FAIS User Manual

Version 1.0

Revision History

Version	Change Description	Date
1.0	Initial Version	3/13/2011

1. Table of Contents

1. Introduction

1.1. System Overview

The Food Aid Information System (FAIS) allows Program Participants to apply for commodities and funding assistance under the PL 480 Title I - Food for Peace Program (FFPr), CCC – Food for Progress Program (CCC-FFPr), the McGovern–Dole International Food for Education and Child Nutrition Program (MGD) and Section 416(b).

The FAIS also allows applicants to negotiate Food Aid Agreements (Contracts), submit project status reports, financial and other reports, process payments & receivables, negotiate claims and close contracts.

For more detailed information on each of these programs, you may click on the following hyperlinks to take you to each program's home page:

Food for Progress: http://www.fas.usda.gov/excredits/FoodAid/FFP/foodforprogress.asp

Food for Education: http://www.fas.usda.gov/excredits/FoodAid/FFE/FFE.asp

Food for Peace: http://www.fas.usda.gov/excredits/FoodAid/pl480/pl480.asp

Section 416 B: http://www.fas.usda.gov/excredits/FoodAid/416b/section416b.asp

The FAIS is a concise one stop solution covering the complete life cycle of a Food Aid application for the above mentioned programs. FAIS can also be directly accessed through the following links

Any Web User: - http://www.fas.usda.gov/fais.web

FAIS Registered User: - https://www.fas.usda.gov/fais/webapp

In summary, FAIS provides the following benefits to its user community:

- A fully integrated and secure workflow based Web Application
- A streamlined online Food Aid proposal submission
- Enables easy negotiation of agreements between participants and Food Aid Division
- Streamlined reporting process for submission of project status reports, financial reports, etc without sacrificing accounting accuracy and reliability.
- Online management of claims, payments & receivables and agreement closeout

1.2. Purpose and Scope

This manual is intended to provide participant users with necessary instructions and guidelines on the use of the FAIS system and to assist users in FAIS proposal submission, agreement negotiation, reports submission, payments & receivables and compliance management.

The scope of this document is limited to the use of FAIS system and associated functionalities. Any other applications are outside the scope of this document.

2. Getting Started

2.1. User Access Levels

The access for FAIS falls under the ambit of US Federal eAuthentication process. Further to the eAuthentication each participant user's access to the various functions available in FAIS depends on the role assigned to the user. Following are the possible list of roles for a program participant user

Role Abbreviation	Role	Role Description	Remarks
PPDir	Program Participant Director	Person from participant organization who is authorized by the participant organization to create Food Aid proposals and negotiate Food Aid agreements	A participant organization may have multiple people in directors role
PPCR	Program Participant Proposal Creator	Person nominated by a PPDir to create & manage a proposal	A participant organization may have multiple people in proposal creator's role. But any given proposal can have only one proposal creator
PPCONT	Program Participant Proposal Contributor	Person nominated by a PPDir or a PPCR to work on a section of a proposal	A participant organization may have multiple people in proposal contributor's role. But any given proposal section can have only one proposal contributor
PPAgEx	Program Participant Agreement Executor	Person nominated by the PPDir to manage and negotiate an Agreement	A participant organization may have multiple people in agreement executor's role. But any given agreement can have only one agreement executor
PPAgCONT	Program Participant Agreement Contributor	Person nominated by the PPDir or PPAgEx to work on an Agreement section	A participant organization may have multiple people in agreement contributors role. But any given agreement section can have only one agreement contributor

PPAdmin	Program Participant Administrator	This person will maintain participant organizations details and handle access request to the FAIS system by users from their organization	A participant organization can have multiple PPAdmin

2.2. eAuthentication

eAuthentication is the system used by USDA agencies to enable users to obtain accounts that will allow them to access USDA Web applications and services via the Internet.

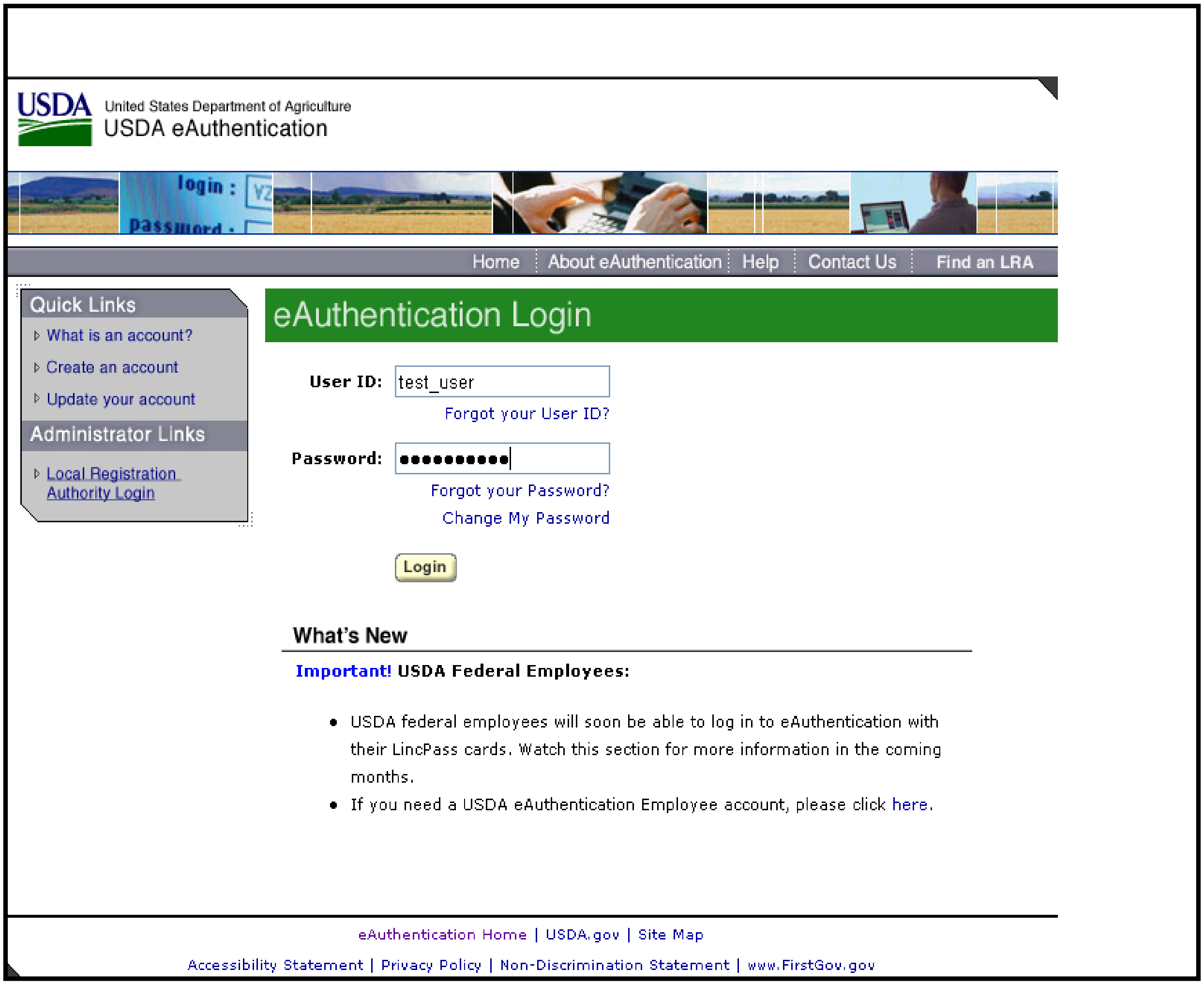
Your eAuthentication account consists of a User ID, a password, and your customer profile containing information about you that will help USDA applications make decisions about your identity. Currently, USDA offers Accounts with Level 1 Access and Accounts with Level 2 Access. Please visit http://www.eauth.egov.usda.gov/ for more details.

FAIS system can be accessed by both Level 1 and Level 2 users. Level 1 user will need an additional PIN to access FAIS.

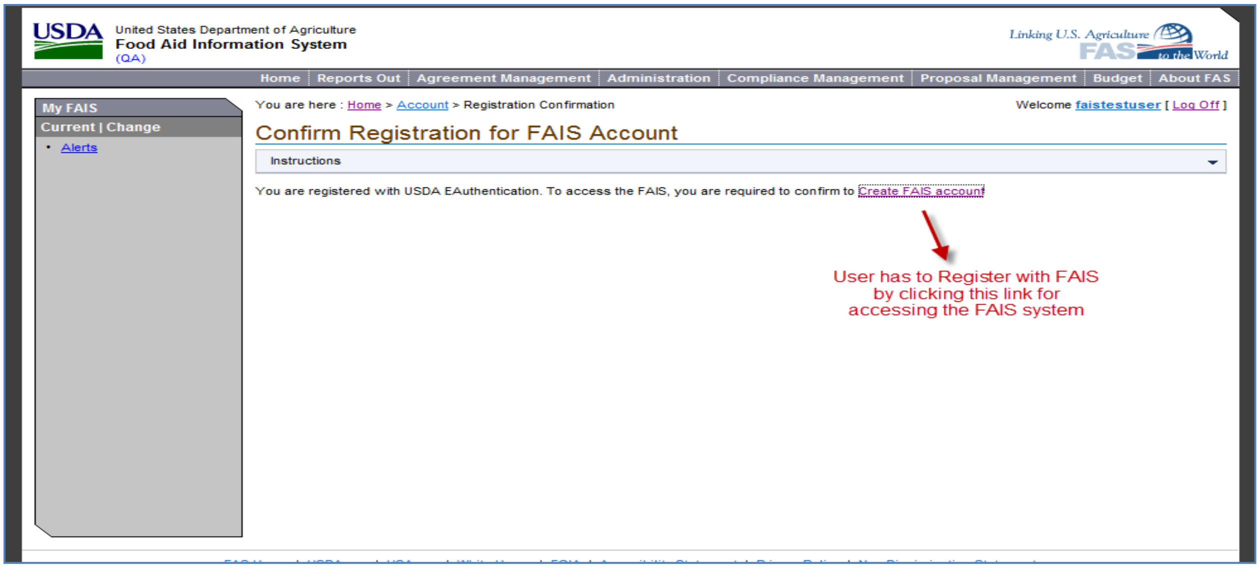
2.3. System Access, User Registration and FAIS Login

Once you have an eAuthentication account, you will be able to access FAIS. Please type the URL, https://www.fas.usda.gov/FAIS/WebApp/ in your browser to access the FAIS Web application. The system will display a warning window as shown in figure. Select the 'I Agree' button to continue.

The eAuthentication Login window appears where you can enter your eAuthentication credentials and login to access FAIS. Appropriate links to create new accounts, to retrieve forgotten credentials, to change passwords, etc. have been provided on the screen.

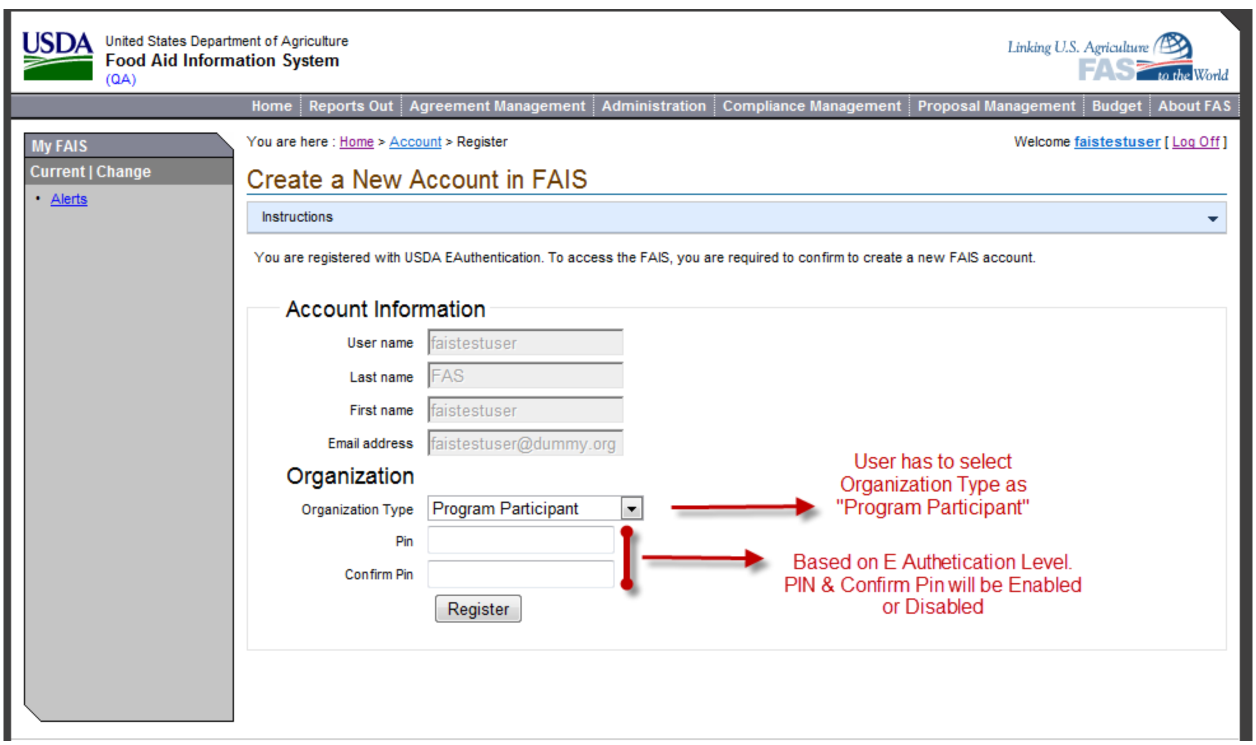


After successful validation of the E authentication credentials, system displays "Confirm Registration for FAIS Account" screen



In order to access FAIS, User has to register in FAIS also. This registration is in addition to the E Authentication

Click on "Create FAIS Account" link



If logging in to FAIS for the first time, system displays "Create New FAIS Account" screen

PIN and Confirm PIN fields will be enabled or disabled based on the E Authentication Level

E Auth Level 1 User

Select Organization Type as “Program Participant”

Set your FAIS PIN

Select ‘Register’ button to register to FAIS.

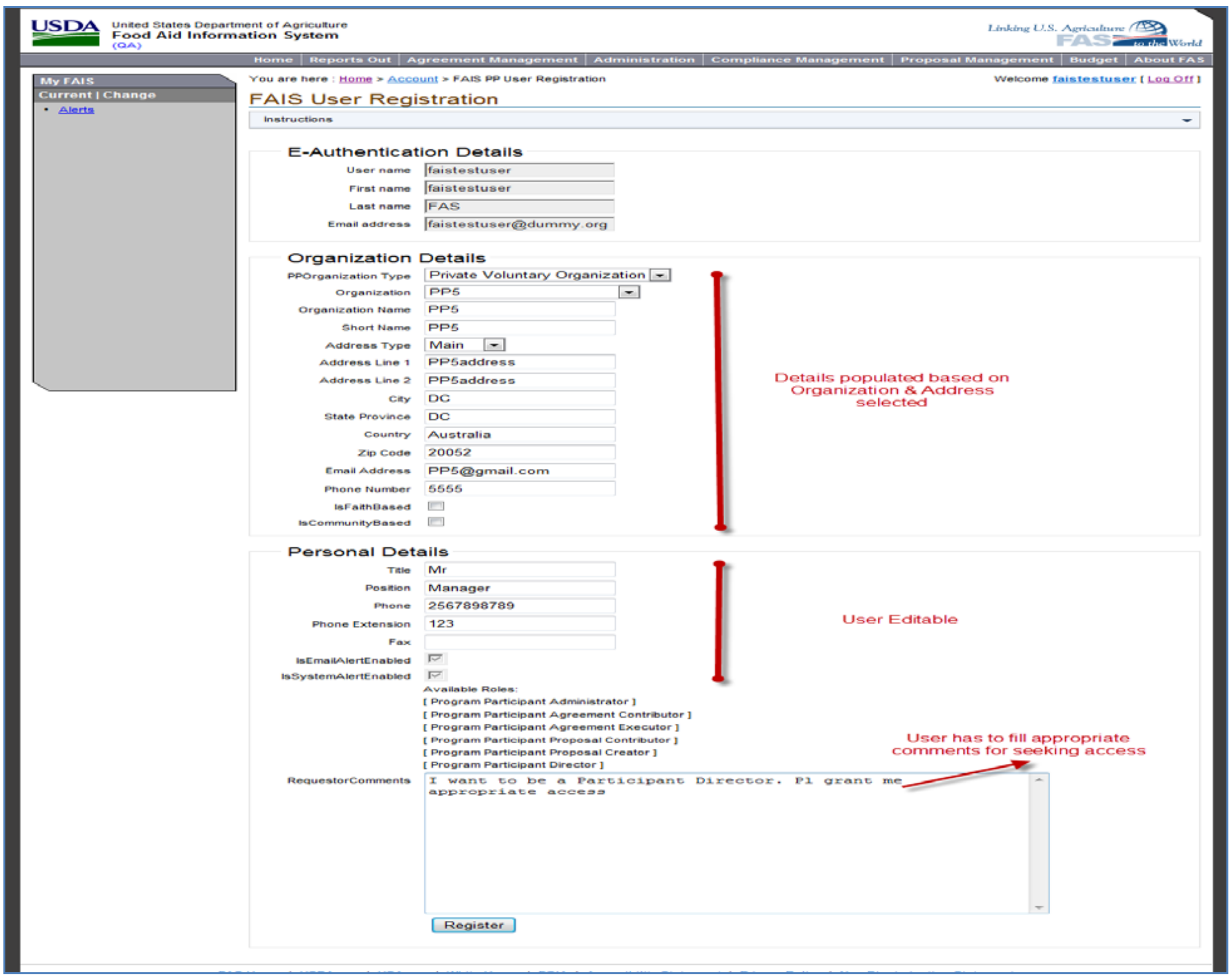
E Auth Level 2 User

Select Organization Type as “Program Participant”

Select ‘Register’ button to register to FAIS

2.3.1. FAIS User Registration for Participant User

Once user selects organization and clicks on register, system will display the **FAIS User Registration** screen



1. Select participant organization type from the 3 types available
2. Select Organization
3. Based on selection system will populate the organization details
4. Enter the following details in Person Details
    - Title (Mr./Mrs./Ms etc)
    - Position (Designation in the organization like Manager etc)
    - Phone
    - Phone Extension (Not Mandatory)
    - Fax (Not Mandatory)
    - EmailAlertEnabled – Check this box if Email alerts are preferred whenever any workflow action (like submit, request modification etc) are sought on any process in FAIS
    - FAISAlertEnabled - Check this box if System alerts are preferred whenever any workflow action (like submit, request modification etc) are sought on any process in FAIS
    - Available Roles – This un editable list of roles is populated by the system, specific for participant organization. Details about the roles are listed at <link>
    - Requestor Comments – Enter appropriate comments seeking access to the Administrator. Program Participant can seek for the following roles
        - **PPDir** – Program Participant Director will be capable of creating a proposal and negotiating Agreements
        - **PPCR** – Program Participant Proposal Creator will be capable for managing and coordinating proposal creation
        - **PPCONT** – Program Participant Proposal Contributor will be capable of working on assigned sections of a proposal
        - **PPAgEX** – Program Participant Agreement Executor will be capable of managing and negotiating an Agreement on behalf of the PP Organization
        - **PPAgCONT** - Program Participant Agreement Contributor will be capable working on assigned sections of an Agreement
        - **PPAdmin** – Program Participant Administrator will be capable of maintaining Participant Organization details and approve access to their participant organizations users
5. Click on **Register**
6. Once registered, await for an email confirmation about the grant of access

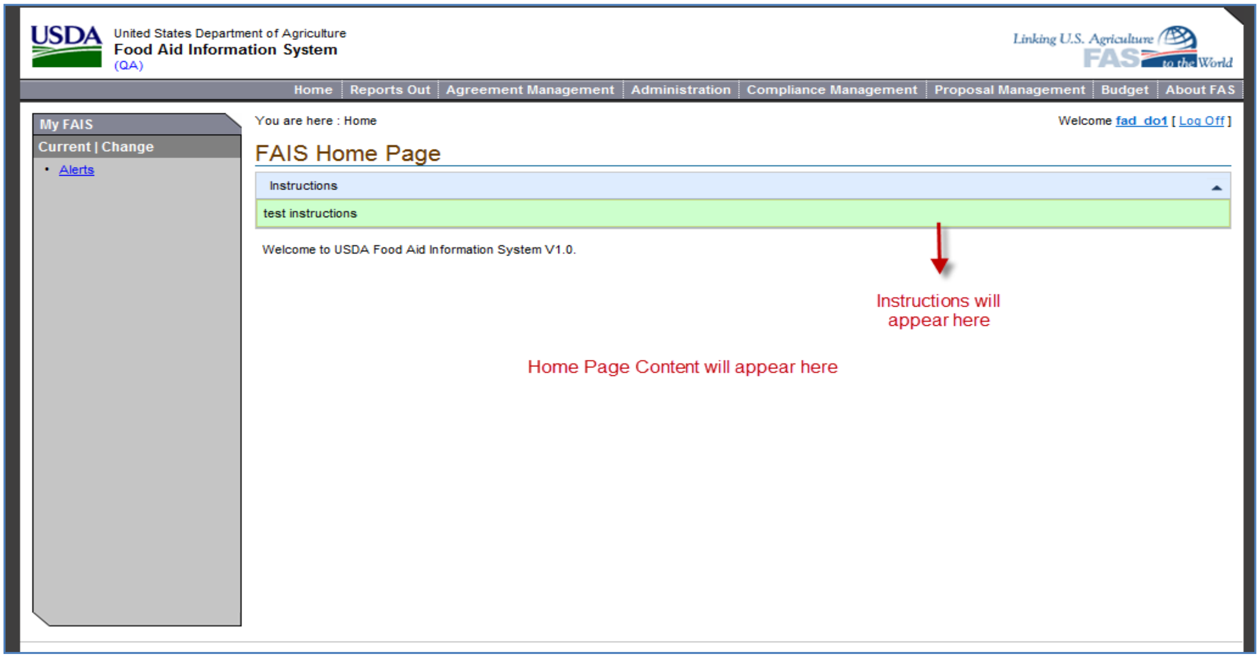
Note: - If Organization is not available in the drop down. Please fill in the attached Organization Registration Form in www.fas.usda.gov/fais/public and send the same to ITSTechnicalSupport@wdc.usda.gov

Post Registration & Pre Approval – Screen

Below screen will be displayed if the user logs into the system before the FAIS user account is verified

2.3.2. Post Registration & User Account Approval

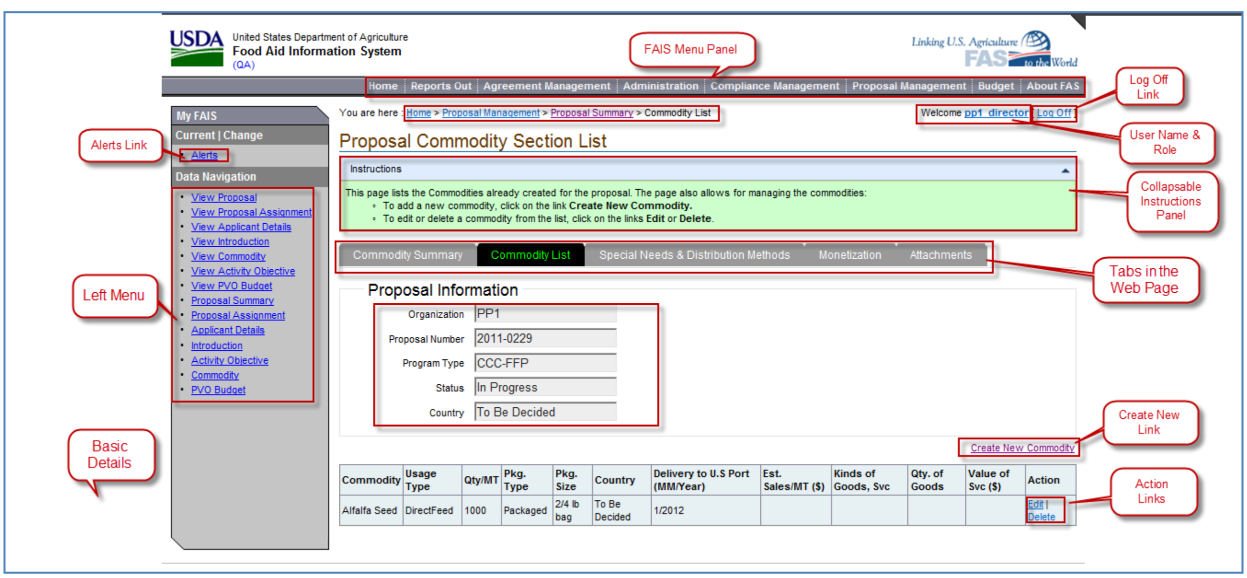
Once user receives FAIS Registration approval email, user will see the following screen when logged into the system



2.4. General Instructions

2.4.1. Screen Layout

Appropriate screenshots have been included in the manual to aid the user in understanding the functional navigation. A brief orientation of the layout and design of the FAIS interface is provided here.



A **left panel** provides links to most of the application items. All other functions are arranged as menu items under several menus, access to which is governed by FAIS Roles.

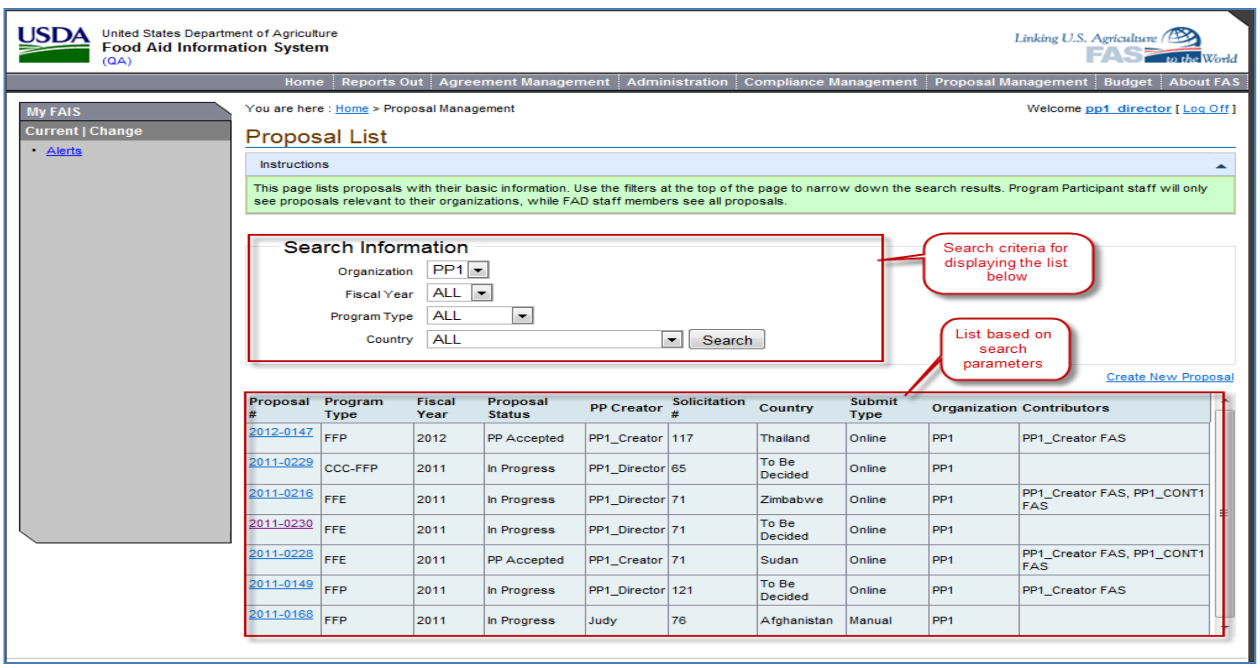
Breadcrumb trail or **Sitemap index** links are provided horizontally across the top of each page just below the menu bar. These links will help in navigating through the hierarchies of each element and to keep track of locations within FAIS.

Add or create new will bring the creation page where details can be entered. Once the new record is created, the system might reveal any tabs, if appropriate and the new record is added to the list. To toggle between tabs, click directly on the tabs presented.

Brief **instructions** are provided on each screen in a green box as shown in figure. The instructions describe the mechanics of viewing and editing the screens and defined the data fields. Important business rules to be followed have also been included, where appropriate. Additional insight is provided with helpful hints throughout identified by '**Note**'.

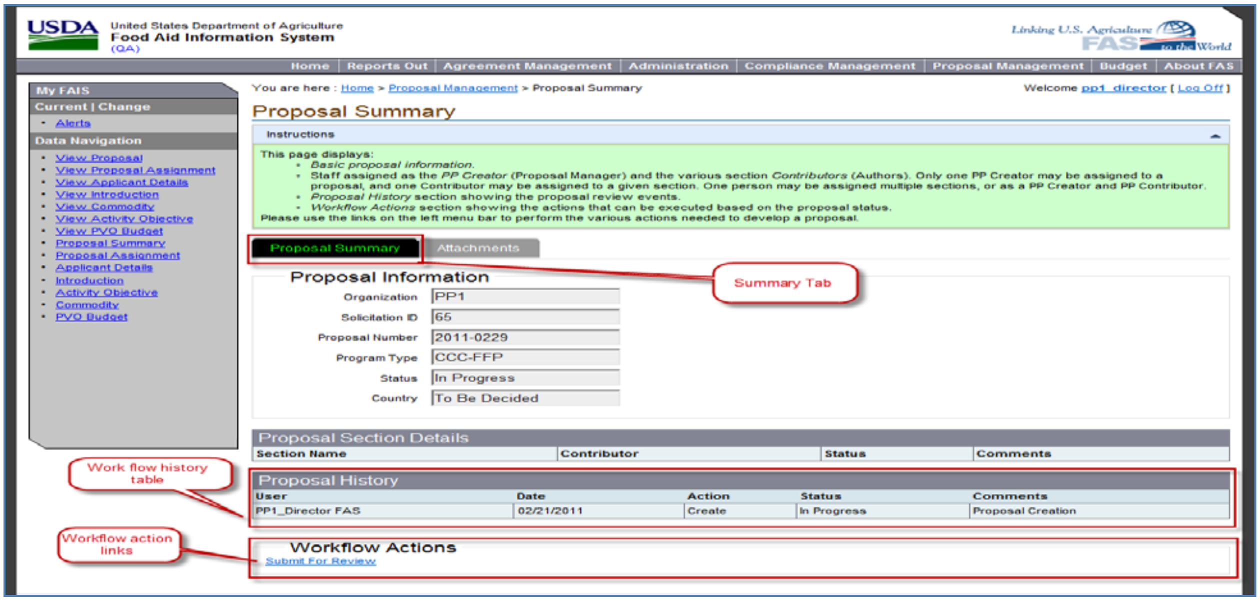
List Page

All of the **list pages** are presented as shown in figure where there is a search criteria section on the top, if applicable, and the matching list appears below. An action column with appropriate links is provided to the right of the list where users can choose to perform corresponding functions. To add or create new, appropriate links are provided to the right at the top or bottom of the list.

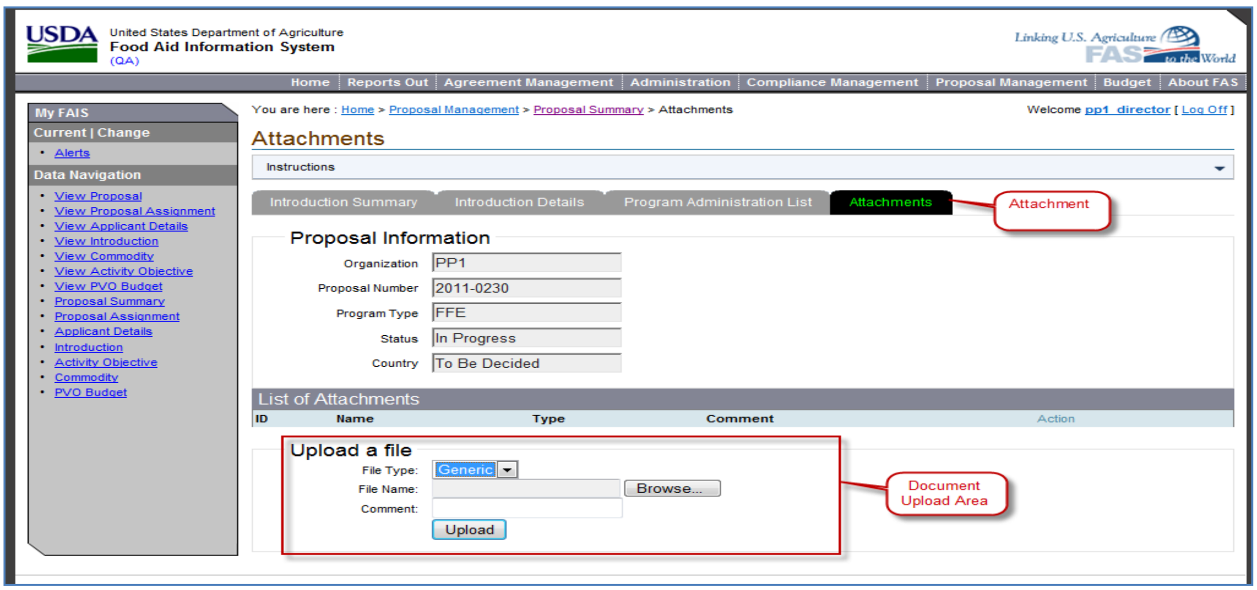


Summary Page

Each major work flow data group like proposal, proposal section, agreement, agreement section will have a summary page through which the user will be able to carry out work flow actions like submit, approve etc. Summary page will also display the work flow history and current status of that data group



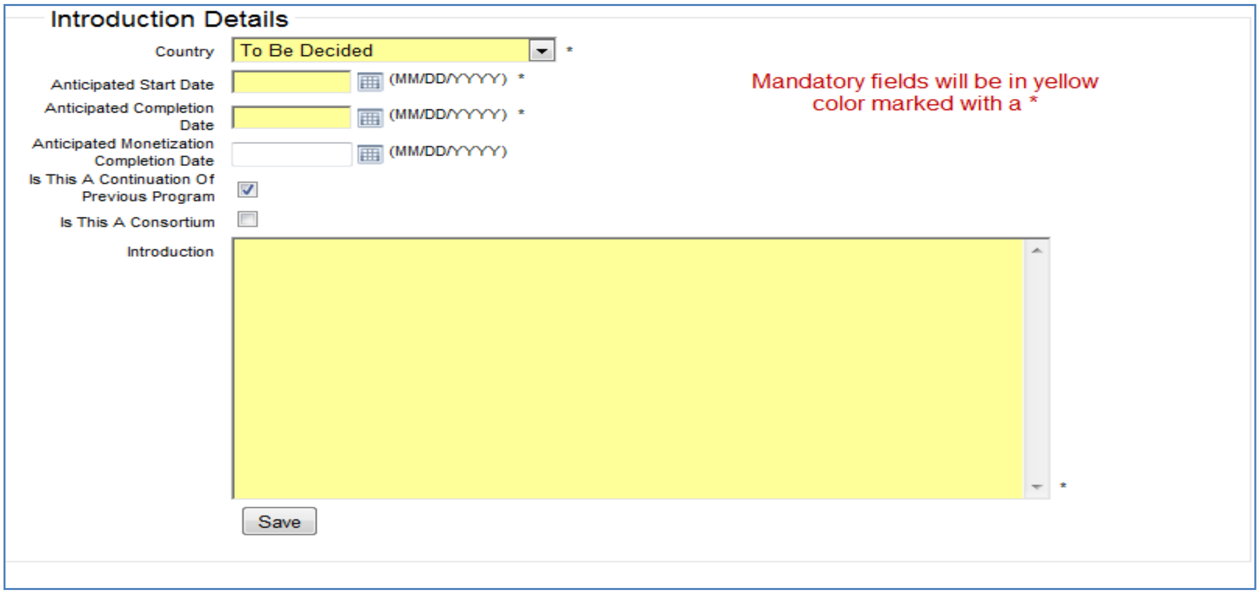
Attachments



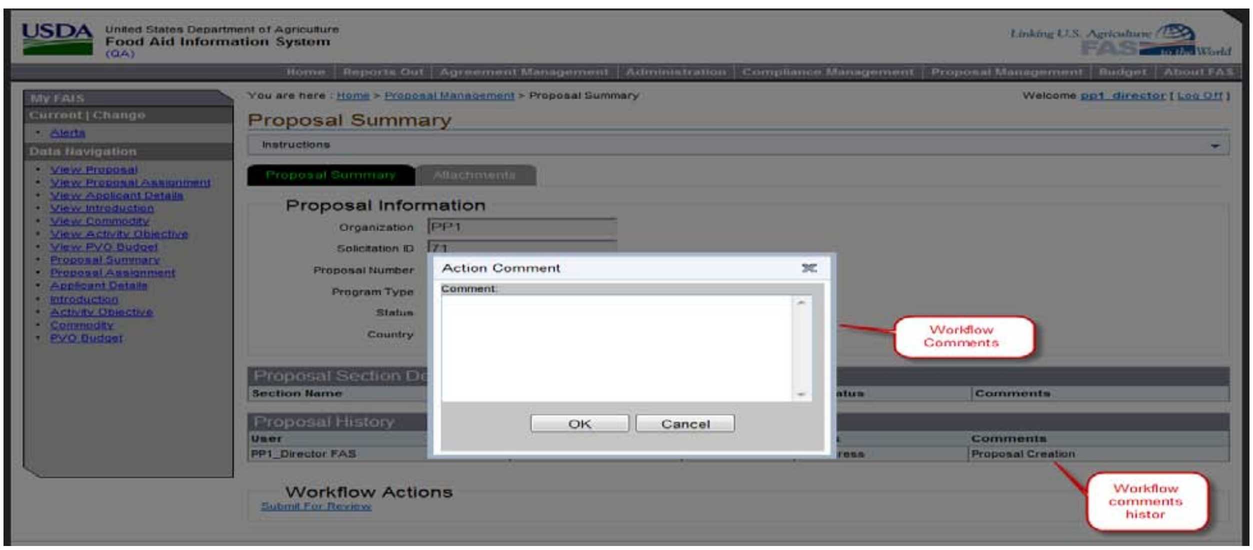
Across FAIS there are options for documents upload. Documents can be uploaded through the attachment tab and once they get uploaded these documents get associated with appropriate process like Proposal, Agreement etc. System also maintains a list of documents like SF 424, NICRA etc

Mandatory Fields

Fields required by the system to create a record, save or submit are indicated by an asterisk next to the field and the data entry box highlighted in yellow. See fields boxed in red in the figure below.

