AkvoRSR user manual for Tailor-Made Training (Plus) Orange Knowledge Programme (OKP)

Version 2.0

Contents

1. Introduction

1.1 About this AkvoRSR manual

This document is intended for project partners involved in the implementation of the Orange Knowledge Programme (OKP) – Tailor-Made Training (Plus). The manual is only intended for OKP Tailor-Made Training and Tailor-Made Training Plus and not for any other instruments within OKP.

The aim of the manual is to provide guidance for project partners on how to perform their tasks regarding reporting in the online reporting tool AkvoRSR.

The tasks and formal responsibilities of the project partners regarding reporting for the OKP Tailor-Made Training (Plus) projects are described in the Grant Obligations and Conditions and in the grant letter.

Please note that the document contains hyperlinks for easy access and that AkvoRSR performs best in Google Chrome and Microsoft Edge.

2. Getting access to AkvoRSR

2.1 Access to AkvoRSR

Each grant recipient and project partner who works in AkvoRSR needs a personal account, which is a unique combination of an account name and an email address. To prevent unauthorized access, requests for a new AkvoRSR account, changes to existing accounts or requests to close accounts can **only** be submitted by the grant recipient and must be sent to tmt@nuffic.nl.

The grant recipient has the obligation to enter the project into AkvoRSR within three months after the start of the project. The grant recipient is responsible for requesting relevant AkvoRSR accounts for its projects well in advance of this deadline. The request should contain the following information: the email address(es), the corresponding full name(s), the employer organisation(s), the project number(s) and the role (i.e. project editor up until the project is published or enumerator afterwards) that has to be assigned to the account.

Note: As a project editor you have the permission to add or edit a project update, to add an indicator update, to edit a project, to add new organisations, to export reports and export IATI-files. The creator of a Project Update can edit or delete their update. As enumerator, you have the permission to add or edit project updates, to add indicator updates and to export reports.

As a rule, Nuffic will only give access to a maximum of two persons per project.

If the user is already active in AkvoRSR, the user will be added to the organisation to which the user is invited (Nuffic) and the user will receive an email about this. If the user is new or not active yet, he or she will receive an activation email with an activation link. This link will lead the new user to a page where he or she will need to fill in additional details (first and last name, and a password) to activate the account.

Once the new user has activated his or her account, Nuffic will receive a notification of this per email.

2.2 Log in to AkvoRSR with your credentials

To log in to the Nuffic environment in AkvoRSR:

- Go to: https://nuffic.akvoapp.org/en/sign_in/;
- Enter your email address under the header "Email" and password under the header "Password";
- Click on [Login];
- After logging in you will see the my projects overview page, displaying one or multiple projects (depending on the assigned rights and roles). My projects is the section where you can manage your projects.

2.3 Password self-service

When the user tries to log in in AkvoRSR and enters a wrong password, has forgotten the password or the login consistently fails, he or she can reset the password. If this is the case, follow the [I forgot my password] link on the login page, fill in your email address and click on [Reset password].

It is also possible to change your password when logged in. To do so, click on your name in the right upper corner, followed by clicking on the [My details] tab. Under the **"Change your password" header** you are able to change the password of your account. You will need to know the old password in this case.

3. Project editor

You can search and navigate through the list in the my projects overview page. After clicking on the title of a project, you can enter the **Project Editor** mode.

The project information that you have to fill in is divided into sections. Every section has its own progress bar and has an information button with an explanation about what information is required. Some fields have limited characters. When you start typing, it is indicated underneath the field how many characters you have left. The overall progress bar shows you when your project is ready to be published. When you fill in the mandatory fields, indicated by a red asterisk, you will see that the progress bar increases. When the bar is green, it means all mandatory fields are filled in, the project is compliant with the DGIS IATI requirements and your project is ready to be published. However, please remember that for Nuffic section 05 (results and indicators) is also an obligatory section, which may appear as green, even when it has not been filled in yet. Before you start, Nuffic recommends that you read through all the project fields first, so that it is clear which information belongs where in the RSR project form.

