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# Vision statement - Benefits of using the partner portal



The Partner Portal enables **powerful partnerships** that are responsive and support **mutual development and learning**.



It will **bring together** CBM Resource mobilisation, CBM Initiatives, CBM Geography and Partners by **facilitating a common space for work**.



It provides **transparency** on key project information to CBM and its stakeholders by offering an **efficient way of data and information exchange**.

# Partner Portal Functions



- ✓ Read all project information including finances
- ✓ Request of Funds from your budget and acknowledge receipt of transfers
- ✓ Report on expenditure with upload of receipts
- ✓ Report on project indicators
- ✓ Project documents upload, collaboration, management
- ✓ Access to CBM templates in the resource library
- ✓ Read access to partner action plan
- ✓ Receive tasks via the system

# CBM ProMIS Partner Portal – Selection of staff

## **Step 1: Selection of users for CBM ProMIS Parnter Portal**

Within your partner organisation please select staff / users who actually do the request of funds from CBM, report on expenditures with up-load of vouchers, who up-load narrative reports and report on CBM project indicators.

Please choose 2 to max. 4 staff – one main user and a deputy.

If you have separate staff for finance and for programme work for example, it can be 4 staff.

Please note: As before, CBM programme & finance officers/managers at our CBM Country Offices are your primary contacts.



# CBM ProMIS Partner Portal –Corporate E-Mail



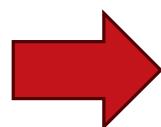
**Step 2: Check if you have a Microsoft Account or [create one](#)**

We need your e-mail address registered for this Microsoft Account to create a “ProMIS Guest User Account”.

*(Ideally you have an e-mail from your organization/workplace versus a private e-mail - i.e. you have an organizational Microsoft account)*

**Your Microsoft Account and the ProMIS access are always linked!**

When working in ProMIS you need to be logged into your Microsoft Account. Also to receive e-mail notifications from our ProMIS system you need to be active in your Microsoft account.



Please make sure your CBM Country Office contact receives the correct and exact e-mail.

# CBM ProMIS Partner Portal – Access ProMIS

## **Step 3:** Login

You will receive an Invitation from **Microsoft Invitations on behalf of CBM <invites@microsoft.com>** with an invitation button. **Please also check your spam folders.** It should say something like : *Welcome to ProMIS - CBM's Programme Management Information System!*

If you accept this invitation, you'll be sent to <https://myapplications.microsoft.com/?tenantid=87630e11-3313-4ca9-95a4-d66668365b6a>.

[Accept invitation](#)

Simply ACCEPT clicking this button.

Then open your Browser and enter: [ProMIS - Start page](https://promis.cbm.org/start)

<https://promis.cbm.org/start>



# CBM ProMIS Partner Portal – Access ProMIS

## **Step 4:** Partner User Member

When you click on the link to ProMIS start page ProMIS will open.

Once you have a ProMIS user account your CBM Country Office contact needs to make you a MEMBER of your projects in ProMIS Life. **Only then can you see and access your projects.**

If you do not see your projects on the start page, please inform your CBM Country Office contact.



# Using ProMIS



# Partner Portal – Start page

- On CBM ProMIS start page you can see your projects

The screenshot shows the CBM ProMIS Partner Portal start page. At the top left is the cbm logo and the word "promis". At the top right are navigation icons: a magnifying glass for search, a document icon, an information icon, a clock icon, and a gear icon. The top center displays the user's name: Partner-Irene Guaman Rivademeira (Partner-Irene.Guaman@cbm365.onmicrosoft.com). Below the header, there are two main sections: "MY SITES" and "MY TASKS AND MILESTONES". The "MY SITES" section contains a list of projects: "Projects", "P00489 Guidance to use ProMIS portal", and "P00422 Providing support to increase efficiency". The "MY TASKS AND MILESTONES" section lists a task: "Logframe reporting approval - 2023 Jul - Dec" with a link "P00489 Guidance to use ProMIS portal", a "To do" status, and a due date "28-02-2024". A red arrow points from the text "In the box „My Sites“ you see your projects if you have been made a MEMBER" to the "MY SITES" section. Another red arrow points from the text "As partner users you will see recent and favourite documents from your „Partner Folder“ from your project document library." to the "DOCUMENTS" section below.

In the „TASKS AND MILESTONES“ box you will see tasks („to dos“) assigned to you with the respective due date

In the box „My Sites“ you see your projects if you have been made a MEMBER

If you do not see your projects, contact your CBM Country Office staff/contact

As partner users you will see recent and favourite documents from your „Partner Folder“ from your project document library.

# Partners' view – Project Browse List



Click on logo to return to Start page

[Start / Projects](#)

Projects

[Export to Excel](#)

Click on headings to sort



Reduced top bar – main navigation & toolbox

Region Contract partner Donor Initiative Components included Target group Status

Active x On proviso x

Search Project set-up Country

Use filters to reduce the list

ID ↓	PROJECT NAME	FORMER NAV ID	PROJECT SET-UP	PROGRAMME(S)	COUNTRY	REGION	CONTRACT PARTNER	DONOR(S)	PERIOD	INITIATIVE(S)	COMPONENTS INCLUDED	TARGET GROUP(S)	RESPONSIBLE PROJECT MANAGER	CURRENT PHASE	STATUS
P00273	<a href="#">WASH</a>		Development	PG00006 CBID Kenya programme	Kenya	Africa East & South (AFES)	ST00318 Child care	ST00004 European Commission	01-03-2023 - 31-12-2025	IEH - Inclusive Eye Health (100%)	NTD - well construction	Boys, Boys with disability, Girls, Girls with disability, Men, Men with disability, Women.	Bui Thanh, Le	Implementation & Monitoring	Active
P00045	<a href="#">P3382-ANCP-MY P Strengthening eye care services in Dien Bien Province</a>		Development											Development & eval	Active
P00003	<a href="#">Disability inclusion in emergency response for natural disaster in Quang Ngai</a>	P4109-MYP	Sudden onset	PG0 Dev Sup										Implementation and eval	Active

- **Clicking on “projects” in the top bar will lead you to the project browse list. It will only show your projects (those you are a member of).**
- Clicking on the logo you can always go back
- You can export the project list to excel.