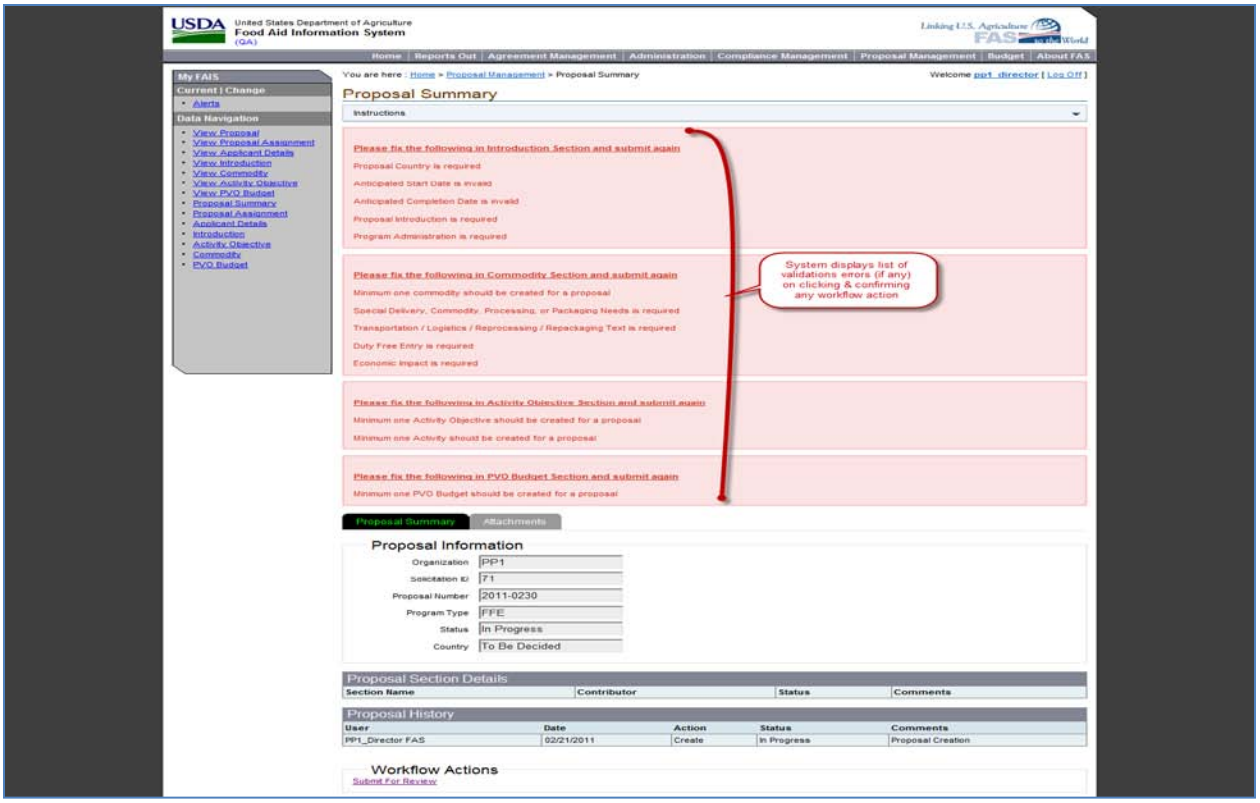


Work Flow Comments



On clicking any workflow action like “Submit”, “Request Modification” etc system will pop up a workflow action comments link where user will be able to enter comments (comments are not mandatory) and confirm the action by clicking on “OK”. If user clicks “Cancel” the system will roll back the workflow action. The comment box confirms the workflow action before committing it

Workflow Validation Error Messages



System displays a list of validation errors (if any) in red when the user clicks “OK” on the workflow comments. System will not commit the workflow action until the user fixes all the validation errors

Hot Keys

Keyboard shortcuts have been provided as appropriate throughout the application. Use **Alt** key **plus** the **underlined alphabet** of the field label to navigate to a particular field. (**Alt + <underlined label alphabet>)**. You may use **Alt + S** to save or submit, where appropriate.

If a page contains Rich Text Formatting (RTF) text boxes, use the following keyboard shortcuts to focus on a particular area of the page and then tab through links or fields.

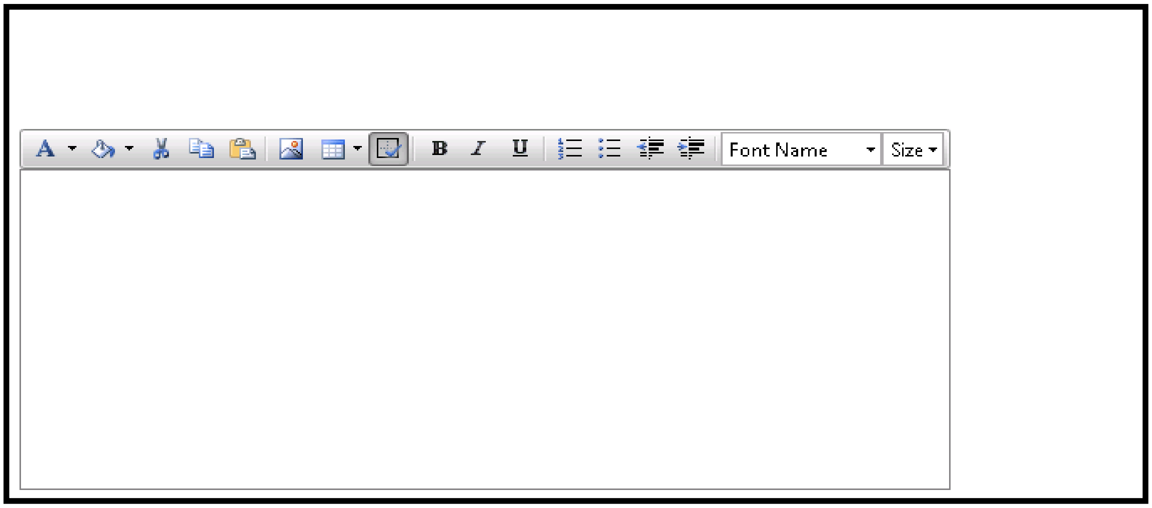
- Alt + 0 → Sitemap or Breadcrumb links
- Alt + 1 → My FAIS panel to the left
- Alt + 2 → Top of the page
- Alt + 3 → Bottom of the page

Required Security Settings

If you experience difficulty navigating to the website please change your browser’s security settings. Open the Internet Explorer and click on Tools, Internet Options. Click on the Advance tab. Scroll down the page until you see the “Use SSL” section. Check the Use SSL 2.0, SSL 3.0 and TLS 1.0. Click the OK button to save the changes.

Rich Text Capability

Certain text fields have been provided with a bar of text formatting icons, as shown in figure. These fields can hold large amounts of data and are **Rich Text Formatting (RTF)** capable, i.e., it provides word processing capabilities like highlighting, bolding, bulleting, copying, inserting tables and other formatting features. A scroll bar provided along the right side of the text box aids in viewing descriptions larger than the display area of the text box.

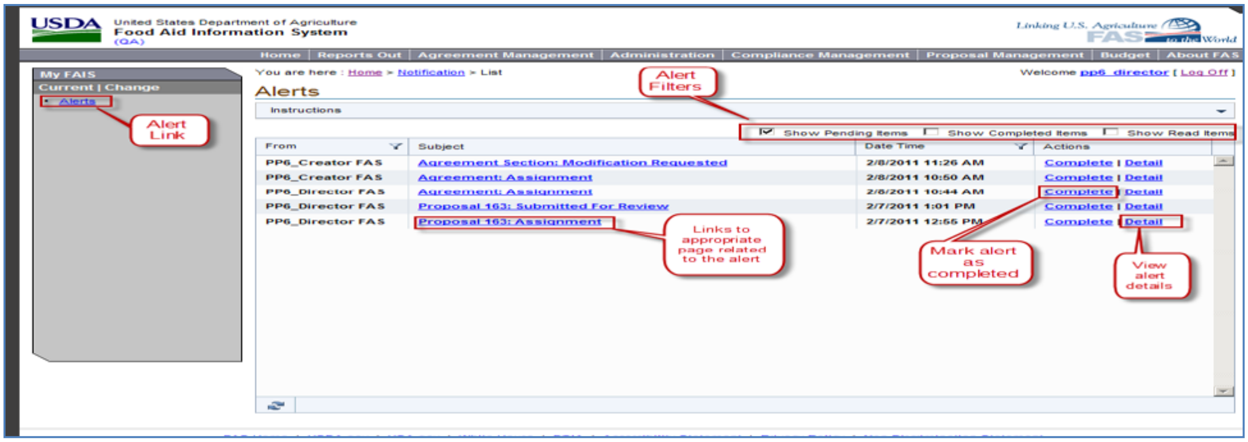


Listed below are the formatting options presented as icons on a bar along the text boxes.

Icon	Function
A	Formats the selected text with the color you click
	Colors the background of selected text to highlight
	Cuts selected text or area
	Copies selected text
	Pastes copied data
	Image Manager to upload picture files
	Inserts table
	Reveals or hides borders
B	Makes selected data bold
I	Italicizes selected data
U	Underlines selected data
	Makes a numbered list or reverts back to normal
	Creates a bulleted list or reverts back to normal
	Indents the selected paragraph to the next tab stop
	Decreases the indent to the previous tab stop
Font Name	Changes the font of the selected text to the one picked
Size	Changes the size of selected text and numbers to the one picked

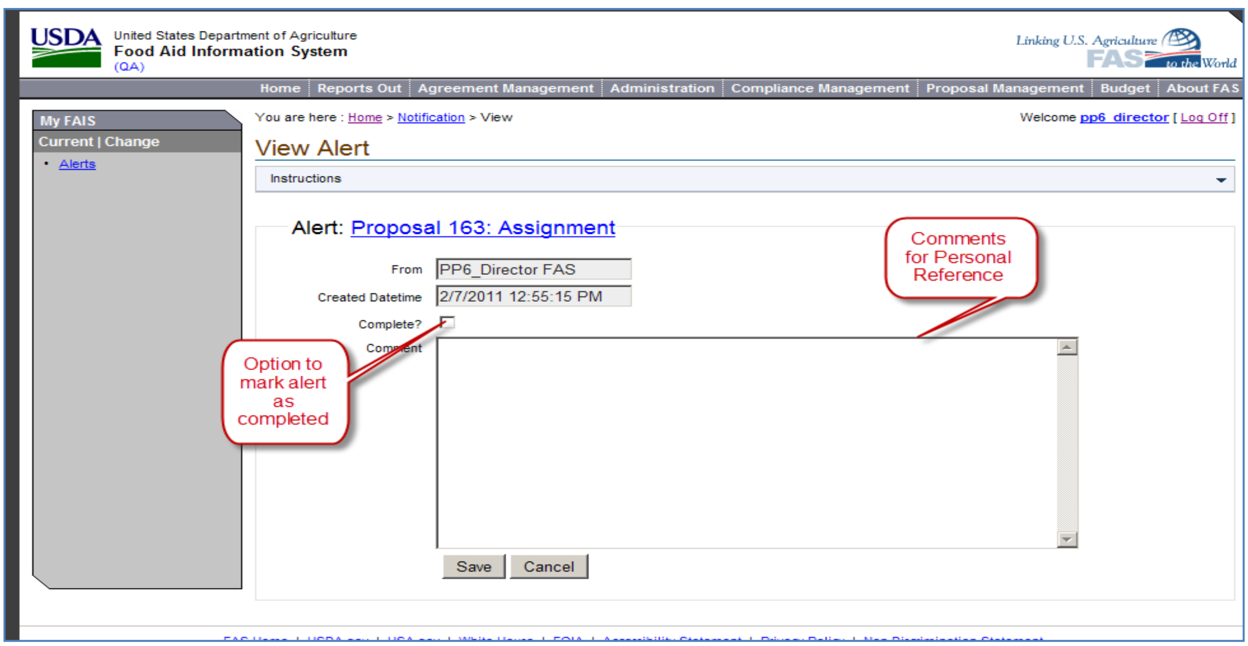
2.4.2. Manage FAIS Alerts

FAIS sends system alerts or Email alerts based on users alerts preference as mentioned in user's profile which can be maintained through the user profile.



If user has opted for FAIS alerts, user will be able to see alerts pertaining to them. Method of navigating through the alerts is mentioned below

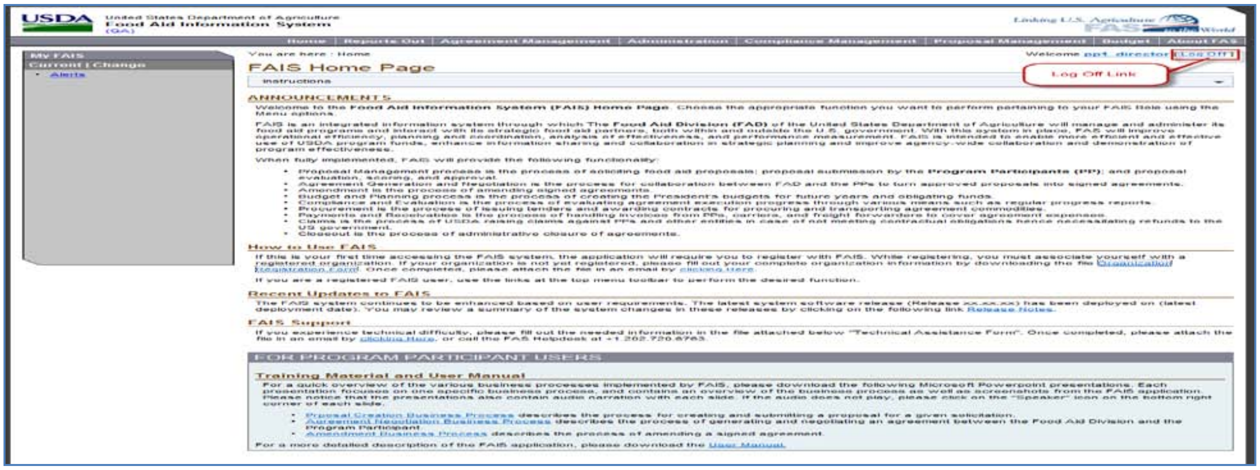
1. Select 'Alert' link from left menu
2. Option 1:- Click on alert link to navigate to appropriate page. Ex: 'Proposal 163: Assignment' will navigate to Proposal Assignment screen
3. Option 2:- Click on 'Complete' link to mark the alert as completed
4. Option3:- Click on 'Detail' link to enter comments on the alerts for future reference (View Alert) screen



View alerts give an option for the user to make some personal notes for future reference and to mark the alert as completed. These actions of entering comments and marking an alert are purely optional

2.5. Exit FAIS

Use the **Logoff** link located at the top right of the page to exit FAIS.


USDA
United States Department of Agriculture
Food Aid Information System
Home | Reports Out | Agreement Management | Administration | Compliance Management | Proposal Management | Budget | About FAS
My FAIS
Current | Change
Alerts
You are here : Home
FAIS Home Page
Instructions
Welcome
Log Off
Log Off Link
ANNOUNCEMENTS
How to Use FAIS
Recent Updates to FAIS
FAIS Support
FOR PROGRAM PARTICIPANT USERS
Training Material and User Manual

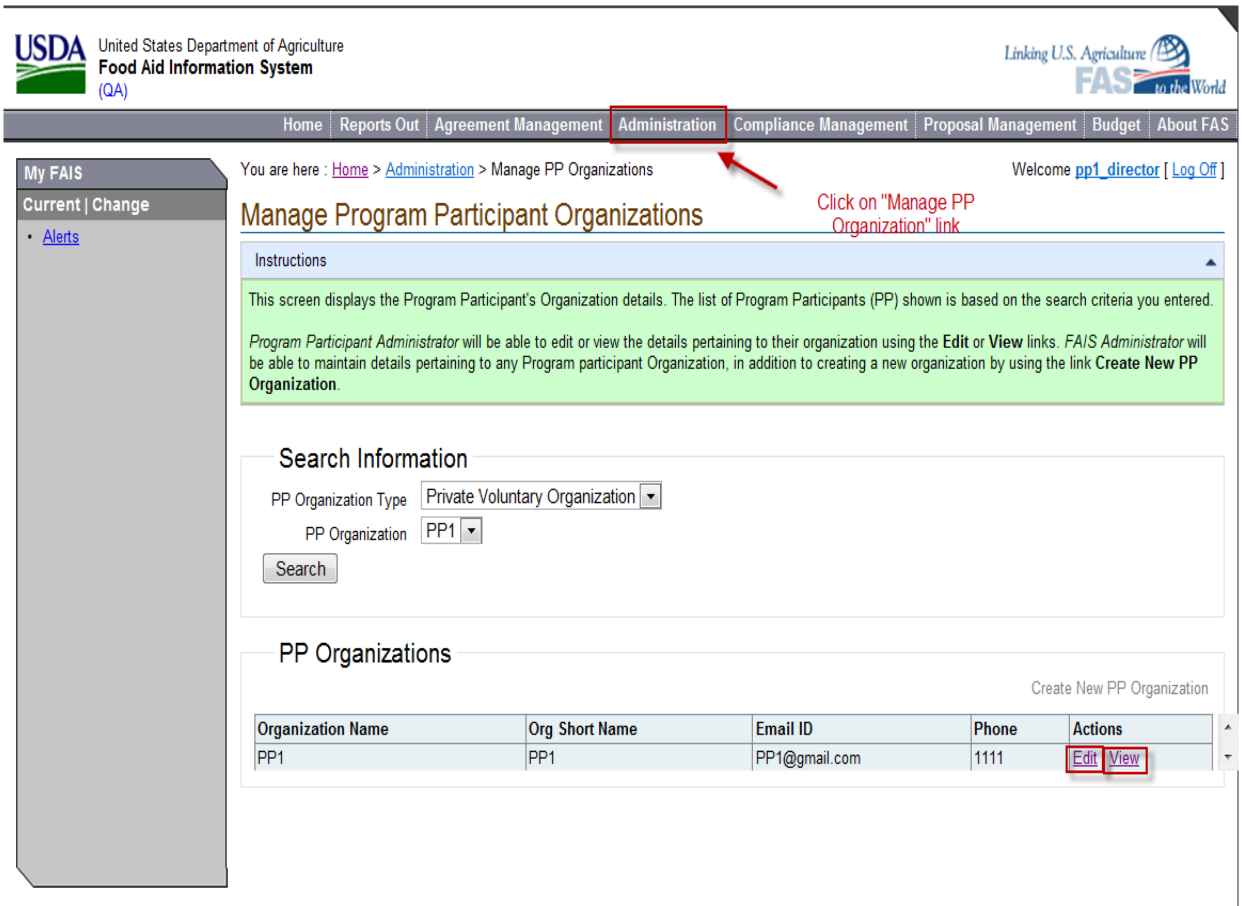
3. System Menu/ Functionalities

3.1. Participant Profile

Each Program Participant organization will have to nominate at least one user for the **PPAdmin** role who will be capable of maintaining the Participant Organization's address and grant access to FAIS for users with valid eAuthentication from that participant organization

3.1.1. Maintain Participant Organization Profile

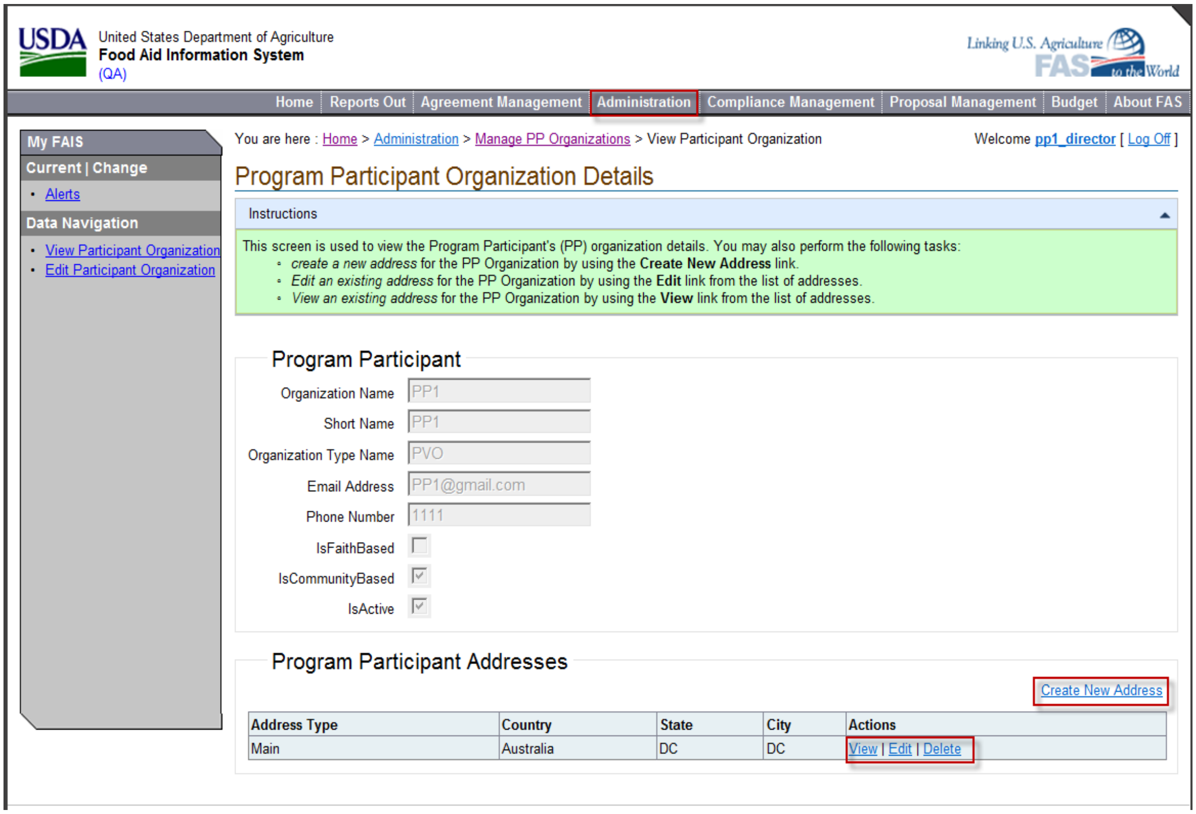
In order to maintain or view the participant organization details, click on **Manage PP Organization** link from **Administration** menu



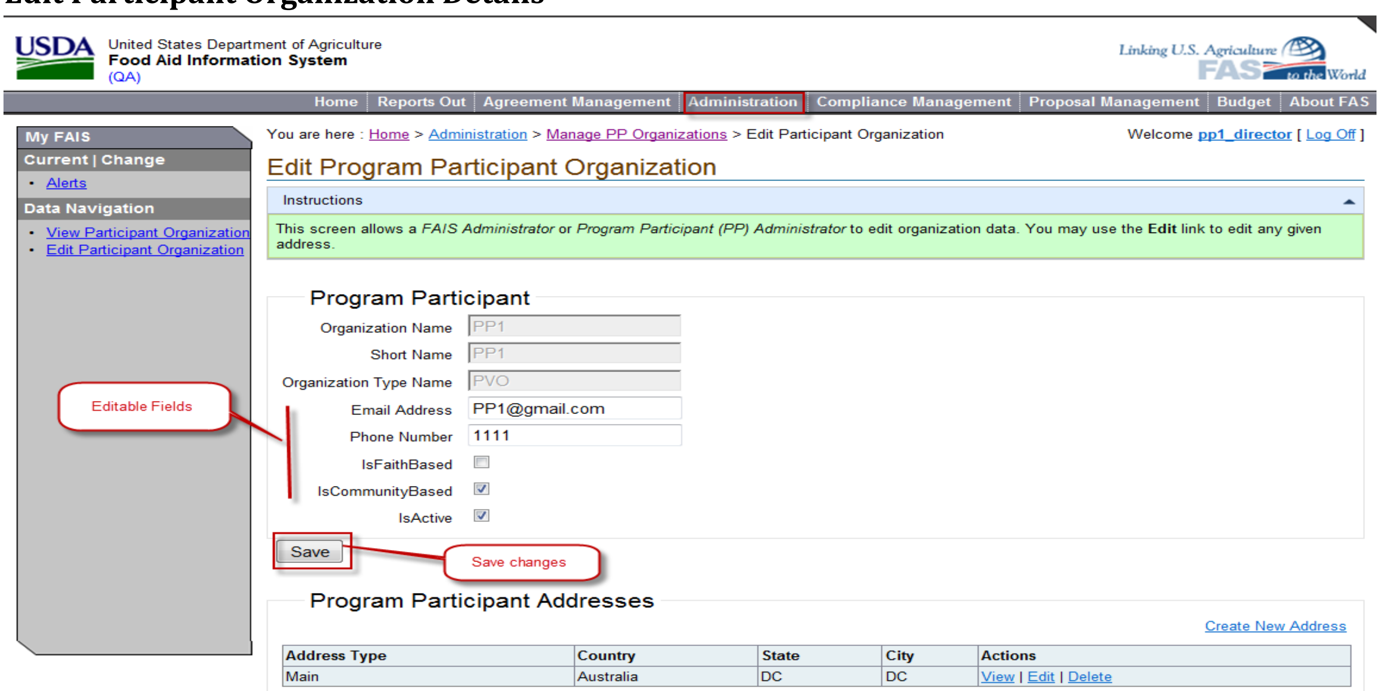
View Participant Organization Details

1. Click on **Manage PP Organization** from **Administration** menu
2. Click on **View**
3. System will display the **Program Participant Organization** screen (below)

3.1.2. Program Participant Organization



Edit Participant Organization Details



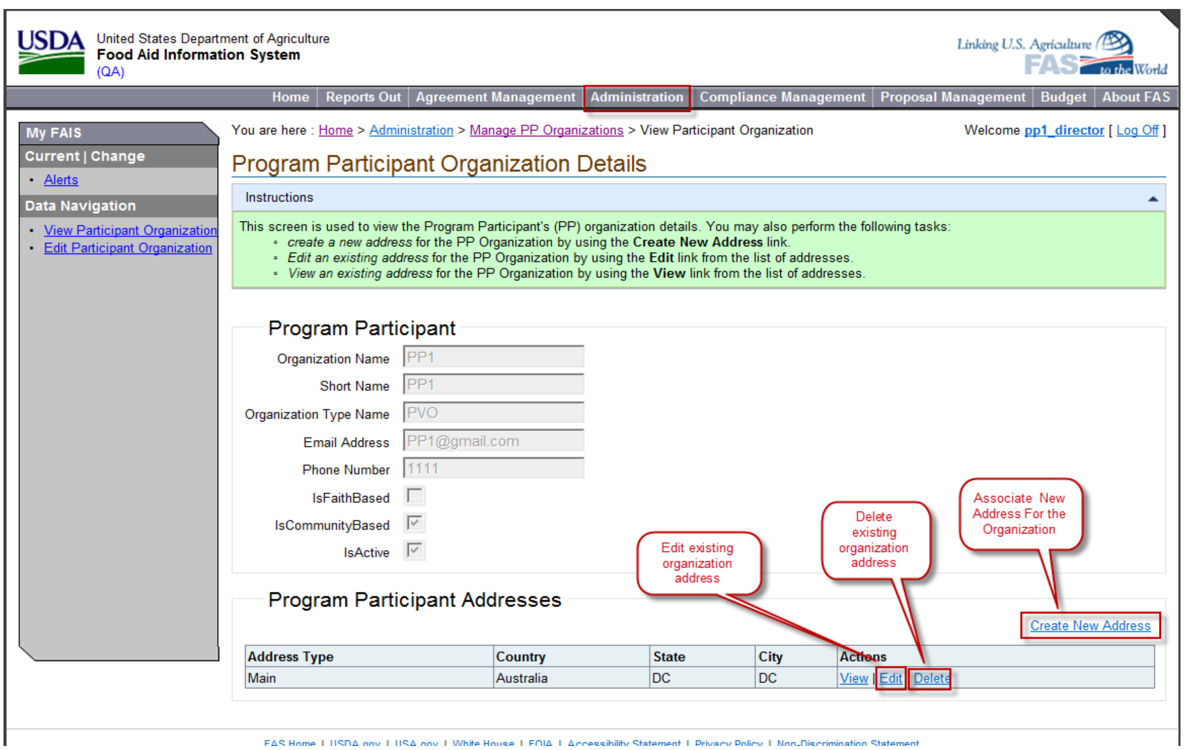
In order to edit a participant organization detail

1. Click on **Manage PP Organization** from **Administration** menu
2. Click on **Edit**
3. System will display the **Edit Program Participant Organization** screen
4. Edit any of the following details
    - Email Address
    - Phone Number
    - Is Faith Based
    - Is Community Based
5. Click on **Save** to save the details

Manage Participant Address

Participant User with **PPAdmin** role will be able to maintain the addresses of the participant organization. Each participant organization can have more than one address. All other participants will only be able to **View** the organization and address details

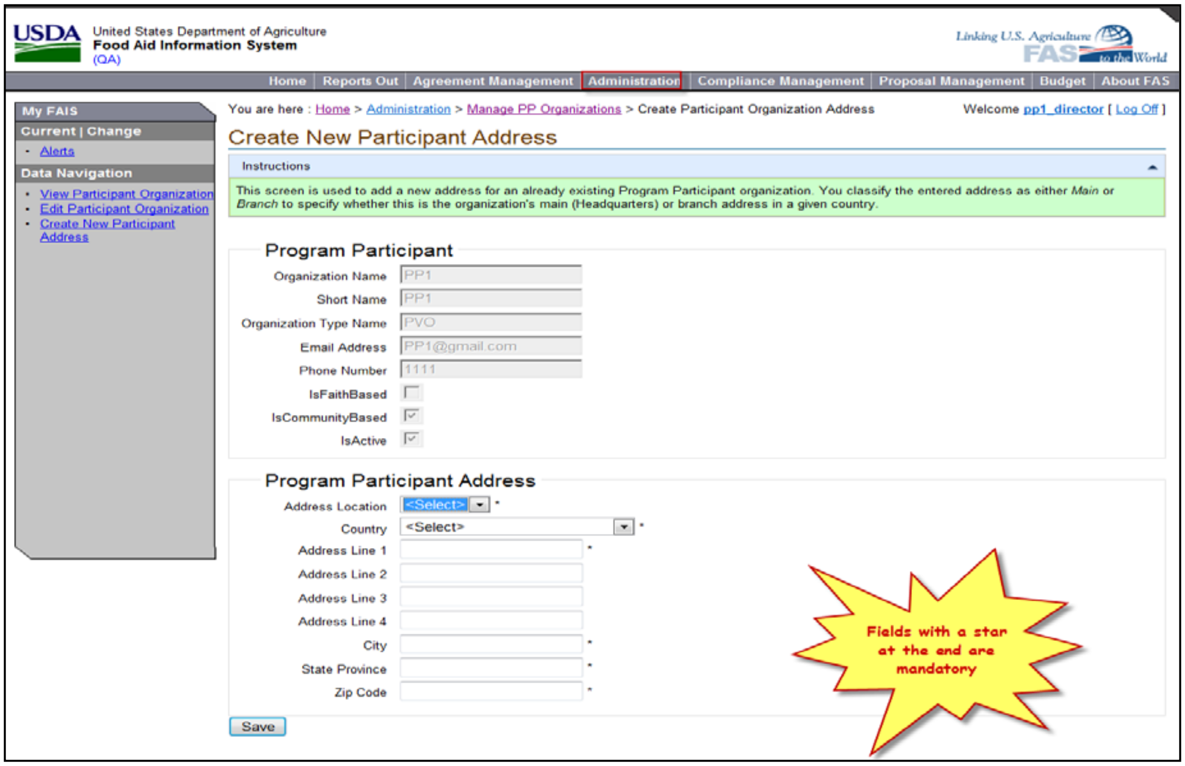
Participant addresses can be maintained through **Program Participant Organization Details** screen or through **Edit Program Participant Organization Details** screen



To delete an address

1. Click on **Delete** against an address

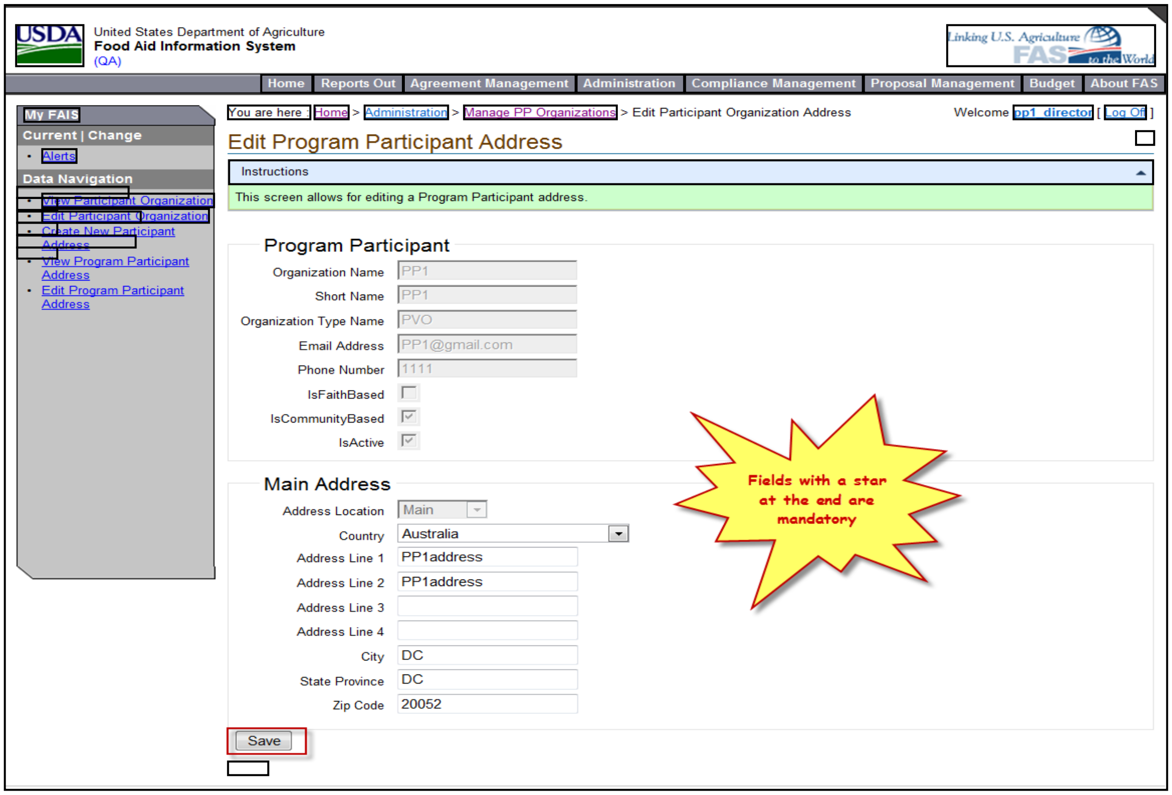
3.1.3. Create New Participant Organization Address



To create a new address

1. Click on **Create New Address** on **Program Participant Organization Details** screen or **Edit Program Participant Organization Details** screen
2. Enter the following details
   - Select Address Location
   - Select Country
   - Enter Address Line 1
   - Enter Address Line 2(Not Mandatory)
   - Enter Address Line 3(Not Mandatory)
   - Enter Address Line 4(Not Mandatory)
   - City
   - State / Province
   - Zip Code
3. Click on **Save**

