GIRAF USER MANUAL

MANAGEMENT OF INSTITUTIONAL SUPPORTS

2017-2021 PROGRAMME

CONTENTS

GIRAF is the french acronym for 'Integrated Management of Reporting and Financial Administration'. This application of the ARES Development Cooperation Directorate is now the reference tool for the monitoring of the institutional supports financed by the 2017-2021 programme. Through this platform, you can access your project sheet and enter the expenses incurred, the missions and scholarships related to it. In this manual, you will find the detailed procedure that will allow you to use all the GIRAF functionalities. Tab by tab, you will discover the procedure to follow in order to make the most of the resources of GIRAF.

This manual does not replace the institutional supports's vademecum.

01. ACCESS AND PROFILE

To access GIRAF, go to giraf.ares-ac.be/en. You will be asked to log in with your e-mail address and personal password.

If you do not yet have an activated account on GIRAF and you are linked to an ongoing project, you can contact giraf@ares-ac.be to request activation of your account.

If you do not remember your password, use the Reset your password function.

If you wish to update your personal information, you can access your profile at any time by clicking on your name in the top right-hand corner of the screen, or by clicking on *My account* in your dashboard.

02. DASHBOARD

Your dashboard gives you access to the different projects you are involved in. Indeed, when you are mentioned in an activity by ARES, this activity appears in the block *My projects* of your dashboard. Other information is also available via this screen.

If one of the blocks mentioned below does not appear in your dashboard, it means that none of the items in that block are related to your account..

MESSAGES

Messages sent by ARES via GIRAF are displayed in this block. Please note: this is not a messaging system, but a notification system (no reply or exchange possible). A warning will be sent to you regularly by e-mail if you have not consulted the announcement messages sent to you via GIRAF.

MY ACCOUNT

The *My account* block shows the user's contact details. By clicking on 'My account' in the top right-hand corner, the user accesses his contact details and can view all the information recorded in GIRAF concerning him. He/she can modify this information via the 'Edit' option.

MY SHORTCUTS

If you have indicated a page of GIRAF as a shortcut (by clicking on the star at the top of the page on the right), it will appear in the block *My shortcuts*. This will make it easier for you to find it the next time you log on.
To delete a shortcut, you can click again on the star at the top right of the page concerned. Alternatively, in your *My Shortcuts* block, you can tick the shortcut you wish to remove and click the 'Apply' button.
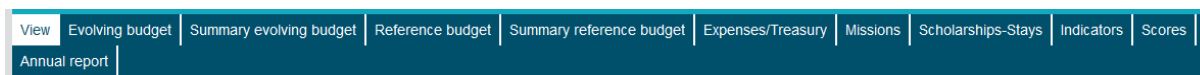
MY PROJECTS

If your account is linked to a current intervention registered in GIRAF, it will appear in the *My projects* block of your dashboard. Click on the title of the intervention to access its reporting sheet.

MY SCHOLARSHIPS

If your account is linked to a scholarship in GIRAF, it will appear in the *My Scholarships* block of your dashboard.

03. MY PROJECTS

The *My projects* block of your dashboard allows you to access the different activities that concern you. You will find the current institutionals supports. By clicking on the title of an activity, you can access the project sheet. Here you will find the main information about the project and the people authorised to manage the activity. The tabs then allow you to navigate through the different reporting aspects.

| View | Evolving budget | Summary evolving budget | Reference budget | Summary reference budget | Expenses/Treasury | Missions | Scholarships-Stays | Indicators | Scores |
| Annual report |

The type of stakeholder assigned to a user in the project sheet (see the *Coordination and Partners* and *Managers* blocks in the *View* tab) determines which functionalities that user has access to in that activity. To find out which functionality is available to which type of stakeholder, please refer to the stakeholder matrix below. The North financial management of institutional support is carried out by ARES. The expenses in the North and the modification of the evolving budget are therefore not governed by this matrix for institutional support.