# Filter options

cbm **promis**

Start / Projects Ott, Partner-Karin (Partner-Karin.Ott@cbm365.onmicrosoft.com)

**Projects**

Export to Excel

Region	Contract partner	Donor	Initiative	Components included	Target group	Status
						Active <input checked="" type="checkbox"/> On proviso <input type="checkbox"/>

Search Project set-up Country

ID ↓	PROJECT NAME	FORMER NAV ID	PROJECT SET-UP	PROGRAMME(S)	COUNTRY	REGION	CONTRACT PARTNER	DONOR(S)	PERIOD	INITIATIVE(S)	COMPONENTS INCLUDED	TARGET GROUP(S)	RESPONSIBLE PROJECT MANAGER	CURRENT PHASE	STATUS
P10014	<a href="#">ADDA-Improving Inclusive Education in Machakos and Kajiado counties in Kenya</a>	4386-BMZ-ADDA-MYP	Development	PG10006 Improving Inclusive Education in Machakos and Kajiado counties	Kenya	Africa East & South (AFES)	ST10035 Agency for Disability and Development		01-01-2022 - 31-12-2025	IE- Inclusive Education (100%)	Schooling / education children, school feeding, books, renovation costs	Boys, Boys with disability, Girls, Girls with disability	Bariu, Victoria	Implementation & Monitoring	Active

cbm **promis**

Start / Projects

**Projects**

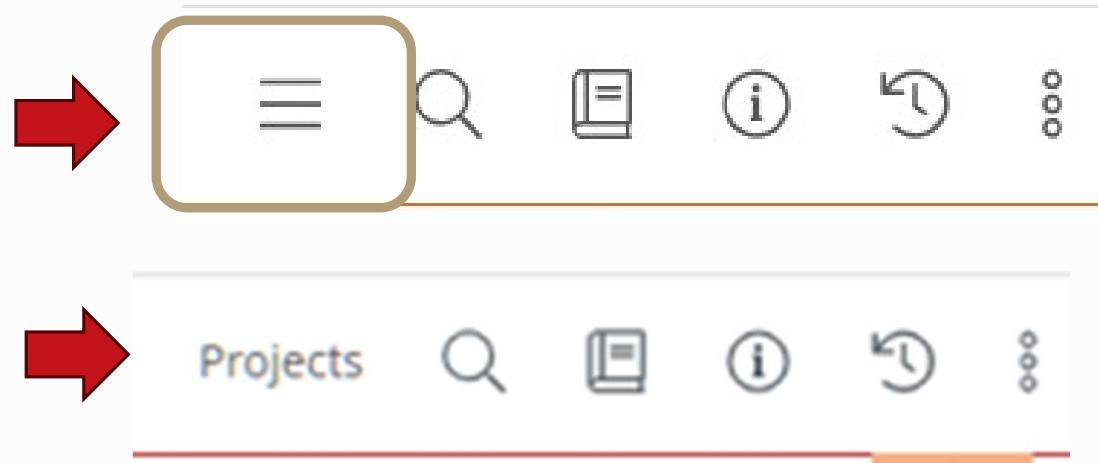
Export to Excel

Region	Contract partner	Donor
	<input type="text" value="I"/> <ul style="list-style-type: none"> <li>ST10001 Pak Women</li> <li>ST10002 College of ophthalmic</li> <li>ST10003 Bedari</li> <li>ST10004 Marie Adelaide Leq</li> <li>ST10005 LRBT Layton Rahm</li> <li>ST10006 Taraqee Foundatio</li> <li>ST10007 Women Empowerr</li> <li>ST10008 Sindh Institute of C</li> <li>ST10009 Deeba Foundation</li> </ul>	

ID ↓	PROJECT NAME	FORMER NAV ID	PROJECT SET-UP	PROGRAMME(S)	COUNTRY
P10014	<a href="#">ADDA-Improving Inclusive Education in Machakos and Kajiado counties in Kenya</a>	4386-BMZ-ADDA-MYP	Development	PG10006 Improving Inclusive Education in	Kenya

You can see all filter options.  
However, when filtering for any entity or page you do not have access to the list below stays blank

# Hamburger Menu



Your projects can be found in the hamburger menu. Whether you see the 3 lines (Hamburger menu) or the button “projects” depends on the screen size – i.e. if you zoom in or out.