Edit Program Participant Address

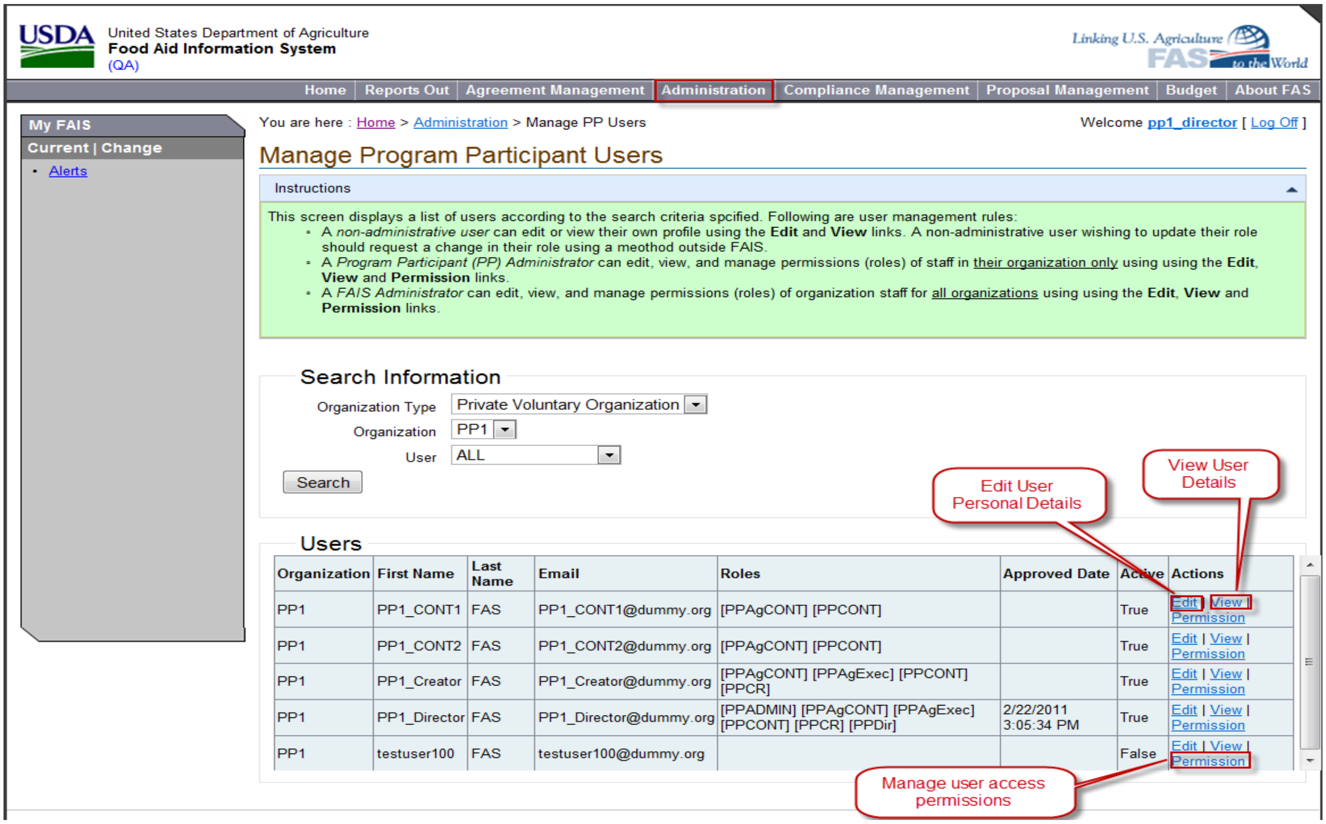


To edit an address

1. Click on **Edit** on **Program Participant Organization Details** screen or **Edit Program Participant Organization Details** screen
2. Edit the following details
    - Select Address Location
    - Select Country
    - Enter Address Line 1
    - Enter Address Line 2(Not Mandatory)
    - Enter Address Line 3(Not Mandatory)
    - Enter Address Line 4(Not Mandatory)
    - City
    - State / Province
    - Zip Code
3. Click on **Save**

3.1.4. Manage Participant User

Participant users with PPAdmin will be able to edit, view and grant access to users of his / her organization. All other users will be able to edit or view their user details

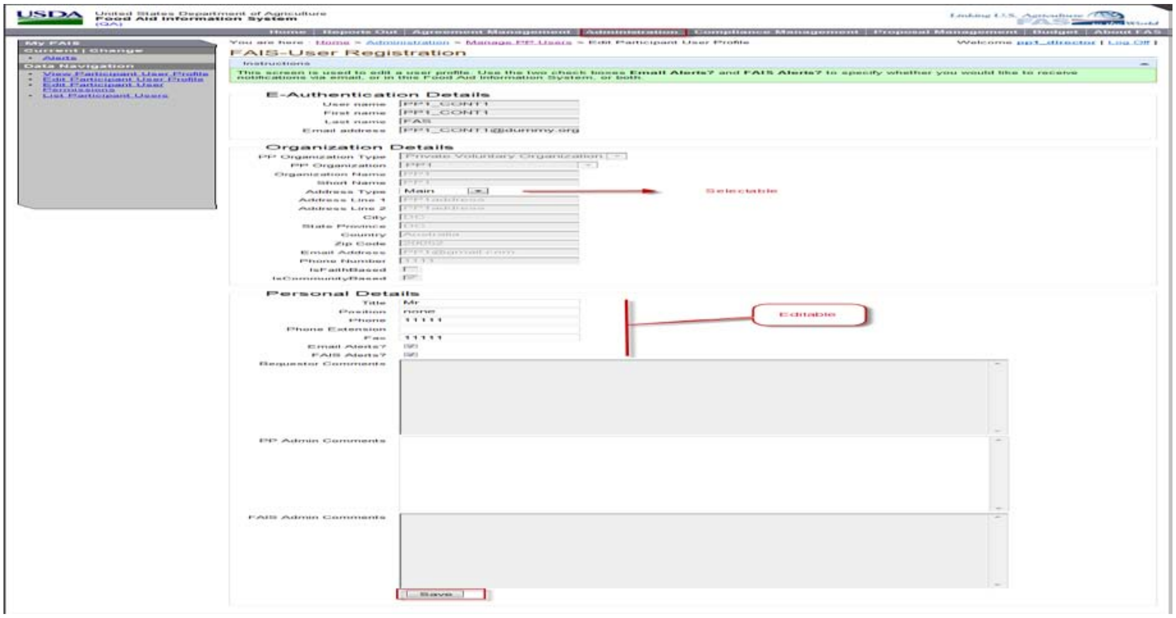


Organization	First Name	Last Name	Email	Roles	Approved Date	Active	Actions
PP1	PP1_CONT1	FAS	PP1_CONT1@dummy.org	[PPAgCONT] [PPCONT]		True	Edit | View | Permission
PP1	PP1_CONT2	FAS	PP1_CONT2@dummy.org	[PPAgCONT] [PPCONT]		True	Edit | View | Permission
PP1	PP1_Creator	FAS	PP1_Creator@dummy.org	[PPAgCONT] [PPAgExec] [PPCONT] [PPCR]		True	Edit | View | Permission
PP1	PP1_Director	FAS	PP1_Director@dummy.org	[PPADMIN] [PPAgCONT] [PPAgExec] [PPCONT] [PPCR] [PPDir]	2/22/2011 3:05:34 PM	True	Edit | View | Permission
PP1	testuser100	FAS	testuser100@dummy.org			False	Edit | View | Permission

To manage PP users, click on **Manage PP Users** link from **Administration**

1. Click on **Edit** to edit user personal details
2. Click on **View** to view user details
3. Click on **Permission** to edit user permission settings (Only users with **PPAdmin** role)

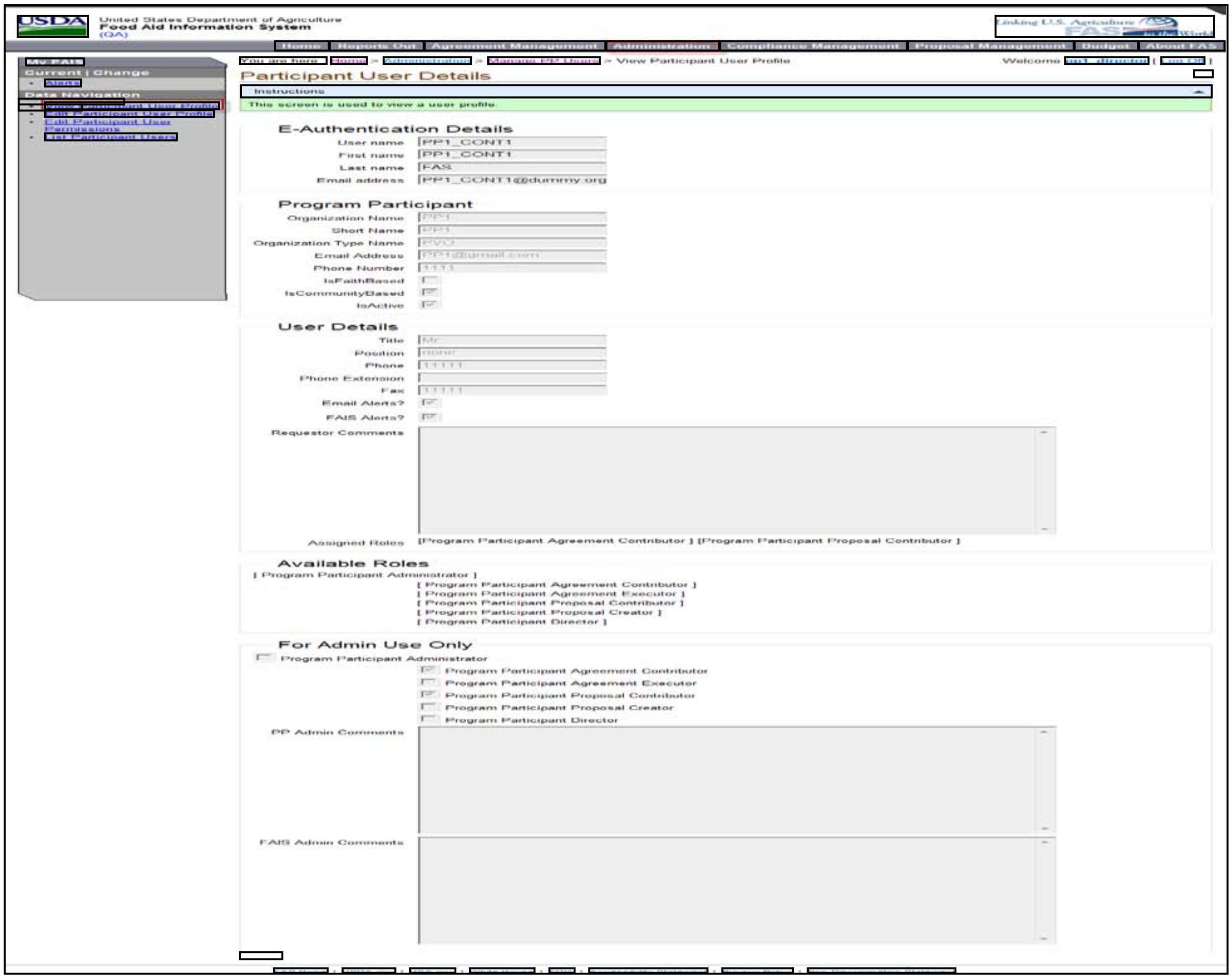
Edit PP User Details



In order to Edit Users personal details

1. Click on **Edit** against a user in **Manage Program Participant User** screen
2. System will display **FAIS User Registration** screen
3. The following details will be editable
    - Select Address Type
    - Edit Title
    - Edit Position
    - Edit Phone
    - Edit Phone Extension
    - Edit Fax
    - Check / Un Check E Mail Alerts
    - Check / Un Check FAIS Alerts
4. Click **Save** to save details

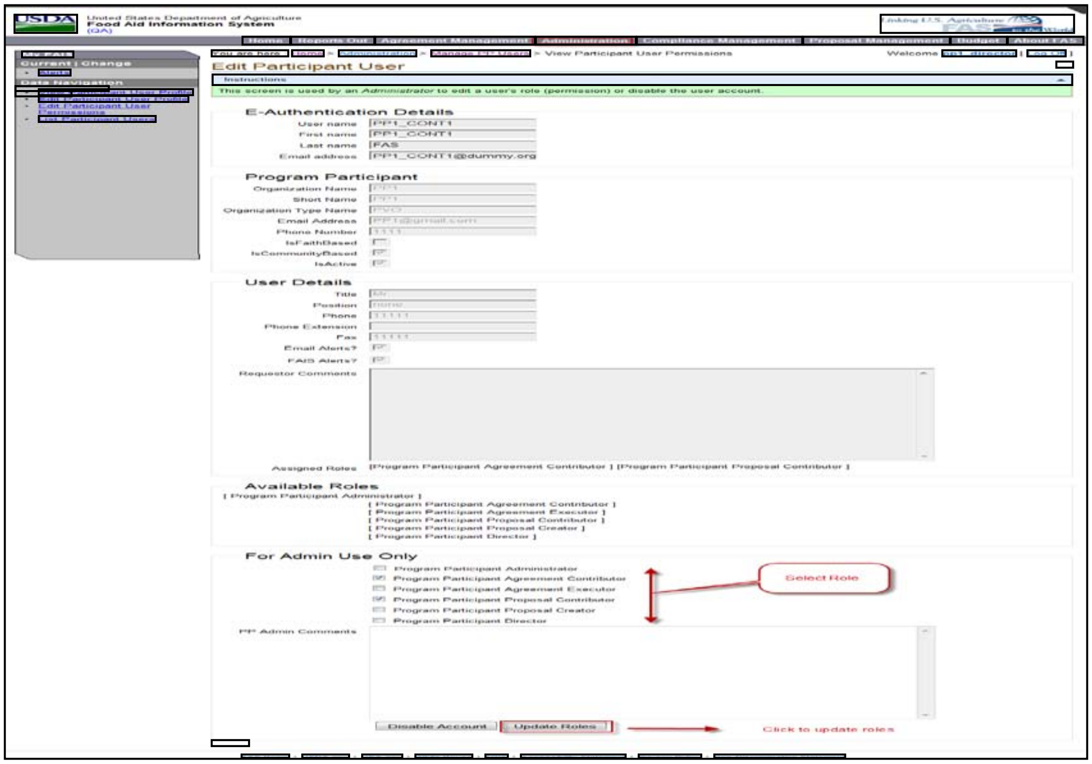
View PP User Details



In order to View Users details

1. Click on **View** against a user in **Manage Program Participant User** screen
2. System will display **Participant User Details** screen

3.1.5. Manage User Permissions



In order to manage user's role for accessing the FAIS, PPAdmin users will (Only PPAdmin users)

1. Click on **Permission** against a user in **Manage Program Participant User** screen
2. System will display **Edit Participant User** screen
3. The **Admin Use Section** will be editable
    - Click on check box against requisite roles
4. Click **Update Roles**
5. System will send an alert to the user whose roles has been modified

4. Proposal Creation

The application section of the manual is the most important part of the manual. It will go through each element of the process of creating and submitting a proposal through FAIS.

4.1. Getting started with proposal creation

Proposal Creation

Once a solicitation is created and published, the participant user will be able to create a proposal; the proposal should be created and submitted before the end date of the solicitation.

Note: A proposal can be submitted only for solicitations that are published.

Proposal Management at Participant Organization

Proposal Management			
Module/ Role	**Participant Director**	**Participant Proposal Creator**	**Participant Proposal Contributor**
Proposal	Can work on all sections of the proposal created by that director	Can work on all sections of an assigned proposal	Can work on assigned sections of a proposal
Proposal Submittal	Can submit proposal created by him / her to FAD	Can submit proposal assigned to him/her to Participant Director	Cannot submit proposal
Proposal Section Submission	Can submit to participant proposal creator	Can submit to participant proposal creator	Can submit proposal **section/s** assigned to him / her to participant proposal creator

4.1.1. Proposal Status

Proposal will be under various statuses along its life cycle as listed below

Proposal Status			
Status	**Status Description**	**Action Button**	**UI / Page**
In Progress	Proposal is created by a participant director	Create Online Proposal	Create Proposal
	Modification is requested on proposal details by participant director	Request Modification	Proposal Summary
Submitted For Review	Proposal is submitted to participant director for review by proposal creator	Submit for Review	Proposal Summary
Submitted	Proposal is submitted to FAD by participant director	Submit to FAD	Proposal Summary
Cancelled	Proposal submission to FAD is cancelled by participant director	Reject	Proposal Summary
Withdrawn	Proposal is withdrawn by participant director after it is submitted to FAD		
Approved	Proposal is approved by FAD Branch	NA	NA
Rejected	Proposal is rejected by FAD Branch	NA	NA
On Hold	Decision on the proposal is put On Hold by FAD Branch	NA	NA
PP Accepted	Approved proposal has been accepted by participant director	Accept	View Approval Letter
PP Declined	Approved proposal has been declined by the participant director	Decline	View Approval Letter

4.1.2. Accessing Proposal Link

There are different ways of accessing or navigating to the creating a proposal link. The different ways are mentioned below:

Navigating via USDA Food Aid

1. Through the USDA- Food Aid site, the user can select the programs listed in the page.
2. The user must select the program link
3. User will be redirected to https://fas.usda.gov/fais/public/FoodAid

Navigating via FAIS

There are two ways through which you can create proposals through the FAIS system, they are as follows:

1. Select **Solicitation** from Proposal Management Menu > Select **View** against the solicitation you want to view > Select **Create Proposal** on the Create Proposal page.

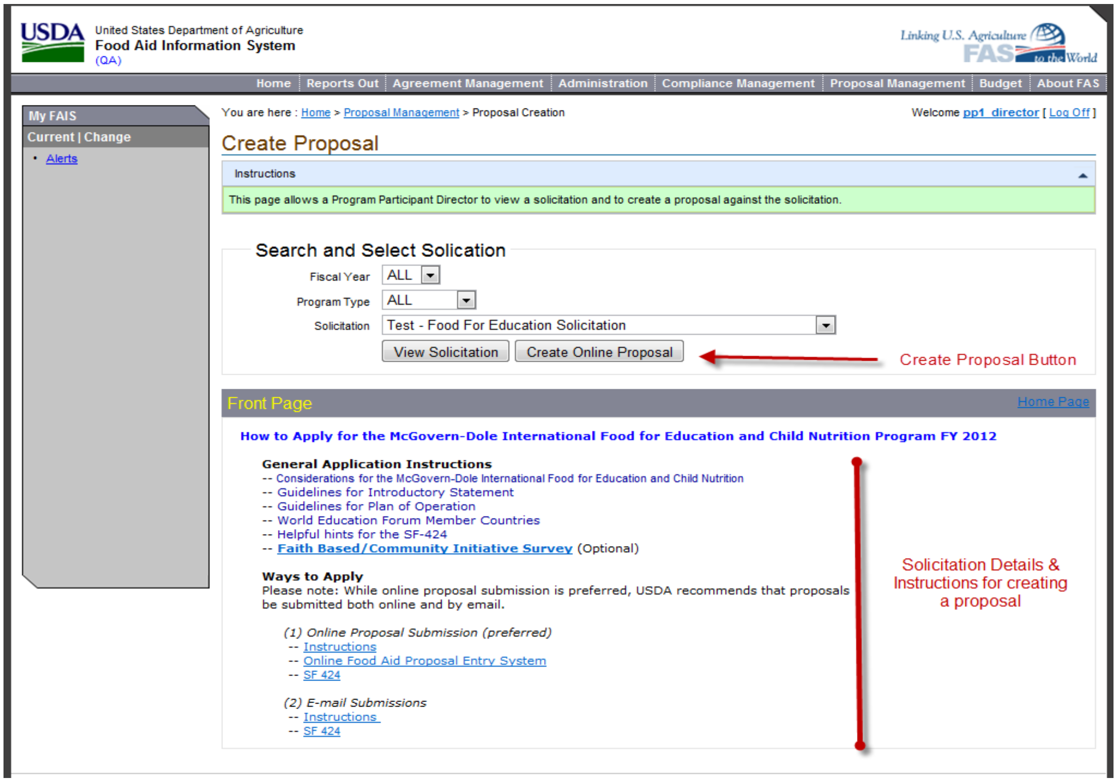
2. Select Proposals from the Proposal Management Menu > Select **Create New Proposal** from the Proposal List.

Note: Some of the fields in the Create New Proposal page are already pre populated with the solicitation details.

4.2. Creating a Proposal

In the Proposal Creation page to create new proposal select the Create New Proposal, the Create New Proposal screen opens. To create a proposal, follow the steps listed below:

1. Select the **Fiscal Year** from the Drop Down List
2. Select the **Program Type** from the drop down list
3. Select the **Solicitation** from the drop down list.
4. Select **View Solicitation** to view the solicitation.
5. Select **Create Online Proposal**, to view the proposal.



Proposal Sections & Layout

Proposal is broadly divided into following areas

- Proposal Summary – View proposal workflow history and work flow actions
- Assigning Roles – Assign proposal creators and section contributors
- Applicant Details – Details of point of contacts for the proposal
- Proposal Section –
  1. Introduction Section – Introduces the proposal
  2. Commodity Section – Elucidates the commodity requirement
  3. Activity Objective Section – Explains the Activities to be performed through the proposal
  4. PVO Budget Section / WFP Budget Section – Elaborates Financial requirements

Note: - User should ensure sections are created in the sequence listed above

Assigning a Proposal

Once the user selects Create Online Proposal, the Assign proposal page opens. The page allows you to assign the proposal to a contributor. This allows the user/role to manage the proposal.

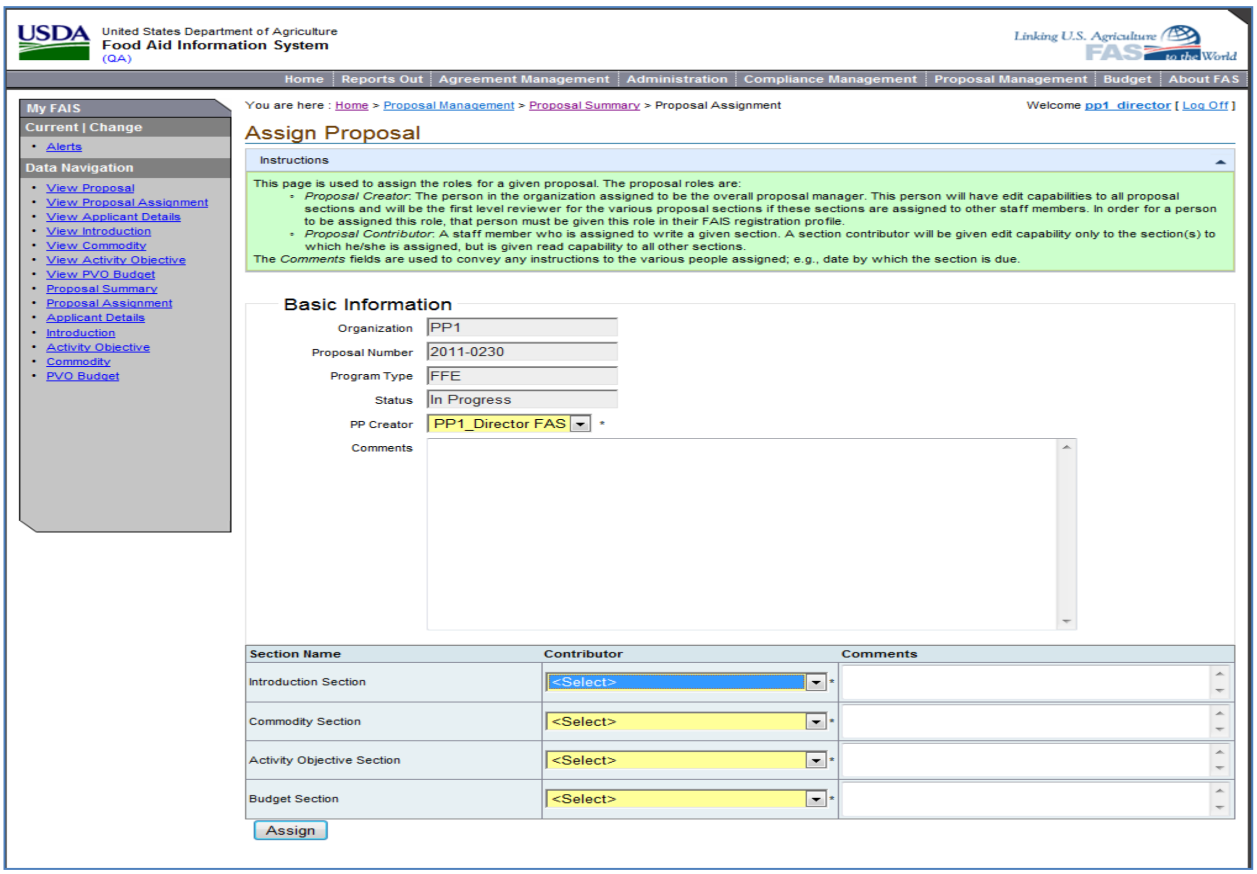
To assign the proposal to a contributor follow the steps listed below:

1. The following details are prepopulated by the system:

  a. Organization name
  b. Proposal Number
  c. Program Type
  d. Proposal Status

2. Select the name of the Program Participant creator from the drop down list. This is a mandatory field.
3. Enter comments if any.
4. Select the name of the contributor for Introduction section from the drop down list. This is a mandatory field. Select the name of the contributor for Commodity section from the drop down list. This is a mandatory field.
5. Select the name of the contributor for Activity Objective section from the drop down list. This is a mandatory field.
6. Select the name of the contributor for Budget section from the drop down list. This is a mandatory field.
7. Select **Assign** to assign the proposal to a creator.

Note: The fields in yellow and with * mark are mandatory.



Once the proposal is assigned, an automated mail is sent out to the contributors assigned to the section. The automated mail is sent out to contributors who opted for email alerts.

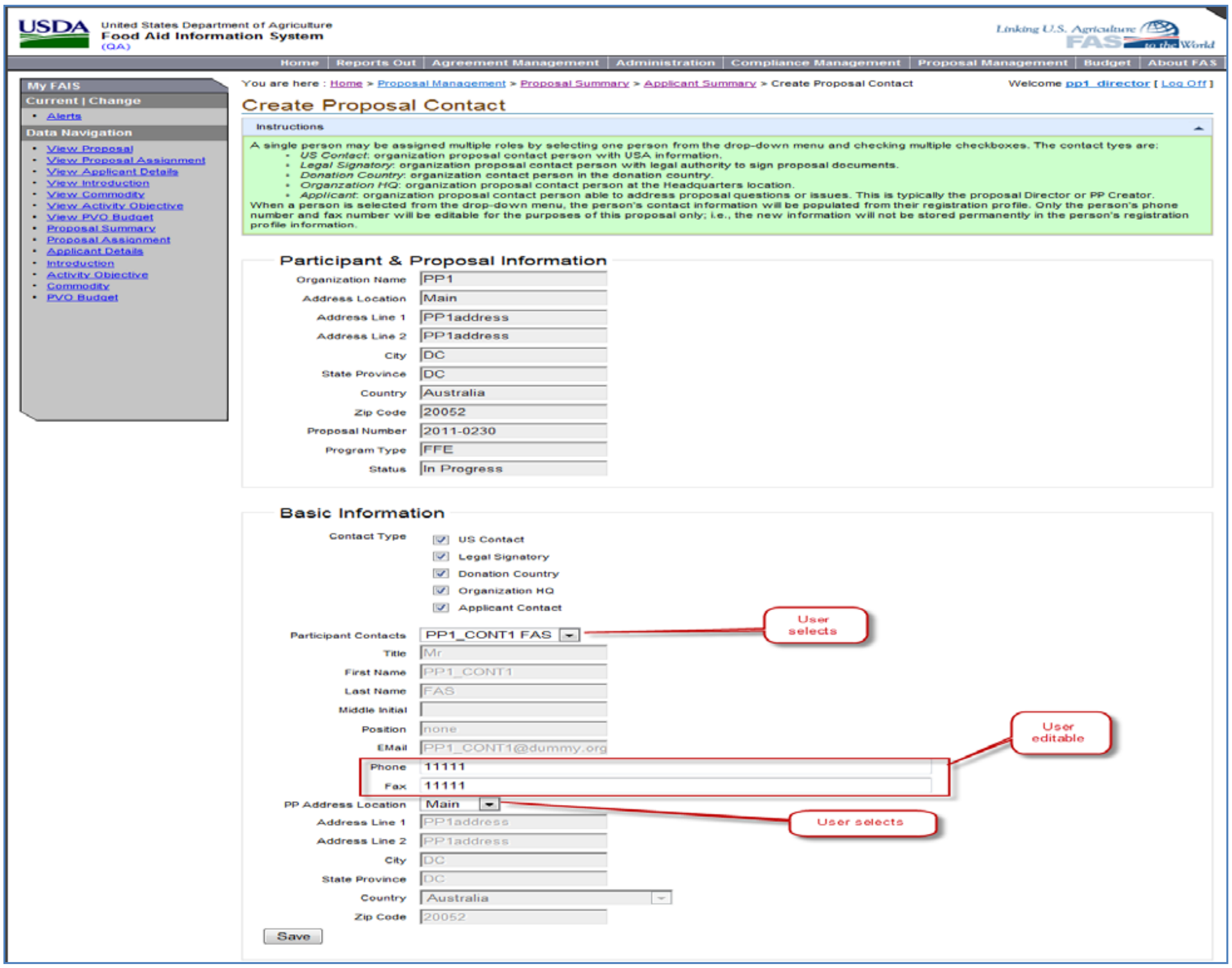
4.2.1. Proposal Applicant Details

The Proposal Applicant Details page lists all the contact information of the applicant. This page needs to be filled by either the Proposal Creator or the Proposal Director.

Most of the applicant details are already prepopulated based on the user profile. The user can only modify the following details:

1. The user can enter or modify the office associated with this applicant; you can select either branch or main from the drop down menu.
2. The user can enter or modify the Phone and fax numbers listed.
3. Select **Save** to save the participant and proposal details.

Note: At least one contact should be listed for each Contact type.



4.2.2. Proposal Sections

Proposal contains 4 major sections and applicant details. The sections can be assigned to contributors and they have their own workflow and statuses as mentioned below

Proposal Section Status			
Status	**Status Description**	**Action Button**	**UI / Page**
In Progress	Proposal is created by a participant director	Create Online Proposal	Create Proposal
	Modification is requested on a proposal section	Request for Modiciation	Section Summary
Submitted For Review	Proposal section is submitted to proposal creator for review by proposal contributor	Submit for Review	Section Summary
Submitted	Proposal is submitted to FAD by participant director	Submit to FAD	Proposal Summary

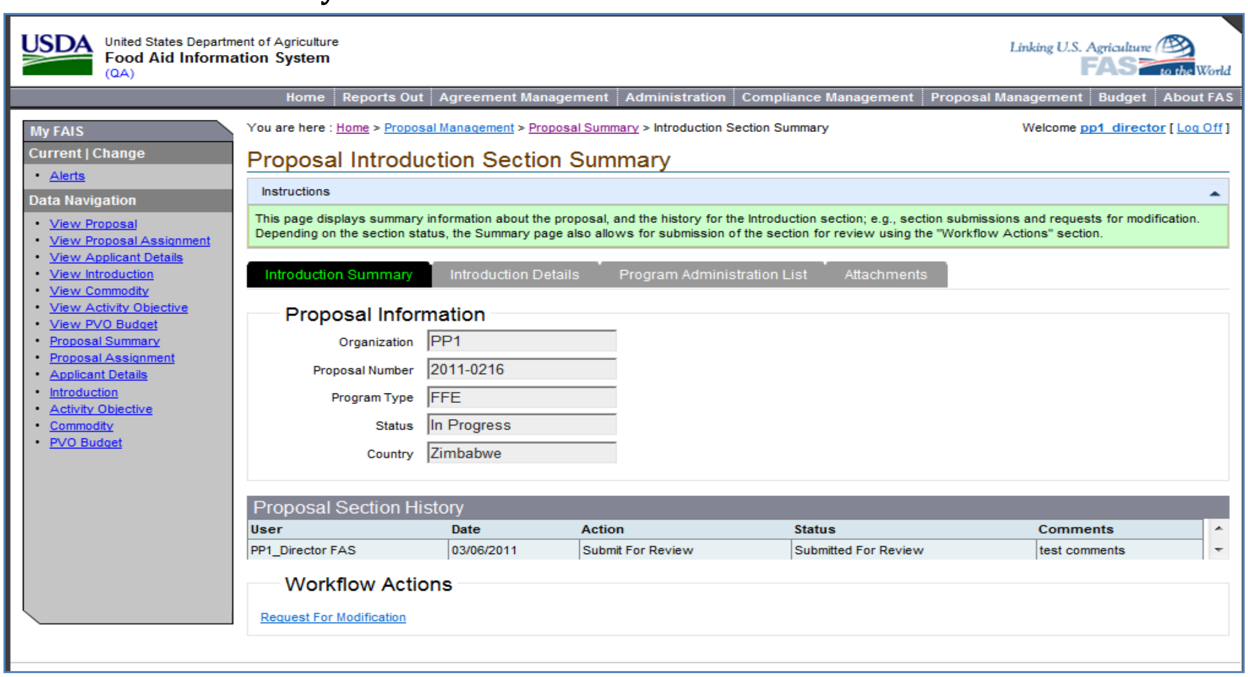
4.2.3. Introduction Section

The Introduction section basically outlines the proposal summary and details. This section is usually handled by a contributor who is assigned this section by the proposal creator.

This section has four tabs, the contributor is required to enter the required details and then submit the section for review to the proposal creator. The four tabs are:

- Introduction Summary
- Introduction Details
- Program Administration Details
- Attachments

Introduction Summary



The introduction summary lists the proposal information, the proposal information is generally pre populated based on the information that was entered while creating the proposal.

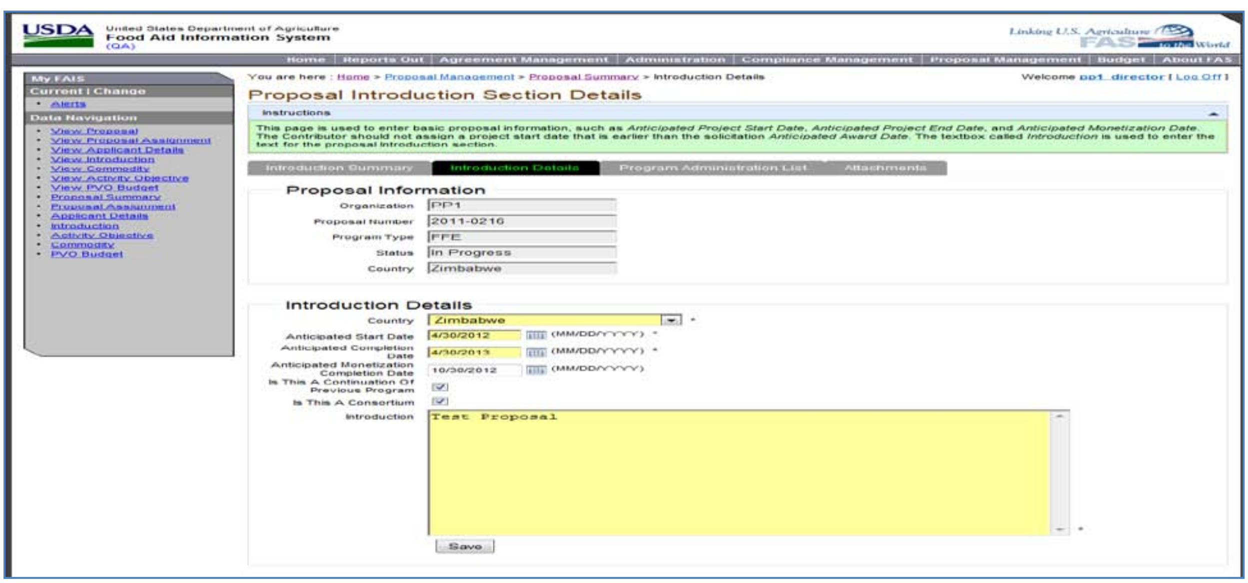
The status of the proposal can either be In Progress or Submitted for Review based on the status of the section.

The proposal section history details the list of activities that occurred as a part of this section.

Workflow Actions: Based on the user role the summary displays the action that can be performed on this summary, which is either Submit for Review or Request for Modification

Proposal Section Status			
Status	**Status Description**	**Action Button**	**UI / Page**
In Progress	Proposal is created by a participant director	Create Online Proposal	Create Proposal
	Modification is requested on a proposal section	Request for Modiciation	Section Summary
Submitted For Review	Proposal section is submitted to proposal creator for review by proposal contributor	Submit for Review	Section Summary
Submitted	Proposal is submitted to FAD by participant director	Submit to FAD	Proposal Summary

Introduction Details

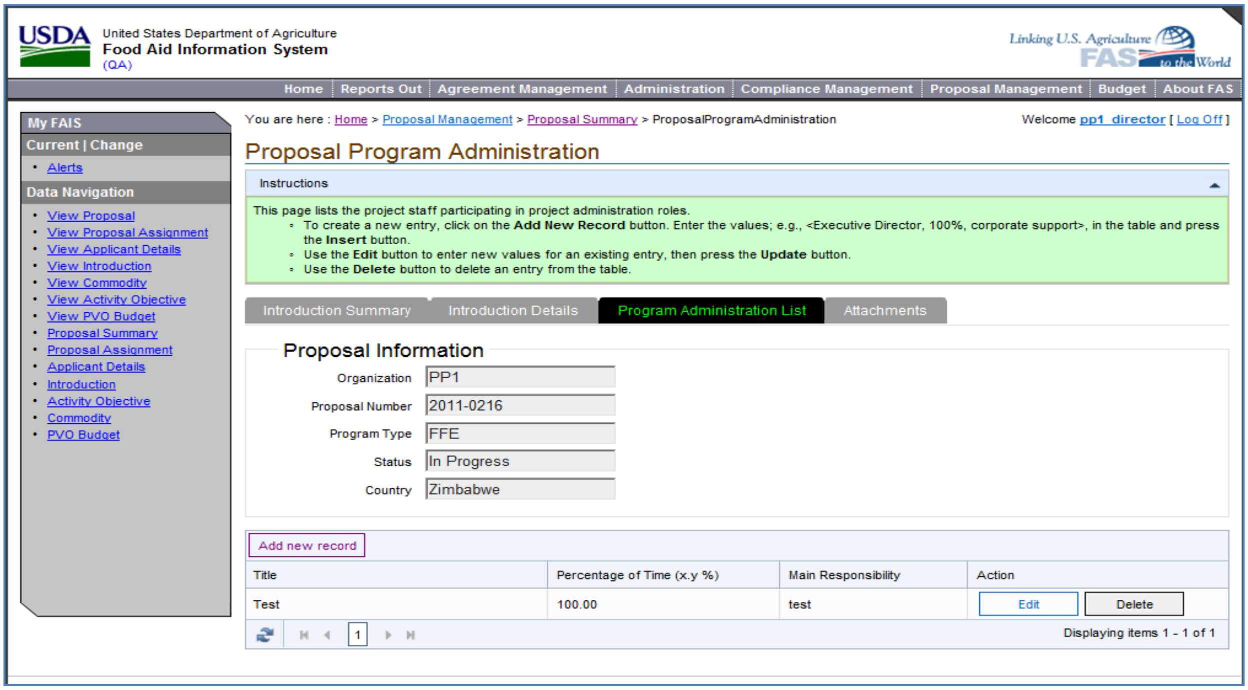


The user is required to enter the following details:

1. Select the name of the Country from the drop down list. This is a mandatory field.
2. Select the Anticipated Start Date from the calendar. This is a mandatory field.
3. Select the Anticipated Completion Date from the calendar. This is a mandatory field.
4. Select the checkbox if this proposal is a continuation of a previous program.
5. Select the checkbox if this is a consortium.
6. Enter Introduction Details in the text box provided. This is a mandatory field.
7. Select **Save** to save the details entered.