03.1 / STAKEHOLDERS MATRIX

	Evolving budget	Reference budget	Treasury — Belgian expenses	Treasury — Local expenses	Missions	Scholarships–Stays	Indicators	Scores	Annual report
North coordinator	Edit	View	Edit	Edit	Edit	Edit	Edit	Edit	Edit
South coordinator	Edit	View	View	Edit	Edit	Edit	Edit	Edit	View
North manager (x2)	Edit	View	Edit	Edit	Edit	Edit	Edit	Edit	View
South manager (x2)	Edit	View	View	Edit	Edit	Edit	Edit	Edit	View
North financial manager	Edit	View	Edit	Edit	View	View	View	View	View
South financial manager	View	View	View	Edit	View	View	View	View	View
Partners	View	View	View	View	View	View	View	View	View

🖊 = Edit 📖 = View

03.2 / WHO ENCODES WHAT?

You will find below a summary of the different encodings that must be made in the GIRAF platform for the monitoring of institutional support.

Evolving budget	ARES manager
Local expenses	Local coordination team
Belgian expenses	ARES manager
Advances	ARES manager
Local grants	Local coordination team
Regional stays	Local coordination team
Stays in Belgium	ARES manager (via arrival announcement form)
North-South missions	ARES manager (via per diem request)
South-North missions	ARES manager (via arrival announcement form)
South-South Missions	Local coordination team

04. EVOLVING BUDGET

The *Evolving budget* tab allows you to monitor the project budget. For each year and each heading/sub-heading, you can consult the budget, the related expenses and the balance.

This budget will be adapted year by year according to possible carry-overs by the ARES manager after consultation with the coordination group. This budget will be validated by the ARES after the closure of the control of year n-1. The budget will then be indicated as 'Validated by ARES' at the bottom of the relevant budget column.

The annual implementation rate of the institutional support (see *Expenses/Treasury*) is calculated on the basis of this budget.

For the 2017-2021 programme, the 2017-2020 budgets have been encoded in a particular way: the budget of each heading has been encoded in the first corresponding sub-heading. This lack of detail by sub-heading will be rectified from 2021.

The *Summary evolving budget* tab shows the same budget under the 3 main headings. This table shows if the authorised budgetary transfers between the three main headings of investment, personnel and operation are respected.

05. REFERENCE BUDGET

The reference budget is the budget as established at the start of the project (initial budget approved by the ARES). In case of budget revisions, changes can be made by ARES in this reference budget.

For the 2017-2021 programme, budgets have been encoded in a particular way: the budget of each heading has been encoded in the first corresponding sub-heading.

The total implementation rate of the institutiona lsupport (cf. *Expenses/Treasury*) is calculated on the basis of this budget.

The *Summary reference budget* tab shows the same budget under the three main headings.

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06. EXPENSES / TREASURY

> **You must add your <u>2021 expenses</u> directly into GIRAF, the Excel financial tools will no longer be accepted for 2021. The <u>2020 expenses</u> will be imported by ARES at the closure of your 2020 financial control.**

The *Expenses/treasury* tab is the control screen that allows you to monitor the financial execution of your project. It consists of two parts:
» A summary table gives you a real-time overview of the status of project expenses and the balances and implementation rates.
» A table lists all the expenses you have recorded. Filter criteria can be applied.

Adding and changing expenses is governed by the stakeholder matrix (see above) with a particularity for institutional supports :
» North expenses are recorded by the ARES manager and cannot be modified.
» South expenses can be modified by both South and North stakeholders.

06.1 / SUMMARY TABLE

The summary table automatically calculates information useful for project management: totals and implementation rates for the budget, advances, etc. The total expenditure for each heading or sub-heading is available directly in the budget tabs, alongside the budget allocated to each heading, with the updated balance.

The lines *Local instalments implementation* rate and *Local treasury balance* are specifically planned for the local monitoring of institutional support.

06.2 / VIEWING AND SORTING EXPENSES

The list of expenses added in GIRAF is displayed in the Expenses/Treasury tab, under the summary table. Several criteria can be applied to view only the desired expenses. You can select one of them via the 'Sort by' criterion.

You can save a filter (i.e. a set of criteria) if you need to perform the same searches regularly. To do this, select your criteria in the search tool and click on 'Save filters'. You can then name your filter. You can then retrieve your filter by placing your cursor on 'Save filters'. The list of your filters will appear. To change a saved filter, simply re-save the filter with the same name. It will then be replaced.

This screen does not give you an overview of the addition of expenses heading by heading. This information, as well as the calculation of balances, is available directly via the *Evolving budget* tabs.

An export of the expenses can be done. By clicking on 'Export csv' at the bottom of the page, you can download all the expenses included in the applied filter. The number of expenses concerned is indicated at the top of the search tool. You will then get a raw csv file containing all the expense fields. You can save this file in xlsx format and use it as required.