Leave the project unpublished until you have (almost) everything filled-in and you want to share the project with the rest of the world.

Project settings

Under this heading you can indicate whether the project should be kept private. OKP projects are not private, unless in exceptional cases (e.g. risks that flow from the sensitivity of subjects that are part of the training). Private projects do not appear on the AKVO homepage and are not visible to the public. A project can be kept private only after approval of Nuffic and by sending a motivated request to tmt@nuffic.nl.

3.1 Project editor sections

This section gives you basic information on how to use the project editor mode in AkvoRSR in order to achieve the best representation of your project.

3.1.1 General information

In this section you can fill in the basics about your project.

Nuffic will fill in the project title, the project subtitle, the IATI identifier and the relationship with other projects. Nuffic will create a hierarchical relationship between projects, so that it is clear that all these projects are part of OKP and so that the results of all these projects can be aggregated.

The project partners have to fill in the remaining information in this section:

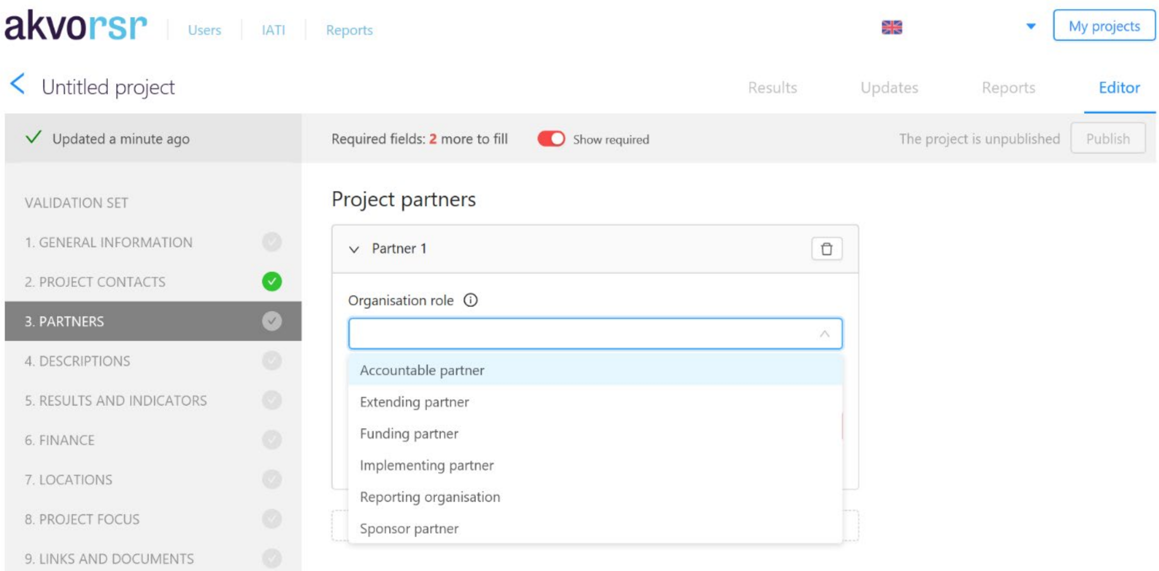
- Status: [2-Implementation];
- Start date planned: fill in the start date as stated in the grant letter;
- Start date actual: fill in the start date as stated in the grant letter, unless Nuffic agreed with a different start date;
- End date planned: fill in the end date as stated in the grant letter;
- The actual end date does not have to be filled *(ignore the red asterisk displayed at end date actual*);
- Project photo: Please note that it is obligatory to send the declaration of consent form for use of pictures and other data to tmt@nuffic.nl and that the maximum upload size is 2 MB for this picture. Keep in mind that it might take some time to upload a picture when it is a large file or the internet connection is slow;
- Default aid type vocabulary: [1 - OECD DAC];
- Default aid type: [C01- Project-type interventions];
- Default flow type: [30 – Private grants];
- Default tied status: [5 – Untied];
- Default finance type: [110 – Standard grant].

