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# 1.0 Proposal Management

# 1.1 Working Groups

This section outlines adding a working group:

From the Proposal Management Menu, Click "Working Group"

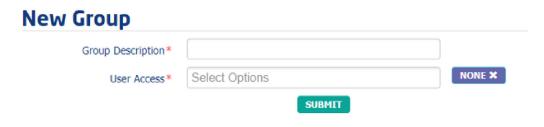
(Proposal Management » Working Groups)



To enter a new working group, select



- 1. Enter the Work Group Name/ Description
- 2. Select the employees with access to this group.



- 3. Select Submit to save.
- 4. Select to edit and to delete a working group.

Group Name 👢	Added Date	Added By		
Technical Working Group	21 Jul 2022	Jamie Azul	<b>✓ EDIT</b>	m DELETE
Climate Finance	25 Jul 2022	Kayla Burns	✓ EDIT	m DELETE

# 1.2 Document Sharing

This section outlines adding a Document Sharing:

From the Proposal Management Menu, Click "Document Sharing"

(Proposal Management » Document Sharing)

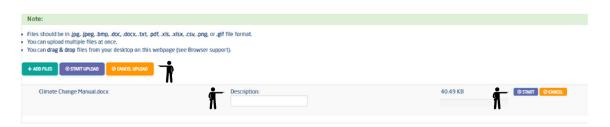


1. Select a Working Group to add documents to.

Proposal Management >> Documents Sharing



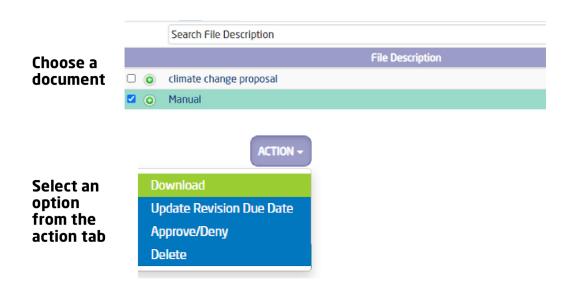
- A. Select and choose a file to upload.
- B. Enter a Title/Description for the document.
- C. Select ostart upload or start to upload the file.
- D. Select ocancel file upload.



#### 2. To:

- a. Download the document
- b. Update the document Revision Date
- c. Approve/Deny the document
- d. Delete the document

CHOOSE the document and select the action tab for edit options.



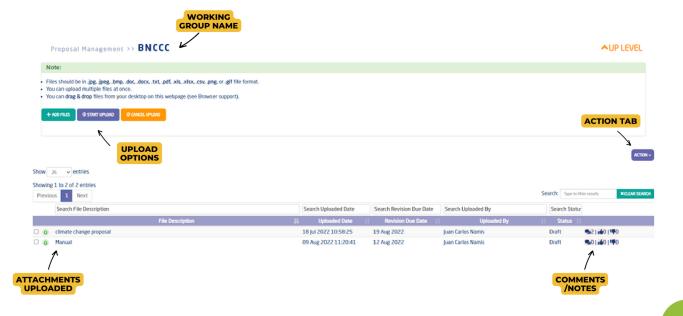
3. To add notes to the document uploaded,

Click the file ( Manual ) and click



Document D	etails						
Group: BNCCC   File: Manual Upload Date: 09 Aug. 2022   Upload By: Juan Carlos Namis   Status: Draft   Revision Due Date: 12 Aug. 2022							
Add Note Show 25 Showing 0 to Previous	entries o O of O entries Next						
	Search Date	Search Notes					
Date JA		Notes					
		No data available in table					

# **OVERVIEW:**



# 1.3 Document Revision

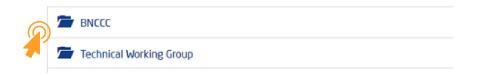
This section outlines adding a **Document Revision**:

From the Proposal Management Menu, Click "Document Revision"

(Proposal Management » Document Revision)

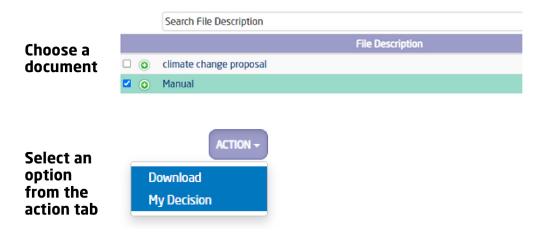


 Select a Working Group folder with the documents you want to revise.



- 2. To:
  - a. Download the document
  - b. Make a Decision

**CHOOSE** the document and **select** the action tab for options.



# 2.0 Frameworks

# 2.1 Add Project/Programme

This section outlines creating a policy/project

(a) From the Frameworks Menu, Click "Add Project/ Programme"

(Frameworks >> Add project/ Programme)



From the

Add Project/Programme Sub

Menu. Click "Basic Information"



1. Enter all required information under "Basic Information"



#### **Form Fields:**

**Code**: Code given to the policy **Title**: The title given to the policy

**Description**: Information describing the policy

Start Year: Start date of the policy
End Year: End date of the policy
Years: Duration of the policy in year

**Years**: Duration of the policy in years

**Submission Date**: Date the policy is to be submitted **Approval Date**: Date the policy should be approved by

Note: All fields with a red asterisk (\*) beside them must be filled out for a form to be saved correctly.