06.3 / ADD AN EXPENSE

Vous ne devez pas tenir compte de la 'Vérification Nord-Sud' qui s'affiche en fin de formulaire. Cette notion s'applique aux projets.

By clicking on 'Add an expense', you will be taken to the addition form. You are then invited to enter the information relating to the expense (the form is built on the same structure as the Excel financial tool). Mandatory fields are marked with a red asterisk. You are invited to enter as much information as possible.
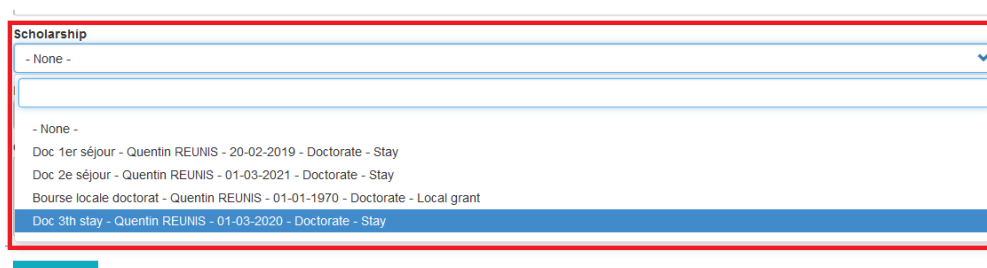
Notes :

» **Headings and subheadings**: It is necessary to select a heading to have access to the corresponding sub-headings.
» **Amount**: Without a thousands separator, ". " or "," can mark the decimal places (2 decimal places accepted). The *Amount* and *Currency code* fields are mandatory. The system will then automatically calculate the final amount based on the exchange rate you have added.
» **Exchange rate**: Note that the exchange rate must be encoded in the form of *Amount 1/Amount 2*. The formula applied in GIRAF for the conversion is as follows: Amount 1/exchange rate = Amount 2. The exchange rate accepts 4 decimal places.

Example : 100.000 XOF > exhange rate: 655,9570 > 152,45 €

» You should ignore the 'North-South verification' that appears at the end of the form. This applies to projects.

06.4 / EXPENSES RELATED TO A SCHOLARSIP/STAY OR A MISSION

GIRAF allows you to link expenses to a local grant, to a stay or to a mission. To do this, the grant or mission must have been previously entered in the respective tab (see below). Then, in the form for adding an expense, you can select the corresponding item.

It is therefore necessary **to identify the expenses of each grant holder or each mission** in order to monitor these expenses. A table for monitoring expenses per grant holder is available in the *Scholarships/Stays* tab. This will also facilitate the financial control of the project.

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06.5 / EDIT AN EXPENSE

The expenses created by south stakeholders can be modified as long as the annual report has not been validated by the North coordinator of the project. The status of these expenses is *Modifiable.* When the report is validated, all expenses for the year in question will automatically change to *Non-modifiable* status.

The North expenses, recorded by the ARES manager, cannot be modified by the North and South stakeholders.

To modify an expense, simply click on 'Edit' in the expenses table.

06.6 / DUPLICATE AN EXPENSE

You can duplicate an encoded expense. To do this, click on 'Duplicate' in the options for modifying an expense. GIRAF then creates a duplicate of the desired entity. **Please note that it is essential to open and adapt the newly created entity directly** by modifying the information that differs: expense number, nature of the expense, dates, amounts, related scholarship or mission.

06.7 / DELETE AN EXPENSE

You can delete a South expense as long as the annual report has not been validated by the North coordinator. Simply select the 'delete' option on the relevant line in the expenses table.

06.8 / ADVANCES MANAGEMENT

The *Expenses/Treasury* tab also allows you to follow up on the advances paid by ARES. The ARES manager will fill in each advance at the time of payment. Local managers should therefore not use the 'Add advance' option. You are required to enter these advances in GIRAF, as this allows you to see the balance and the cumulative implementation rate of the advances and to determine when you can apply for the next advance

» The **nature** will follow the template: IS-[UNIV] XXXX Advance X. Example: « IS-ITC Budget 2021 Advance 1 ».
» You can view the advances by changing the *Cost type* filter in the expenses table.