3.1.2 Project contacts

Here you can provide contact information of involved project partners so that people who visit the project page can get in touch with them. **Be aware that this information is publicly visible, so be careful providing personal details.** Nuffic recommends that no personal data (such as full names, personal telephone numbers and personal email addresses) is entered. It is strongly advised to only use general contact details (for example, the general name of the institution or companies, the general telephone number and a general email address).

3.1.3 Partners

In this section you can indicate which partners are involved in your project.



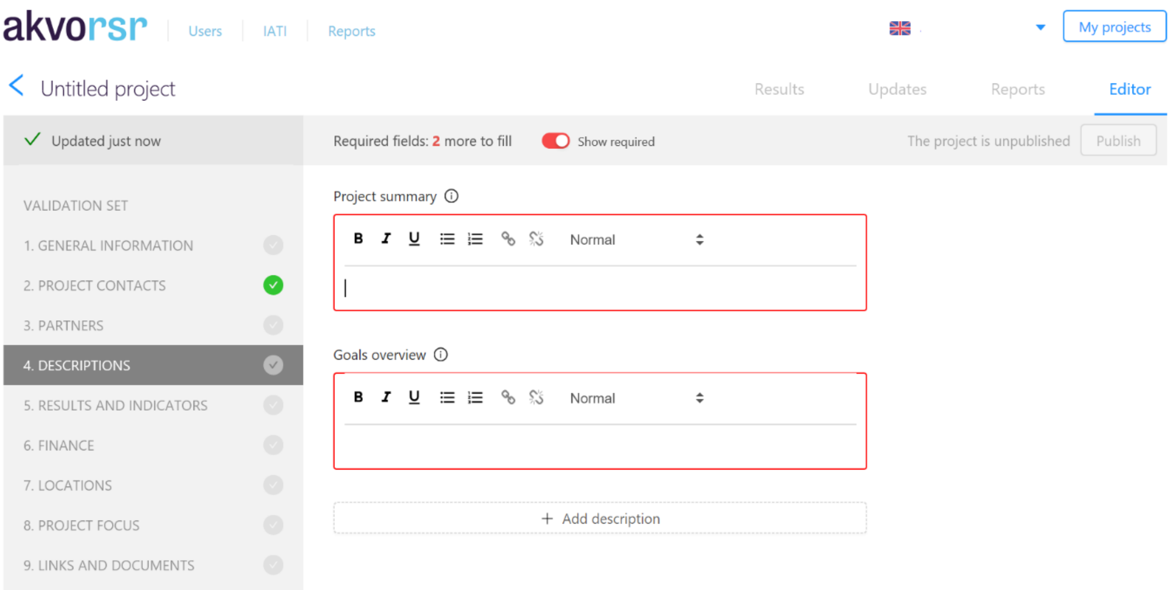
An organisation can have multiple roles within a project. You can select organisations from the dropdown. In case you cannot find an organisation in the dropdown under "project partner", you are able to add a new organisation by clicking on [+ add new organisation], visible in green in the last row of the dropdown.

Fill in the following information:

- Nuffic: [funding partner];
- Grant recipient: [both accountable and implementing partner] (This can be done by adding the same organisation twice and assigning different roles);
- The requesting organisation(s): [implementing partner].

3.1.4 Project descriptions

This section gives you the opportunity to provide more detailed project information.



- Project summary: Enter a brief summary of the project plan, try to restrict the number of characters to 400 in order to display the summary nicely on the project page. This will be publicly displayed on the project page. The summary should explain: Why the project is being carried out; Where it is taking place; Who will benefit and/or participate; What it specifically hopes to accomplish and; How those specific goals will be reached.
- Goals overview: Please elaborate on the medium-term and long-term impact, outcomes and outputs as specified In the logical framework.