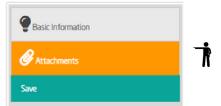
Field boxes in grey will fill automatically.

2. Upload necessary attachments under the Attachments tab

From the

Add Project/Programme Sub

Menu, Click "Attachments"

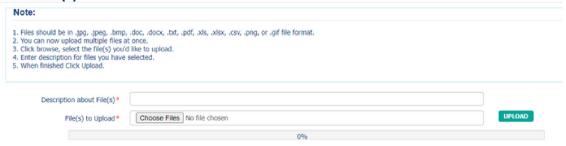


3. To Add a **NEW** Attachment, **Select** 



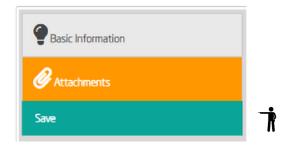
Follow **all** instructions provided, and **select Choose Files** to upload a file.

#### Upload Document(s)



Select **UPLOAD** to **upload and save the file**.

4. **Select** "Save" to save the project.

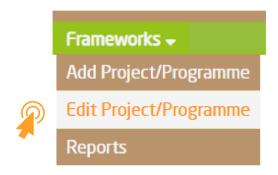


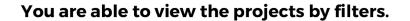
# 2.2 Edit Project/Programme

This section outlines how to edit a policy (created in 2.1)

From the Frameworks Menu, Click "Edit Project/Programme"

(Frameworks » Edit Project/Programme)





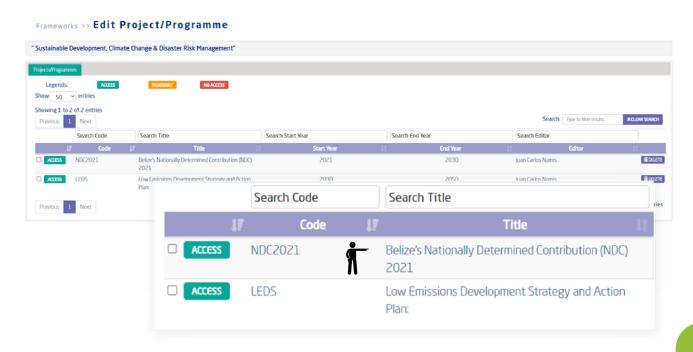
Full Access to edit policy details

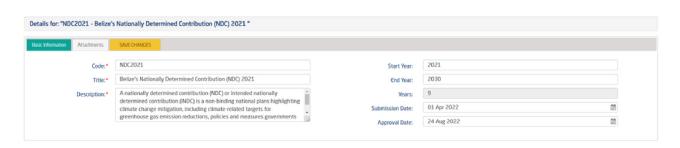
READONLY Read Only Access to policy details

No Access to edit or view policy details

1. To edit, **Select** a policy.

For Example: Belize's Nationally Determined Contribution (NDC) 2021





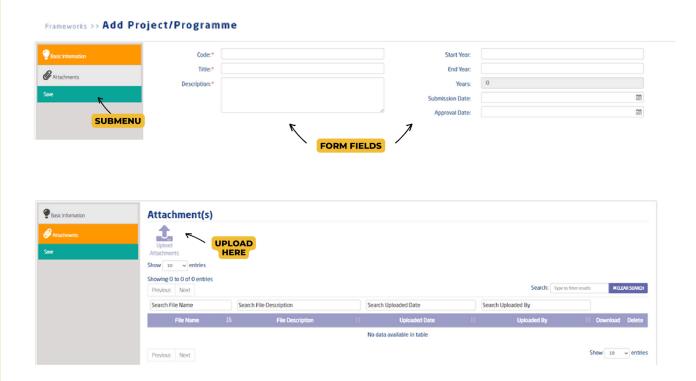
This gives you an overview of the project/programme created in section 2.1 (Add Project/Programme, **PAGE 5**)

You are able to edit the basic information as well as upload any additional attachments necessary in the section.

2. After editing, **select** save changes to save.

# FRAME WORKS OVERVIEW:

Add Project/Programme overview



Edit Project/Programme overview



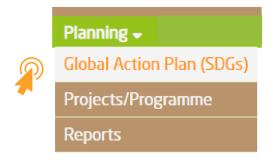
# 3.0 Planning

# 3.1 Global Action Plan (SDGs)

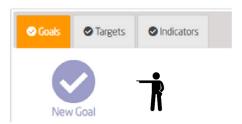
This section outlines creating **Global Action Plans**. Here you will assign indicators and targets to the goals created.