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07. MISSIONS

In this tab, you must fill in the missions that are held within the framework of your institutional support. The local coordination team is in charge of registering the South-South missions, the other missions will be registered by ARES (on the basis of the arrival announcement form which has to be filled in and sent to ARES according to the usual procedure or on the basis of the per diem requests).

07.1 /   ADD A MISSION

In the *Missions* tab, click on 'Add a mission'. When creating a mission, it is necessary to specify the object of the mission, the person in charge of the mission, its nature and its type. Also indicate the departure and return dates (including travel) and the country of destination.

You have to record as many missions as there are people involved. This allows you to distinguish the mission's dates of each person and to link the expenses to each participant.

The person in charge of the mission must be selected from the existing users in GIRAF. Type in a few letters of the first name **or** last name you are looking for, and then select the user from the drop-down list. Please note that if you type in both first **and** last names, no result will be proposed even if the user exists in GIRAF.

If you cannot find a user, you can create a new user via the link 'Create a user'. Be careful when creating a new user. It is imperative to avoid any duplication of user. If you find a duplicate user, please report it to giraf@ares-ac.be.

For missions carried out in the framework of institutional support, the result can be indicated.

Once the mission has been created in this tab, expenses can be linked to it when adding it via the *Expenses/Treasury* tab. Please note that it is necessary to have created the mission beforehand so that it can be selected in the expense add form.

07.2 /   DUPLICATE A MISSION

In order to avoid having to complete a form again for each mission, it is possible to duplicate a form that has already been completed. To do this, click on 'Duplicate' in the mission modification options. GIRAF then creates a duplicate of the desired entity. **Please note that it is essential to open and adapt the newly created entity directly** by modifying the information that differs (object of the mission, dates, person in charge of the mission,...).

07.3 /   EXPENSE RELATED TO A MISSION

Once the mission has been created in this tab, expenses can be linked to it when adding it via the *Expenses/Treasury* tab. Please note that it is necessary to have created the mission beforehand so that it can be selected in the form for creating an expense.

08. BOURSES - SÉJOURS

Via cet onglet, vous pouvez créer et visualiser les bourses et séjours de boursier·ères qui sont lié·es au projet. La bourse locale d'un·e boursier·ère ainsi que ses différents séjours en Belgique doivent chacun faire l'objet d'une entité créée dans GIRAF.

08.1 / BOURSE LOCALE

Si un·e boursier·ère bénéficie d'une bourse locale, l'équipe de coordination locale crée une bourse dans GIRAF. **Cette entité ne doit pas comporter de dates de séjour**. Il vous est par contre demandé d'actualiser cette fiche de bourse en indiquant au fur et à mesure les périodes où le boursier a bénéficié d'une bourse locale en remarque. Cette information sera utilisée lors du contrôle financier effectué par l'ARES.

Veillez à remplir les champs suivants en respectant les consignes spécifiques :

» Champs d'**informations personnelles** sur le/la boursier·ère : nom, prénom, e-mail, date de naissance, nationalité.
» L'**objet de la bourse** : indiquez au minimum qu'il s'agit d'une bourse locale. Merci d'être concis dans les objets des bourses.
» Le **type de bourse** : pour chaque type de bourse (bourse d'études, doctorat, post-doctorat, stage, recyclage), il existe 2 sous-types. Sélectionnez bien le type 'bourse locale' correspondant.

Les autres champs doivent être, dans la mesure du possible, complétés au maximum, à savoir l'institution d'accueil et d'origine (qui seront souvent identiques), les promoteurs, l'adresse de résidence lors du séjour, les ODD et thématiques liées à la recherche,…

08.2 / SÉJOUR

Pour chaque séjour en Belgique effectué par un·e boursier·ère, le gestionnaire ARES enregistre ce séjour via ce même onglet avec les dates du séjour sur base du formulaire d'annonce d'arrivée qui est à remplir et à envoyer à l'ARES dans les délais impartis selon la procédure habituelle.

Pour les séjours régionaux, l'équipe de coordination locale enregistre chaque séjour via ce même onglet. Dans le cas d'un séjour, il est nécessaire d'indiquer les dates du séjour (dates d'arrivée et de départ du pays de destination), contrairement à une bourse locale.