3.1.5 Results and indicators

In the results and indicators section you can recreate your logical framework and assemble the indicators that are used to measure whether your project is a success. Nuffic will provide all quantitative indicators that are part of the original Monitoring and Evaluation framework for OKP and qualitative indicators that form the 'narrative report'. These indicators help us to measure the project's progress. The grant recipient has the responsibility to adjust this section according to the provided information in the logical framework in the project proposal.

You can remove results and indicators that are not relevant for these particular project. However**, these indicators cannot be brought back later, so if an indicator is or may be somewhat relevant to your project, Nuffic asks you to leave it in without filling in the targets.** This way, unexpected results and changes in outputs/indicators can still be reported upon and aggregated.

You also can add new results and indicators (including targets and indicator reporting periods, if applicable) that are not part of the overall framework, but that are relevant for this particular project. However, these indicators and targets cannot be aggregated and will be project specific. Therefore, **Nuffic asks you to translate your chosen output(s) and other results as much as possible into existing indicators,** before coming up with new ones.

Nuffic indicates for which period you have to measure a specific indicator. The reporting periods follow calendar years, which may not be the case for your specific project. In this case, the end date of your project is leading for in which year you will have to report.

- Example 1: If the project period for your TMT is from 1 June 2019 until 31 May 2020, you will have to enter the targets for this period under the reporting period "1 January 2020 – 31 December 2020". On some results, you also have to report 1 year after the end of the project. In this case, you'll have to fill in the targets under the reporting period "1 January 2021 – 31 December 2021".
- Example 2: If the project period for your TMT+ is from 16 November 2019 until 15 November 2021, you will have to enter the targets for the first year under the reporting period "1 January 2020 – 31 December 2020"and for the second year under "1 January 2021 – 31 December 2021". On some results, you also have to report 1 year after the end of the project. In this case, you'll have to fill in the targets under the reporting period "1 January 2022 – 31 December 2022".

It is important to note that **you only enter the target values that are expected to be achieved during the reporting period in question**. If you entered the values in the logical framework in the project proposal in a cumulative manner, you'll have to separate them when inputting them into AkvoRSR.

Example (for TMT+): FNS indicator: # of undernourished people with improved food intake.
- Baseline: 0
- After the first year of implementation: 500 (total)
- After the end of the project: 500 (including total first year of implementation)
- One year after project end: 2000 (including total first year of implementation and total after the end of the project)

In the logical framework, you have to fill in: 0 / 500 / 0 / 1500.

For the project periods that are not relevant to your project, you do not need to fill in any targets. E.g. when your project starts in 2020, you leave the project period "1 January 2019 – 31 December 2019" empty. Also, if you have chosen an impact indicator, you only have to report on it 1 year after the project period. Reporting periods that come after this deadline, can be left empty.

For the indicators under the heading "narrative report", it is not necessary to enter baseline indicators or targets.

3.1.6 Finance

In this section you can specify your project budget and the amounts for every budget item. Transactions are meant to indicate the transfer of funds between organisations (for example, when you receive funds from a donor, you can indicate how much and when you have received the funding, who provided and who received the funding).

For the purpose of OKP Tailor-Made Training (Plus), only fill in the information under "budget item". At this moment we only fill in under budget item: "total" and under budget item value:

the amount of the maximum grant. The budget item period start and end date equals to the (actual) project start and (planned) end date.

3.1.7 Locations

By adding information about the geographic area(s) in which your project is being carried out, the locations will be visible on a map at your project page.

3.1.8 Project focus

The project focus aims to define the broad areas of the project activities e.g. forestry, health, water and sanitation, agriculture, poverty reduction.