From the Planning Menu, Click "Global Action Plan (SDGs)"

(Planning >> Global Action Plan (SDGs)



1. To Enter a new Goal, Select "New Goal"



Then, Enter all the required information.

New Goal	
Code *	
Description *	
	SAVE AND NEW SAVE & CLOSE

#### Form Fields:

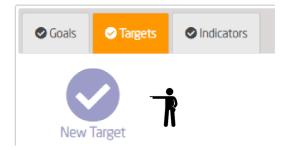
Code: Code given to the goal

**Description**: Information describing the goal

Select Save and new to Save and add another goal.

Select SAVE & CLOSE to Save.

# 2. To Enter a target, Select "New Target"



# Then, Enter all the required information.



## **Form Fields:**

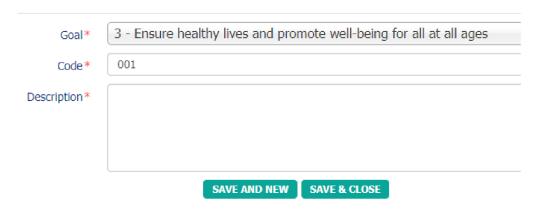
**Goal:** Select a goal from the list created **Code**: Code given to the target group

**Description**: Information describing the target group

Select Save and add another target.

Select SAVE & CLOSE to Save.

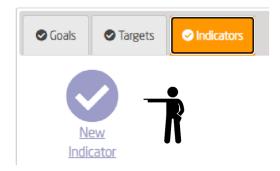
# Example:



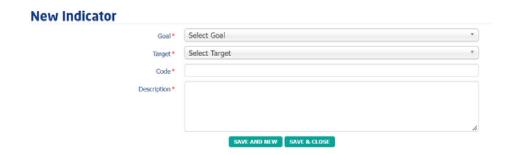
## Beside each target, is its corresponding goal code.



#### 3. To Enter a Indicator, Select "New Indicator"



## Then, enter all the required information.



# **Form Fields:**

Goal: Select a goal from the list created

Target: Select a target from the list created

Code: Code given to the indicator

**Description**: Information describing the indicator

Select Save and add another indicator.

Select SAVE & CLOSE to Save.

# Example:

1 - End poverty in all its forms everywhere	7
1.1 - By 2030, eradicate extreme poverty for all people everywhere, currently measured as people	7
002	
` /	1.1 - By 2030, eradicate extreme poverty for all people everywhere, currently measured as people

Beside each indicator, is its corresponding target code and goal code.



# 3.2 Projects/Programmes

This section assigns the targets, actions and indicators to their respective **Intervention**.

From the Planning Menu, Click "Projects Programme"

(Planning » Projects/Programmes)



1. To edit, **Select** a policy/framework.

For Example: Belize's Nationally Determined Contribution (NDC) 2021

#### Planning >> Projects/Programme



#### 2. To Enter a target, Select "New Target"



**Then,** enter all the required information.

# Sector \* Select Sector Description \* SDG Goal: Select Option SAVE AND NEW SAVE & CLOSE

#### **Form Fields:**

**Sector:** Select a sector to target

**Description**: Information describing the target

SDG Goal: Sustainable Development Goals for the target

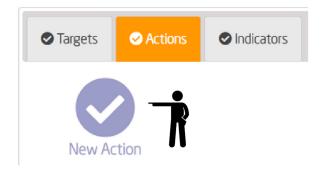
Select Save and add another target.

Select SAVE & CLOSE to Save.

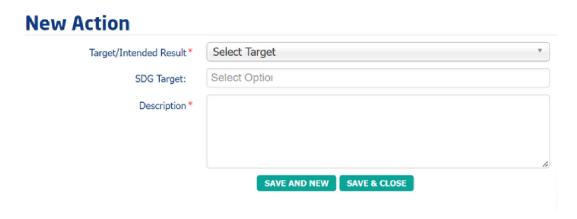
## Beside each target, is its corresponding sector and SDGs.



#### 3. To Enter a Indicator. Select "New Action"



Then, enter all the required information.



#### **Form Fields:**

**Target/Intended Result**: Select a Target **SDG Target**: SDG Target for this action

**Description:** Information describing the target

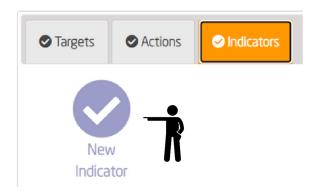
Select Save and sadd another action.

Select SAVE & CLOSE to Save.

Beside each action/Intervention, is its **targeted/intended result and SDG target**.

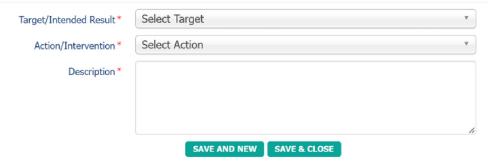


#### 3. To Enter a Indicator, Select "New Indicator"



**Then**, enter all the required information.

#### **New Indicator**



#### **Form Fields:**

Target/Intended Result: Select a Target for this indicator Action/Intervention: Select an action for this indicator Description: Information describing the indicator

Select Save and new to Save and add another action.