Note: The fields in yellow and with * mark are mandatory.

Program Administration List



The Program Administration tab basically lists the number of people who will be working on the project, their title, and % of time they will devote to this project and their main responsibility.

To add a new record, select Add a New record, a new record opens in the table below.

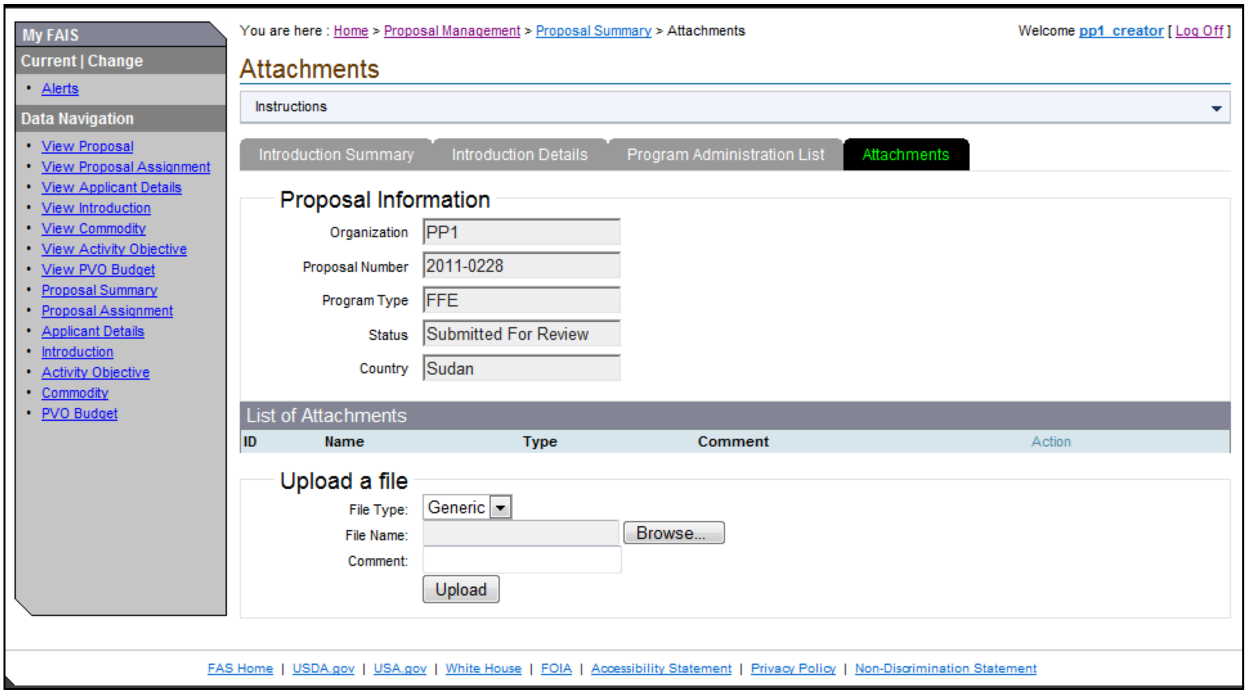
1. Enter the title of the person who will be working on this proposal.
2. Enter the % of time the person will be dedicating for this project
3. Enter the main responsibility of the person.
4. Select **Insert** to Insert the record.
5. Select **Cancel** to cancel.

Editing a record:

To Edit the record that already exists,

1. Select **Edit** and modify the details.
2. Select **Update** to update the modified details

Attachments



To attach any documents that will support this section you can attach the documents in this tab.

To attach a document:

1. Select the File Type from the drop down list.
2. Select the file you want to upload by selecting **Browse.**
3. Select **Upload** to upload the document. Once uploaded, the document will be listed in the table below.
4. To delete any document uploaded select **Delete**.

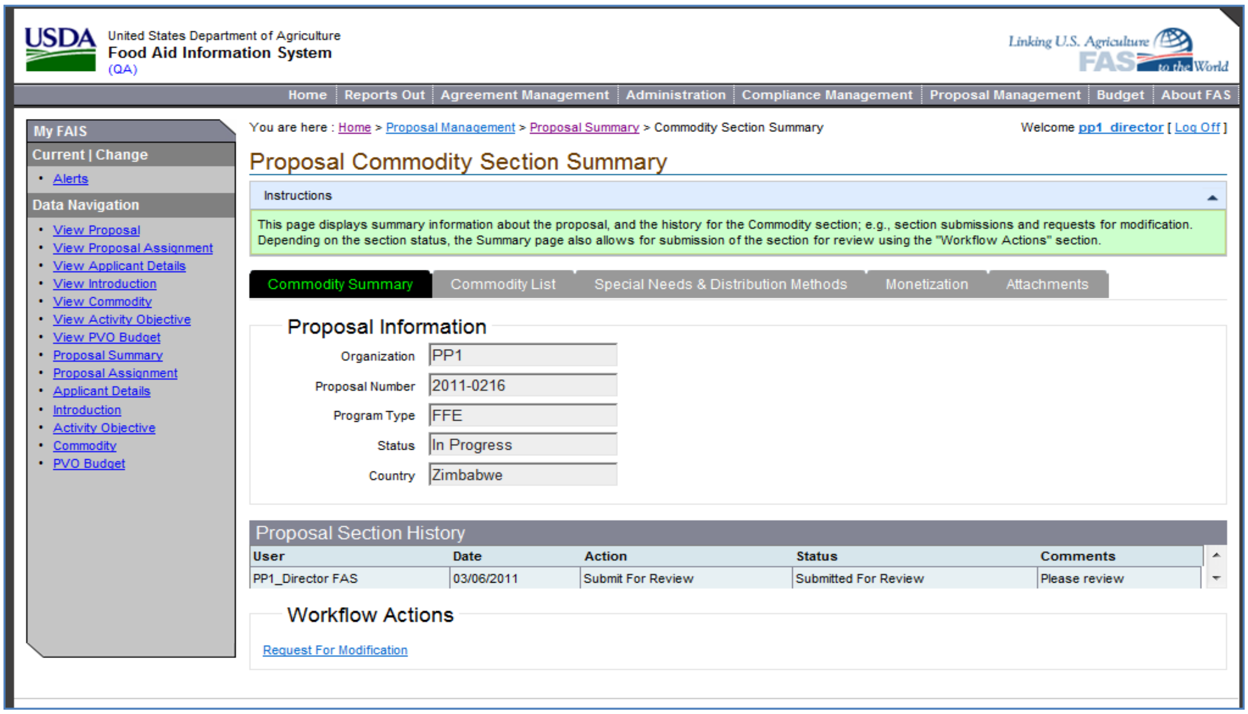
4.2.4. Commodity Section

This section is where the user enters information about the commodity. This section has four tabs, as listed below:

- Commodity Summary
- Commodity List
- Special Needs and Distribution methods

- Monetization
- Attachments

Commodity Summary



The Commodity summary lists the proposal information, the proposal information is generally pre populated based on the information that was entered while creating the proposal.

The status of the proposal can either be In Progress or Submitted for Review based on the status of the section.

The proposal section history details the list of activities that occurred as a part of this section.

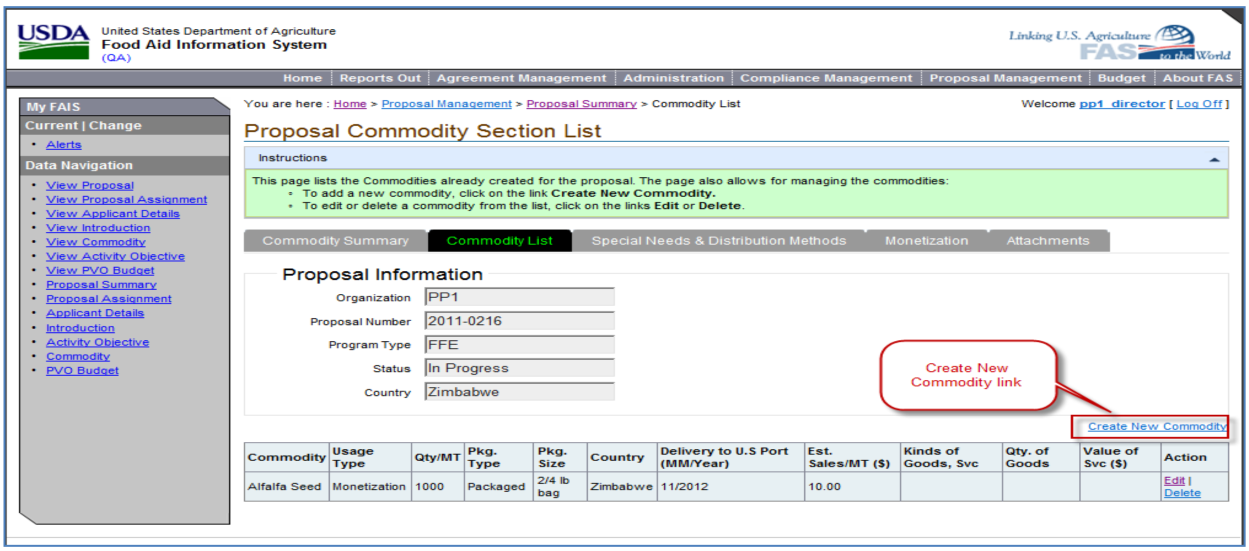
Workflow Actions: Based on the user role the summary displays the action that can be performed on this summary, which is either Submit for Review or Request for Modification.

Proposal Section Status			
Status	**Status Description**	**Action Button**	**UI / Page**
In Progress	Proposal is created by a participant director	Create Online Proposal	Create Proposal

	Modification is requested on a proposal section	Request for Modification	Section Summary
Submitted For Review	Proposal section is submitted to proposal creator for review by proposal contributor	Submit for Review	Section Summary
Submitted	Proposal is submitted to FAD by participant director	Submit to FAD	Proposal Summary

Create Proposal Commodity Section List

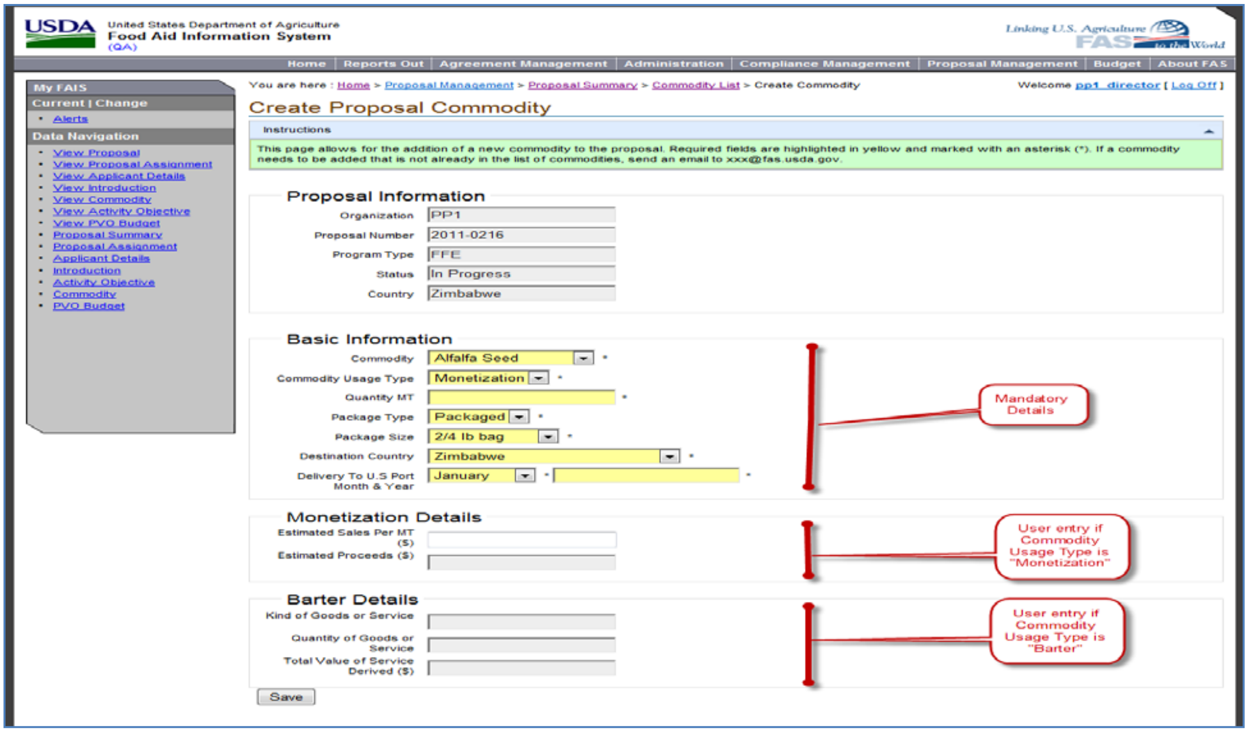
The Create Proposal Commodity Section List tab details the proposal information and the list of commodities selected.



To create a new commodity select Create New Commodity and to Edit an existing commodity select Edit against the commodity you want to edit.

Create New Commodity

To create a new commodity select Create New Commodity, the create Proposal Commodity page opens.



The Proposal information is prepopulated. Enter the Basic Information as shown below,

1. Select the Commodity type from the drop down list.
2. Select the commodity Usage Type from the drop down list
3. Enter the Quantity MT as required.
4. Select the Package Type from the drop down list.
5. Select the Package Size from the drop down list.
6. Select the Destination Country from the drop down list.
7. Select the Month and enter the Year of Deliver to US Port.

Note: All the fields listed are mandatory fields.

Based on the Commodity Usage Type you selected the sections below will be active. If the Commodity type selected is Monetization or Barter, the corresponding sections will be active below:

Monetization Details:

Enter the following information if Commodity Usage Type is "Monetization"

1. Enter the Estimated Sales per MT in the field.
2. The estimated Proceeds fields get calculated based on your input.

Barter details:

Enter the following information if Commodity Usage Type is "Barter"

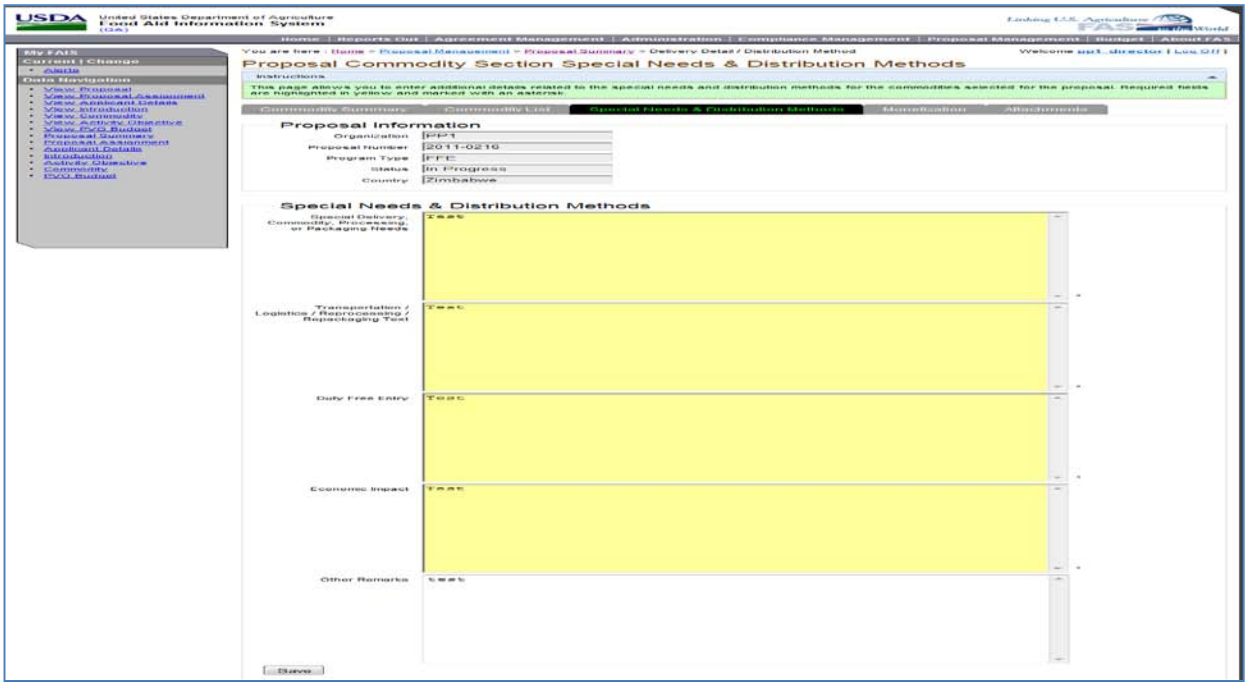
1. Enter the Kind of Goods or Service in the field.
2. Enter the Quantity of Goods or Service.

3. Enter the Total value of Service Derived.

Select **Save** to create a commodity for the proposal.

Special Needs and Distribution Method

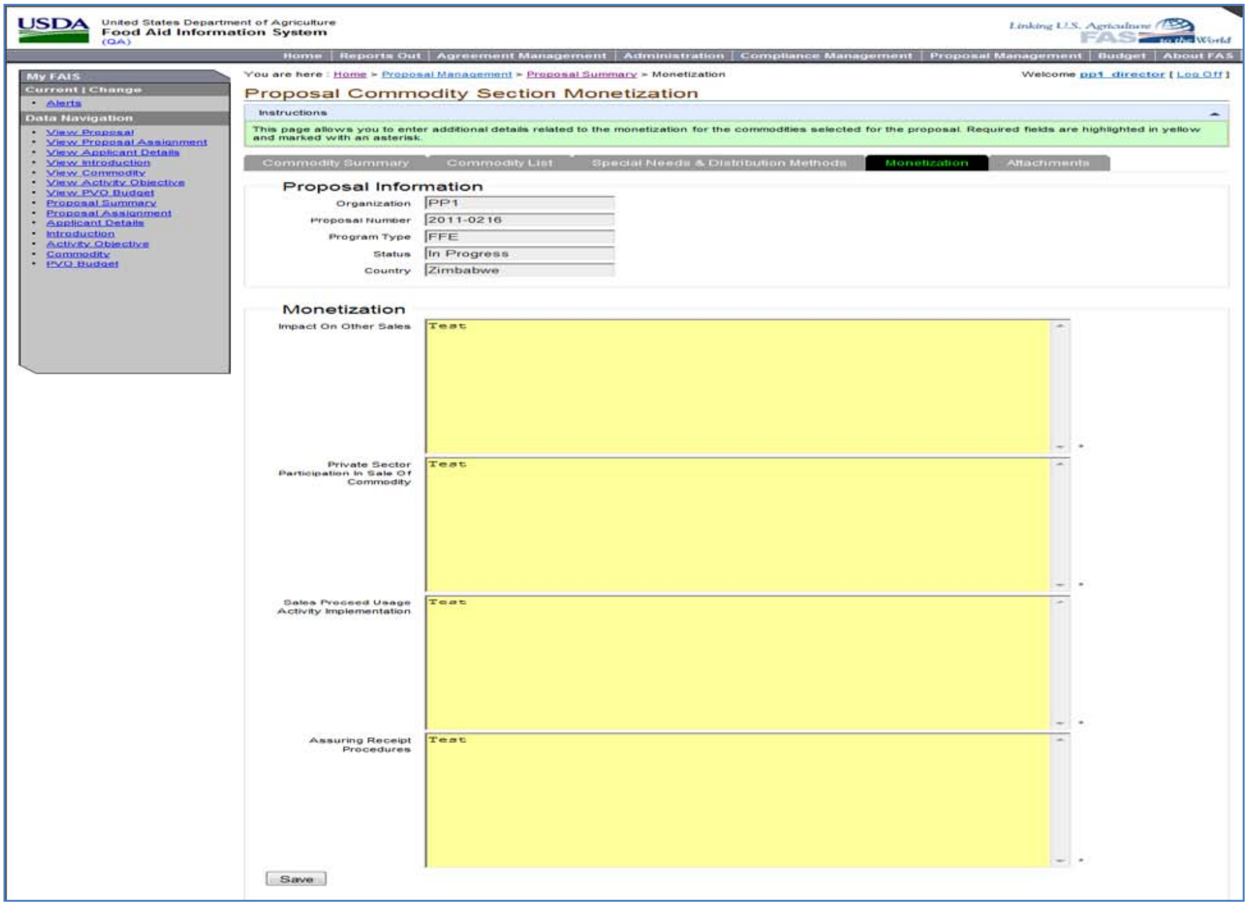
In the Special Needs and Distribution Method tab, the user is required to enter details for the following fields:



1. Special Delivery, Commodity, Processing, or Packaging Needs
2. Transportation / Logistics / Reprocessing / Repackaging Text
3. Duty Free Entry
4. Economic Impact
5. Other Remarks
6. Select **Save** to save the details entered.
   Note: The fields in yellow and with * mark are mandatory.

Monetization

The Monetization tab is active / editable only if the user selects the Commodity User Type as Monetization in the Create Proposal Commodity tab.



The user is required to enter details for the following fields:

1. Impact On Other Sales
2. Private Sector Participation In Sale Of Commodity
3. Sales Proceed Usage Activity Implementation
4. Assuring Receipt Procedures
5. Select **Save** to save the details.

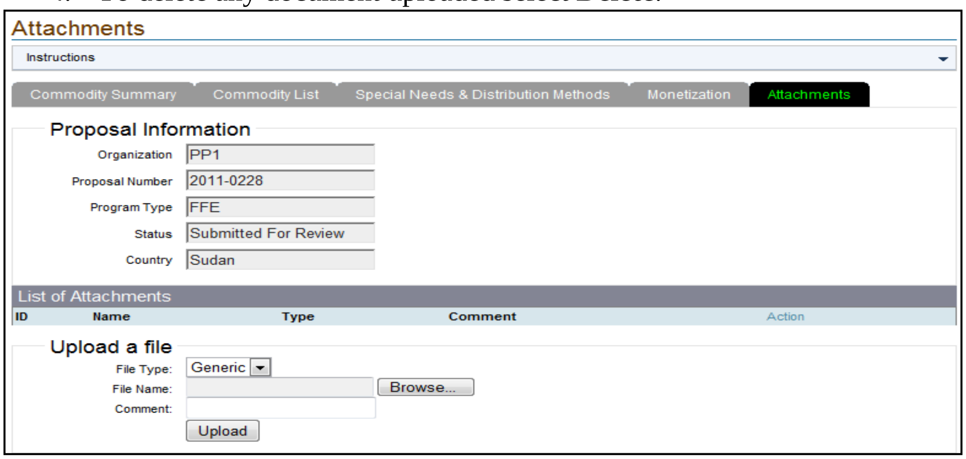
Note: The fields in yellow and with * mark are mandatory.

Attachments

To attach any documents that will support this section you can attach the documents in this tab.

To attach a document:

1. Select the File Type from the drop down list.
2. Select the file you want to upload by selecting **Browse.**
3. Select **Upload** to upload the document. Once uploaded, the document will be listed in the table below.
4. To delete any document uploaded select **Delete**.

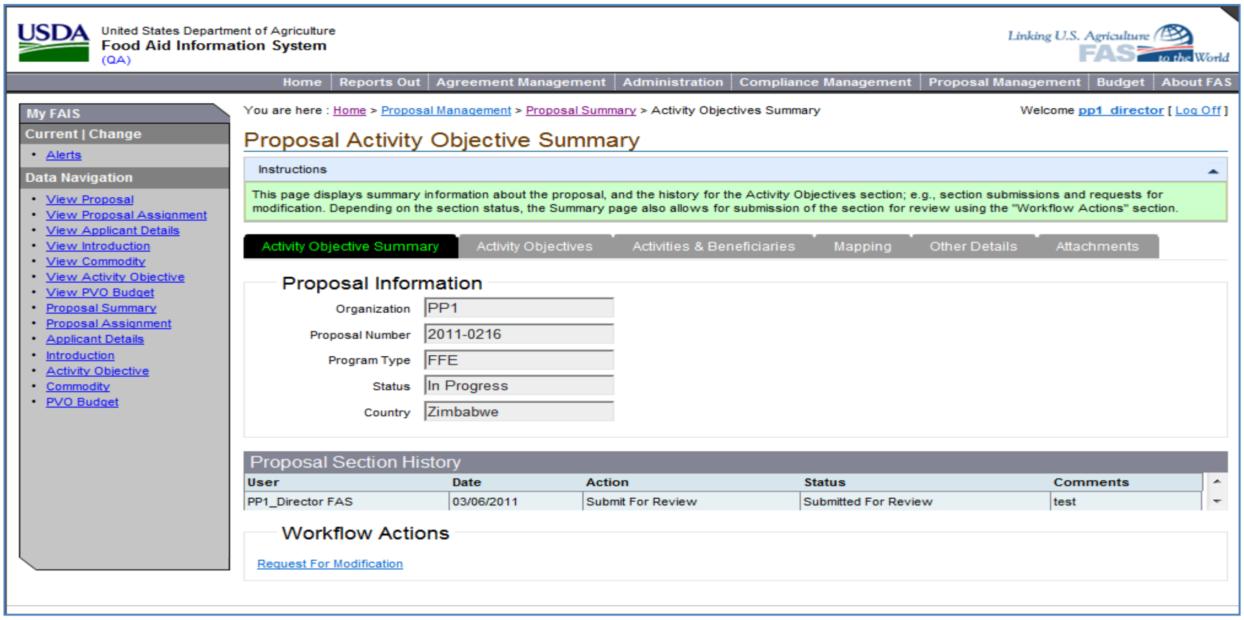


4.2.5. Activity Objective Section

This section is used to explain the objectives addressed through this proposal. This section has the following tabs:

- Activity Objective summary
- Activity Objectives
- Activities & Beneficiaries
- Mapping
- Other Details
- Attachments

Activity Objective Summary



The Activity Objective summary lists the proposal information, the proposal information is generally pre populated based on the information that was entered while creating the proposal.

The status of the proposal can either be In Progress or Submitted for Review based on the status of the section.

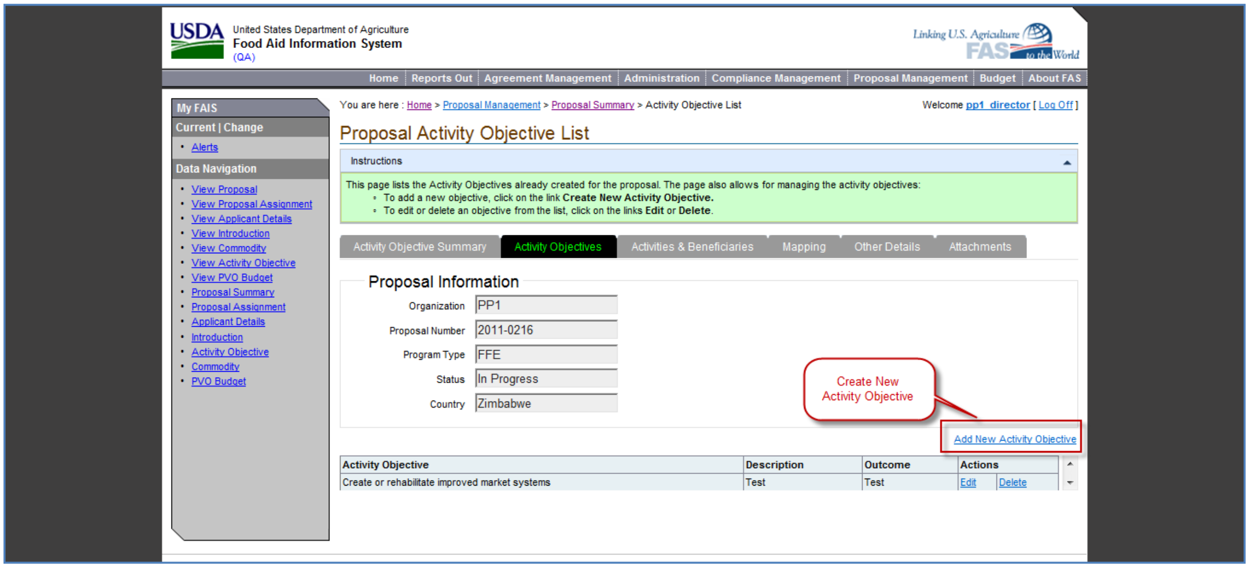
The proposal section history details the list of activities that occurred as a part of this section.

Workflow Actions: Based on the user role the summary displays the action that can be performed on this summary, which is either Submit for Review or Request for Modification

Proposal Section Status			
Status	**Status Description**	**Action Button**	**UI / Page**
In Progress	Proposal is created by a participant director	Create Online Proposal	Create Proposal
	Modification is requested on a proposal section	Request for Modification	Section Summary
Submitted For Review	Proposal section is submitted to proposal creator for review by proposal contributor	Submit for Review	Section Summary
Submitted	Proposal is submitted to FAD by participant director	Submit to FAD	Proposal Summary

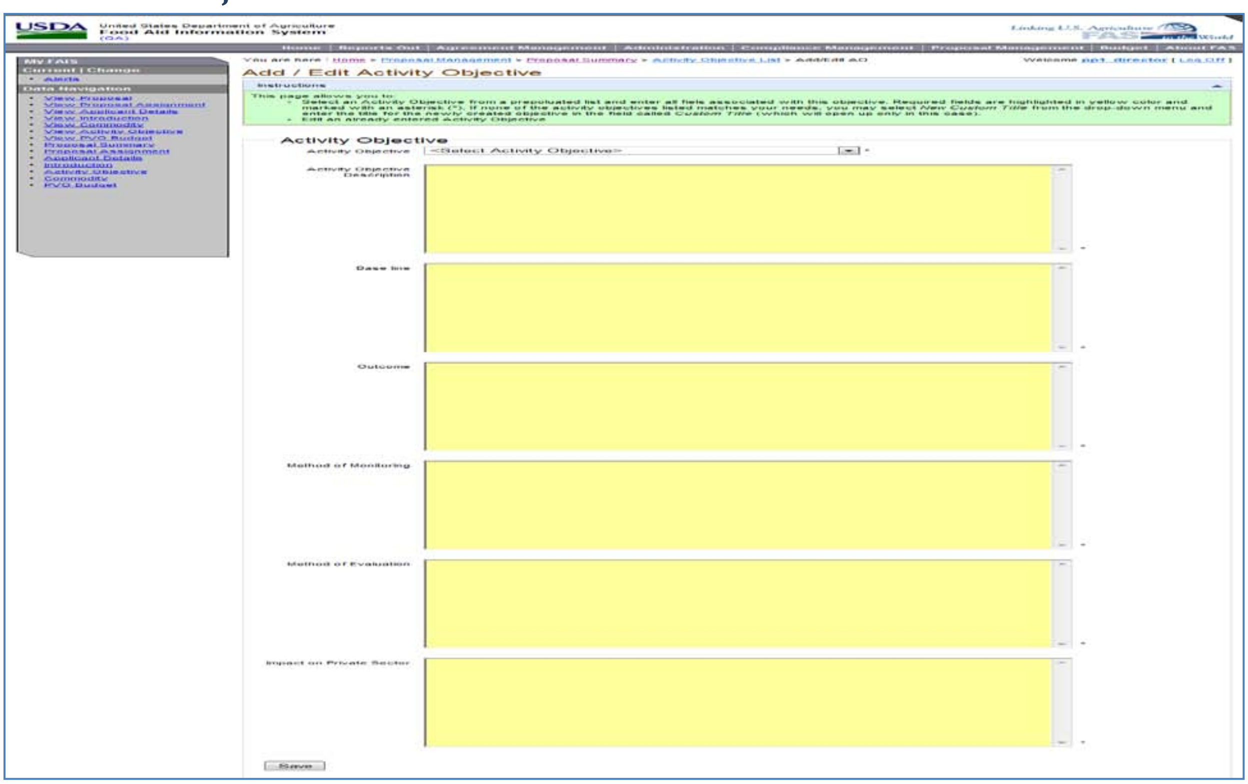
Activity Objective List

The Activity Objective List tab details the activity objectives, along with the proposal information.



To Edit an existing objective select **Edit** against the commodity you want to edit. To delete an objective select **Delete.**

Create a New Objective



To create a new objective, select Add New Activity Objective, the Add/Edit Objective page opens. To add an objective:

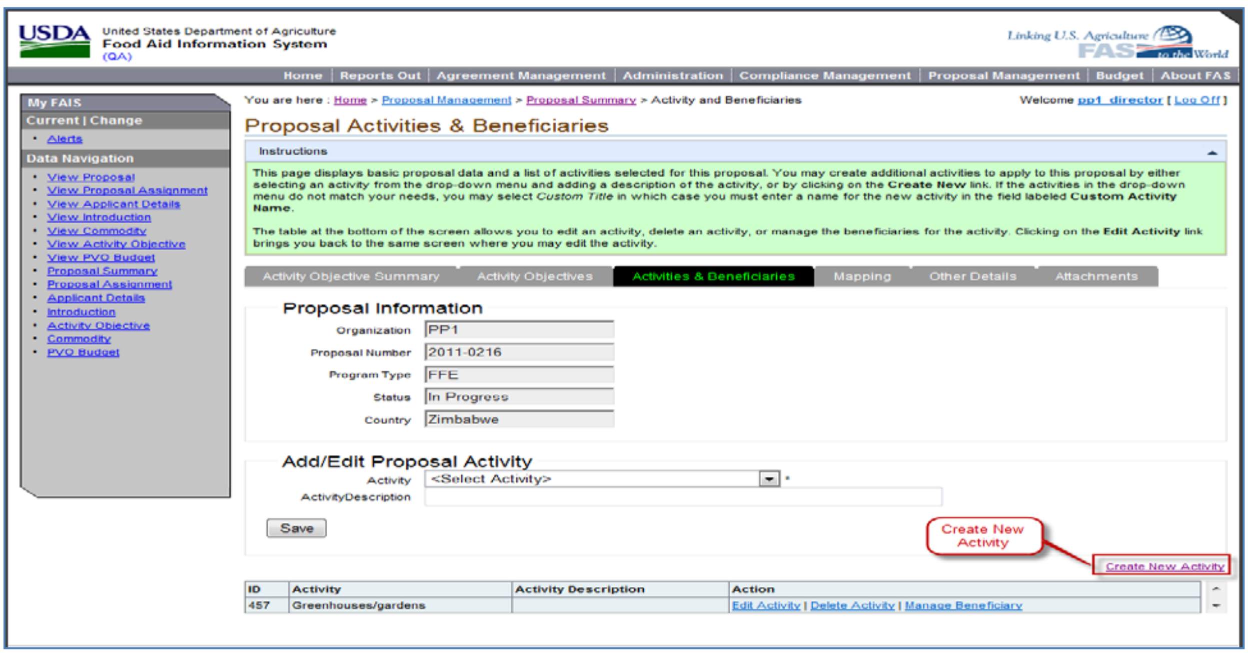
1. Select the Activity Objective from the drop down list
2. Enter description for the following category:
    - Activity Objective Description
    - Base line
    - Outcome
    - Method of Monitoring
    - Method of Evaluation
    - Impact on Private Sector
3. Select **Save** to save and add the objective.

   Note: The fields in yellow and with * mark are mandatory.

Activities and Beneficiaries

This section allows you to add or edit activities that will benefit the beneficiaries.