Sector: this subsection should indicate the sector that the project benefits

- Sector vocabulary: Select [1-OECD DAC CRS Purpose Codes (5 digit)];
- Sector code: The Ministry of Foreign Affairs requires the specification of so called DAC-5 sectors (5 digit codes, specified by OECD-DAC). The full list of available sector codes can be found here: https://reference.iatistandard.org/201/codelists/Sector/.
- Sector percentage: Multiple sectors can benefit from the same activity. In this case, the percentage of total commitments or total activity budget to this sector must be given. The total of the percentages must add up to 100%. Please make sure the chosen sector codes comply with the policy priority themes you have indicated in your project proposal (e.g. 100% SRoL or a combination of policy priorities: 67% FNS and 33% water, etc).

Policy Markers: This subsection should indicate a policy or theme addressed by the activity. These indicators track key policy issues or cross-cutting themes, such as gender equality, aid to environment, or trade development. The full list of available OECD DAC policy markers can be found here: https://reference.iatistandard.org/201/codelists/PolicyMarker/. Each reported marker must contain the significance of the policy marker for this activity. Choices are:

0 - Not targeted
1 - significant objective: the policy objectives are important, but were not the prime motivation for undertaking the activity.
2 - principal objective: the policy objective was the primary reason to undertake this activity.
3 - principal objective AND in support of an action programme: valid for the markers dealing with Desertification only.
4 - explicit primary objective: only to be used in combination with policy marker “9 – Reproductive, Maternal, Newborn and Child Health”.

Most OKP projects will have gender equality as significant objective. Some OKP projects may have trade development or Reproductive Maternal, Newborn and Child Health as significant objective.

3.1.9 Links and documents

In this section you can add additional documents or links to external websites. You can think of annual reports, your organisation’s or a project partner’s website, brochures, baseline surveys or any other contextual information that relate to your project and help project page visitors understand project’s activities better.

3.1.10 Project comments and keywords

This section is for internal use only and will not be visible to the public. You can add comments about the project, for example to share with Nuffic or your colleagues with an RSR account.

3.2 Publish project page

To get an idea of what your project will look like when it is published, you can see a preview by clicking on the 'View project page' button on top of the project editor page.

When all mandatory fields are completed, the progress bar on top of the project editor will be green. When you are satisfied with the preview and when the project is ready to be published, please send an email to tmt@nuffic.nl. Nuffic will verify and approve the entered information and publish the project if the project is filled in correctly.

Keep in mind that after Nuffic has approved the entered project information, Nuffic will change your role from "project editor" to "enumerator". This means that you are no longer able to edit project information. As a project editor you have the permission to add or edit a project update, to add an indicator update, to edit a project, to add new organisations, to export reports and export IATI-files. As enumerator, you have the permission to add or edit project updates, to add indicator updates and to export reports.

4. The indicator reporting approval flow

Once the project is up and running, AkvoRSR can be used to report on the results and indicators of the project. The Grant Obligations and Conditions tell you when you need to report and what kind of report is expected.

The results framework is centred on the indicator reporting '**approval flow**'. The indicator reporting approval flow consists of three tabs, the tabs represent the three states/phases that an indicator can be in the results framework: *Needs Reporting, Pending Approval*, and *Approved*. This approval flow is only visible after Nuffic has published the project.

After your role has been changed from "project editor" to "enumerator" by Nuffic, you are able to report on indicators and results (by filling in the actual value for that indicator) and to add or edit project updates.

The indicator reporting 'approval flow' has been designed to allow you to know exactly which indicators require reporting for a specific reporting period (*Needs Approval*), which have been already reported on and are waiting for approval from Nuffic (*Pending Approval*), and which approved indicator reporting updates are waiting to be locked by Nuffic after having been thoroughly reviewed (*Approved*).

Nuffic will review indicator updates submitted by project partners, where Nuffic will either approve the submitted result or return it for review. In the latter case, Nuffic will inform you by email that the submitted indicator updates are returned for review.

After all updates has been reviewed and approved for a reporting period, the indicator reporting update will be 'locked' by Nuffic, after which no further indicator reporting updates can be made for the indicator.

4.1 The three phases

This section gives you more information about the three phases and tabs in the results framework.