Select SAVE & CLOSE to Save.

Beside each indicator, are their **corresponding action/intervention and target/intended result**.



# 3.3 Reports

This section outlines creating and exporting **reports based on projects** and policies.

From the Planning Menu, Click "Reports"

(Planning » Reports)

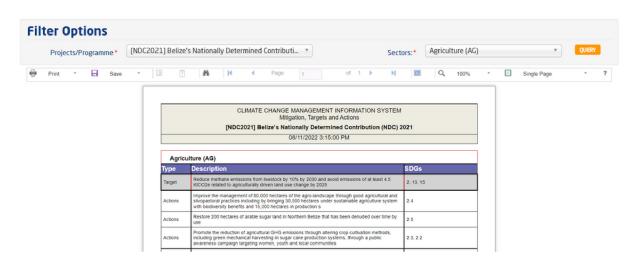


1. Select the report you would like to review, download, and/or print





2. **Select** the project/programme and sector to be displayed in the report.



You are able to download reports as excel sheets, pdfs, word documents, and etc.

# 4.0 Implementation

# 4.1 Add an Intervention

This section outlines adding an **Intervention**. **NOTE**: Targets and Actions will only display corresponding to the policy/project.

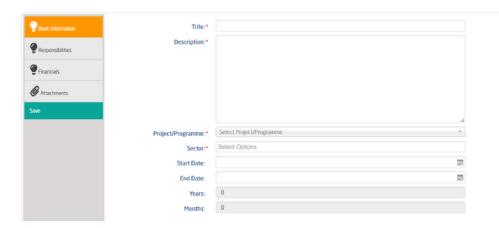
From the Implementation Menu, Click "Add an Intervention"

(Implementation >> Add an Intervention)



Notes & Updates

1. Enter all required information under "Basic Information"



#### **Form Fields:**

Title: The title given to the Intervention

**Description**: Information describing the Intervention

Project/Programme: Project/programme type Sector: Select a sector for this intervention Start Date: Date the intervention begins End Date: Date the intervention finishes

Years and months will automatically calculate.

Note: All fields with a red asterisk (\*) beside them **must be** filled out for a form to be saved correctly.

Field boxes in grey will fill automatically.

2. Fill out all required information under "Responsibilities."



3. Enter all required information under "Financials"



The amount in **BZD** will calculate automatically.

4. Upload necessary attachments under the Attachments tab







Follow **all** instructions provided, and **select Choose Files** to upload a file.



Select **UPLOAD** to **upload and save the file**.

5. **Select** "Save" to save the intervention.



# 4.2 Edit Intervention

This section outlines how to edit an intervention:

From the Implementation Menu, Click "Edit Intervention"

(Implementation » Edit Intervention)



# You are able to view the interventions by filters.

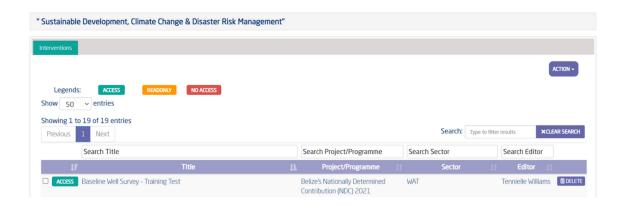
READONLY
Read Only Access to intervention details

NO ACCESS

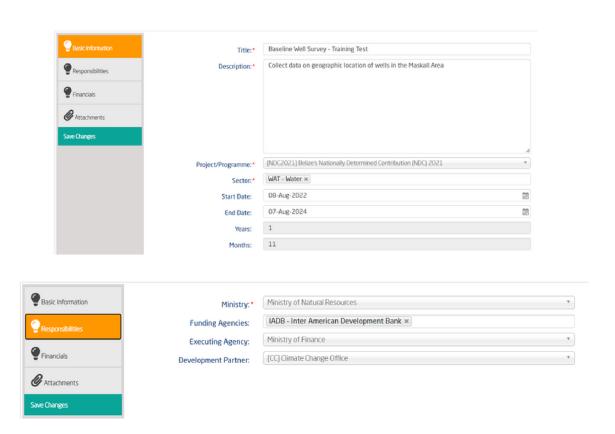
No Access to edit or view intervention details

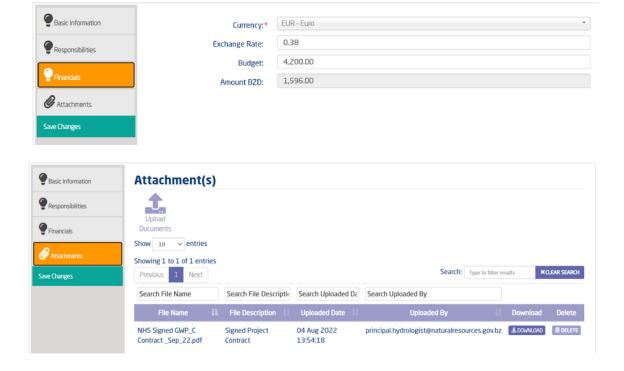
□ Access Baseline Well Survey - Training Test

1. To edit, Select an intervention



2. In this section you are able to edit the information entered when creating **an intervention**.





2. **Select** "Save Changes" to save the changes made





Click to delete a SINGLE intervention.