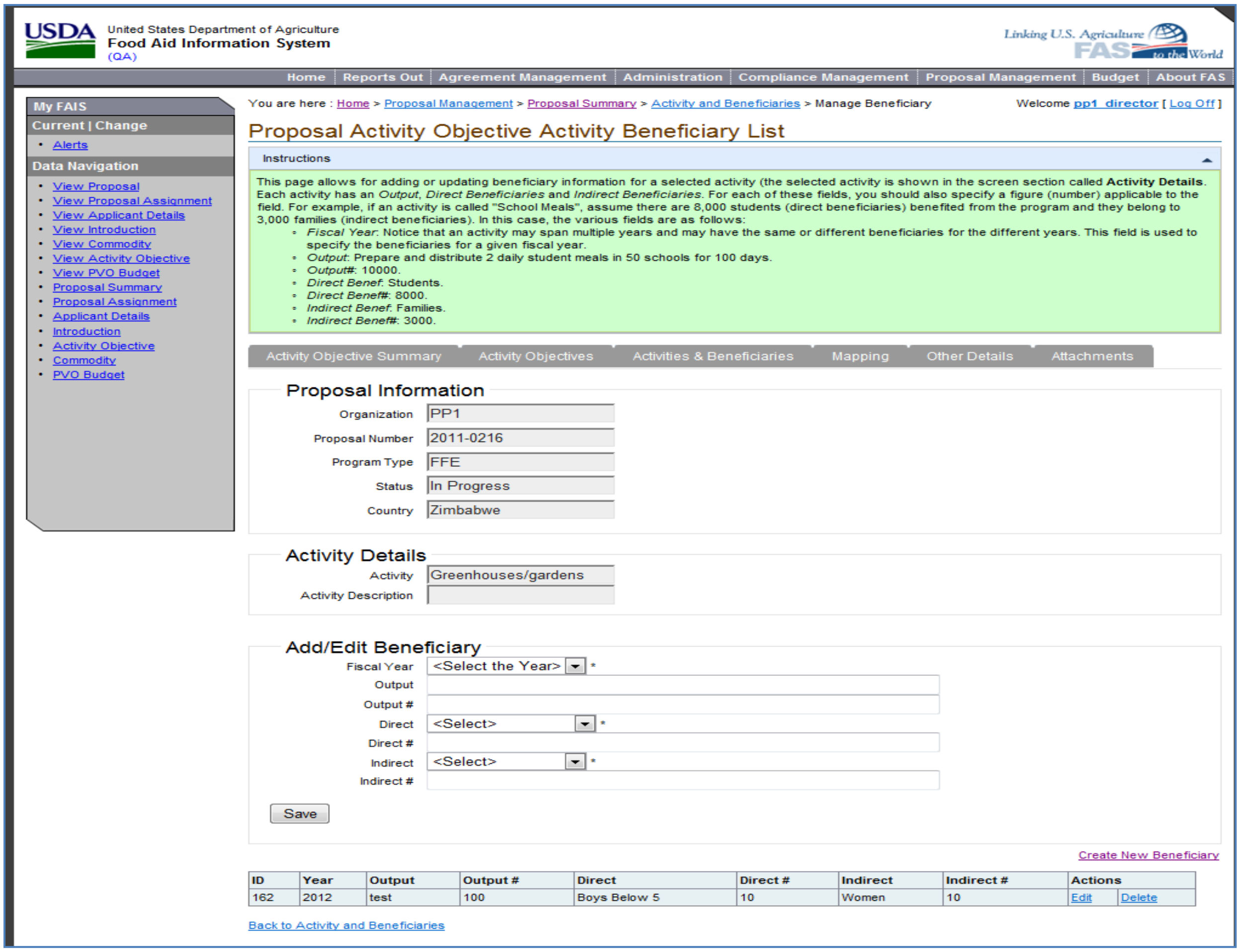
Adding an activity



To add an activity:

1. Select the Activity type from the droop down list.
2. Enter the description in the activity description field.
3. Select **Save** to save and add the activity. The activity will appear on the activity list.
4. To edit the activity select **Edit**.
5. To delete an activity select **Delete**.

Managing Beneficiaries



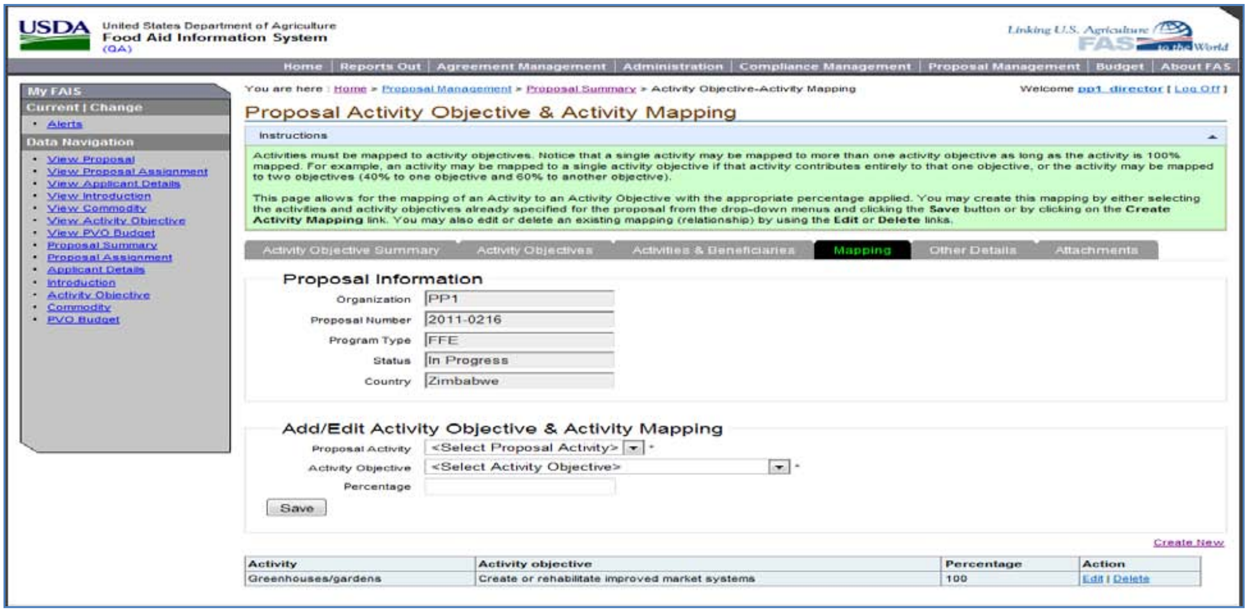
To manage beneficiaries, select **Manage Beneficiaries,** on the Activity list, the Proposal Activity Objective Activity Beneficiary List page opens.

Adding Beneficiaries

To add a beneficiary:

1. Select the fiscal year from the droop down list
2. Enter the output description in the Output field.
3. Enter the number of beneficiaries for the output in the Outout # field.
4. Select the type of direct beneficiaries from the drop down list
5. Enter the number of direct beneficiaries
6. Select the type of indirect beneficiaries from the drop down list
7. Enter the number of indirect beneficiaries
8. Select **Save** to save and add the beneficiaries.

Mapping

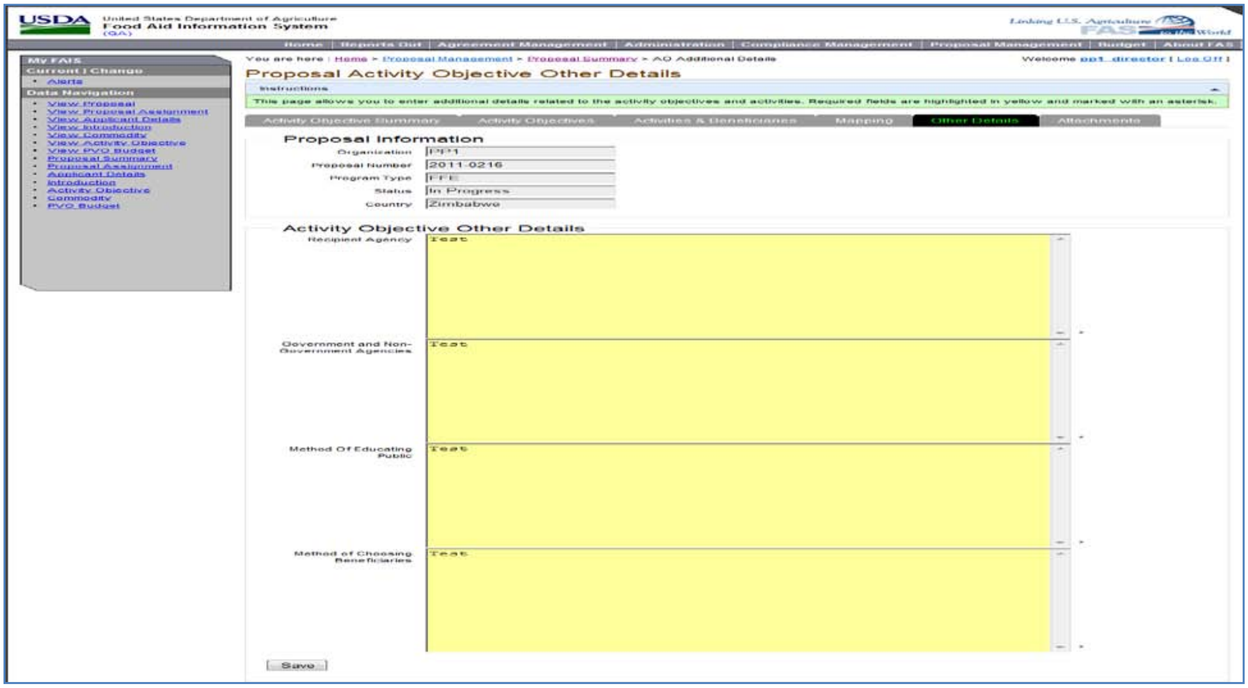


In this tab, the user can map the activity to the objective. To map an activity to an objective:

1. Select Create New, to map an activity to an objective.
2. Select the activity type from the drop down list.
3. Select the objective from the drop down list.
4. Enter the percentage of mapping.
5. Select **Save** to save and map the activity to the objective.

Note: - Each Activity has to be mapped exactly 100%

Other Details



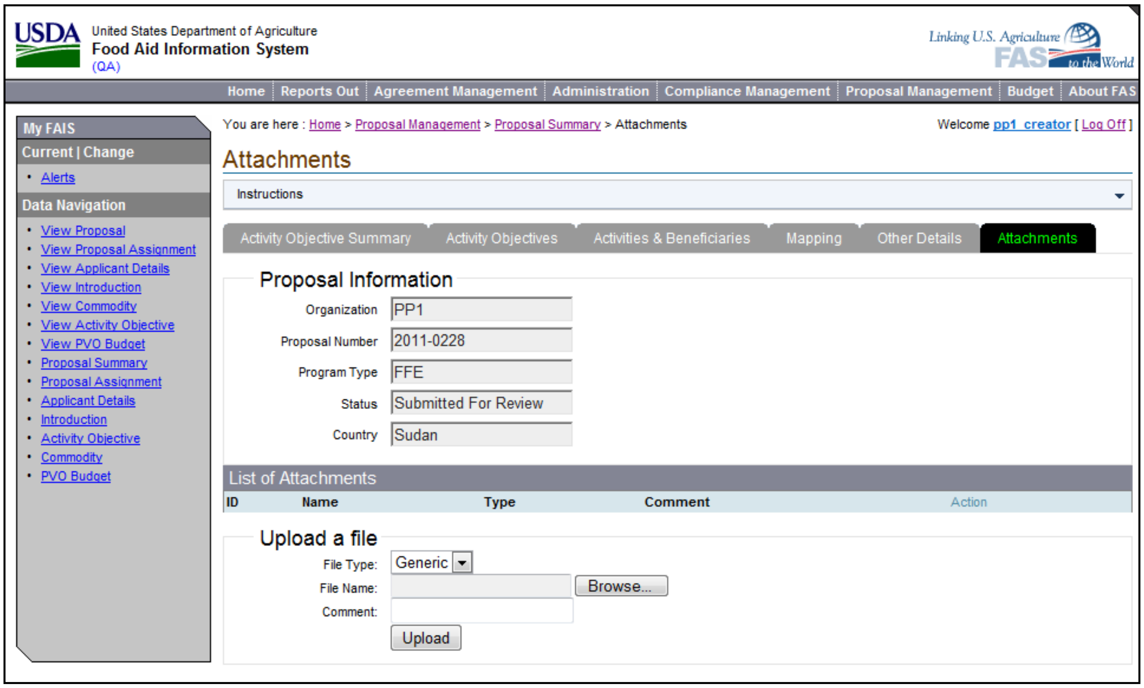
Using this tab the user can enter any other details pertaining to objectives and activities in here.

The user needs to

1. To enter the following descriptions:
    - Recipient agency
    - Government and Non-Government Agencies Test
    - Method Of Educating Public Test
    - Method of Choosing Beneficiaries
2. Select **Save** to save and add the objective.

    Note: The fields in yellow and with * mark are mandatory.

Attachments



To attach any documents that will support this section you can attach the documents in this tab.

To attach a document:

1. Select the File Type from the drop down list.
2. Select the file you want to upload by selecting **Browse.**
3. Select **Upload** to upload the document. Once uploaded, the document will be listed in the table below.
4. To delete any document uploaded select **Delete**.

4.2.6. PVO Budget Section

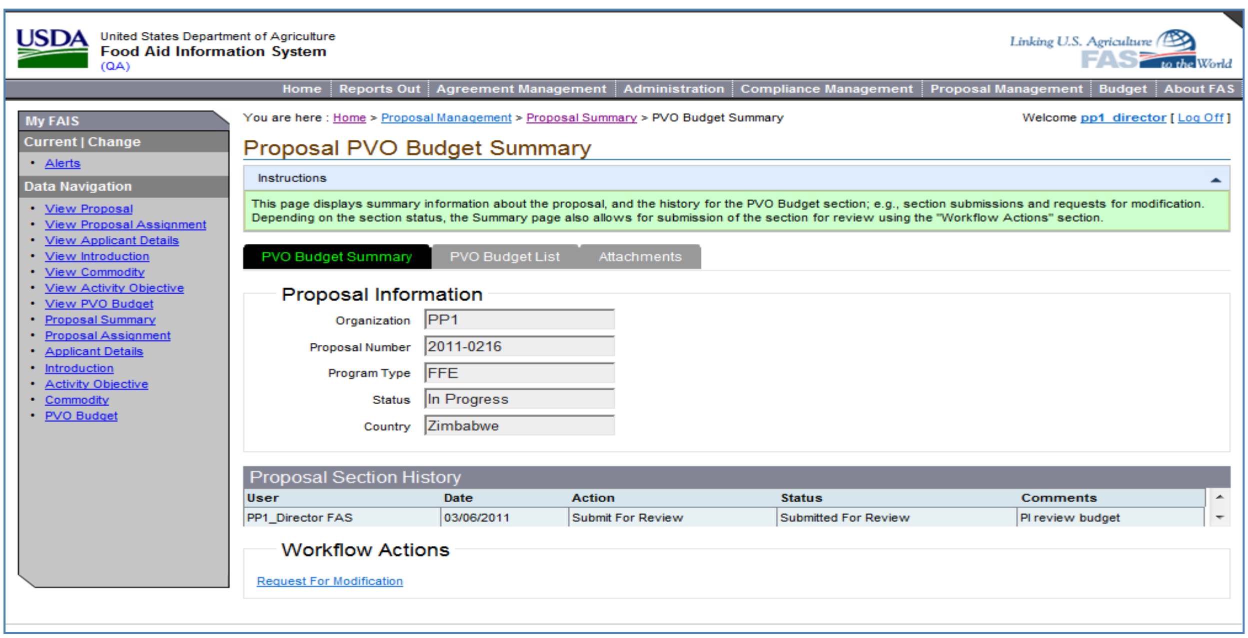
Budget section should be completed only after completing the Activity Objective section. Budget format differs based on PP Organization type

- Private Voluntary Organization – PVO Budget
- World Food Program – WFP Budget
- Government – No Budget

This section is divided into three tabs in case of a PVO Budget, they are as follows:

- PVO Budget Summary
- Budget List
- Attachments

PVO Budget Summary



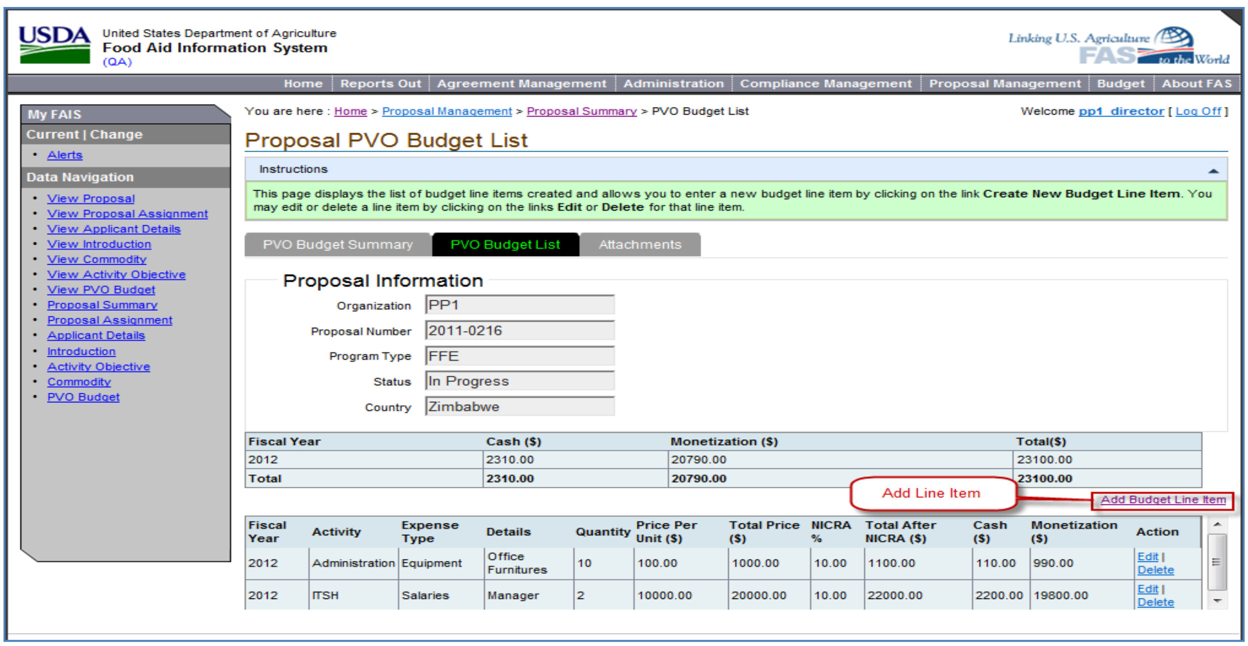
The PVO Budget Summary lists the proposal information, the proposal information is generally pre populated based on the information that was entered while creating the proposal.

The proposal section history details the list of activities that occurred as a part of this section.

Workflow Actions: Based on the user role the summary displays the action that can be performed on this summary, which is either Submit for Review or Request for Modification.

Proposal Section Status			
Status	**Status Description**	**Action Button**	**UI / Page**
In Progress	Proposal is created by a participant director	Create Online Proposal	Create Proposal
	Modification is requested on a proposal section	Request for Modiciation	Section Summary
Submitted For Review	Proposal section is submitted to proposal creator for review by proposal contributor	Submit for Review	Section Summary
Submitted	Proposal is submitted to FAD by participant director	Submit to FAD	Proposal Summary

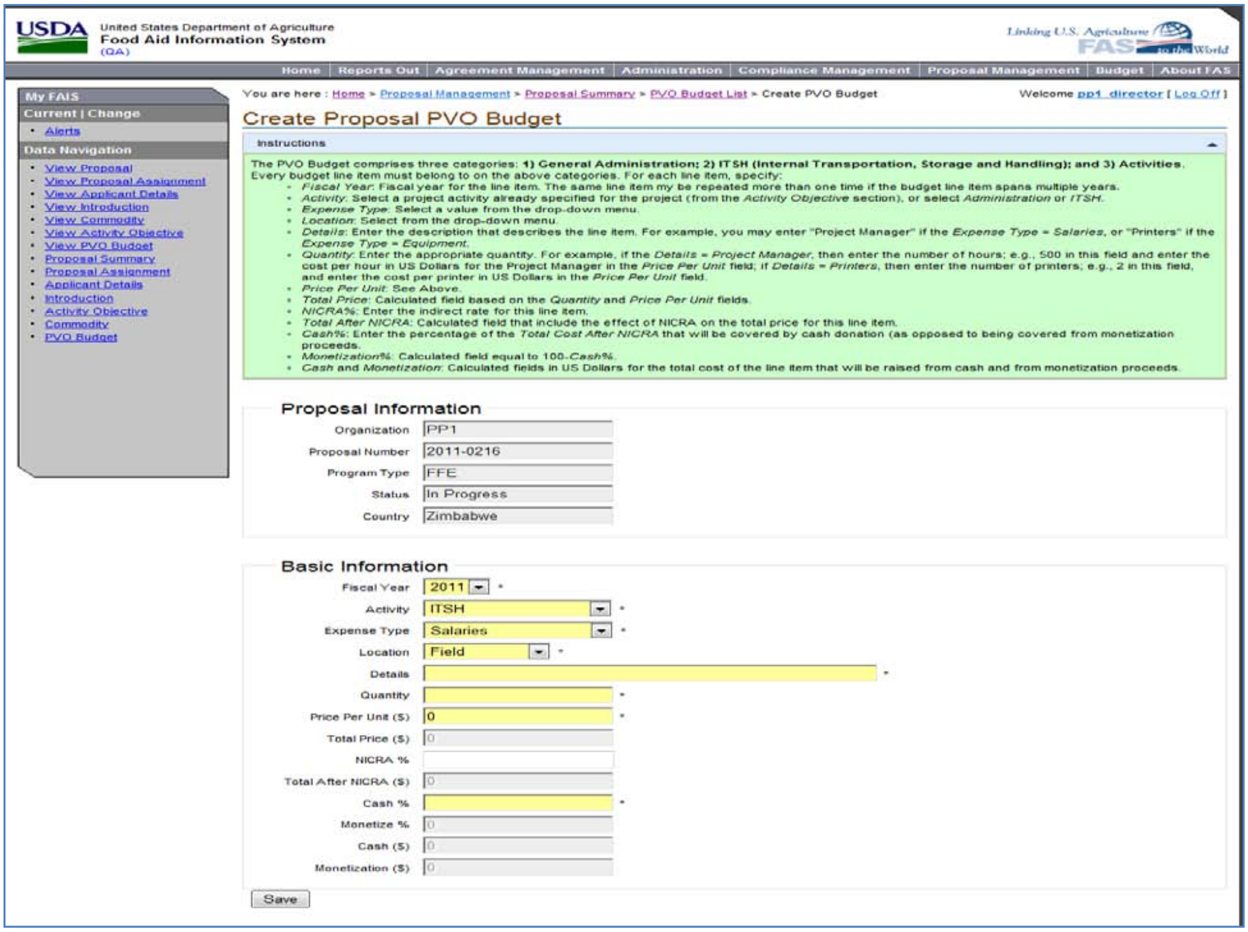
PVO Budget List



This tab lists the budget details for each activity listed in this proposal.

You can add a new budget line item, or edit a line item by selecting **Edit** and delete a line item by select **Delete**.

Adding an budget line item

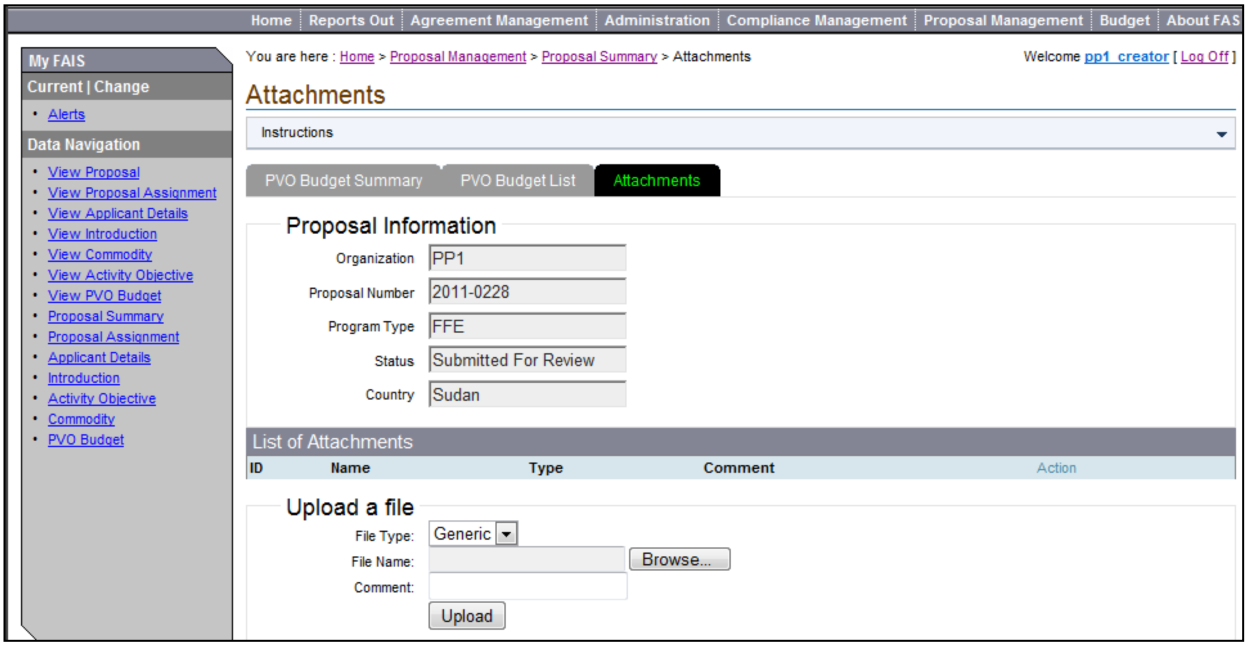


To add a budget line item:

1. Select Add Budget Line item, the Create Proposal PVO Budget page opens.
2. Select the Fiscal year from the drop down list.
3. Select the Activity from the drop down list. (This will depend on the Activities selected in the Activity Objective section)
4. Select the Expense type from the drop list.
5. Select the Location from the drop down list.
6. Enter the details in the details field.
7. Enter the quantity desired in the Quantity field.
8. Enter the Price per unit.
9. The Total Price will be calculates automatically based on the input in the Price Per unit field.
10. Enter the NICRA %
11. The Total after NICRA % will be calculates automatically based on the input in the Enter the NICRA % field.
12. Enter the cash % desired
13. The Monetize % will be calculates automatically based on the input
14. The Cash % will be calculates automatically based on the input
15. The Monetize amount will be calculates automatically based on the input
16. Select **Save** to save and add the budget line item.

Note: The fields in yellow and * mark means they are all mandatory.

Attachments



To attach any documents that will support this section you can attach the documents in this tab.

To attach a document:

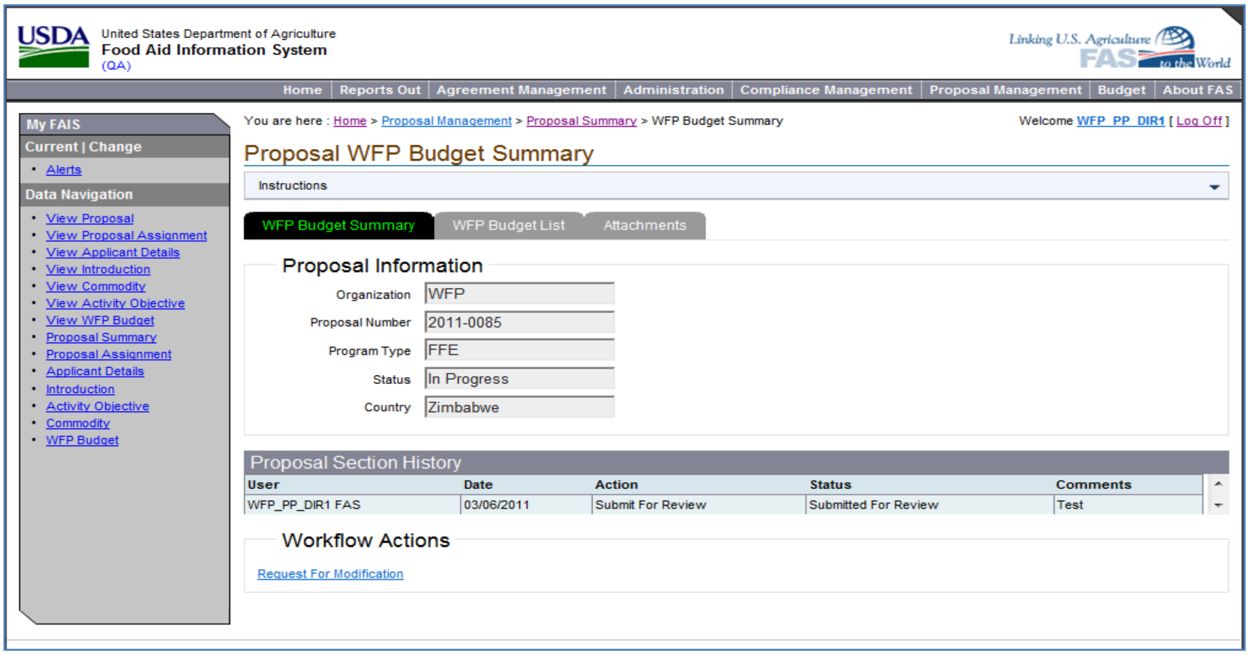
1. Select the File Type from the drop down list.
2. Select the file you want to upload by selecting **Browse.**
3. Select **Upload** to upload the document. Once uploaded, the document will be listed in the table below.
4. To delete any document uploaded select **Delete**.

4.2.7. WFP Budget Section

WFP will be submitting budget which will be different in format. User will be able to submit a budget for each year of the intended project. Commodity section has to be completed before creating the WFP Budget. WFP Budget is captured in 3 screens

- WFP Budget Summary
- WFP Budget List
- Create Proposal WFP Budget
- Attachments

WFP Budget Summary



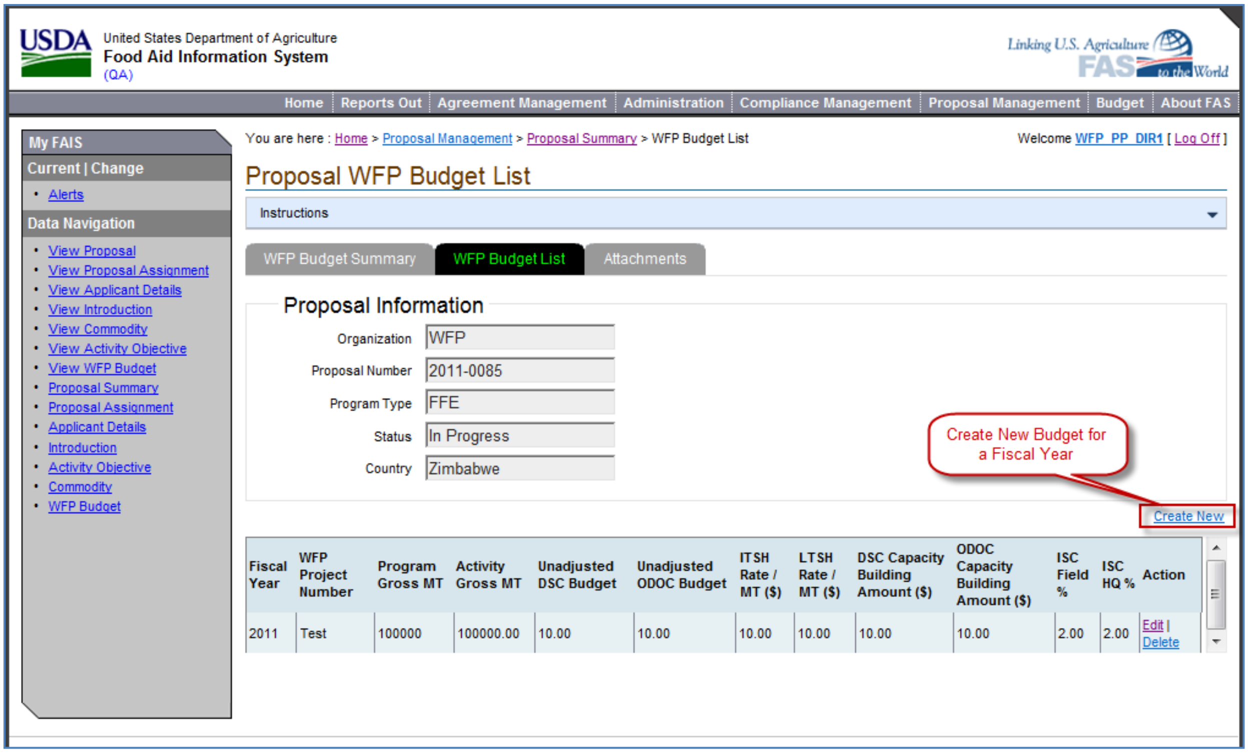
The WFP Budget Summary lists the proposal information, the proposal information is generally pre populated based on the information that was entered while creating the proposal.

The proposal section history details the list of activities that occurred as a part of this section.

Workflow Actions: Based on the user role the summary displays the action that can be performed on this summary, which is either Submit for Review or Request for Modification

Proposal Section Status			
Status	**Status Description**	**Action Button**	**UI / Page**
In Progress	Proposal is created by a participant director	Create Online Proposal	Create Proposal
	Modification is requested on a proposal section	Request for Modiciation	Section Summary
Submitted For Review	Proposal section is submitted to proposal creator for review by proposal contributor	Submit for Review	Section Summary
Submitted	Proposal is submitted to FAD by participant director	Submit to FAD	Proposal Summary

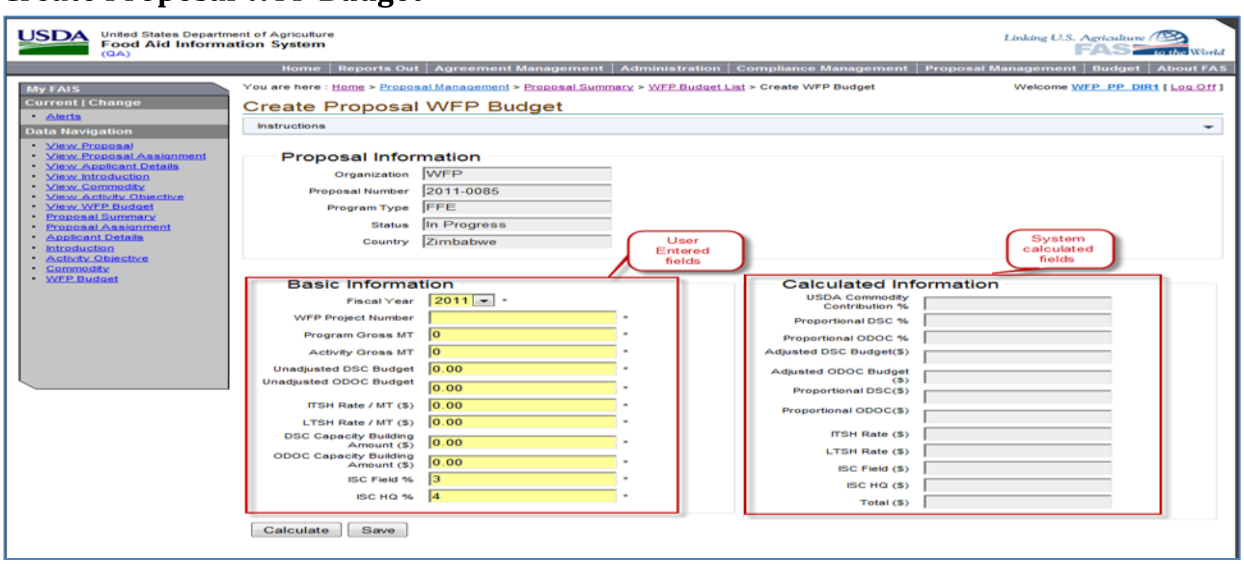
WFP Budget List



WFP proposal budget by year is listed in this screen.

Budget for a Fiscal Year can be created by clicking on **Create New**

Create Proposal WFP Budget



Following fields have to be entered

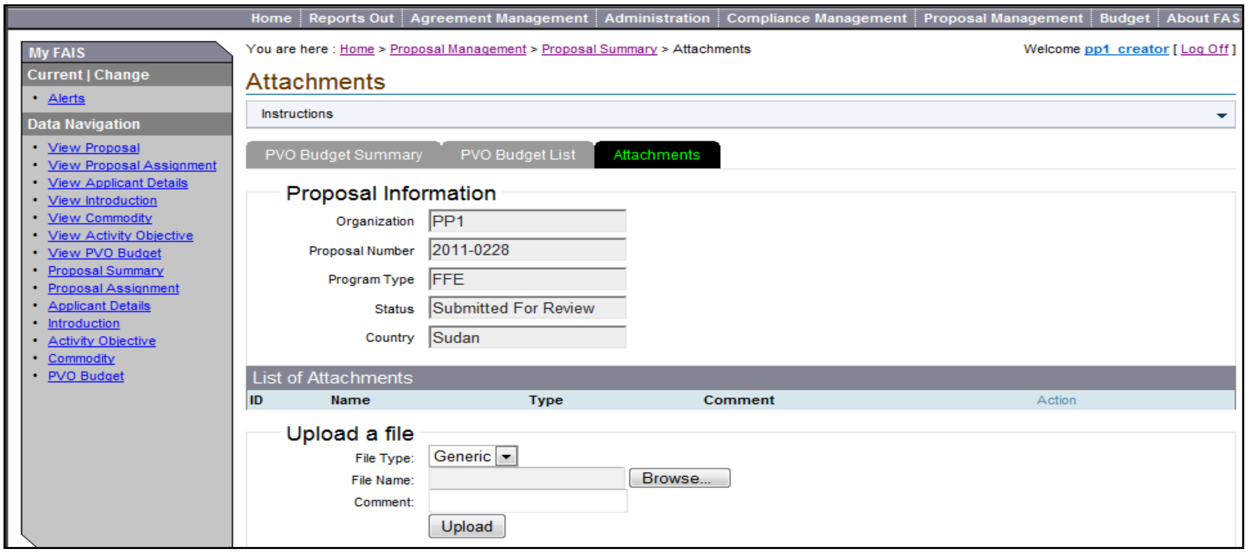
1. Fiscal Year
2. WFP Project Number
3. Program Gross MT
4. Activity Gross MT
5. Unadjusted DSC Budget
6. Unadjusted ODOC Budget
7. ITSH Rate / MT
8. LTSH Rate / MT
9. DSC Capacity Building Amount
10. ODOC Capacity Building Amount
11. ISC Field %
12. ISC HQ %

Based on the data entered by the user system will calculate the values for following fields once the button **Calculate** or **Save** is clicked

1. USDA Commodity Contribution
2. Proportional DSC %
3. Proportional ODOC %
4. Adjusted DSC Budget
5. Adjusted ODOC Budget
6. Proportional DSC
7. Proportional ODOC
8. ITSH Rate
9. LTSH Rate
10. ISC Field
11. ISC HQ
12. Total

Click on **Save** to save data**.**

Attachments



To attach any documents that will support this section you can attach the documents in this tab.