4.1.1 Needs approval

Once the reporting period has been unlocked, the project partners can begin entering indicator results data. The indicators that you are required to report on will appear in the 'Needs Reporting' tab of your project(s).

Each indicator contains one or multiple reporting periods. Click on the relevant reporting period and choose to add 'Insert reporting value'.

Reporting periods

The actual reporting period depends on the end date of your project. In case of a regular TMT, the report covers the entire project period. Project partners also have to submit a report 1 year after the end of the project. In case of a TMT+, project partners have to report over the results that were achieved in the first year of implementation, at the end of the project period and 1 year after the end of the project. However, in AKVO, reporting periods have been standardized and follow calendar years. This means that you have to pick the period in AKVO during which the final date of the period over which you will be reporting falls. E.g. If the project period for your TMT is from 1 June 2019 until 31 May 2020, you will have to enter all the results for this period under the reporting period "1 January 2020 – 31 December 2020".

After picking the right reporting period, please note that you can only report on an indicator when the relevant reporting period has been unlocked by Nuffic. Nuffic will leave the reporting periods open, one period at a time. Inserting a reporting value allows you to report on the 'actual value' for a specific indicator within a reporting period. If previous indicator updates have been made in the same reporting period, the new indicator reporting update will automatically be added to the previous updates to calculate the new actual value.

You can add an 'actual value comment' to contextualize the reported result. An 'actual value comment' will be visible in the public display. Additionally, you can attach an image or a file to support the 'actual value' result submitted. This can serve as a means of verification for the reported results as each file is saved and archived with the reported result.

You can also leave an internal comment for Nuffic under "internal notes" when filling in the actual value. This comment is private and won't be visible in the public display. If you want to revise your update later on, you can save the indicator update instead of clicking on the "submit for approval" button.

When you choose "submit for approval" you have to notify Nuffic by sending an email to tmtreports@nuffic.nl (including the project number) that you have submitted your indicator updates. To complete your reporting duty, you also have to add the list with participants and the statement of actual costs or statement of expenditures to this email.

Nuffic can either approve the indicator reporting update or Nuffic can return the indicator update for revision. In case of the latter, you will receive an email with the request to revise your indicator update. The indicator update will not be visible in the public display until the Nuffic has approved the update.

4.1.2 Pending approval

The 'Pending Approval' tab is where Nuffic can see which indicators have been reported on, and review the results data submitted with each update. When Nuffic would like the project partners to have a second look at the results they reported, Nuffic clicks on "Return for revision". This sends the update back to the project partners, and it will once again (re)appear in the 'Needs Reporting' tab. When there are no further questions, Nuffic will approve the update.

4.1.3 Approved

Once an indicator reporting update has been approved, the update is moved to the 'Approved' tab. From here Nuffic will lock the reporting period for each indicator after all updates for each indicator have been approved. When an indicator reporting period has been locked, additional indicator updates for that period are not possible; the indicator update will no longer appear in the 'Approved' tab. Results data for indicator updates that have been approved and locked will be included in the aggregated overall (OKP) results for that particular indicator and the results data of the update become publicly visible on the project's project page.

5. Project updates

Project partners are required to publish at least one project update per year of implementation. This is possible after the project has been published by Nuffic.

To update your project, simply sign in with your email and password
You now enter the project overview page and see an overview of all your projects
Select a project and click on the 'Project updates' tab
You can now add a title, description, photo and/or video
Click 'Add an update' to publish your project update.

After you've published your update, you've got 20 minutes to tweak the updates, for example when you see a typo. After 20 minutes your update can't be changed anymore. The update can only be deleted by the creator of the project update or by Nuffic.

In **Project updates** you will find an historic overview under "previous updates" of all RSR updates your organisation has done. Here you can:

Search through all your RSR updates.

- **Edit** an update via the **view** button followed by the **edit** button. Note: you can only edit an update for 20 minutes.
- Adding a new update can be done via **Add an update** on the top of the screen