# Resource Library



- The Resource Library is a centralised document library for templates, guidance, policies and manuals specific to CBM
- Documents that are templates have a ‘T’ to the left of their name
  - These templates can then be accessed via the ‘New document (from template)’ button on the Documents tab of any page

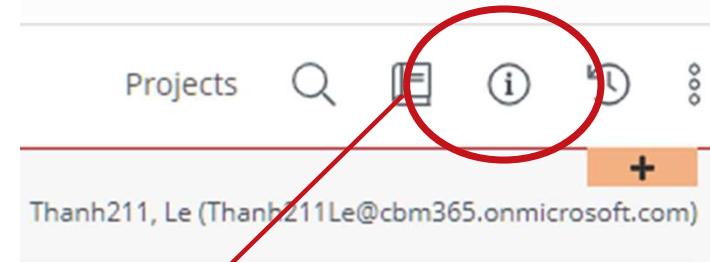
The screenshot shows the CBM promis Resource Library interface. At the top, there are navigation links: Start / Resource library / 10 Partner Resource Library / 10 Development and Approval. Below this is a search bar labeled "Search". On the left, there is a sidebar titled "Resource library" with a tree view showing the structure: 10 Partner Resource Library, 10 Development and Approval, 20 Implementation and Monitoring, 30 Assessment and Review, and 40 Closure. The main content area displays a list of documents:

- T [Humanitarian Aid Project Design Form.dot](#)
- T [Project Design Form Annex C Activity Planning Schedule.xlsx](#)
- T [Project Design Form Guideline.docx](#)
- T [Project Design Form Template.docx](#)

# Help function

You have access to the help function, but you can only access 5. Projects:

- CBM cannot open the complete system due to licence costs
- We do not want to overburden you with too many new functions
- Let's start simple with the main functions



Help documentation

Filter

- 0. Support
- 1. Introduction, Terminology & Permissions
- 2. Navigation
- 3. Start Page
- 4. Ideas
- 5. Projects
- 6. Programmes
- 7. Fundings
- 8. FR requirements
- 9. Partners / Donors
- 10. Teams
- 11. Geography
- 12. Add, view and edit a Risk entry

5. Projects

PROJECTS

Projects are created via approved Ideas (or manually by Admins or Project/Programme creators). Project pages provide a space where project activities and progress can be managed, documentation can be developed, and the project can be monitored.

PROJECTS in ProMIS

All project ideas and projects are approved in ProMIS. It is crucial to select the right project set-up already in the project idea page as the information and workflow required in the future project varies:

- Development (QPRG project development and approval)
- Sudden onset (QPRG sudden onset)
- CBM Own implementation (Guidance note)

For CBM own implementation projects and projects implemented in a non-programme country (interregional projects), financial information will not be added to ProMIS. The payments will be processed in BC and financial reporting will take place in PowerBI.

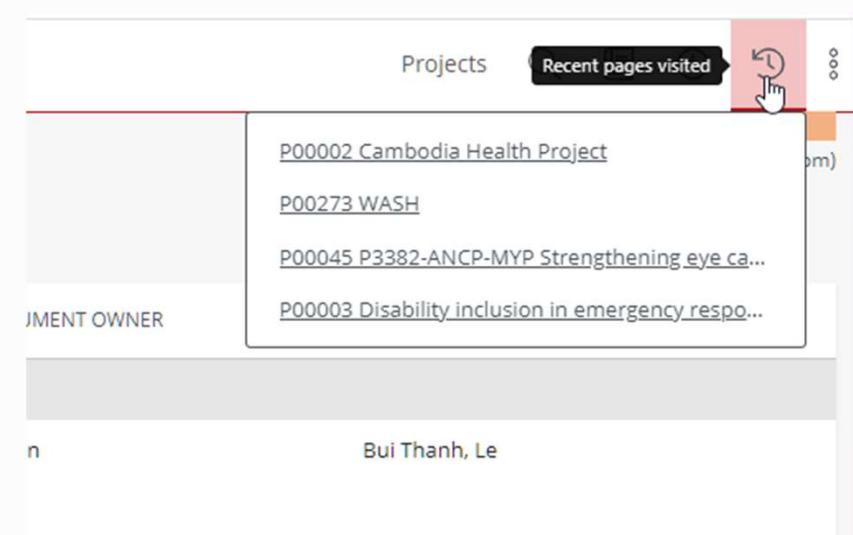
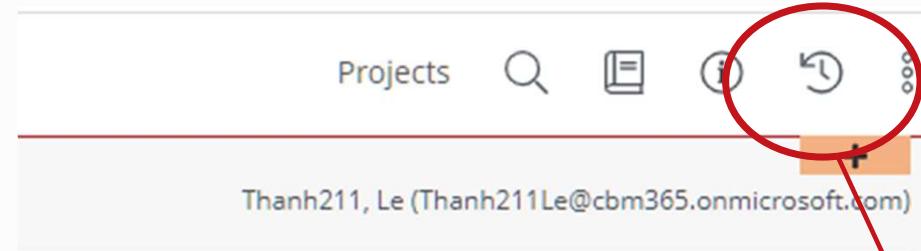
5.1 Overview

Project Overview

**Forms with guidance have an (i) in the top right of the form, click the (i) and the form will expand to show the guidance, close the form guidance clicking on the 'x' in the top right corner**

# Top Bar – Recent Pages

You can see the recent pages visited.