» Champs d'**informations personnelles** sur le/la boursier·ère : nom, prénom, e-mail, date de naissance, nationalité.
» L'**objet de la bourse** : renseignez l'objectif du séjour et sa situation chronologique dans le déroulement du parcours du/de la boursier·ère. Ex : 1er séjour, 2e séjour,… ou séjour 2018, 2019,… Merci d'être concis dans les objets des bourses.
» Le **type de bourse** : pour chaque type de bourse (bourse d'études, doctorat, post-doctorat, stage, recyclage), il existe 2 sous-types. Sélectionnez bien le type 'séjour' correspondant.
» Le **pays de destination** du/de la boursier·ère.

Les autres champs doivent être, dans la mesure du possible, complétés au maximum, à savoir l'institution d'accueil et d'origine, les promoteurs, l'adresse de résidence lors du séjour, les ODD et thématiques liées à la recherche,…

08.3 / GRANT HOLDER : NEW VERSUS ALREADY ENCODED

To add a scholarship or a stay, click on 'Add a scholarship/stay' and fill in the form. Even if the scholarship holder has already been entered into GIRAF, you must enter his/her basic information, i.e. the fields last name, first name, e-mail and date of birth. GIRAF automatically checks whether the user already exists in the database. If the user exists, the grant is awarded to him/her. If it does not yet exist, the user is created. This system also allows scholarships/stays to be attached to a grant holder in the framework of another ARES programme.

08.4 / DUPLICATE A SCHOLARSHIP/STAY

In order to avoid having to fill in a complete form again for each stay, it is possible to duplicate a form already filled in for this grant holder. To do this, click on 'Duplicate' in the modification options. GIRAF then creates a duplicate of the desired entity. **Please note that it is essential to open and adapt the newly created entity directly** by modifying the information which differs (object of the scholarship, dates,...).

08.5 / EXPENSES RELATED TO A SCHOLARSHIP/STAY

Once the scholarship or stay has been created in this tab, expenses can be linked to it when adding it via the *Expenses/Treasury* tab. Please note that it is necessary to have created the scholarship or stay beforehand so that it can be selected in the expense add form.

Example : In the expense add form, the scholarship/stay field allows you to select, via a drop-down menu, the local grants and stays previously created in the *Scholarships-Stays* tab.

In the tab *Scholarships-Stays,* under the general table of grant holders, an individual table per grant holder shows the number of days and expenses incurred during stays in Belgium, but also the local expenses total.

Quentin REUNIS	2019	2020	2021	Total
Total stays in Belgium	120 days	46 days	46 days	212 days
Research expenses in Belgium	0 €	0 €	0 €	0 €
Total expenses in Belgium	0 €	0 €	0 €	0 €
Total local expenses	0 €	0 €	1 003,20 €	1 003,20 €

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09. NARRATIVE REPORTING

The *Indicators* and *Scores* tabs must be filled in when completing the annual report and, together with the activity report to be submitted elsewhere (not in GIRAF), form the narrative reporting of the institutional support each year.

09.1 /   INDICATEURS

For completing indicators in GIRAF for Institutional Support:

» Open the Indicators tab in your project's menu. You will see the table of indicators for the 2017-2021 programme.

» Fill in the figures for the designated year for each variable. It is possible to add a comment for each line (global comment, not annual).

» The baseline, mid-frame and end-of-frame targets are not changeable. Neither are the figures for previous years.

» Save your data at the bottom of the page by clicking on the green "Save" button. The totals per indicator are then added automatically.

   » Please note that there is no automatic saving.

   » Simultaneous changes are not possible. If two users complete the same table at the same time, only the last registered version will be taken into account.

» If you wish to download a CSV version of the completed table, click on "Export CSV" at the bottom of the page.
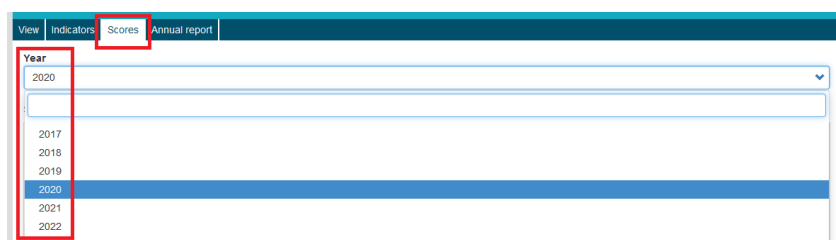

On the screen above:

» The white fields can be modified.

» The grey fields cannot be modified.