Use the Action tab to bulk delete multiple interventions.





# 4.3 Targets & Actions

This section outlines how to create targets and actions.

## From the Implementation Menu, Click "Targets & Actions"

(Implementation » Targets & Actions)



1. To add Targets and Actions, Click an intervention.



**Note:** The **Action Tab** is used to invite users or view invited users.



1.To create a target, Select "Add Target"

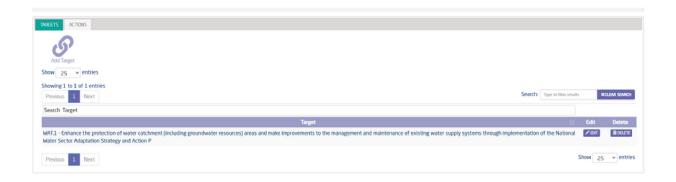


**Then**, enter all the required information.

# New Target Target: \* Select Target Display Order Before: SAVE & CONTINUE SAVE & CLOSE

Select Save and add another action.

Select SAVE & CLOSE to Save.



2. To create an action, Select "Add Action"



Then, enter all the required information.



Select SAVE & CONTINUE to Save and add another action.

Select SAVE & CLOSE to Save.

Beside each target, is its corresponding action.



# **4.4 Actions Indicators**

This section outlines Actions Indicators.

## From the Implementation Menu, Click "Actions Indicators"

(Implementation » Actions Indicators)



1. To add an Action Indicator, Click an intervention.



Note: The Action Tab is used to invite users or view invited users.



#### To add a new action indicator, **Select**



## Then, enter all the required information.



#### **Form Fields:**

Action: Select an action

Indicator: Select an indicator

Source of Information: Origin of the information used

Assumption: Notes on the indicator
Unit: Select a unit of measurement
Baseline: Current state of the indicator

**Baseline**: Current state of the indicator **Baseline Year:** Year of the baseline state

Overall Target: A projected target for this indicator (What

you'd like to accomplish)

Select Save and add another action indicator.

Select SAVE & CLOSE to Save.

2. To Add a target, select + TARGET

To **Edit**, select **SEDIT** 

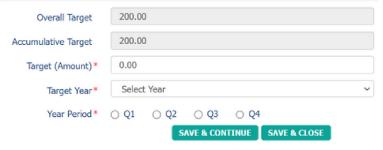
To **Delete**, select **DELETE** 

To **View more details, click (1)** beside each indicator

# After selecting + TARGET

Enter all the information needed under **New Monitoring Targets**. In this section, you would be able to create a breakdown of when you would like to accomplish this goal/target.

# **New Monitoring Targets**



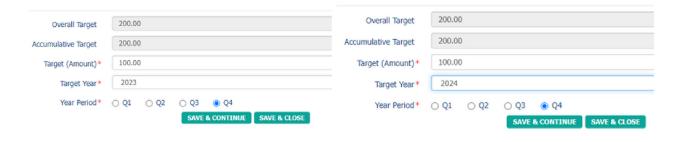
The Overall Target and Accumulative Target fields will fill automatically.

Enter the "Target Amount" and "Target Year".

Select a "Year period"

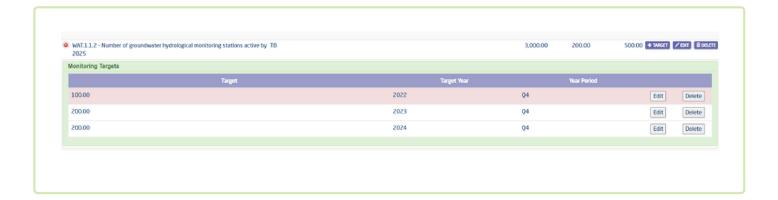
## Example: If the targeted amount is 200,

You would be able to set a targeted amount of 100, for 2023 in the 4th quarter (Q4). Then Select SAVER CONTINUE and create another for the remaining 100, but to be accomplished by the year 2024 (Q4)



Select SAVE & CLOSE to Save.





# 4.5 Notes & Updates

This section outlines project **Notes & Updates.** This is used to track the project progress.