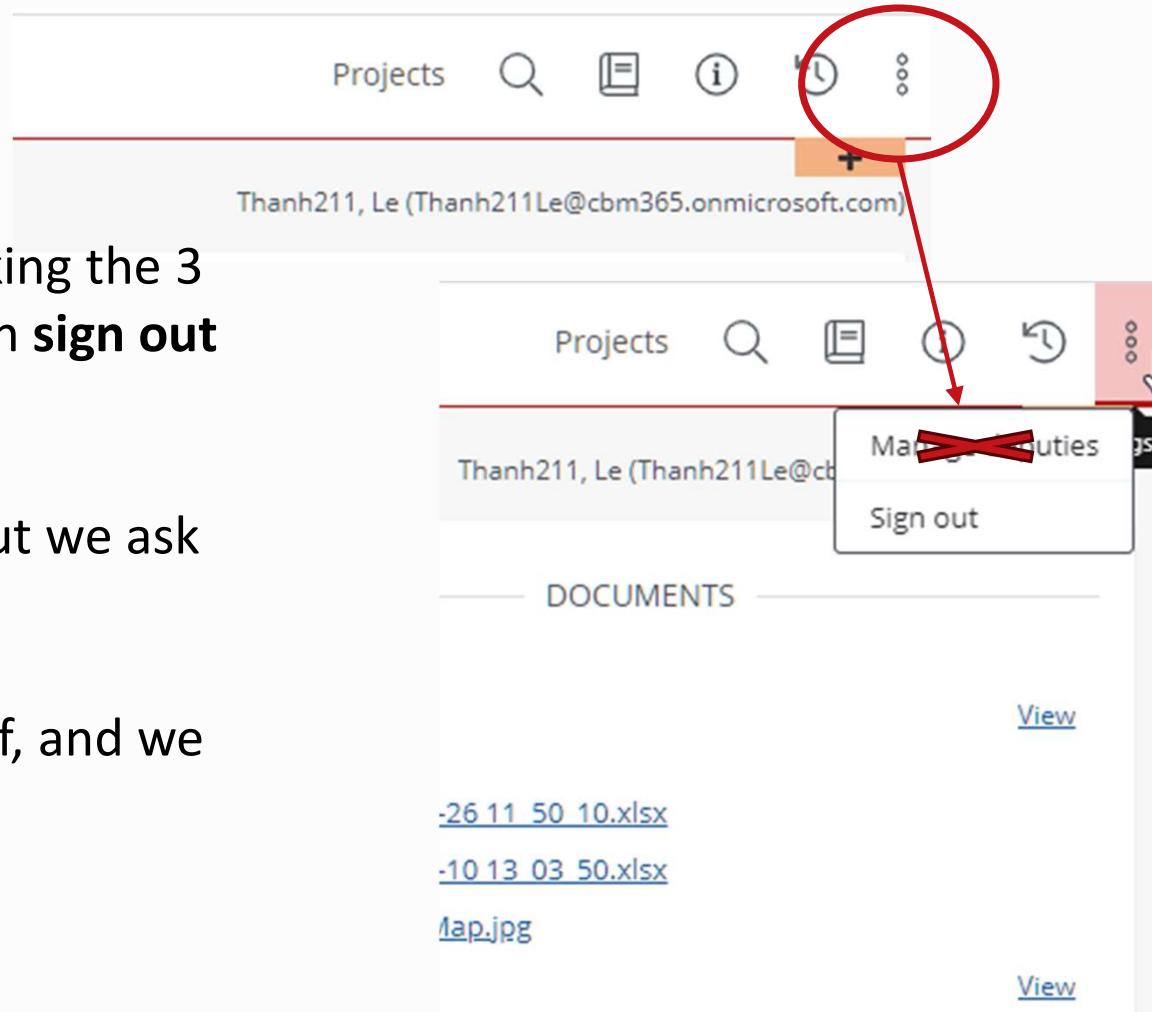


# Top Bar - Parameters

When on the start page clicking the 3 vertical dots/settings you can **sign out** here.

**Manage Deputy** is visible, but we ask you to **kindly ignore it**.

This works only for CBM staff, and we will hide it in future.



# PROJECTS

Overview – Documents – Tasks – Finance – Logframe – Linked Partner Actions

Overview

Documents

Tasks

Finance

Logframe

Linked partner actions

# Partner Portal - Project Overview

- The project page includes all the relevant functionalities

The screenshot shows the ProMIS Project Overview page for project P00489. The page is divided into several sections:

- INFORMATION:** Status (Active), Project set-up (CBM own implementation), Lead CBM team (T00004 RO A&A), Responsible person (Guaman Rivadeneira, Irene), Period (02-01-2023 - 28-02-2027), Country (Germany), Region (Interregional (IR)), Programme(s) (ST00496 Lorie and Nelly Partner), Contract partner (ST00496 Lorie and Nelly Partner), Implementing partner(s) (None), Planning currency (EUR - Euro), Donor currency (EUR - Euro), Fundraising relevant (No). A yellow box highlights the "INFORMATION" section.
- TASKS & MILESTONES:** Logframe reporting approval - 2023 Jul - Dec, Due date: 28-02-2024. A yellow box highlights the "TASKS & MILESTONES" section. A red arrow points from the text "You have VIEW options" to the "View" link under the tasks section.
- PARTNER ASSESSMENT:** Partnership status (Assessment completed), Date assessment completed, Date assessment due for renewal, Overall assessment rating, Safeguarding audit conducted. A yellow box highlights the "PARTNER ASSESSMENT" section. A yellow box contains the text "Please ask your CBM Country Office contact to explain the forms & fields".
- DESCRIPTION:** Example to show how ProMIS works. A yellow box highlights the "DESCRIPTION" section.
- DOCUMENTS:** Key, Recent. A yellow box highlights the "DOCUMENTS" section.

At the top right, there are navigation tabs: Development & Approval, Implementation & Monitoring (highlighted in black), Assessment and Review, and Closure. The user is identified as Partner-Irene Guaman Rivadeneira (Partner-Irene.Guaman@cbm365.onmicrosoft.com).



# Project Info Box

The Project fields can be viewed by clicking the '**view**' option in the 'Information' box on the Project Overview - you cannot edit.