» The 'Comment' fields allow a global commentary for the entire five-year programme, which can be completed as and when required. You can enlarge the field by placing the cursor on its lower right corner.

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- » The 'Total' rows and columns are calculated automatically during registration.
- » Clicking on the green 'Save' button is necessary for the changes to take effect. No automatic saving is performed.
- » By clicking on the 'Export CSV' link at the bottom of the page, you can download a version of the indicator table.
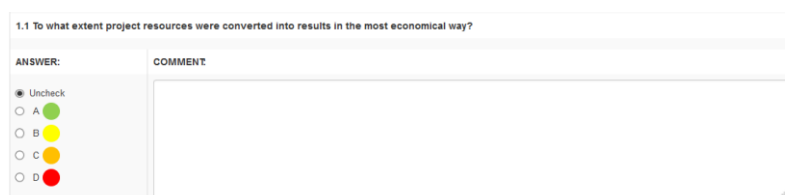
09.2 / PERFORMANCE SCORES

For completing performance scores in GIRAF:

- » Open the Scores tab in the menu of your institutional support.

- » Select the year for which you want to report. **Be careful**, if you skip this step, you will be entering the scores for the first year of the activity. They will therefore not appear in the expected report.

- » Tick the score corresponding to each question and explain your choice as a comment (obligatory). You must answer all the questions.
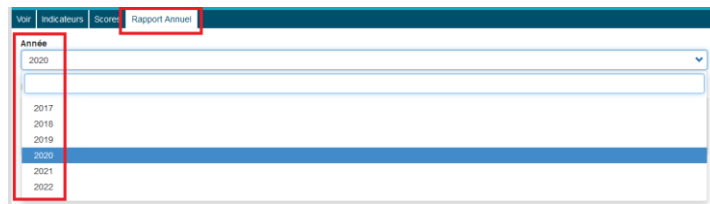

- » Save your data at the bottom of the page by clicking on the green "Save" button.
  - » Please note that there is no automatic saving.
  - » Simultaneous changes are not possible. If two users complete the same table at the same time, only the last registered version will be taken into account.

- » If you wish to download a CSV version of the completed form, click on "Export CSV" at the bottom of the page for the year in question.

10. ANNUAL REPORT

When all the expenses for the year have been recorded in GIRAF, and the indicators and performance scores have been completed, the North coordinator must validate this information for submission to ARES. The procedure is as follows:

» Open the Annual report tab in the menu of your project.

» Select the year for which you want to validate your report. **Be careful**, if you skip this step, you will validate the scores and indicators for the first year of the activity. The 2020 figures will not be validated correctly.

The status of the scores is a check to ensure that data has been recorded before validation. Until you have completed all the scores, you will not be able to validate. **Please note** that the expenses and indicators are not mentioned here. This does not mean that you have not entered any, but simply that no verification is performed.

» When all your information is completed, click on the green "Validate" button. This button is **only available to the North Coordinator**. The data can no longer be modified in GIRAF. They will be processed by ARES. The status of the expenses is automatically adjusted to non-modifiable.

» During the financial control carried out by the ARES, a right of amendment will be available to the stakeholders on expenses requiring correction or clarification. This right of modification will be granted by the ARES.

11. ASSISTANCE IN CASE OF TECHNICAL PROBLEMS

Your **ARES manager** remains the privileged contact person for any questions about the management of your project. If you encounter a technical problem, you can address your questions to giraf@ares-ac.be. We will deal with your request as soon as possible.

12. ANNEXE (CURRENCY CODE)

In GIRAF, currencies are referred to by their international ISO code. The table below shows the ISO code for each of the currencies available in GIRAF.

If a currency is needed to monitor your project but is not available in GIRAF, please contact giraf@ares-ac.be.

CURRENCY CODE	ISO CODE
Euro	EUR
US Dollar	USD
Pound Sterling	GBP
Canadian dollar	CAD
Swiss franc	CHF
New Zealand dollar	NZD
CFA Franc (West African)	XOF
Rwandese franc	RWF
Congolese franc	CDF
Burundian franc	BIF
Dirham	MAD
Ariary	MGA
Dong	VND
Cambodian riel	KHR
Peruvian sol	PEN
Boliviano	BOB
Haitian gourde	HTG
CFA Franc (Central African)	XAF
Cuban convertible peso	CUC
Cuban peso	CUP
Philippine peso	PHP
Birr	ETB