From the Implementation Menu, Click "Notes & Updates"

(Implementation » Notes & Updates)

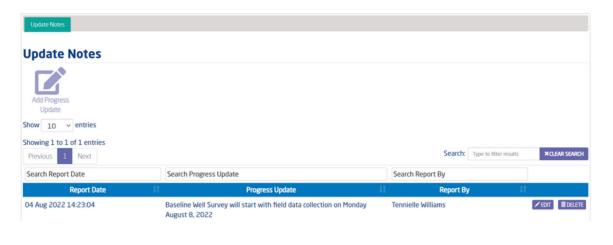


#### 1. **Select** a intervention/ project Implementation >> Project Updates "Sustainable Development, Climate Change & Disaster Risk Management" Title ACCESS Baseline Well Survey - Training Test Showing 1 to 19 of 19 enti **≭**CLEAR SEARCH Previous 1 Next Search Title Search Project/Programme Search Sector Search Project Ow □ Access Baseline Well Survey - Training Test Belize's Nationally Determined Tennielle Williams Contribution (NDC) 2021

# 2. To Add and update, Select



- 3. To **Edit** an update, **Select** FDIT
- 4. To **Delete** an update, **Select**



# 5.0 Monitoring, Reporting, and Verification Activities

This section displays a breakdown of the activities under each intervention

Olick the Activities tab on the main menu

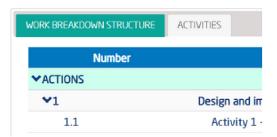
(Main Menu>> Activities)

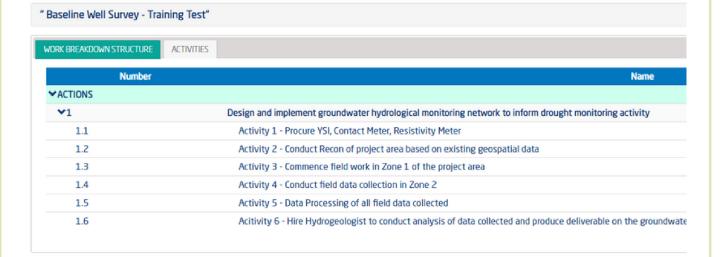


To View more details of the actions under Work Breakdown Structure









To ADD a new activity, Select the activity tab and then





# Then, enter all the required information.



#### **Form Fields:**

Action: Select an action

**Description**: Information describing the activity **Years**: Duration period of the activity in years

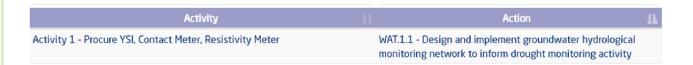
Display Order Before: This will determine the order in which

the actions will be displayed

Select Save and add another activity.

Select SAVE & CLOSE to Save.

Beside each activity, is its corresponding action.



# 6.0 Monitoring, Reporting, and Verification Monitoring

# **6.1 Action Indicators**

This section provider users with access to report on the progress of a project.

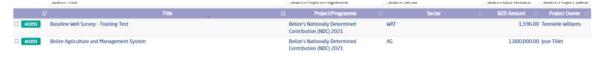
From the Monitoring Menu, Click "Action Indicators"

(Monitoring >> Action Indicators)

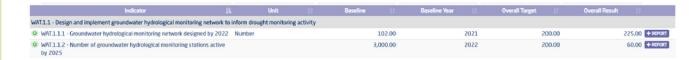


1. Select an intervention/project

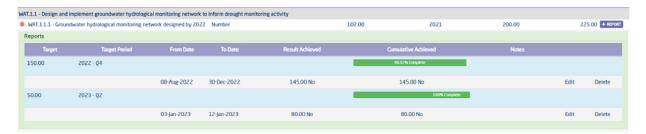




This gives the user an overview of the action indicators, baseline, baseline year, and target.



You are also able to view the progress report history

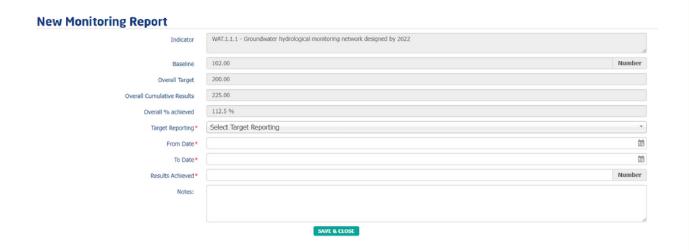


# 2. To create a **NEW progress report**, select





# Then, enter all the required information.



#### **Form Fields:**

Targeting Report: Select the quarter in which this target is due

**From Date**: When the progress started **To Date**: When the progress stopped

Results Achieved: State what was completed in this time frame

Select SAVE & CLOSE to Save.