INFORMATION	
Status	Active
Project set-up	CBM own implementation
project.overview_organisationalunits_lead_cbm_team	T00004 RO A&A
project.overview_responsibleperson_responsible_project_manager	Guaman Rivadeneira, Irene
Period	02-01-2023 - 28-02-2027
Country	Germany
Region	Interregional (IR)
Programme(s)	
Contract partner	ST00496 Lorie and Nelly Partner
Implementing partner(s)	
Planning currency	EUR - Euro
Donor currency	EUR - Euro
Fundraising relevant	No
project.overview_textfile7_nav_project_no	

[View](#)

## View project

(i) X

Project name	ADDA-Improving Inclusive Education in Machakos and Kajiado counties in Kenya	Start date	01-01-2022
Project set-up	Development	End date	31-12-2025
Implementation type	Partner-implementing	Admin end date	31-03-2026
Programme(s)	PG10006 Improving Inclusive Education in Machakos and Kajiado counties in Kenya	Planning currency	EUR - Euro
Responsible project manager	Bariu, Victoria	Donor(s)	
Lead CBM team	T10001 CBM Kenya CO	Primary donor currency	EUR - Euro
Region	Africa East & South (AFES)	Funding source	LCDF/Institutional Donors
Country	Kenya	Is funding secured?	Yes
Specific geographical area		Funding page(s)	F10013 KE BMZ-PT 2022 ADDA&GCN
GIS coordinates		Fundraising relevant	Yes
Contract partner	ST10035 Agency for Disability and Development	Fundraising teams	Team Major Donors
Project manager at contract partner		Former NAV project no.	4386-BMZ-ADDA-MYP
Implementing partner(s)	ST10035 Agency for Disability and Development	Linked Idea	
Components included	Schooling / education children, school feeding, books, renovation cost		
Target group(s)	Boys, Boys with disability, Girls, Girls with disability		
Project includes NTD or IHA			
Does not include NTD or IHA components			
To be kept up-to-date by Initiative staff. Select max. 4 technical areas/Main initiative min. 40%, other initiatives min. 20%, intervals of 10%.			
Technical area(s)/Initiative(s)	IE- Inclusive Education (100%)		
Summary description	ADDA has been active in Kenya since 2011. ADDA's vision is an inclusive society in which all people have equal opportunities, regardless of their impairment and/or special needs. ADDA's mission is to promote the potential of children, young people and adults with disabilities in their communities and to advocate for their inclusion and active participation in society.		

Project pages provide a space where project activities and progress can be managed, documentation can be developed, and the project can be monitored

# Project Partner Assessment Box

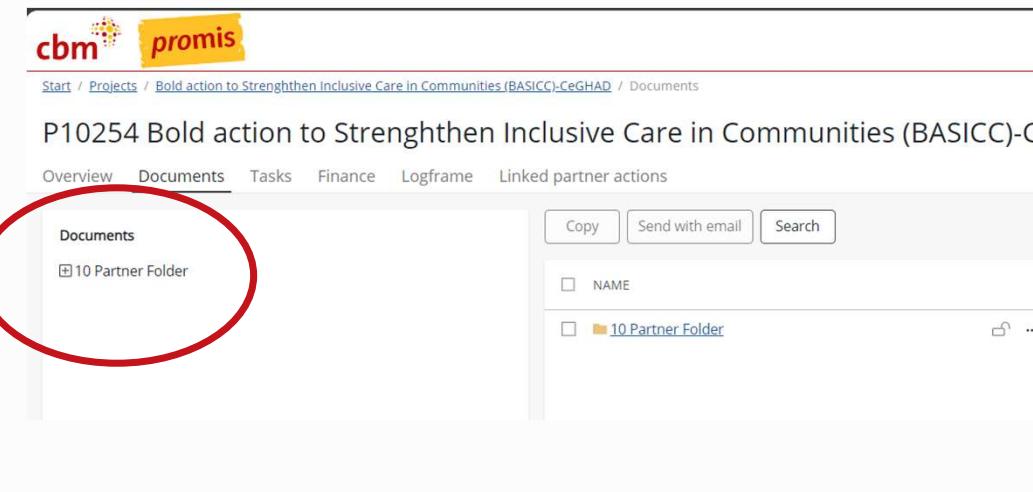
View partner assessment ×

Partnership status	Governance and Leadership scoring
Active	1.90
Partnership start date	Finance scoring
01-01-2019	1.90
Partnership end date	Programme scoring
	2
Partner assessment completed	Overall partner assessment rating
Yes	<span style="color: green;">█</span> Green
Date partner assessment completed	Partner has LCDF experience
23-11-2021	Yes
Date partner assessment due for renewal	Partner has emergency response experience
23-11-2024	No
Safeguarding audit conducted	Linked document(s)
Comments/notes	
Created 27-04-2023 by Jondiko, Eric Modified 27-04-2023 by Jondiko, Eric	
<span style="border: 1px solid black; padding: 2px;">Cancel</span>	

You can VIEW  
the Partner  
Assessment Box  
in ProMIS.

