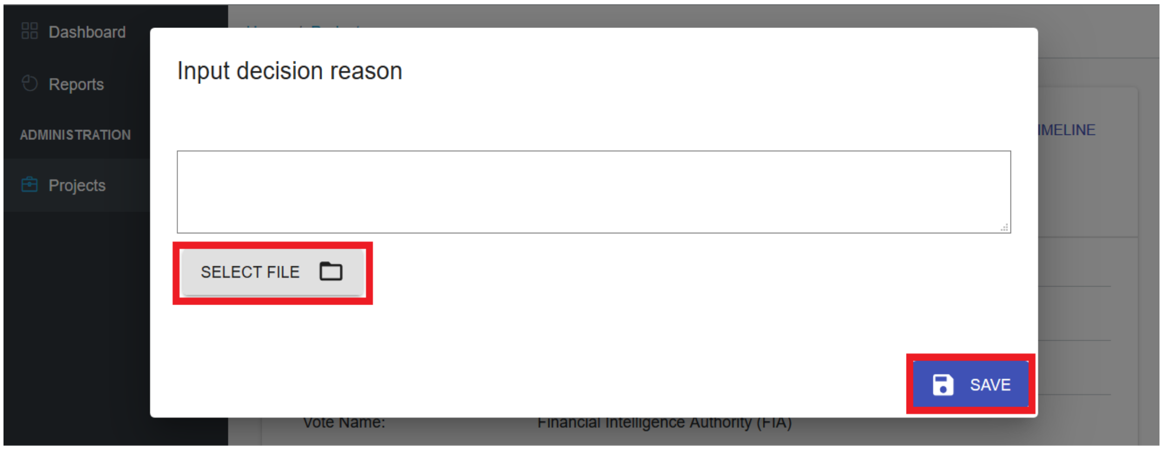
After clicking the **SUBMIT** button, indicate the decision in the Input decision reason pop up and attach the Project analysis and DC minutes by clicking **SELECT FILE**. Then click **SAVE**



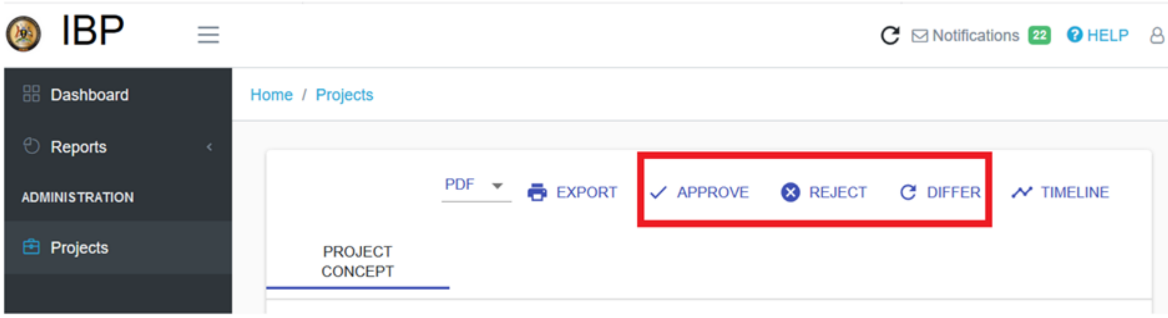
After submission of the analysis by the **PAP STANDARD USER**, the project is forwarded to the PAP HEAD for approval. In the **PAP HEAD** dashboard, it can be able to be viewed. Click **APPROVE, REJECT or DIFFER** depending on the decision.



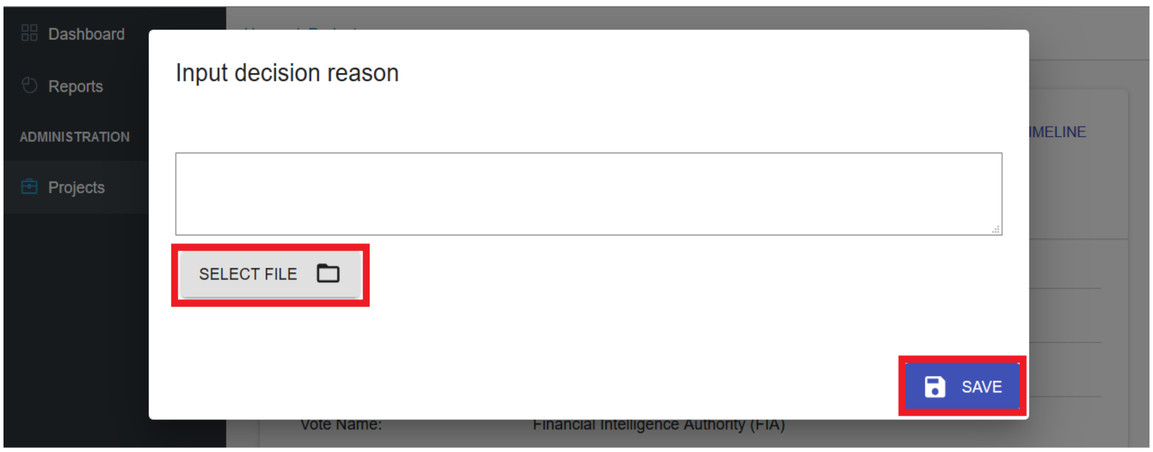
In the Input decision reason pop up, indicate the reason for the decision and attach the file by clicking **SELECT FILE** then click **SAVE**