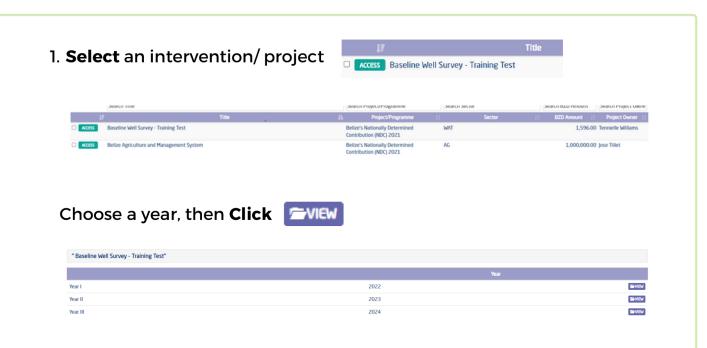
# **6.2 Activities (POA)**

This section outlines the activities completed per year/targeted year.

## From the Monitoring Menu, Click "Activities (POA)"

(Monitoring» Activities)





You are able to view the activities, the start date, end date and how long the activity lasted in days under a project.



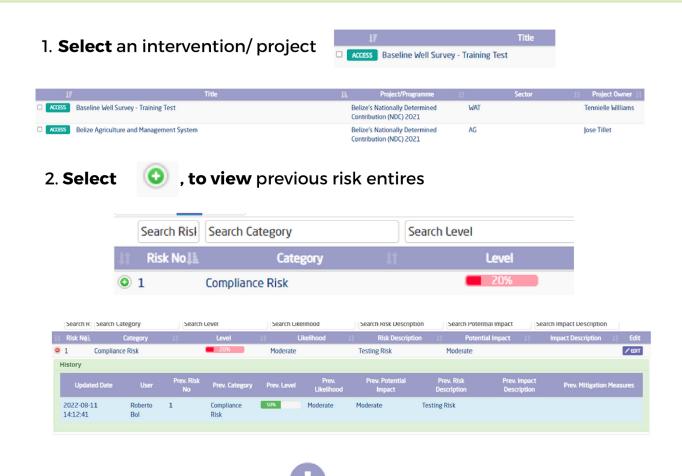
# 6.3 Risk Log Update

This section outlines the possible risk under each project and activities.

From the Monitoring Menu, Click "Risk Log Update"

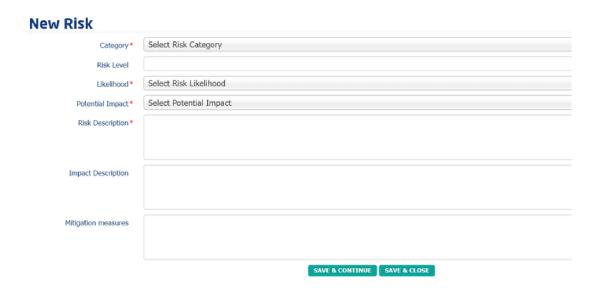
(Monitoring» Risk Log Update)





2. To add a **NEW risk**, select





#### **Form Fields:**

Category: Select a risk category

Risk Level: Insert a risk level in the percentage

**Likelihood**: Select the level of the likelihood for this risk to happen

Potential Impact: Select a level of impact the risk could have

**Risk Description:** Information describing the Risk **Impact Description:** Information describing the Risk

Mitigation Measures: Information about the measure used to

reduce the risk

Select SAVE & CONTINUE to Save and add another risk.

Select SAVE & CLOSE to Save.

# 7.0 Settings

## 7.1 Sector Setup

This section outlines **Sector Setup** 

From the **Settings Menu**, Click "**Sectors**"

(Settings >> sectors)



1. To Add a new **Sector**, select



**Then**, enter all the required information.

New Sector	
Sector Code*	
Description*	
	SAVE AND NEW SAVE & CLOSE

#### **Form Fields:**

Sector Code: The code given to the sector

**Description**: Information describing the sector

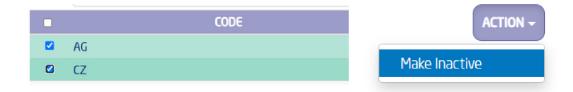
Select **SAVE AND NEW** to **Save and create another sector**.

Select SAVE & CLOSE to Save.

## Here, you are able the view active and inactive sectors



2. To make a sector **inactive**, choose the sector then **select** the action tab.



In the **Inactive sectors'** view, you are able to make sectors **active** via the **action tab** also.



## 7.2 Ministires

This section outlines **Setting up Ministries**.

From the Settings Menu, Click "Ministries"

(Settings » Ministires)



1. To Add a new **Ministry**, select



Then, enter all the required information.

New Ministry	
Code*	
Vote #*	
Description*	
UDAC	

SAVE & CONTINUE SAVE & CLOSE

#### **Form Fields:**

Code: The code given to the ministry

**Description:** Information describing the sector

:

Select Save & continue to Save and create another ministry.

Select SAVE & CLOSE to Save.