# Documents tab

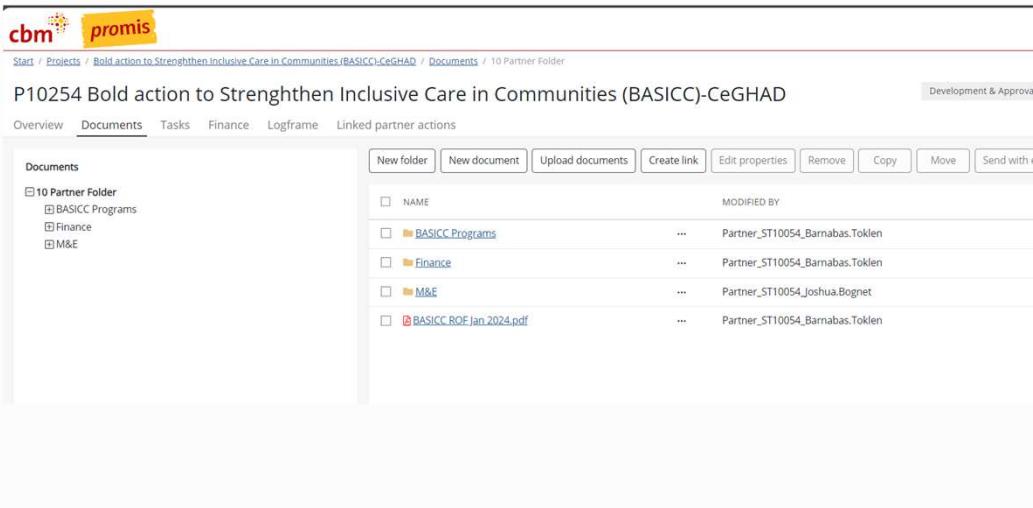
# Partner Portal – 10 Partner Folder



The ProMIS documents library is based on SharePoint with the same functions.

On the Documents tab you have your own “partner folder”. In this folder you have various functions. You can use the partner folder for upload of documents, for example.

As alternative, CBM staff can use the use the **SHARE FOLDER** function to give editing or reading rights to collaborate on documents in the shared folder. If you receive such a link instead, please work in the document and just close it (*do not save on your computer*). The changes will sink into the original document and create a new version. The Document Library has a **version control** – no need to save copies with a new doc name.



# Documents Tab

## Documents tab: NEW Folder

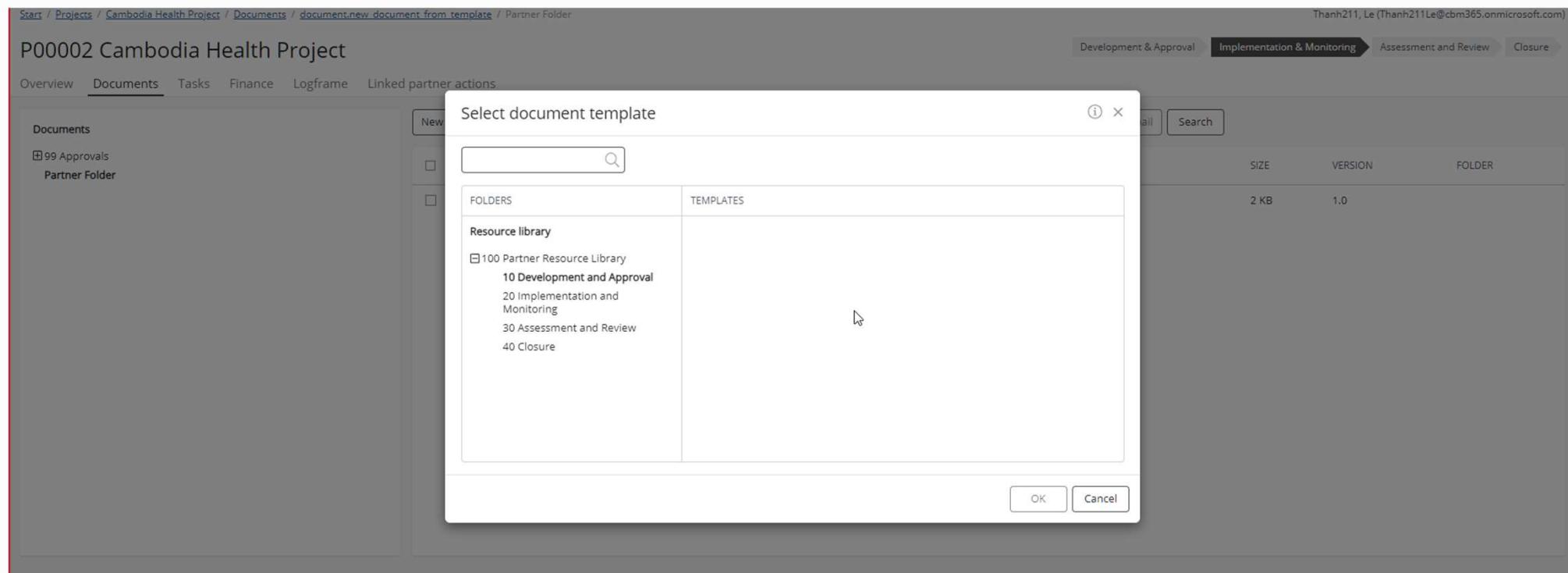
Useful function to organize documents logically in folders, e.g. for uploading reports, receipts, etc. You can link the uploaded documents to tasks in ProMIS and report on finances, for example.

The screenshot shows the ProMIS software interface. At the top, there is a navigation bar with links: Start / Projects / Cambodia Health Project / Documents / Partner Folder. On the right side of the header, there is a user name: Thanh211, Le (Thanh211Le@cbm365.onmicrosoft.com). Below the header, there are several tabs: Development & Approval, Implementation & Monitoring (which is selected), Assessment and Review, and Closure. The main area is titled "P00002 Cambodia Health Project". Under this title, there are links for Overview, Documents (which is selected), Tasks, Finance, Logframe, and Linked partner actions. In the center, there is a table titled "Documents" showing a single item: "Shared sub folder.aspx". The table has columns for NAME↑, MODIFIED BY, MODIFIED, SIZE, VERSION, and FOLDER. At the bottom of the table, there is a "New folder" dialog box. This dialog box has a title "New folder" and a "Name \*" input field containing a single character. It also has "OK" and "Cancel" buttons.