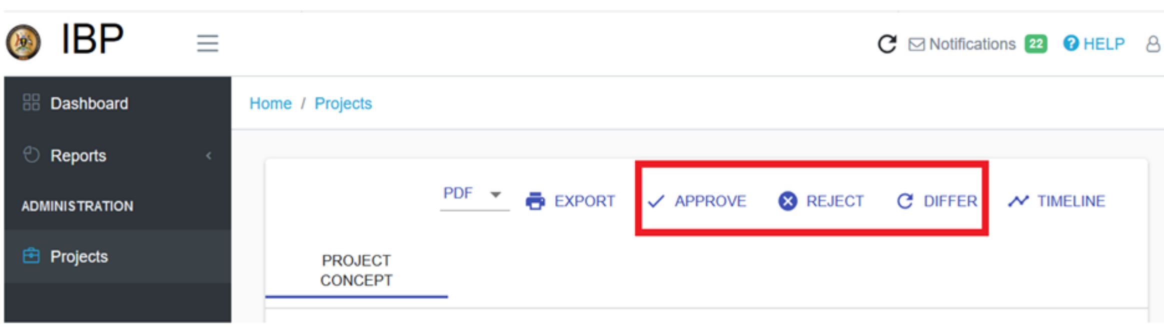
After approval by the **PAP HEAD**, the project analysis is sent to the Commissioner PAP for approval. The PAP commissioner will click **APPROVE, REJECT or DIFFER**.



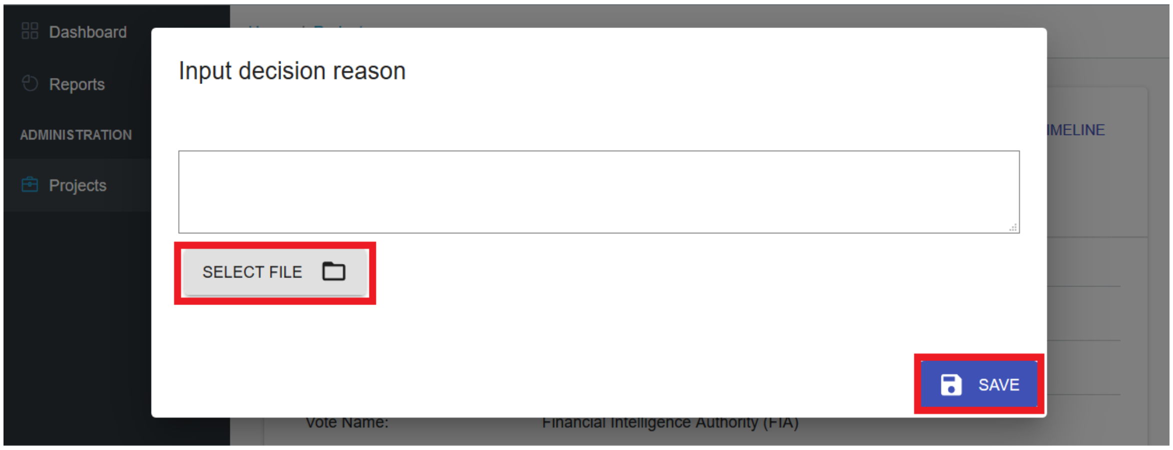
In the Input decision reason pop up, indicate the reason for the decision and attach the file by clicking **SELECT FILE** then click **SAVE**



The PAP Commissioner will again click **APPROVE, REJECT or DIFFER**. This will depend on the decision regarding the project taken by the **DEVELOPMENT COMMITTEE**.



In the Input decision reason pop up, indicate the reason for the decision and attach the file by clicking **SELECT FILE** then click **SAVE.**



The project then will be sent back to the department user for revision, proceed to the next stage or Reject according to the decision by DC. All the users with connection to the project will receive a notification on regarding the change of project workflow.

5.0 Notifications

Every user in IBP system has access to notifications in the upper right corner. Notifications are sent automatically by the system depending on your access level to the projects. Users will receive a notification when any change in the status of the project that they have access to has been recorded in the system. Therefore, keeping them up-to-date at all times.

The badge on the right of the Notification menu shows number of unread messaged that you have. Moreover, when you are on any page in the system and a project that you have access to has been updated, the system will display you a message indicating that you have received a new notification.

You can go to the list of your notifications and view or delete them. The list differentiates read so you never miss important status update. When viewing the notification, the system automatically marks it as read. A notification message contains all relevant and important information about the updates on a project as well as the link which you can follow to view details of the project. Also, you can click on a Delete button to delete messages to keep your inbox clean