2. Here, you are able set a ministry as an active or inactive ministry.

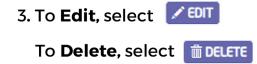


To make a sector inactive, select



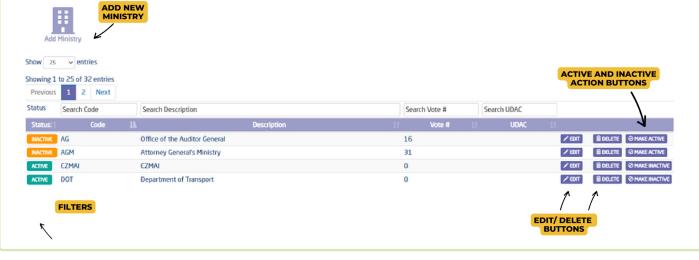
beside the respective ministry.

Do the same for active ministries.



Settings >> Ministries

## **OVERVIEW:**



## 7.3 Subsector Setup

This section outlines subsector setup

From the Settings Menu, Click "Subsectors"

(Settings >> subsectors)



### 1. To Add a new **Subsector**, select



**Then**, enter all the required information.

New Subsector	
Sector *	Select Sector
Subsector Code <sup>★</sup>	
Name *	
	SAVE AND NEW SAVE & CLOSE

#### **Form Fields:**

**Sector:** Select the sector this subsector belongs to **Subsector Code**: The code given to the subsector

Name: Title given to the subsector

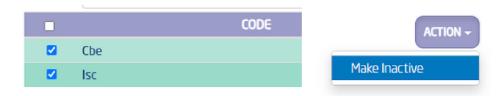
Select SAVE AND NEW to Save and create another subsector.

Select SAVE & CLOSE to Save.

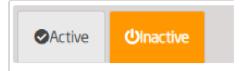
Here, you are able the view active and inactive subsectors



2. To make a subsector **inactive**, choose the subsector then **select** the action tab.



In the **Inactive sectors'** view, you are able to make sectors **active** via the **action tab** also.





# 7.4 Executing Agency Setup

This section outlines executing agency Setup

From the Settings Menu, Click "Executing Agency Setup"

(Settings >> Executing Agency Setup)



1. To Add a new **Executing Agency**, select



**Then,** enter all the required information.

New Executing Agency		
Code *		
Description*		
	SAVE & CONTINUE	SAVE & CLOSE

#### **Form Fields:**

Code: The code given to the executing agency

**Description:** Information describing the executing agency

Select Save and create another executing agency.

Select SAVE & CLOSE to Save.

- 2. To **Edit** an agency, **Select Select**
- 3. To **Delete** an agency, **Select**

## 7.5 Development Partners

This section outlines setting up development partners

From the Settings Menu, Click "Development Partners"

(Settings >> Development Partners)



1. To Add a new **Development Partner**, select



**Then**, enter all the required information.

**New Development Partner** 



#### **Form Fields:**

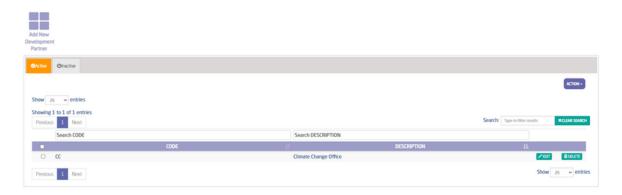
**Code**: The code given to the development partner

**Description:** Information describing the development partner

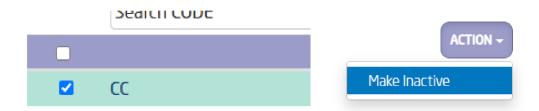
Select SAVE & CONTINUE to Save and create another Development Partner.

Select SAVE & CLOSE to Save.

Here, you are able the view active and inactive development partners



2. To make a sector **inactive**, choose the sector then **select** the action tab.



In the **Inactive Development Partners'** view, you are able to make partners **active** via the **action tab** also.



- 4. To Edit a Development Partner, Select / EDIT
- 5. To **Delete** an Development Partner, **Select**

## 7.6 Unit of Measure

This section outlines setting up Units of Measurement

From the **Settings Menu**, Click "**Unit of Measure**"

(Settings >> Unit of Measure)



1. To Add a new Unit of Measurement, select



**Then,** enter all the required information.

New Unit of Measure	
Code*	
Description*	
	SAVE AND NEW SAVE & CLOSE

#### **Form Fields:**

**Code**: The code given to the unit of measurement **Description**: Information describing the unit of measurement

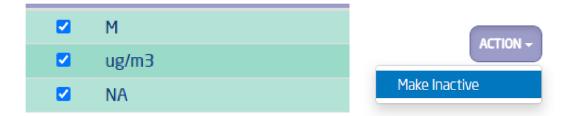
Select Save & CONTINUE to Save and create another Unit of Measurement.

Select Save & CLOSE to Save.

Here, you are able the view active and inactive Unit of Measurements



2. To make a Unit of Measurement **inactive**, choose the measurement then **select** the action tab.



In the **Inactive Unit of Measurements'** view, you are able to make the measurements **active** via the **action tab** also.



- 4. To Edit an Unit of Measurement, Select FDIT
- 5. To **Delete** an Unit of Measurement, **Select**