# Documents Tab

## Documents tab: NEW Document

Useful to create a new document or use a template from the resource library



# Documents Tab

Documents tab: **UPLOAD Document** – you can upload e.g. reports, receipts, etc. which can then be linked to the expenditure reporting in ProMIS for example

The screenshot shows a software interface for managing project documents. At the top, there's a navigation bar with links to 'Start / Projects / Cambodia Health Project / Documents / Partner Folder'. On the right, it shows the user's name 'Thanh211, Le (Thanh211Le@cbm365.onmicrosoft.com)'. Below the navigation, the project ID 'P00002 Cambodia Health Project' is displayed. The main menu includes 'Overview', 'Documents' (which is currently selected), 'Tasks', 'Finance', 'Logframe', and 'Linked partner actions'. A toolbar above the document list contains buttons for 'New folder', 'New document', 'Upload documents', 'Create link', 'Edit properties', 'Remove', 'Copy', 'Move', 'Send with email', and 'Search'. The document list itself has columns for 'NAME↑', 'MODIFIED BY', 'MODIFIED', 'SIZE', 'VERSION', and 'FOLDER'. A sub-menu '99 Approvals' is visible under the 'Partner Folder' heading. An 'Upload documents' dialog box is open in the foreground, containing fields for 'FILE NAME' and 'SIZE', and dropdowns for 'Document types' and 'Key words'. It also features 'Upload' and 'Close' buttons.

# Documents Tab

## Documents tab: CREATE Link

The screenshot shows a 'Create link' dialog box overlaid on a project document library interface. The dialog has fields for 'Name' (with a red asterisk), 'Url' (with a red asterisk), 'Document types', and 'Key words'. Buttons for 'OK' and 'Cancel' are at the bottom. The background shows a list of documents with columns: NAME, MODIFIED, SIZE, VERSION, and FOLDER. One document is selected, showing details: Shared sub folder.aspx, 2023-07-25 12:03, 2 KB, 1.0, Partner Folder.

Start / Projects / Cambodia Health Project / Documents / Partner Folder Thanh211, Le (Thanh211Le@cbm365.onmicrosoft.com)

P00002 Cambodia Health Project

Overview Documents Tasks Finance Logframe Linked partner actions

New folder New document Upload documents Create link Edit properties Remove Copy Move Send with email Search

Documents

99 Approvals Partner Folder

Create link

Name \*

Url \*

Document types

Key words

OK Cancel

NAME	MODIFIED	SIZE	VERSION	FOLDER
Shared sub folder.aspx	2023-07-25 12:03	2 KB	1.0	Partner Folder

The screenshot shows the same project document library interface after the link was created. A new row is visible in the document list: Shared sub folder.aspx, Bui Thanh, Le, 2023-07-25 12:03, 2 KB, 1.0, Partner Folder. The 'Create link' button is now grayed out.

Start / Projects / Cambodia Health Project / Documents / Partner Folder Thanh211, Le (Thanh211Le@cbm365.onmicrosoft.com)

P00002 Cambodia Health Project

Overview Documents Tasks Finance Logframe Linked partner actions

New folder New document Upload documents Create link Edit properties Remove Copy Move Send with email Search

Documents

99 Approvals Partner Folder

NAME	MODIFIED BY	MODIFIED	SIZE	VERSION	FOLDER
Shared sub folder.aspx	Bui Thanh, Le	2023-07-25 12:03	2 KB	1.0	Partner Folder

# Tasks tab

# Tasks Tab

You **cannot** create a task yourself,  
just receive a task from a CBM staff.

Start / Projects / Cambodia Health Project / Tasks

Thanh211, Le (Thanh211Le@cbm365.onmicrosoft.com)

P00002 Cambodia Health Project

Development & Approval   Implementation & Monitoring   Assessment and Review   Closure

Overview   Documents   **Tasks**   Finance   Logframe   Linked partner actions

TASK/MILESTONE		RESPONSIBLE	DUE DATE ↑	COMPLETED ON	STATUS	REVIEW/APPROVAL STATUS	Status
Complete semi annual narrative eport	...	Thanh211, Le	31-07-2023		Planned		

Time indicator colours:	
Grey	Completed
Red	Overdue
Yellow	Due soon (due within 0-11 days)
Blue	Upcoming (due within 12-30 days)
No colour	Inactive (due date in the next 31+ days)

You do also get e-mails from ProMIS to the e-mail you used for the CBM partner user account.  
**But: you need to be logged into your Microsoft account.**

Edit task/milestone

Entity: [Project/P00002 Cambodia Health Project](#)

Type \* Task

Title \* Complete semi annual narrative eport

Description

Start date \* 01-07-2023

End date \* 31-07-2023

Responsible person Thanh211, Le

Status \* Planned

Add checklist

Add review

Add approval

Supporting documents from Resource library

Select document(s)

Linked documents

Select document(s)