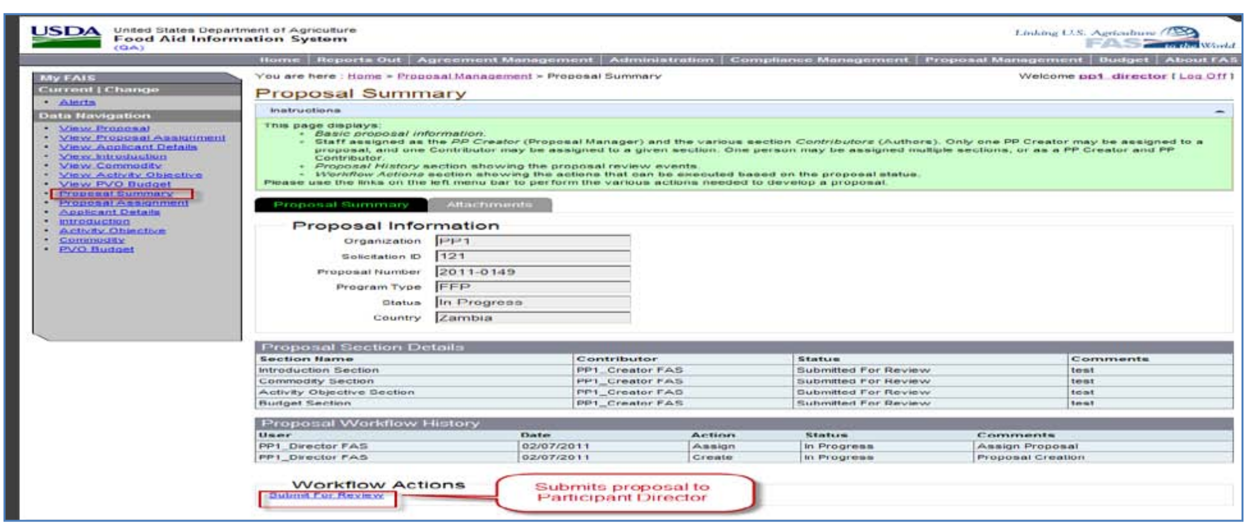
To attach a document:

1. Select the File Type from the drop down list.
2. Select the file you want to upload by selecting **Browse.**
3. Select **Upload** to upload the document. Once uploaded, the document will be listed in the table below.
4. To delete any document uploaded select **Delete**.

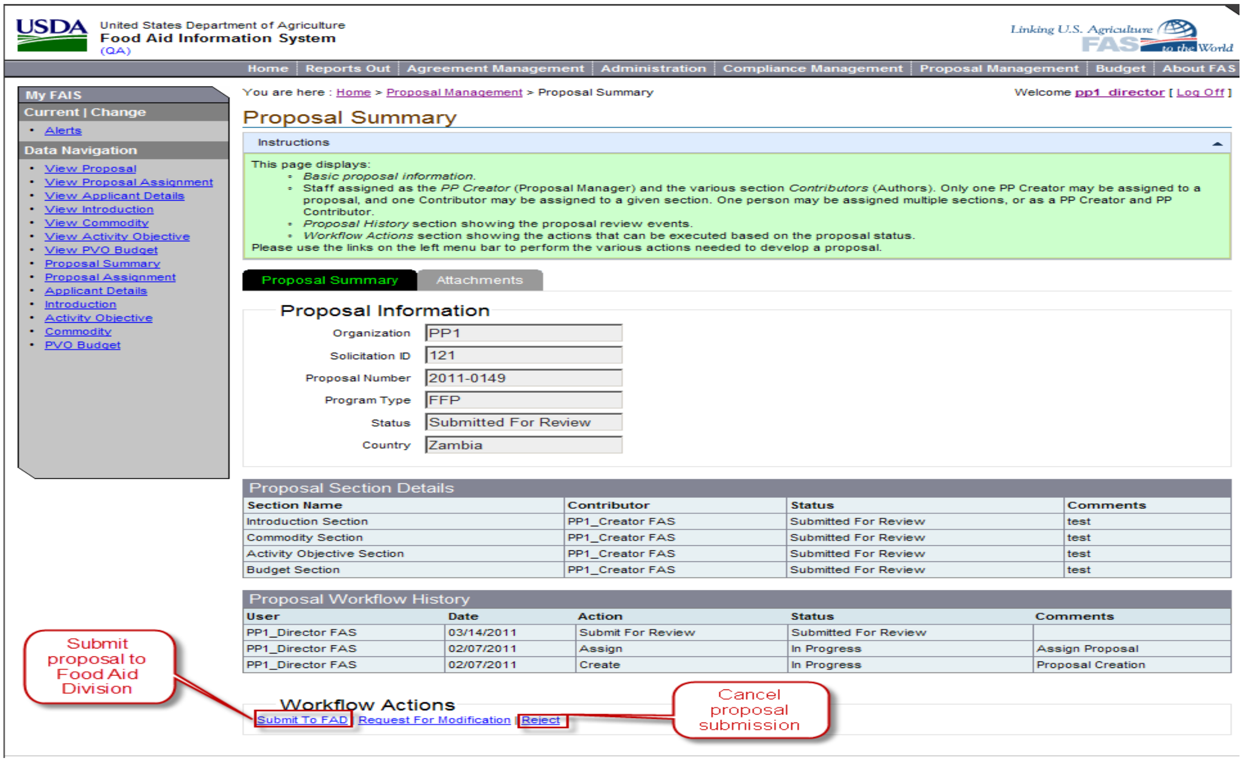
4.3. Proposal Submission

Proposal submission to FAD for consideration is a 2 step process.

Step 1:- Proposal Creator submits proposal to Participant Director



Step 2:- Proposal Director submits proposal to Food Aid Division



Proposal can be withdrawn once it is submitted by clicking the **Withdraw** button which will appear once a proposal is submitted to Food Aid Division

5. Agreement Negotiations

Once the proposal is approved by FAD, an alert is sent to the project participants requesting them to either accept or deny the proposal. Once the proposal is accepted by the project participant, it is converted into an agreement. Now the project participant has the capability to review, and negotiate the agreement with FAD.

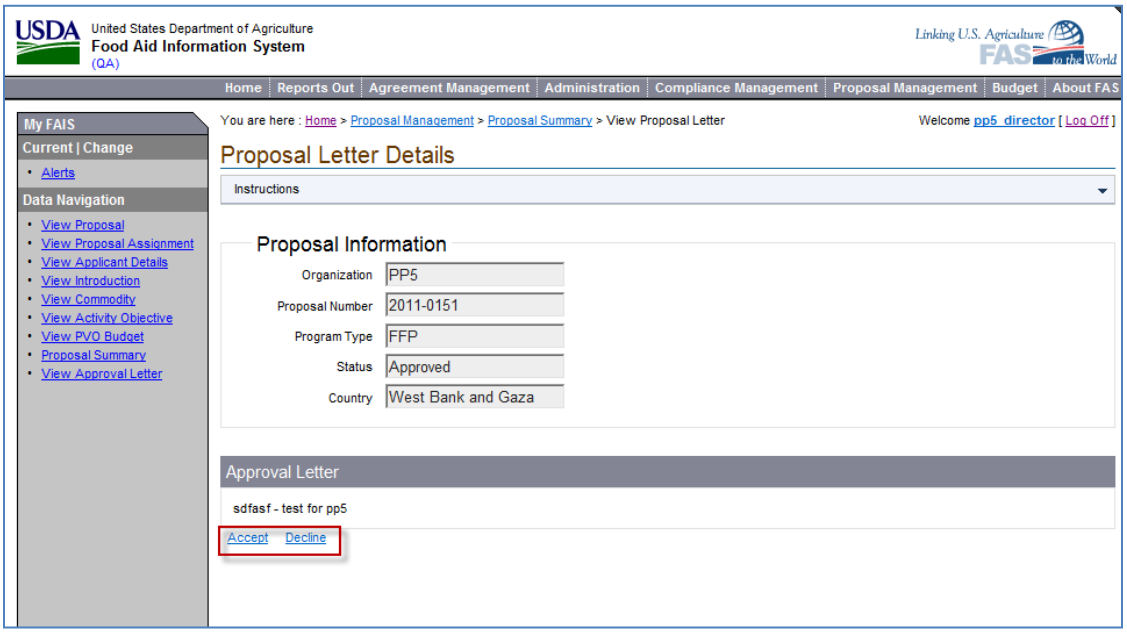
The project participant can negotiate with FAD only after they accept the proposal. The participants can negotiate with FAD, if the quantity of the commodity is lesser than what they had originally requested for. The participant needs to modify the agreement to reflect the quantity approved by FAD.

5.1.1. Accepting Proposal Approval

You can access proposal negotiations in two ways they are:

1. From the top menu select **Proposal** > **Approved Proposal**, The Approved Proposal summary page opens, on the left menu select **View Approved Proposal**, the Approval Letter page opens for review.
2. On the left menu select **Alerts** > **View Approved Proposal**, the Approval Letter page opens for review.

3. On the Proposal Letter Details page, select **Accept** to accept the proposal. After accepting the proposal will be converted into an agreement and **Assign Agreement Roles** screen will be displayed
4. Select **Decline** to decline the proposal, this declines the entire proposal and no further action can be taken on the proposal



5.1.2. Getting Started with Agreement Negotiations

Agreement Navigation

After accepting the proposal, the proposal is converted to an agreement, the Program Participant is expected to review the agreement, and then negotiate with FAD as required. You can access the agreement in two ways:

1. Select Alerts from the left menu, and select the Approved proposal link, the Agreement Summary page opens.
2. Select Agreement management from the top menu > Select Agreements > select particular Agreement, the Agreement Summary page opens.

Agreement Management at Participant Organization Level

Agreement Management			
Module/ Role	**Participant Director**	**Participant Agreement Executor**	**Participant Agreement Contributor**
Agreement	Can work on all sections of the Agreement	Can work on all sections of an assigned proposal	Can work on assigned sections of a Agreement

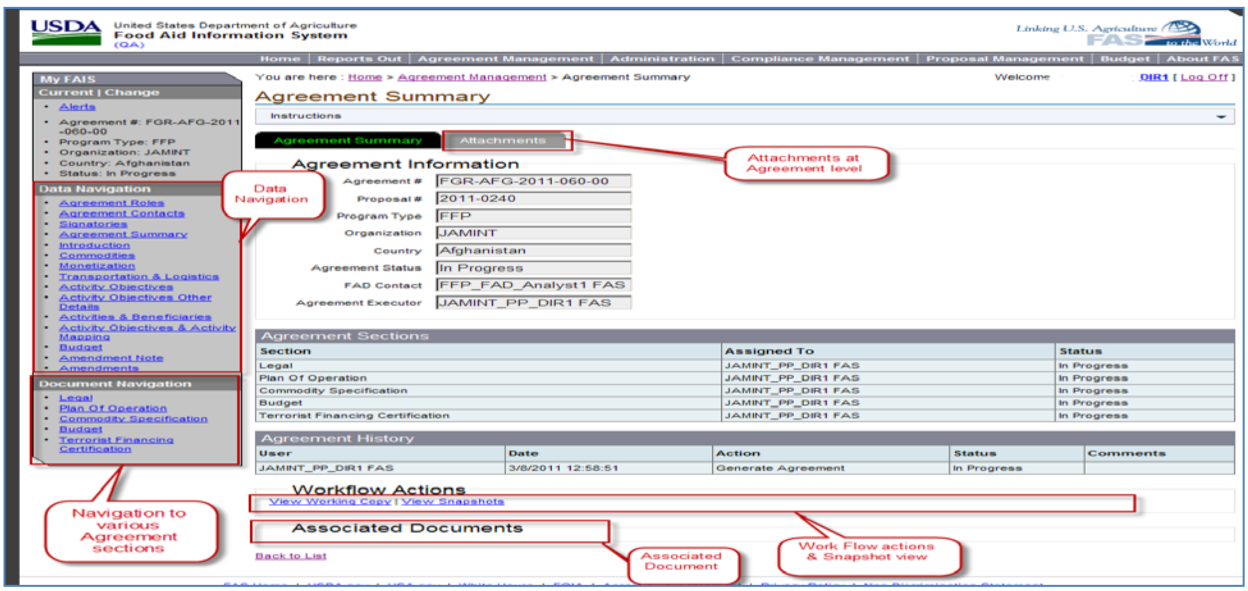
Agreement Negotiation	Can submit Agreement negotiated by him/her	Can submit Agreement negotiated by him/her	Cannot negotiate Agreement Directly
Agreement Section Submission	Can submit to Agreement Executor if assigned to work on an Agreement section	Can submit to Agreement Executor if assigned to work on an Agreement section	Can submit Agreement **section/s** assigned to him / her to Agreement Executor
Agreement Data	Can modify all data	Can modify all data	Can modify all data

Agreement Status

Agreement undergoes various status changes before it is finally signed. Statuses control the ownership of the Agreement document in FAIS at any particular time.Selected Left Menu links in an Agreement will be enabled or disabled for a user based on user role and agreement status

Agreement Status		
Status	**Description**	**Access**
In Progress	Agreement is being prepared as per approved proposal values by PP Agreement Executor.	PP Agreement Executor
PP Dir Review	Agreement is being reviewed by Participant Director	Participant Director
Submitted To FAD	Agreement is being reviewed by FAD Analyst (FAD Contact for the Agreement)	FAD Contact
In Clearance	Agreement is in clearance	FAD Branch Chief
Signed	Agreement is Signed and Agreement details cannot be edited by only viewed	All Users
Closed	Agreement is closed and not transaction can take place for this Agreement. Agreement will be view only	All Users
Terminated	Agreement is Terminated and not transaction can take place for this Agreement. Agreement will be view only	All Users

Suspended	Agreement is Suspended and no transaction can take place on this Agreement till it is reinstated. Agreement will be view only	All Users
Cancelled	Agreement is cancelled during negotiation by FAD Branch Chief. No transaction can take place on this Agreement.Agreement will be view only	All Users

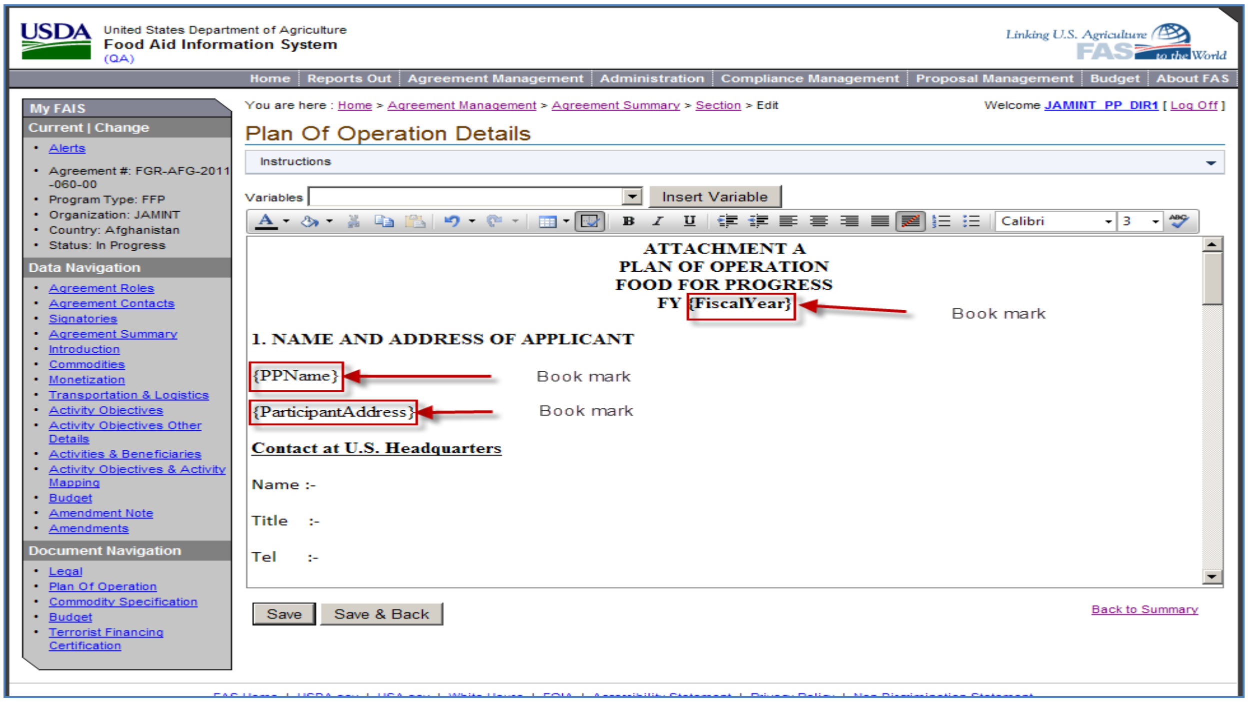


Agreement Left Menu

Agreement Left Menu navigation will have 2 components namely

- Data Navigation - Modify or view data pertaining to the agreement
- Document Navigation – Modify or View or Submit various document sections of the agreement
- WorkFlow Actions – Work flow actions for Agreement like Submit, Request Modification etc
- Associated Documents – Any document related to Agreement
- Attachments – Agreement level attachments

Bookmarks in Agreement Sections



Agreement section will be populated from template with book marked values. Book mark values will be enclosed in {} and participant user should not delete any book mark while editing the document section. Example {FiscalYear}

Agreement Sections

Agreement has sections which can be assigned to user to be worked on. Sections vary based on the participant type as mentioned below

	Agreement Sections				
	Legal	**Plan Of Operations**	**Commodity Specification**	**Budget**	**Terrorist Finance Certification**
PVOs	Yes	Yes	Yes	Yes	Yes
WFP	Yes	No	No	Yes	No
Governments	Yes	Yes	Yes	No	No

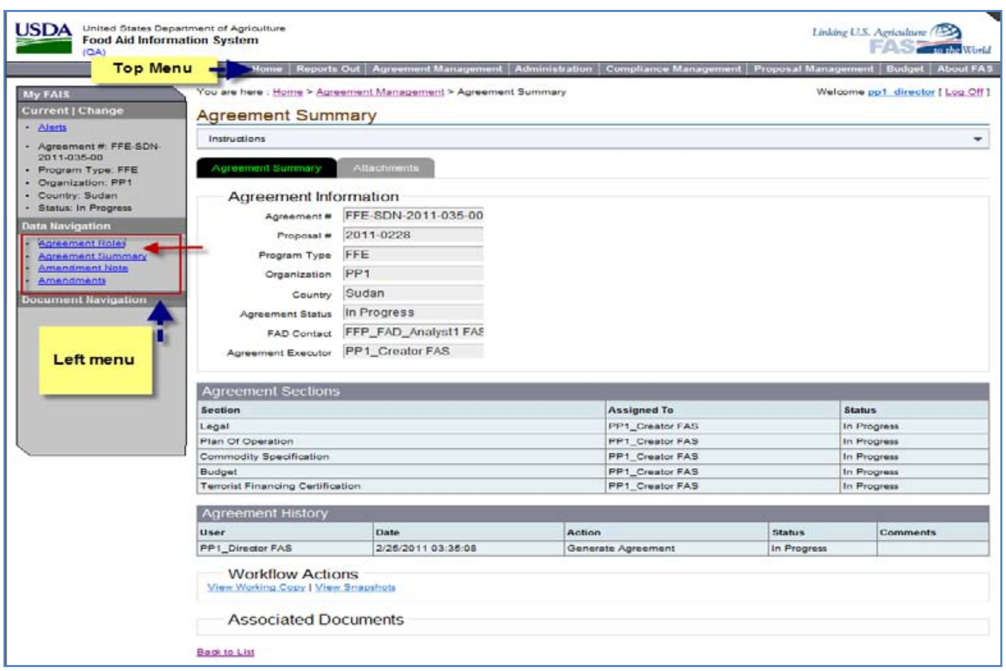
Once the sections are assigned to a contributor, an alert is sent to the contributor stating that the user is assigned to the section.

Agreement Section Workflow

Agreement section has its own section work flow. Once Agreement sections are assigned to Agreement Contributors to work on, Agreement sections will have the following work flow.

Agreement Section Status			
Status	**Description**	**Access**	**Remarks**
In Progress	Agreement section is assigned to an Agreement Contributor for working on the details	Agreement Contributor for that Agreement Section	
Submitted For Review	Agreement Section is being reviewed by the Agreement Executor	Agreement Executor of that Agreement	
Approved	Agreement section has been approved by Agreement Executor	Agreement Executor of that Agreement	Agreement can be submitted to Participant Director review only when all sections are in approved status

Assigning Agreement Roles



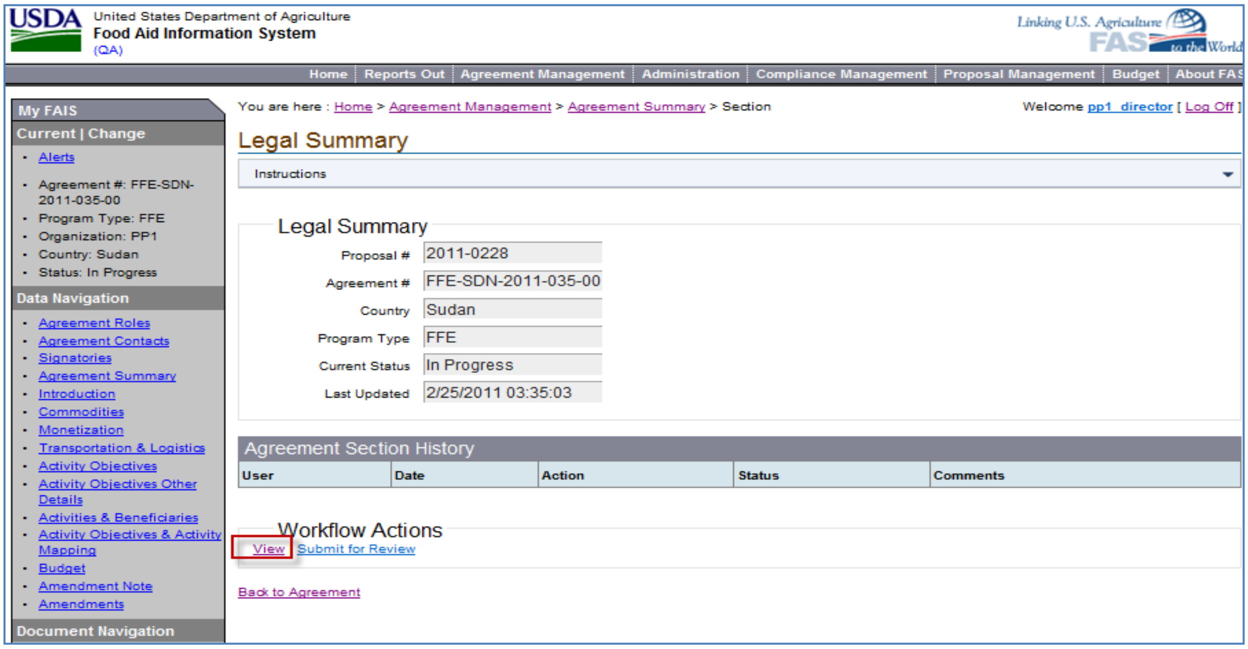
The Participant director needs to assign the agreement executor and contributors in order to modify the agreement for negotiating with the Food Aid Division. To modify the agreement:

1. From the Agreement Summary Page > select Agreement Roles from the left menu, the Agreement roles page open, select **Assign** from the screen.
2. The Program Participant director can select the contributor from the drop down list for the following sections:
   a. Agreement Executor
   b. Legal
   c. Plan of Operation
   d. Commodity Specification
   e. Budget
   f. Terrorist Financing Certification
3. Select the radio button Yes or No if you want to give access to the executor to directly submit the agreement without the approval of the director.
4. Select **Assign** to assign the contributor to the Agreement and the sections.
5. Select Cancel, to cancel the assignment.

Note:-

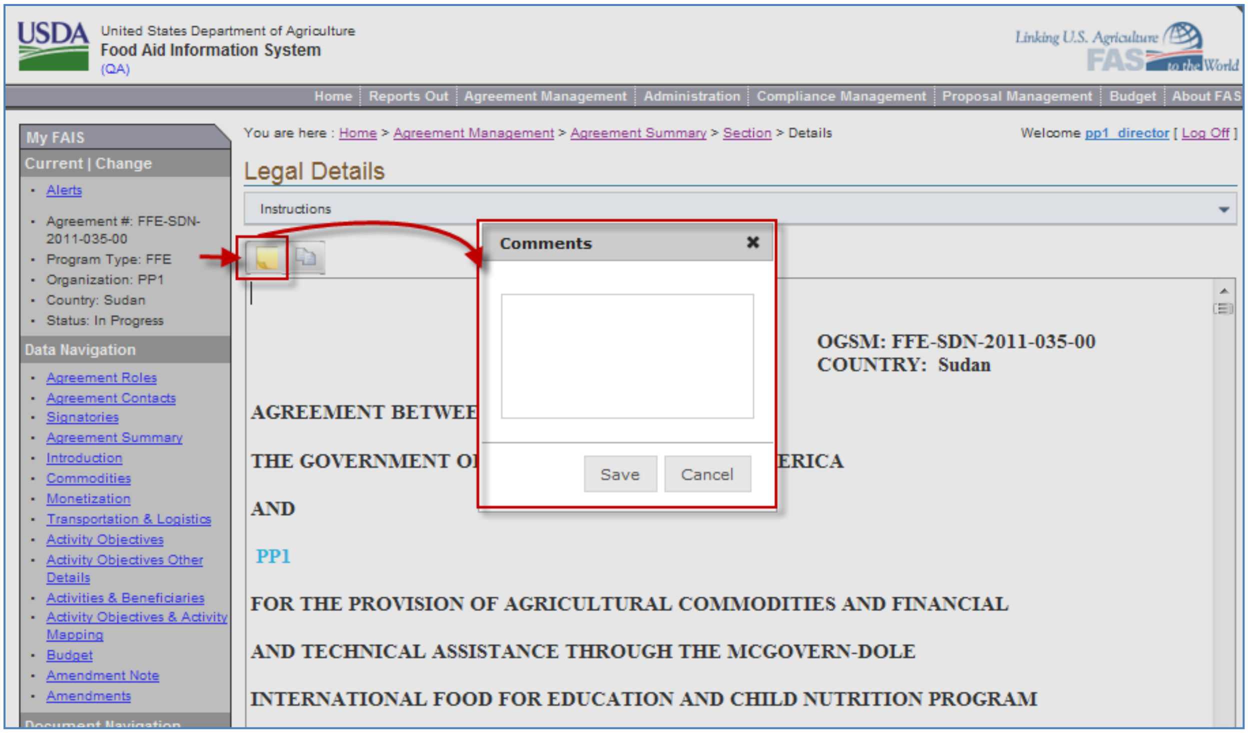
1. Agreement Executor will be able to change the Agreement Contributors to Agreement sections
2. One section can have only one Agreement Contributor at a time
3. Same person can be the contributor for many Agreement sections and also be the Agreement Executor

5.1.3. Legal Section



The legal section is the section where the legal aspects of the agreement are stated. Following functions are possible by any Participant User in Legal section

- Submit or Request Modification from Agreement section Summary screen based on status
- View Legal section
- Enter comments on Legal section



Viewing Legal Document & Adding Comments

The user needs to select View from the Legal Summary page, the legal document opens up.

The user can comment on the legal document in the view mode. To comment on the document:

1. Select the comments icon from the Legal Details page.
2. A comments box opens up, enter the required comments.
3. Select **Save** to save the comments.
4. Select **Cancel** to cancel the comments.
5. To copy text from the document, select the text and select button
6. Select **Back** to Summary to go back to the summary page.

Submitting Legal Section

1. Select Legal Summary Page
2. Based on status and role of logged in User Work Flow Action will be displayed
3. To submit the document for review, select **Submit for Review**.
4. Enter Workflow comments
5. Click on “**OK**”
6. To cancel **Submit For Review**, click on “**Cancel**” on work flow comment box

Requesting Modification on Legal Section

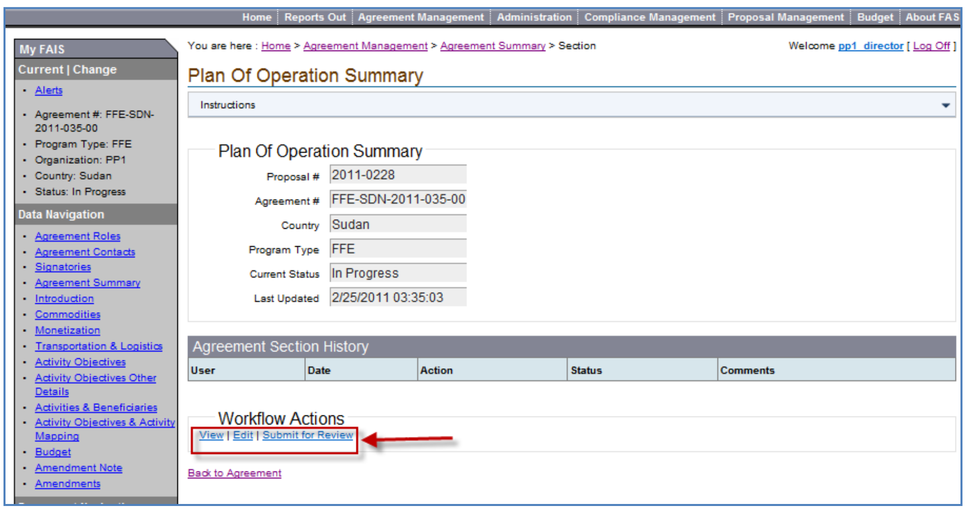
1. Select Legal Summary Page
2. Based on status and role of logged in User Work Flow Action will be displayed

3. To request modification from contributor the document for review, select **Request Modification**.
4. Enter Workflow comments
5. Click on “**OK**”
6. To cancel **Request For Modification**, click on “**Cancel**” on work flow comment box

Approve Legal Section

1. Select Legal Summary Page
2. Based on status and role of logged in User Work Flow Action will be displayed
3. To approve the section, select **Approve**.
4. Enter Workflow comments
5. Click on “**OK**”
6. To cancel **Approval**, click on “**Cancel**” on work flow comment box

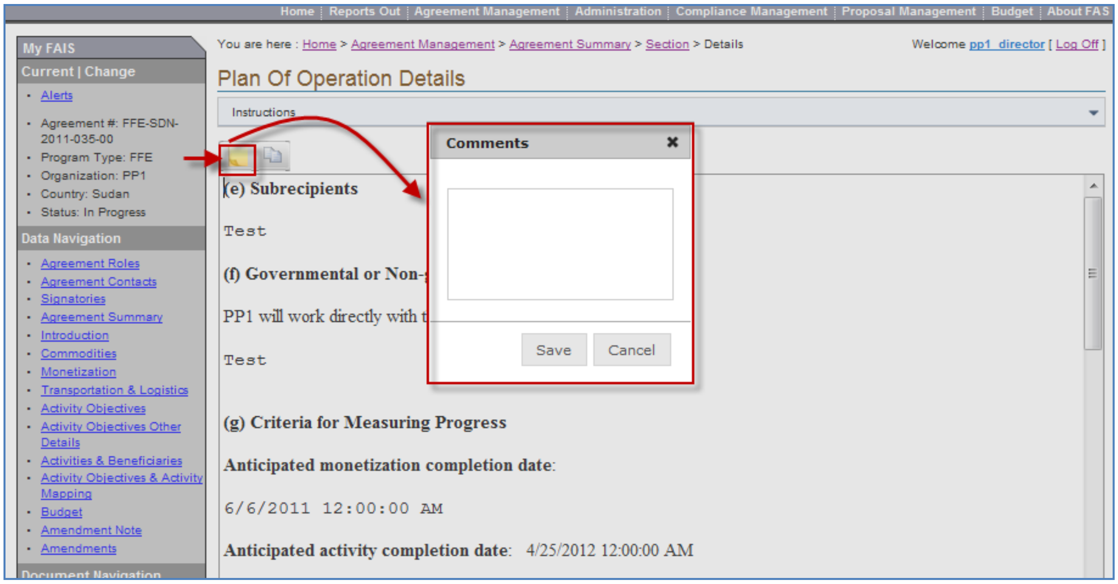
5.1.4. Plan of Operation



Plan of operation basically allows the user to enter details on how the operation is going to be performed to meet the objectives. This is the only section that is editable in the Agreemnt Negotiation section.

To access the Plan of Operations Summary page,

1. Select **Plan of Operation** from the left menu.
2. Select **View** to view the plan of operations page
3. Select **Edit** to edit the document, the document will be editable.
4. Select **Submit** for Review, when the document is ready to be reviewed.
5. Select Request Modification, when the document is required to be modified.

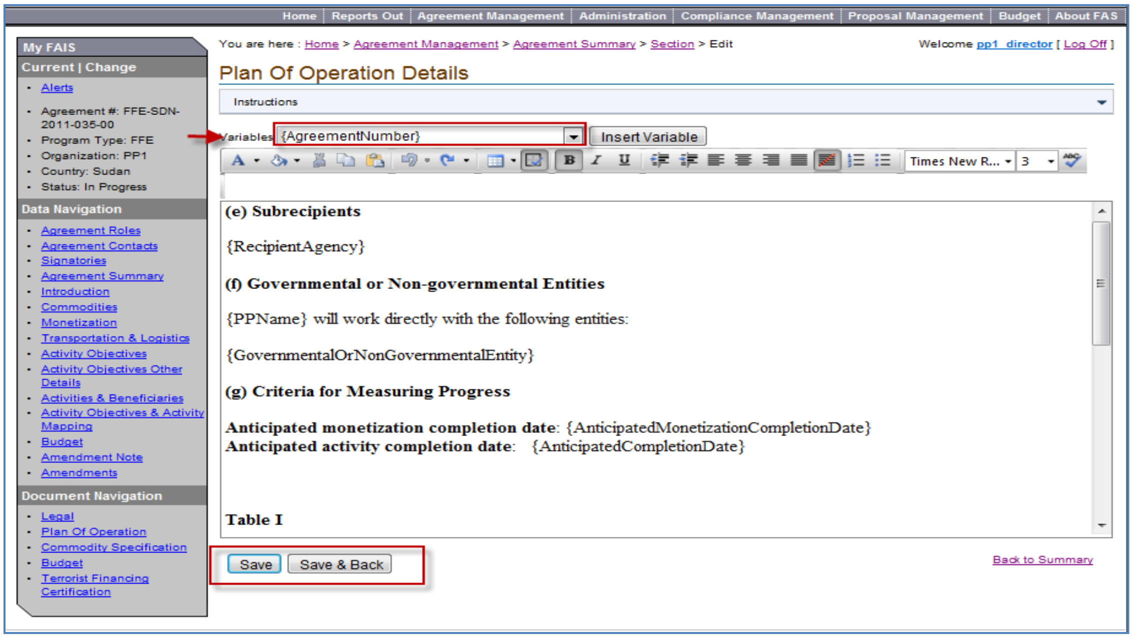


Viewing Plan of Operations Document & Adding Comments

The user needs to select View from the Legal Summary page, the legal document opens up. The user can comment on the legal document in the view mode. To comment on the document:

1. Select the  comments icon from the Plan of Operations Details page.
2. A comments box opens up, enter the required comments.
3. Select Save to save the comments.
4. Select Cancel to cancel the comments.
5. To copy text from the document, select the text and select  button
6. Select Back to Summary to go back to the summary page.

Editing Plan of Operation Details document



To edit the plan of operation details document:

1. Select Edit on the Plan of Operation summary page, the Plan of Operation Details page opens with the capability to edit.
2. The page allows you to edit the document
3. To add a variable, select the variable from the drop down list and select Insert Variable.
4. Select Save to save the changes.
5. Select Save & Back to save and return back to the Plan of Actions Summary page.

Submitting Plan of Operations Section

1. Select Plan Of Operations from Left menu
2. Based on status and role of logged in User Work Flow Action will be displayed
3. To submit the document for review, select **Submit for Review**.
4. Enter Workflow comments
5. Click on "**OK**"
6. To cancel **Submit For Review**, click on "**Cancel**" on work flow comment box

Requesting Modification on Plan Of Operations Section

1. Select Plan Of Operations from Left menu
2. Based on status and role of logged in User Work Flow Action will be displayed
3. To request modification from contributor the document for review, select **Request Modification**.
4. Enter Workflow comments
5. Click on "**OK**"
6. To cancel **Request For Modification**, click on "**Cancel**" on work flow comment box

Approve Plan of Operations Section

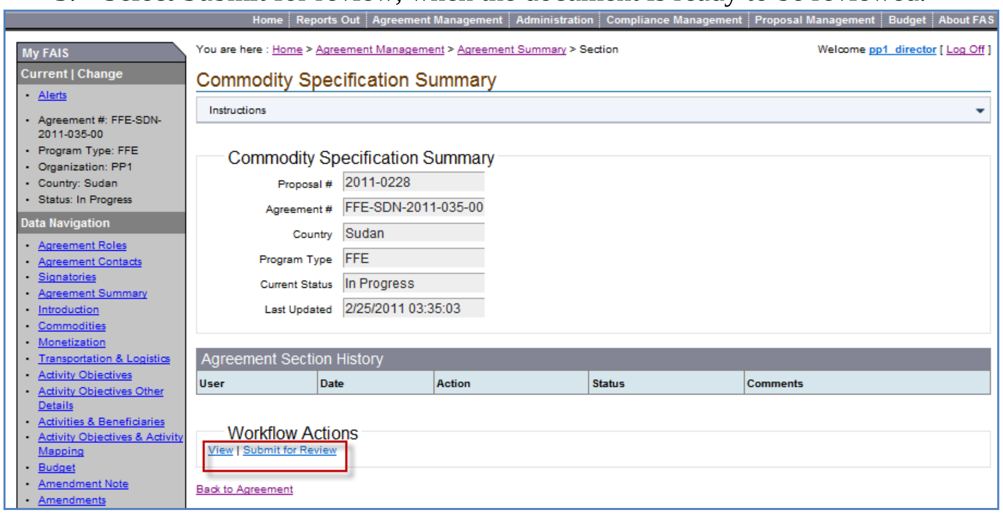
1. Select Plan Of Operations from Left menu
2. Based on status and role of logged in User Work Flow Action will be displayed
3. To approve the section, select **Approve**.
4. Enter Workflow comments
5. Click on "**OK**"
6. To cancel **Approval**, click on "**Cancel**" on work flow comment box

5.1.5. Commodity Specification Summary

Commodity Specification Summary allows the user to comment on the commodity specifications that is approved by the FAD.

To access the Commodity Specification Summary page,

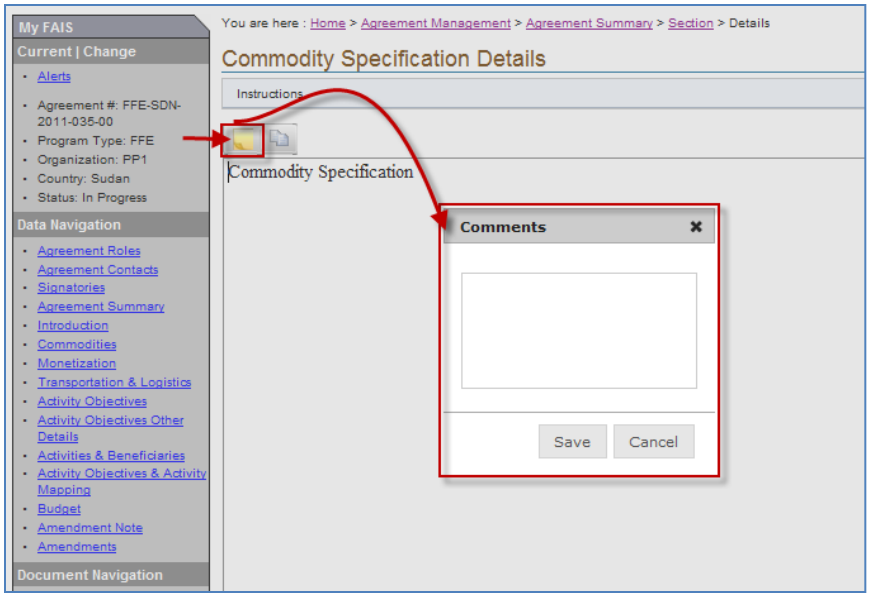
1. Select Commodity Specification from the left menu.
2. Select View to view Commodity Specification summary page
3. Select Submit for review, when the document is ready to be reviewed.



Commenting on Commodity Specification details

The user can comment on the Commodity Specification document in the view mode. To comment on the document:

1. Select the  comments icon from the Commodity Specification Details page.
2. A comments box opens up, enter the required comments.
3. Select Save to save the comments.
4. Select Cancel to cancel the comments.
5. To copy text from the document, select the text and select  button.
6. Select Back to Summary to go back to the summary page.



Submitting Commodity Specification details

1. Select Commodity Specification from Left menu
2. Based on status and role of logged in User Work Flow Action will be displayed
3. To submit the document for review, select **Submit for Review**.
4. Enter Workflow comments
5. Click on "**OK**"
6. To cancel **Submit For Review**, click on "**Cancel**" on work flow comment box

Requesting Modification on Commodity Specification details

1. Select Commodity Specification from Left menu
2. Based on status and role of logged in User Work Flow Action will be displayed
3. To request modification from contributor the document for review, select **Request Modification**.
4. Enter Workflow comments
5. Click on "**OK**"
6. To cancel **Request For Modification**, click on "**Cancel**" on work flow comment box

Approve Commodity Specification Section

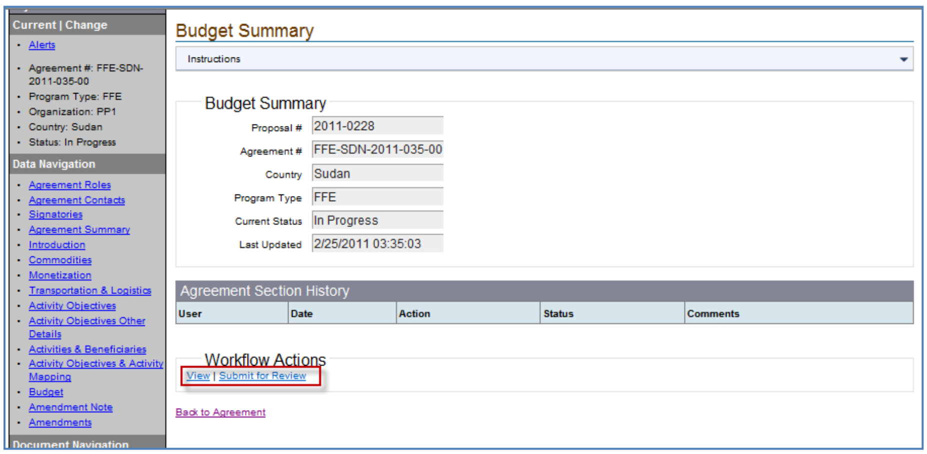
1. Select **Commodity Specification** from Left menu
2. Based on status and role of logged in User Work Flow Action will be displayed
3. To approve the section, select **Approve**.
4. Enter Workflow comments
5. Click on "**OK**"
6. To cancel **Approval**, click on "**Cancel**" on work flow comment box

5.1.6. Budget Summary

Budget Summary allows the user to comment on the budget specifications approved by the FAD.

To access the Budget Summary page,

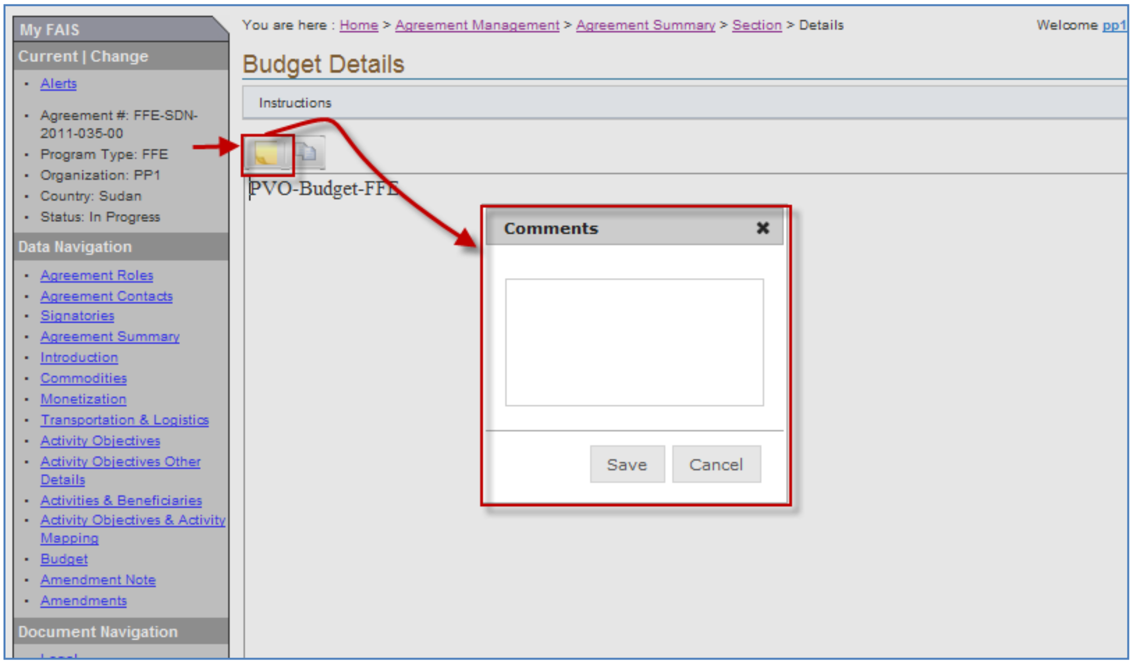
1. Select **Budget** from the left menu.
2. Select **View** to view Budget summary page
3. Select **Submit** for review, when the document is ready to be reviewed.



Commenting on Budget details

The user can comment on the Budget document in the view mode. To comment on the document:

1. Select the  comments icon from the Budget Details page.
2. A comments box opens up, enter the required comments.
3. Select Save to save the comments.
4. Select Cancel to cancel the comments.
5. To copy text from the document, select the text and select  button.
6. Select Back to Summary to go back to the summary page.



Submitting Budget Summary details

1. Select **Budget Summary** from Left menu
2. Based on status and role of logged in User Work Flow Action will be displayed
3. To submit the document for review, select **Submit for Review**.
4. Enter Workflow comments
5. Click on "**OK**"
6. To cancel **Submit For Review**, click on "**Cancel**" on work flow comment box

Requesting Modification on Budget Summary details

7. Select **Budget Summary** from Left menu
8. Based on status and role of logged in User Work Flow Action will be displayed
9. To request modification from contributor the document for review, select **Request Modification**.
10. Enter Workflow comments
11. Click on "**OK**"
12. To cancel **Request For Modification**, click on "**Cancel**" on work flow comment box

Approve Budget Summary Section

1. Select **Budget Summary** from Left menu
2. Based on status and role of logged in User Work Flow Action will be displayed
3. To approve the section, select **Approve**.
4. Enter Workflow comments

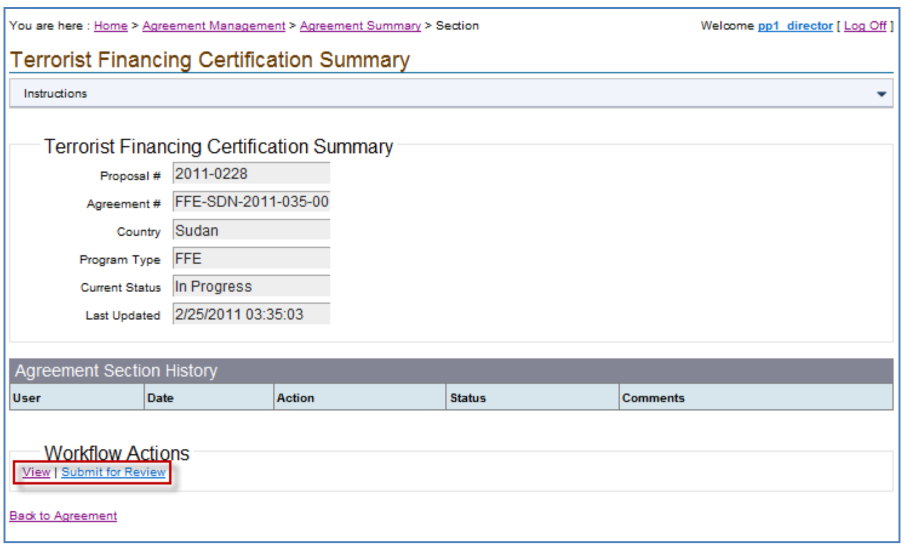
5. Click on “**OK**”
6. To cancel **Approval**, click on “**Cancel**” on work flow comment box

5.1.7. Terrorist Financing Certification

Terrorist Financing Certification Summary allows the user to comment on the Terrorist Financing Certification.

To access the Terrorist Financing Certification Summary page,

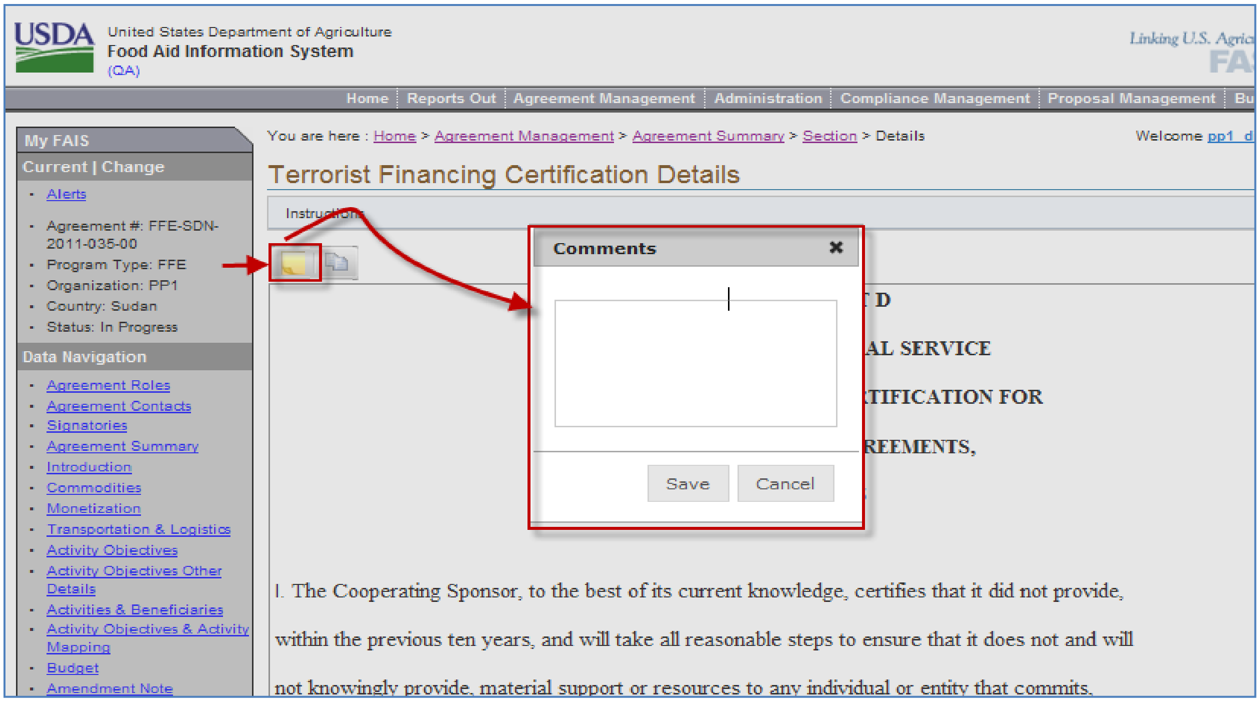
1. Select Commodity Specification from the left menu.
2. Select View to view Terrorist Financing Certification summary page
3. Select Submit for review, when the document is ready to be reviewed.



Commenting on Terrorist Financing Certification details

The user can comment on the Terrorist Financing Certification document in the view mode. To comment on the document:

1. Select the  comments icon from the Terrorist Financing Certification Details page.
2. A comments box opens up, enter the required comments.
3. Select Save to save the comments.
4. Select Cancel to cancel the comments.
5. To copy text from the document, select the text and select  button.
6. Select Back to Summary to go back to the summary page.



Submitting Terrorist Financing Certification details

1. Select **Terrorist Financing Certification** from Left menu
2. Based on status and role of logged in User Work Flow Action will be displayed
3. To submit the document for review, select **Submit for Review**.
4. Enter Workflow comments
5. Click on "**OK**"
6. To cancel **Submit For Review**, click on "**Cancel**" on work flow comment box

Requesting Modification on Terrorist Financing Certification details

1. Select **Terrorist Financing Certification** from Left menu
2. Based on status and role of logged in User Work Flow Action will be displayed
3. To request modification from contributor the document for review, select **Request Modification**.
4. Enter Workflow comments
5. Click on "**OK**"
6. To cancel **Request For Modification**, click on "**Cancel**" on work flow comment box

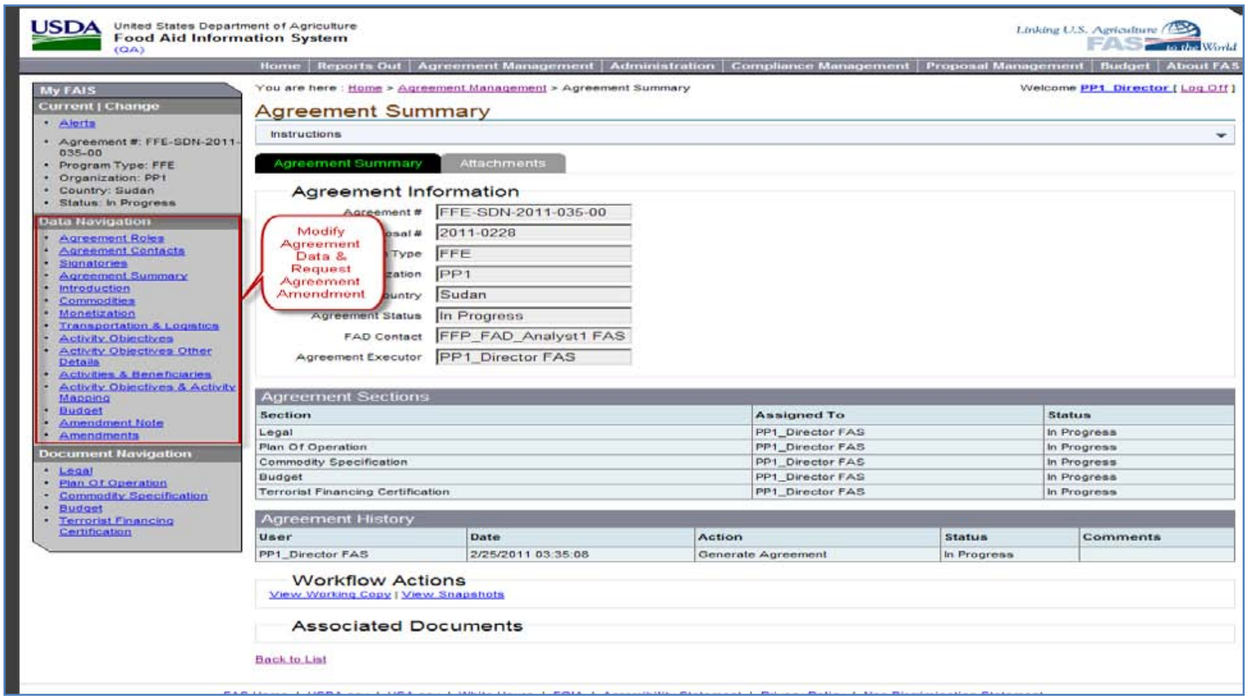
Approve Terrorist Financing Certification Section

1. Select **Terrorist Financing Certification** from Left menu
2. Based on status and role of logged in User Work Flow Action will be displayed
3. To approve the section, select **Approve**.
4. Enter Workflow comments
5. Click on "**OK**"

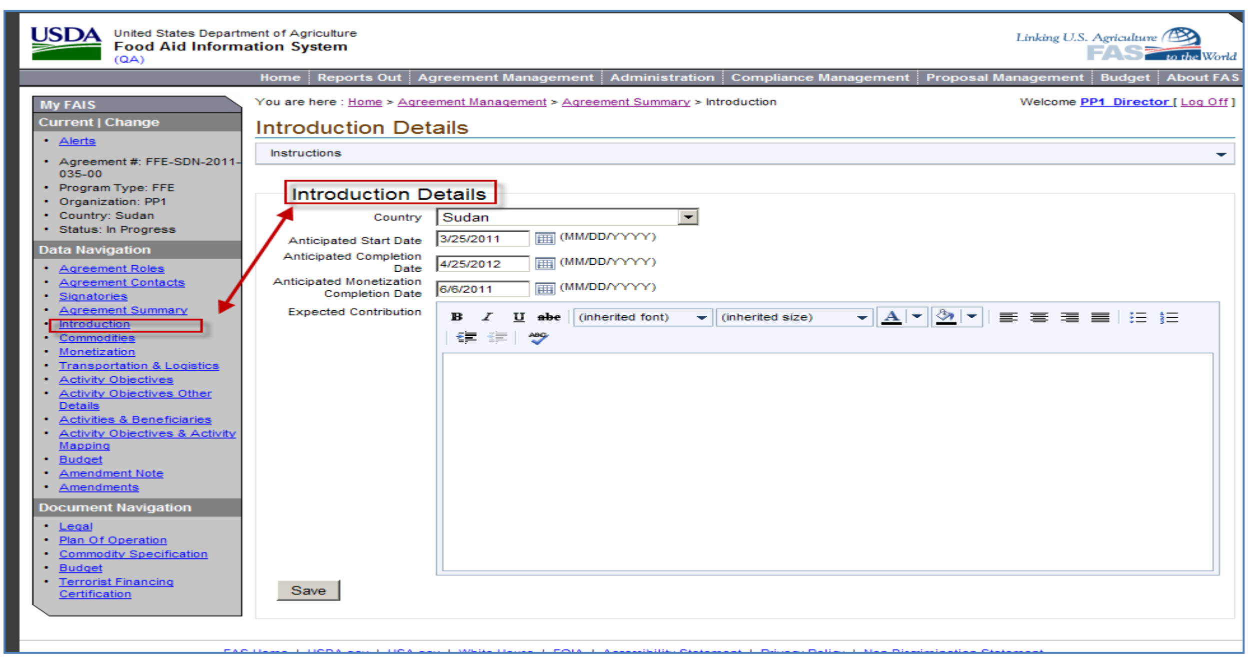
6. To cancel **Approval**, click on “**Cancel**” on work flow comment box

5.2. Agreement Data Management

Data fields in an Agreement document are populated from the database and these data can be changed in the document by changing the data values through **Left Menu –> Data Navigation**

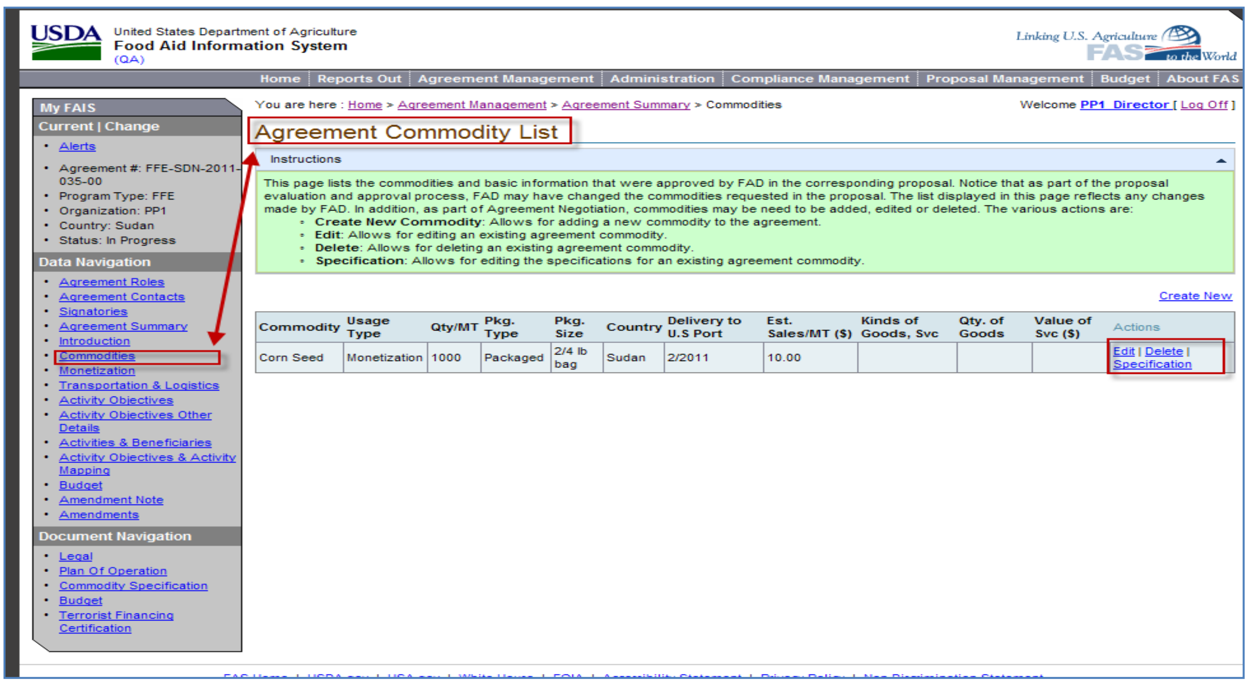


5.2.1. Agreement Introduction Details



1. Click on **Introduction** link
2. System will display "**Introduction Details**" page
3. User will be able to edit the following details
    - Country
    - Anticipated Start Date
    - Anticipated Completion Date
    - Anticipated Monetization Date
    - Expected Contribution
4. Click "**Save**" to save details

5.2.2. Commodity

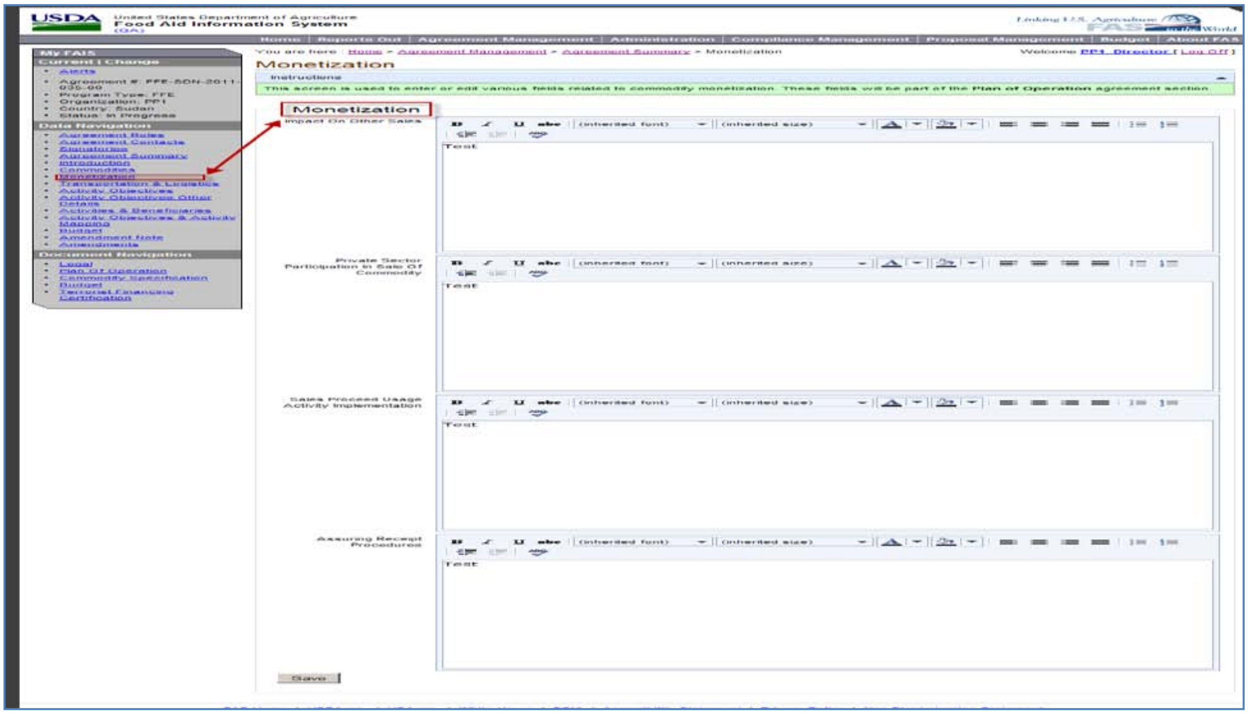


1. Click on **Commodity** link
2. System will display "**Agreement Commodity List**" page
3. Click on **Edit** to edit the following commodity details
    - Commodity
    - Usage Type
    - Qty
    - Package Type
    - Package Size
    - Country (Delivery Country)
    - Delivery to US Port Date
    - Estimated Sales per MT (If Usage type is Monetization)
    - Kinds og Goods, Service (If Usage type is Barter)
    - Qty of Goods (If Usage type is Barter)

- Value of Service (If Usage type is Barter)

4. Click on **Commodity Specification** to view Commodity Specification for that commodity
5. Click on **View** to view commodity details

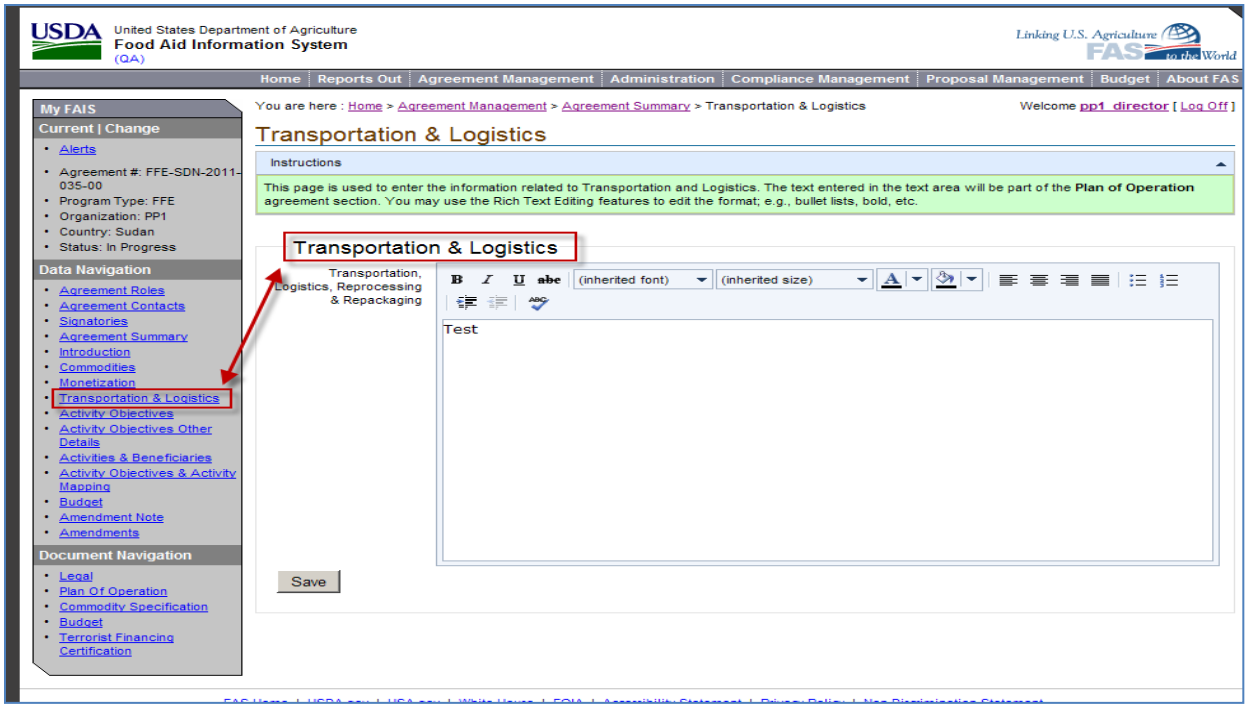
5.2.3. Monetization



If any commodity is monetized, monetization data will be editable

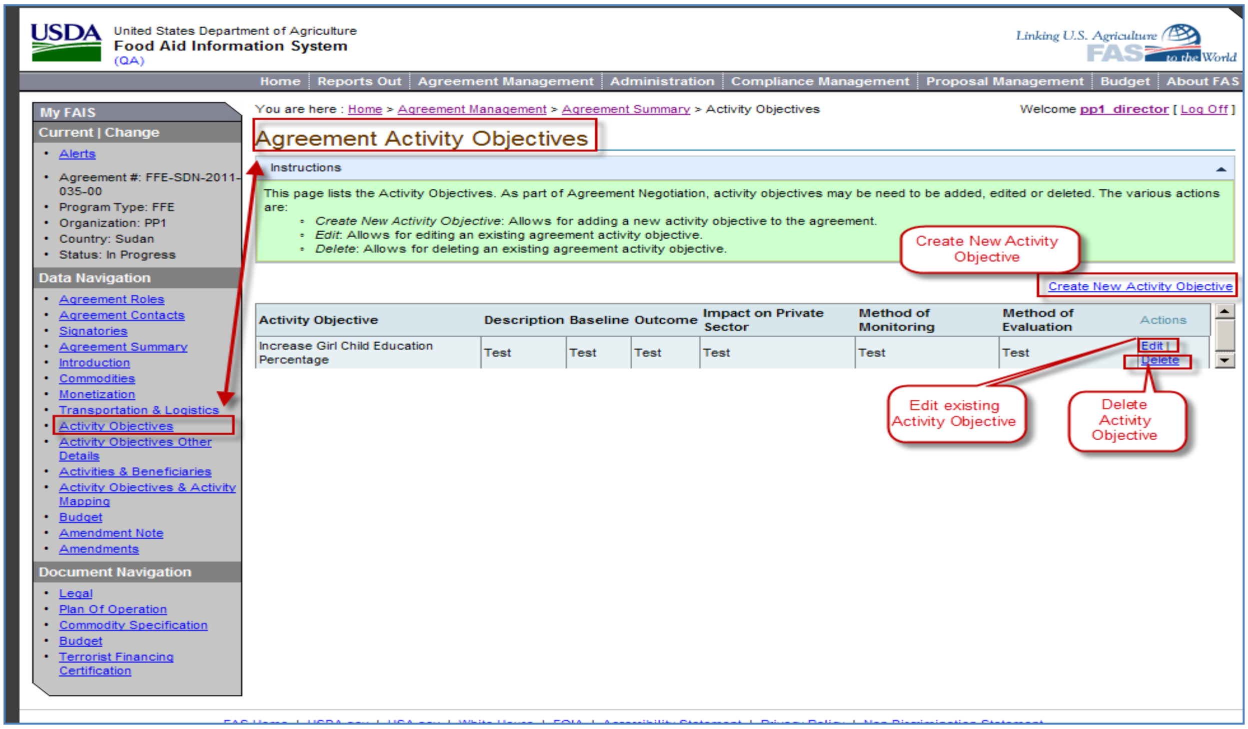
1. Click on **Monetization** link
2. System will display “**Monetization**” page
3. User will be able to edit the following details
   - Impact on Other Sales
   - Private sector participation insale of commodity
   - Sales Proceeds Usage & Activity Implementation
   - Assuring Receipt Procedures
4. Click “**Save**” to save details

5.2.4. Transportation & Logistics



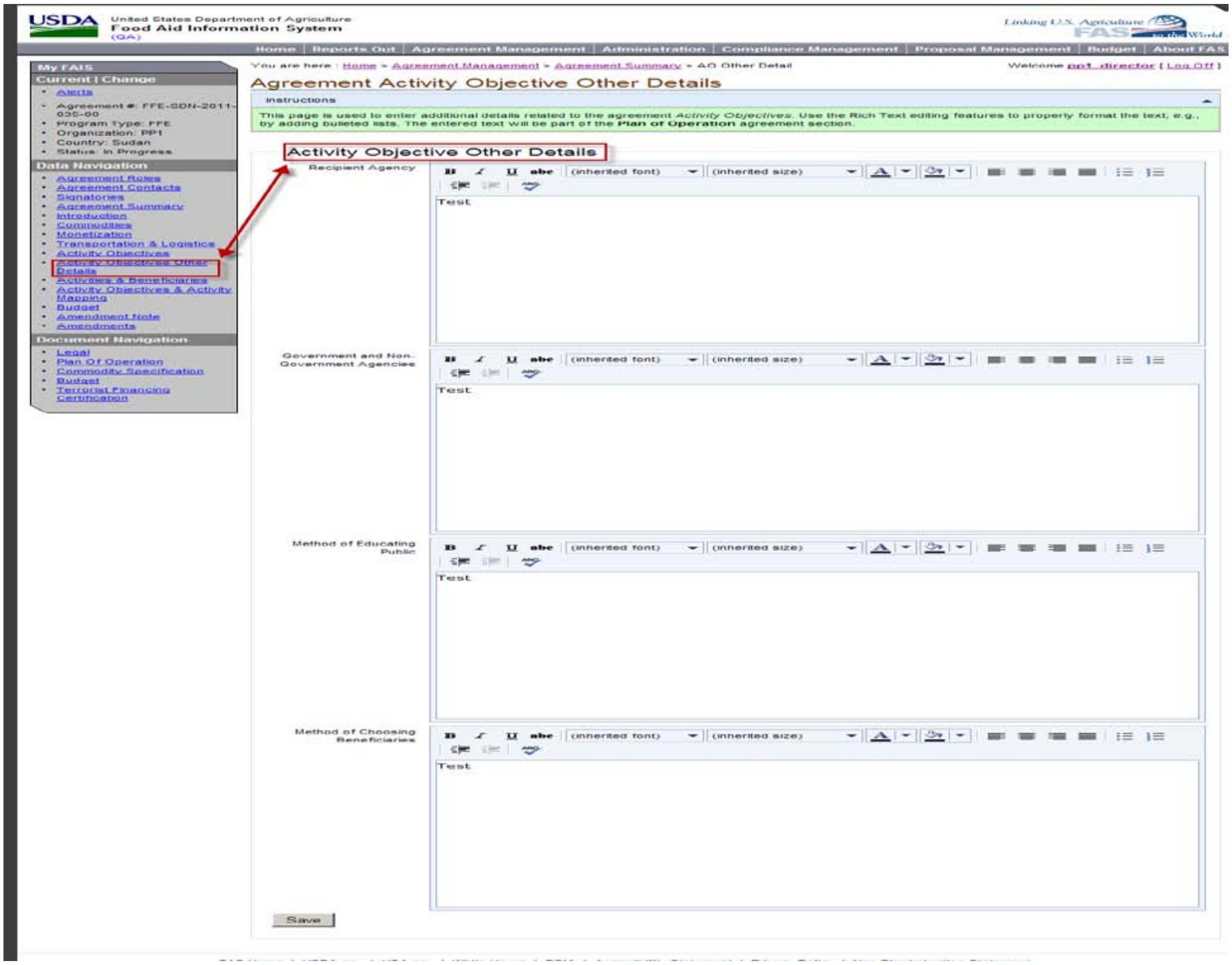
1. Click on **Transportation & Logistics** link
2. System will display "**Transportation & Logistics** " page
3. User will be able to edit the following details
    - Transportation, Logistics, Repackaging & Reprocessing
4. Click "**Save**" to save details

5.2.5. Agreement Activity Objectives



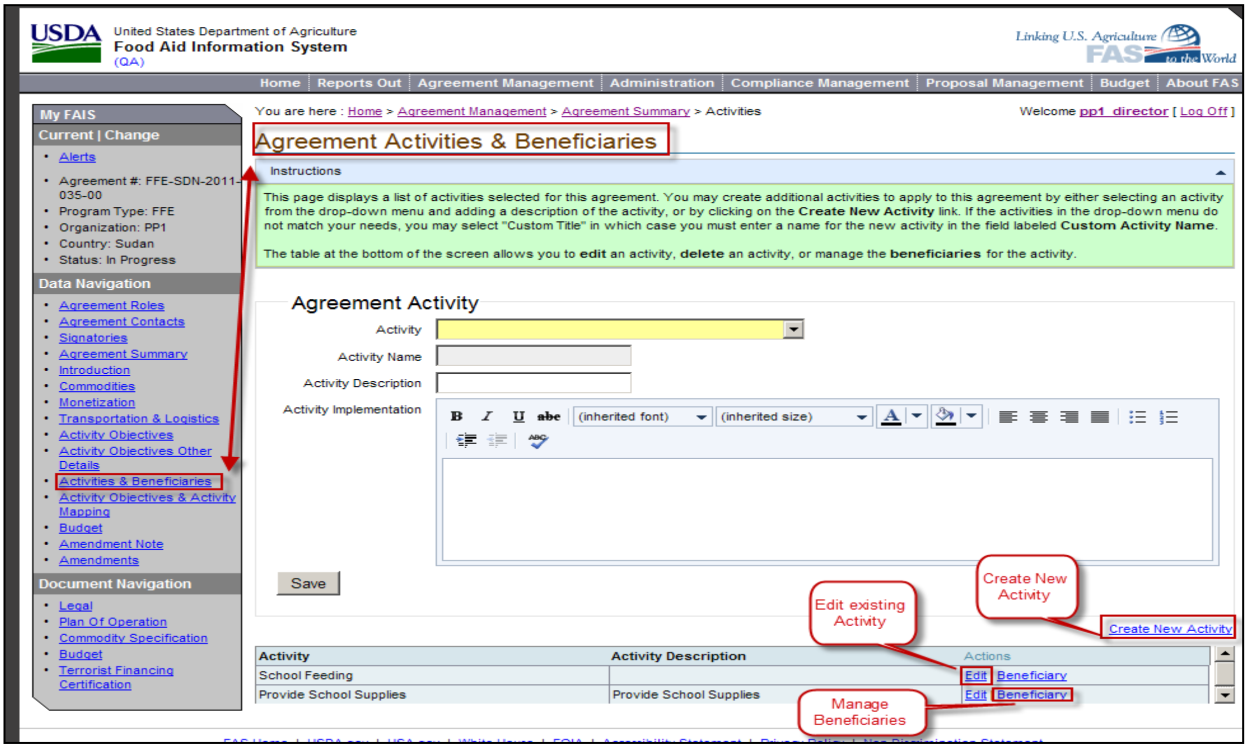
1. Click on **Activity Objective** link
2. System will display "**Agreement Activity Objective**" page
3. In order to Create an Activity Objective click on **Create New Activity Objective**
4. In order to edit an Activity Objective click on **Edit**
5. User enter Activity Objective and related details
    - Activity Objective
    - Activity Objective Description
    - Baseline
    - Outcome
    - Impact on Private Sector
    - Method of Monitoring
    - Method of Evaluation
6. Click "**Save**" to save details
7. In order to delete an Activity Objective click on **Delete**

5.2.6. Agreement Activity Objective Other Details



1. Click on **Activity Objective Other Details** link
2. System will display “**Agreement Activity Objective Other Details**” page
3. Modify or view the following details
    - Receipient Agency
    - Government or Non Gevernment Agencies
    - Method of Educating Public
    - Method of Choosing Beneficiaries
4. Click “**Save**” to save details

5.2.7. Agreement Activities & Beneficiaries



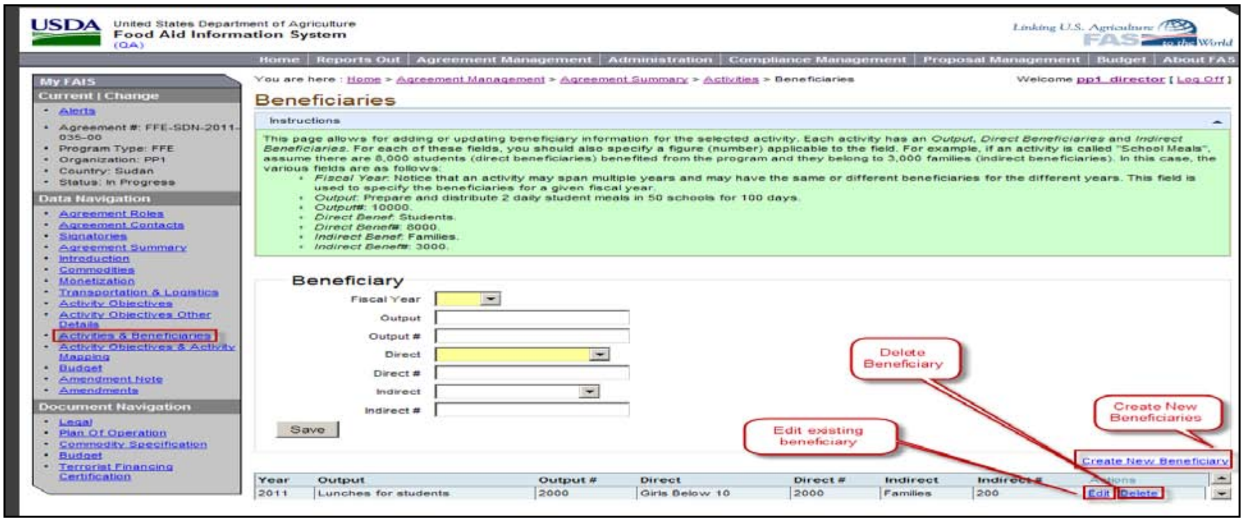
Create New Activity

1. Click on **Activities & Beneficiaries** link
2. System will display “**Agreement Activities & Beneficiaries**” page
3. Click on **Create New Activity**
4. Enter the following details
   - Select or enter Activity
   - Enter Activity Description (Not Mandatory)
   - Enter Activity Implementation (Not Mandatory)
5. Click “**Save**” to save details

Edit Activity

1. Click on **Activities & Beneficiaries** link
2. System will display “**Agreement Activities & Beneficiaries**” page
3. Click on **Edit**
4. Edit following details
   - Select or enter Activity
   - Enter Activity Description (Not Mandatory)
   - Enter Activity Implementation (Not Mandatory)
5. Click “**Save**” to save details

5.2.8. Manage Beneficiaries



Edit Beneficiary

1. Click on **Beneficiaries** link in“**Agreement Activities & Beneficiaries**” page
2. Click on **Edit**
3. Edit following details
    - Select Fiscal Year
    - Enter Output
    - Enter Output #
    - Select Direct Beneficiary
    - Enter Direct Beneficiary #
    - Select InDirect Beneficiary
    - Enter InDirect Beneficiary #
4. Click “**Save**” to save details

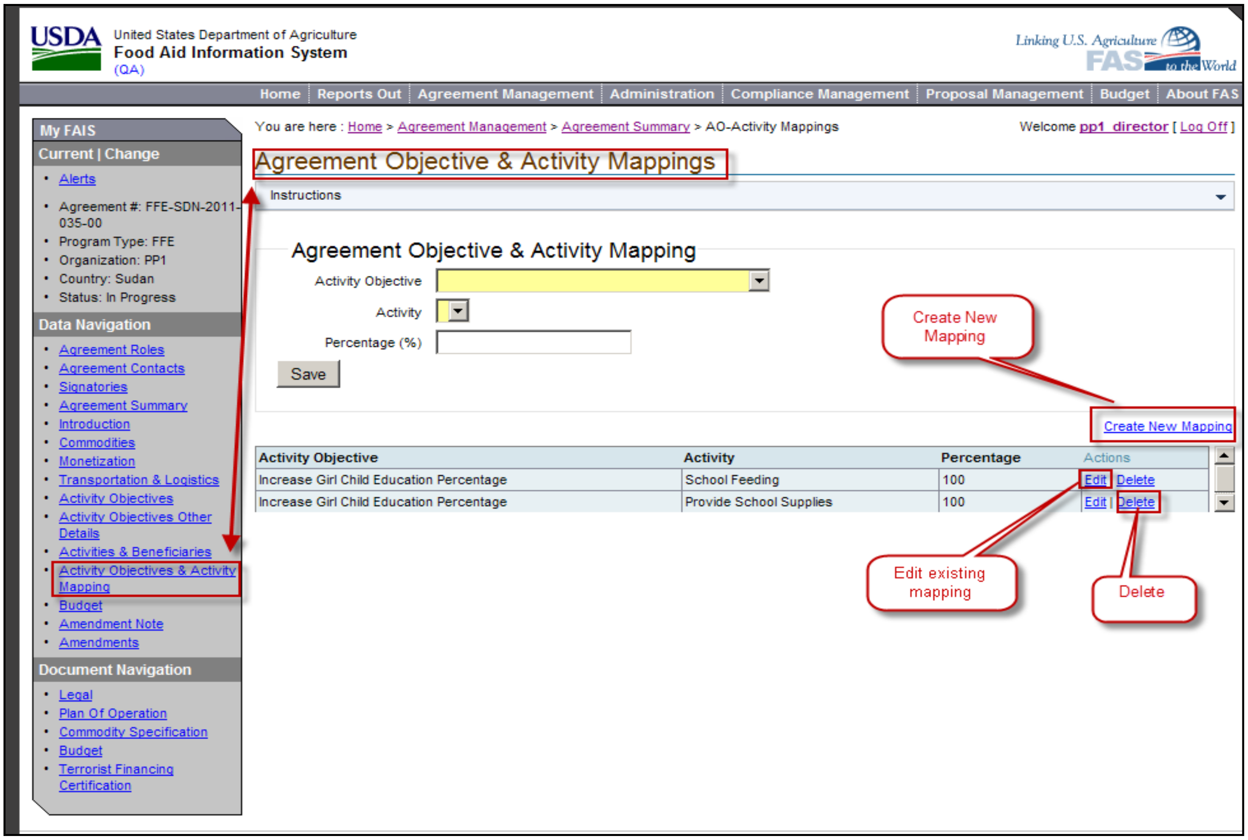
Create New Beneficiary

1. Click on **Beneficiaries** link in“**Agreement Activities & Beneficiaries**” page
2. Click on **“Create New Beneficiary”**
3. Edit following details
    - Select Fiscal Year
    - Enter Output
    - Enter Output #
    - Select Direct Beneficiary
    - Enter Direct Beneficiary #
    - Select InDirect Beneficiary
    - Enter InDirect Beneficiary #
4. Click “**Save**” to save details

Delete Beneficiary

To delete a beneficiary click on **Delete** to delete beneficiary

5.2.9. Activity Objective – Activity Mapping



Each Activity will be associated with one or many Activity Objective. Each Activity will have to be mapped 100%

Create New Mapping

1. Click on link in" **Activities Objective & Activity Mapping**" page
2. Click on **"Create New Mapping"**
3. Enter following details
   - Select Activity Objective
   - Select Activity
   - Enter Percentage

4. Click "**Save**" to save details

Note:- Any activity has to be mapped exactly to 100%

Edit Mapping

1. Click on link in" **Activities Objective & Activity Mapping**" page
2. Click on **"Edit Mapping"**
3. Edit following details
   - Select Activity Objective
   - Select Activity
   - Enter Percentage

4. Click "**Save**" to save details

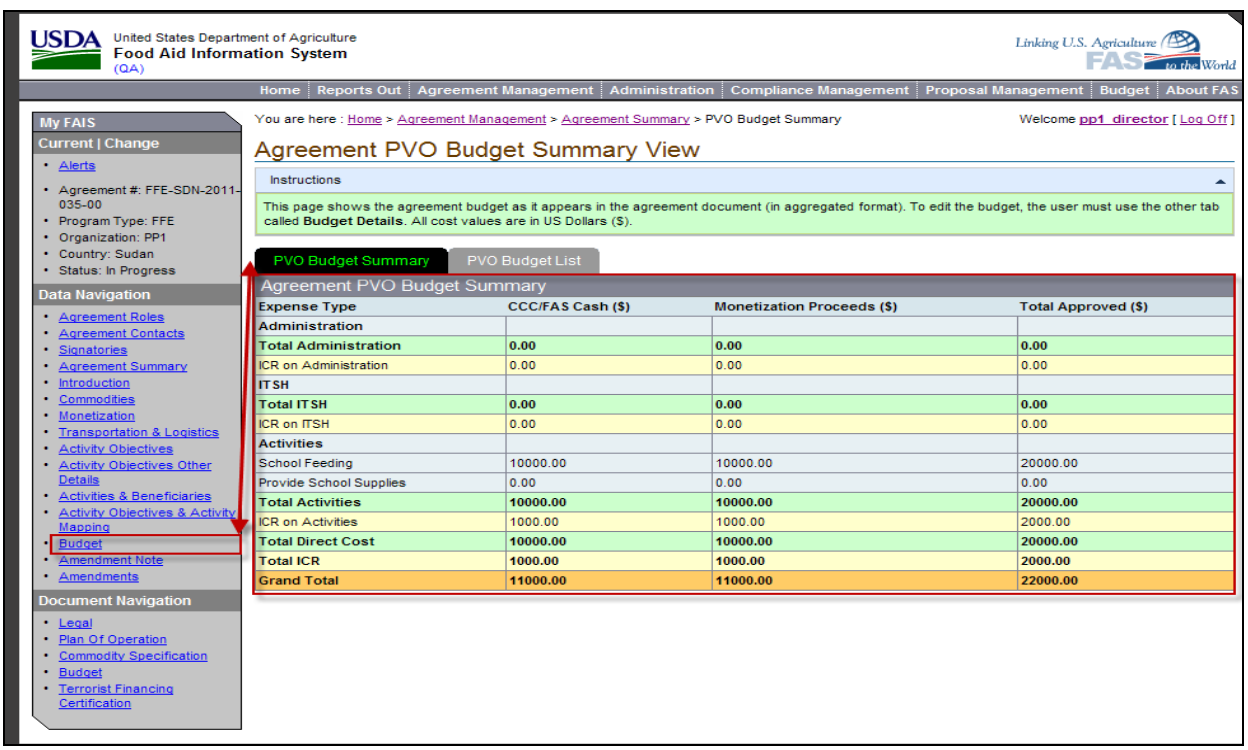
   Note:- Any activity has to be mapped exactly to 100%

Delete Mapping

To delete mapping click on **Delete** to delete mapping

5.2.10. Budget

View PVO Budget Summary



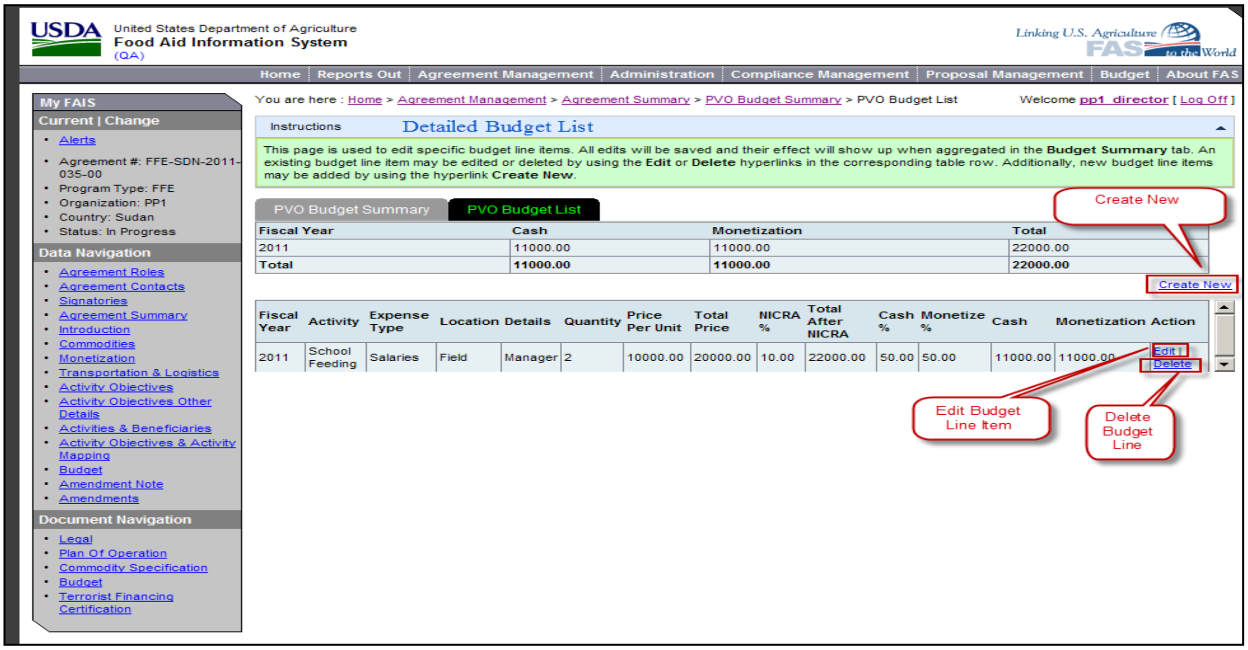
To view PVO Budget Summary

1. Click on **Budget** link on Left Menu

2. View PVO Budget Summary

Detailed Budget List

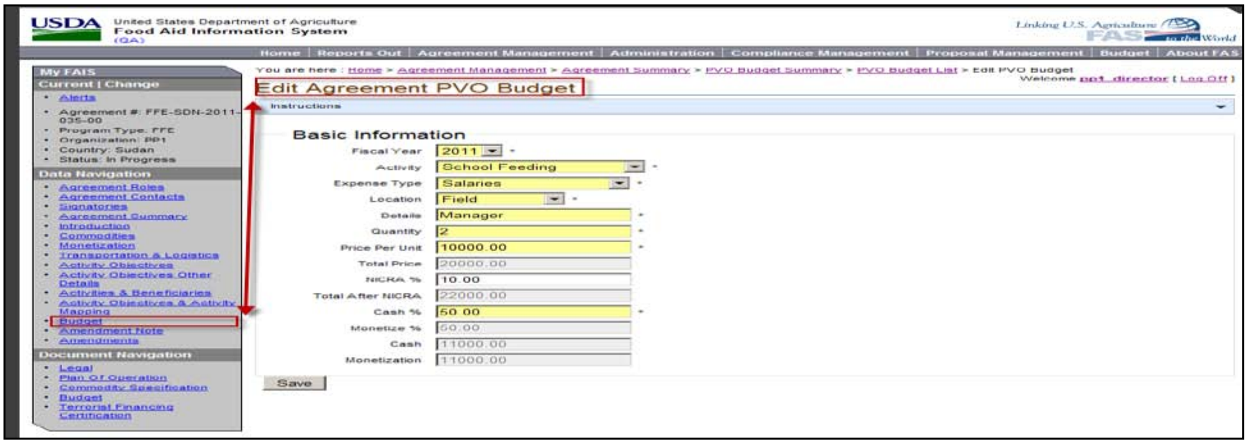
Participant will be able to view and modify Agreement Budget line items through budget link



Detailed Budget List

1. Click on **Budget** link on Left Menu
2. View PVO Budget Summary
3. Click on PVO Budget List tab
4. View Detailed Budget List

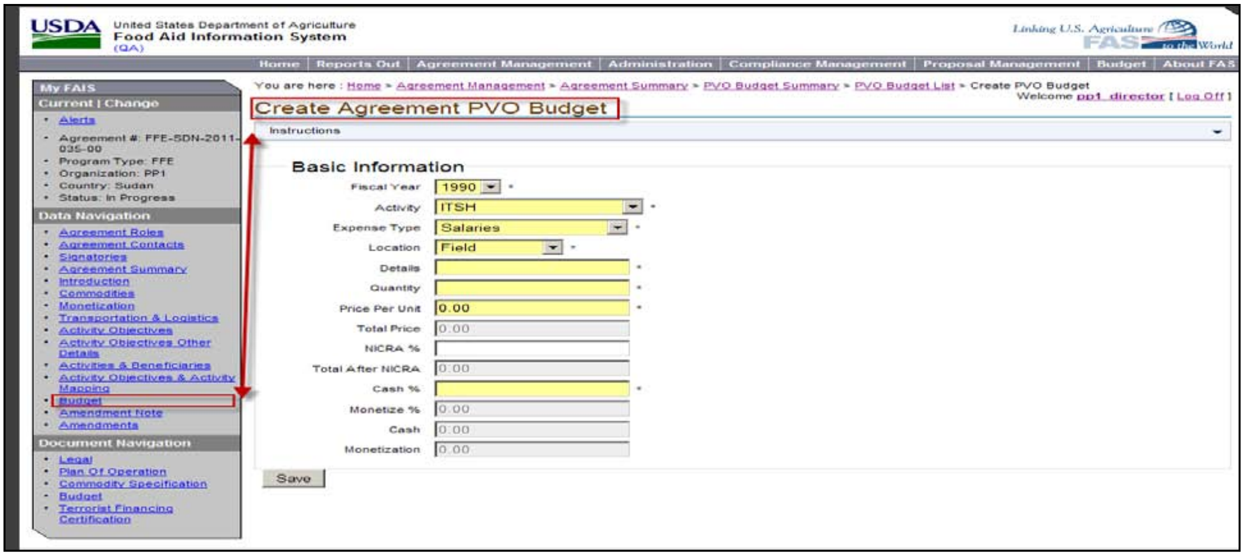
Edit Agreement PVO Budget



Edit Budget Line Item

1. Click on **Budget** link on Left Menu
2. View PVO Budget Summary
3. Click on PVO Budget List tab
4. Click on **Edit** against a Budget Line Item
5. User will be able to Edit following values
    - Fiscal Year
    - Activity
    - Expense Type
    - Location
    - Details
    - Quantity
    - Price Per Unit
    - NICRA % - Not Mandatory
    - Cash % - Money requested as Cash
6. System will calculate the following details based on the above user input
    - **Total Price** - Quantity * Price Per Unit
    - **Total After NICRA** – Total Price + (Total Price * NICRA %)
    - **Monetization %** - 100 – Cash %
    - **Cash** – Cash % * Total After NICRA
    - **Monetization** – Monetization % * Total After NICRA
7. Click on **Save** to save the data

Create Agreement PVO Budget



Create New Budget Line Item

1. Click on **Budget** link on Left Menu
2. View PVO Budget Summary
3. Click on PVO Budget List tab
4. Click on **Create New**
5. User will be able to Enter following values
    - Fiscal Year
    - Activity
    - Expense Type
    - Location
    - Details
    - Quantity
    - Price Per Unit
    - NICRA % - Not Mandatory
    - Cash % - Money requested as Cash
6. System will calculate the following details based on the above user input
    - **Total Price** - Quantity * Price Per Unit
    - **Total After NICRA** – Total Price + (Total Price * NICRA %)
    - **Monetization %** - 100 – Cash %
    - **Cash** – Cash % * Total After NICRA
    - **Monetization** – Monetization % * Total After NICRA
7. Click on **Save** to save the data

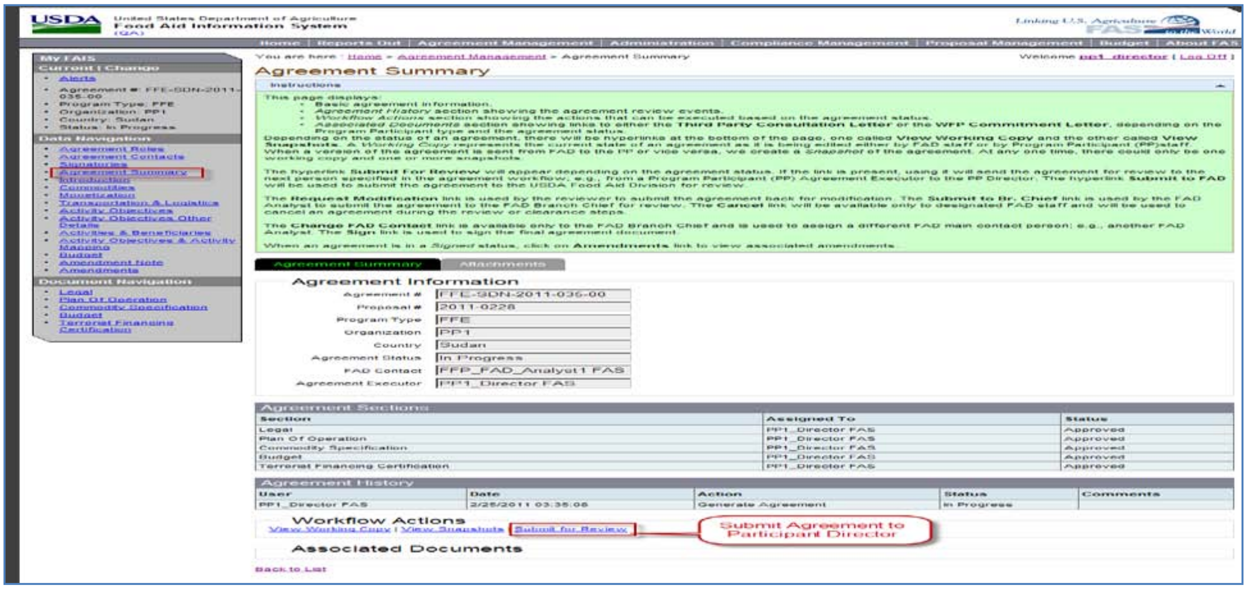
Delete Budget Line Item

To delete a budget line item click on **Delete** against a budget line item.

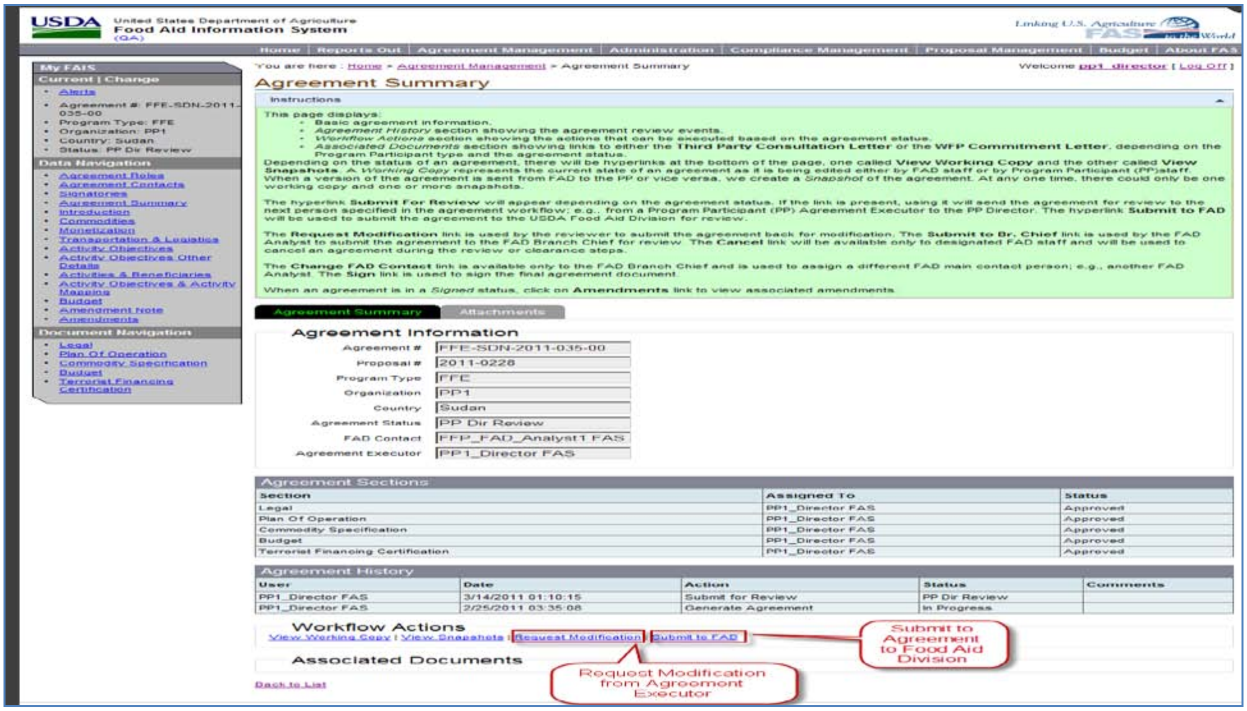
5.3. Agreement Submission

Agreement submission is a 2 step process. Once all sections are approved by Participant Agreement Executor,

Step 1:- Participant Agreement Executor submits Agreement to Participant Director



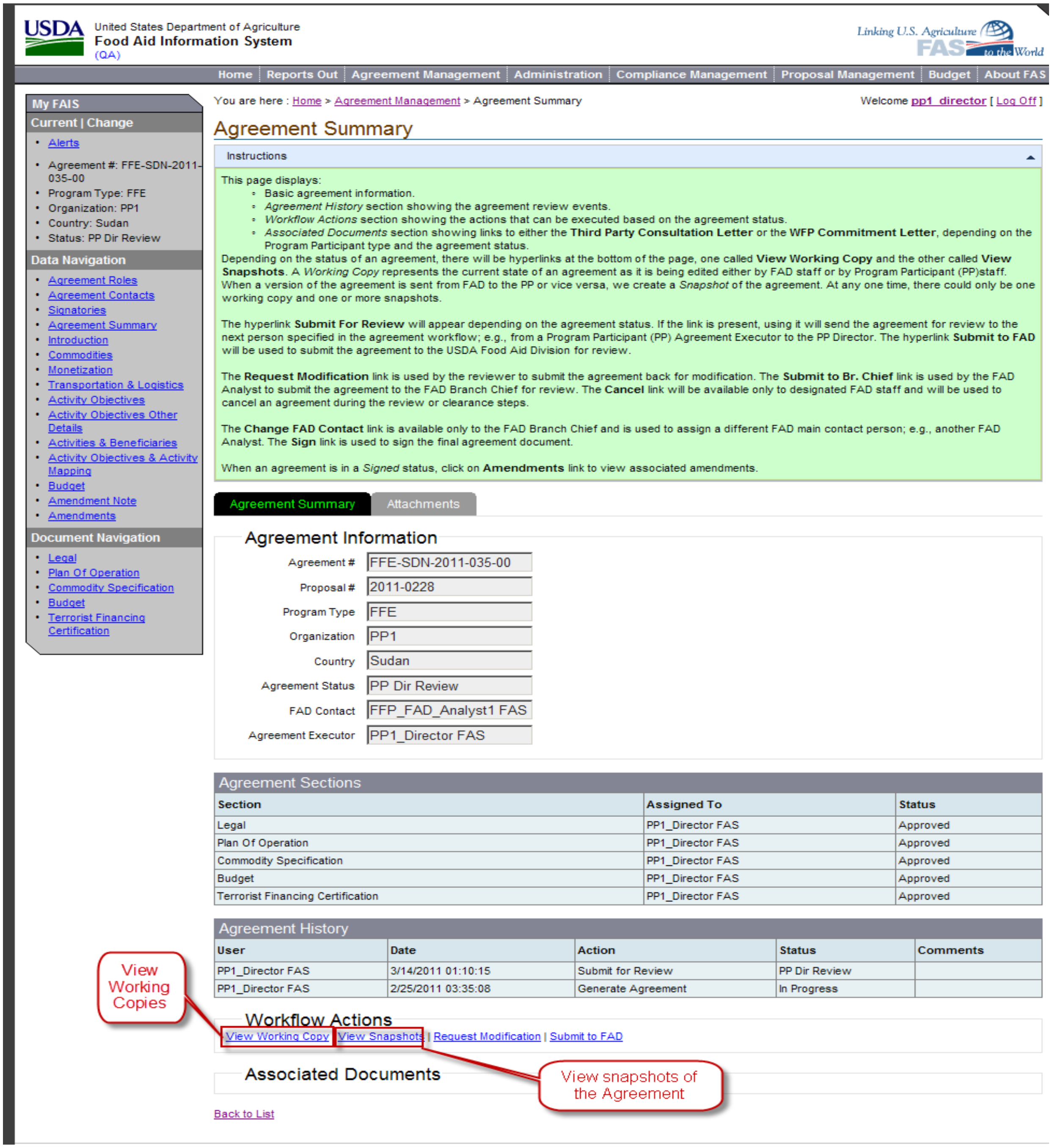
Step 2:- Participant Director submits agreement to Food Aid Division



5.4. Agreement Snapshot & Working Copy

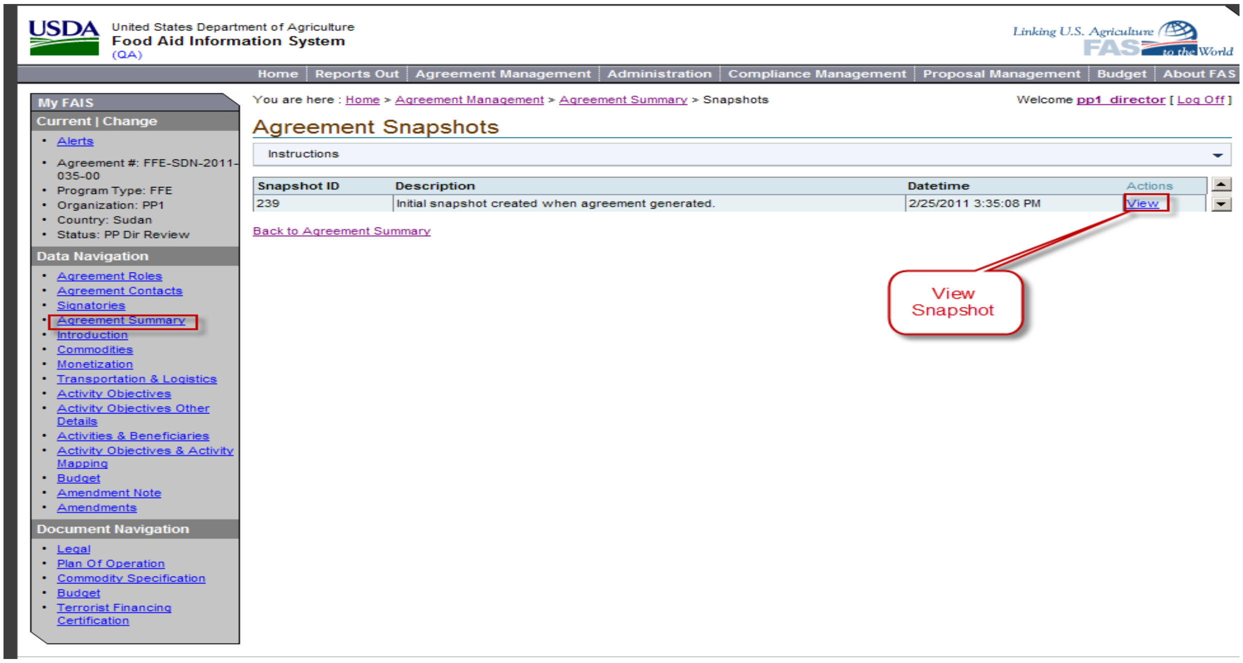
View Working Copy

Agreement can be viewed in total as a single document by clicking on the **View Working Copy** link in the Agreement Summary screen



View Snapshot

FAIS takes a snapshot of the Agreement when it is generated for the first time and whenever the Agreement is submitted by the participant director to FAD and when FAD Analyst request modification on the Agreement from the participant



6. Appendix

6.1. Appendix A – Acronyms and Abbreviations

Below are some acronyms and abbreviations, used in this manual, with their full forms and definitions.

FAS – Foreign Agricultural Service

FAIS – Food Aid Information System

PP – Program Participant

NICRA – Negotiated Indirect Cost Recovery Agreement

USDA – U.S. Department of Agriculture