Comments

+ Add comment

Created 25-07-2023 by Bui Thanh, Le  
Modified 25-07-2023 by Bui Thanh, Le

OK Cancel

# Finance tab

# Finance Tab

- ✓ Budget
- ✓ Forecast
- ✓ Incoming Funding

You can

- see it all
- and export data
- but no editing

Overview	Documents	Tasks	Finance			
Budget	Transfers	Expenditure	Transactions			
<a href="#">Export - Budget</a>	<a href="#">Export - Forecast</a>	<a href="#">Export - Incoming funding</a>				
Version - Budget	Version - Forecast					
Version 2 - draft	Version 6 - draft					
BUDGET CURRENCY (EUR)						
INCOMING FUNDING	2022	2023	2024	2025	TOTAL	
F10013 KE BMZ-PT 2022 ADDA&GCN	108,845	277,883	257,991	107,892	752,611	
Project funds	108,845	277,883	257,991	107,892	752,611	
Cost recovery (Admin)						
Total funding	108,845	277,883	257,991	107,892	752,611	
BUDGET CURRENCY (EUR)						
FORECAST	2022	2023	2024	2025	TOTAL	VARIANCE WITH BUDGET
	222,306.40	313,567.60	107,892	643,766		-108,845
BUDGET CURRENCY (EUR)						
No	BUDGET	2022	2023	2024	2025	TOTAL
01	PARTNER BUDGET	108,845	277,883	257,991	107,892	752,611
Total budget	108,845	277,883	257,991	107,892	752,611	
Remains to budget	0	0	0	0	0	0

# Finance Tab – Transfer / Request of Funds

You can create a new transfer!

Click on New button and fill the form. Ask CBM staff for support

The screenshot shows the CBM Finance Tab interface. On the left, there's a table for transfers with columns: PAYMENT ID, PAYMENT REFERENCE, RECIPIENT, PAYMENT CURRENCY, PAYMENT AMOUNT (PAYMENT CURRENCY), and PAYMENT AMOUNT (PLANNING CURRENCY). A red arrow points from the 'New' button in the table header to the 'Create transfer' dialog box on the right. Another red arrow points from the 'Request of funds' section in the dialog box to a callout box containing instructions. A red box highlights the 'Select document(s)' button in the 'Request of funds' section. A red button labeled 'Step 1' is located in the top right corner of the dialog box. A red arrow points from the 'OK' button at the bottom right of the dialog box to another callout box containing instructions.

Overview Documents Tasks Finance

Budget Transfers Expenditure Transactions

New Export to Excel

PAYMENT ID ↓	PAYMENT REFERENCE	RECIPIENT	PAYMENT CURRENCY	PAYMENT AMOUNT (PAYMENT CURRENCY)	PAYMENT AMOUNT (PLANNING CURRENCY)
PY0010076	P10014/4386 ROF 01/2023 ...	ST10035 Agency for Disability and Development	EUR	98,154.74	98,154.

Create transfer

Payment ID  
Payment reference \*  
Recipient \*  
Recipient bank account \*  
Text for bank statement \*  
Responsible person \*  
Is the project on proviso at the time of payment? \*  
Request of funds \*  
Select document(s)  
Supporting document(s)  
Select document(s)  
Comments/notes

Available budget (planning currency)  
EUR 545,611.26  
Payment currency \*  
Payment amount (payment currency) \*  
Payment amount (planning currency)  
Payment amount (planning currency)  
Exchange rate to EUR  
Payment amount (EUR)  
Payment status  
Open  
Date payment sent to Business Central  
Date payment processed by payment prov  
Final payment amount (EUR)  
Final exchange rate to EUR

**Step 1**

**First step** Click "OK" here to save the RoF  
click OK = preliminary, further  
action is needed

OK Cancel

# Finance Tab – Request of Funds

Start / Projects / WASH / Finance / Transfers  
Thanh211, Le (Thanh211Le@cbm365.onmicrosoft.com)  
P00273 WASH  
Overview Documents Tasks Finance Logframe Linked partner actions  
Budget Transfers Expenditure Transactions  
New Export to Excel

**Step 2**

PAYMENT ID	PAYMENT REFERENCE	RECIPIENT	PAYMENT CURRENCY	PAYMENT AMOUNT (PAYMENT CURRENCY)	PAYMENT AMOUNT (PLANNING CURRENCY)	PAYMENT AMOUNT (EUR)	RESPONSIBLE PERSON	PAYMENT STATUS	DATE SENT TO BUSINESS CENTRAL	FINAL PAYMENT AMOUNT (EUR)	REQUEST OF FUNDS	RECEIPT
PY0000169	zbc	ST00318 Child care	EUR	100	100	100	Thanh211, Le	Open				
PY0000167	testing	care	ETB	100	9,132.81	1,09	Bui Thanh, Le	Sent for approval				
PY0000130	Q1 ROF	... ST00318 Child care	ETB	5,000	5,000	5,000	Mengistu, Seble	Sent for approval				

**2nd step**

Please go to the context menu ● ● ● See the three dots and edit the RoF

→ Click on edit, then you will see the “Send notification” button

Send notification means

→ the RoF will reach CBM's staff / responsible person for checking and confirmation.

→ Only CBM's staff can send the payment request for approval.

Final payment amount (EUR)

Final exchange rate to EUR

Notify CBM project manager of RoF

**Send notification**

Once the **NOTIFICATION** has been sent – the button will not be visible anymore

# Finance Tab – Transfer, acknowledge receipt.

- The ‘Transfers’ sub-tab appears only on Projects and allows users to raise and send payments for approval as well as upload confirmation of receipt from partners.
- Once approved by CBM CO staff, the transfer is sent to our bank for payment.
- Once the transfer is processed, the payment details are ‘pulled’ back into ProMIS and appear in the transfer form.
- You can upload your confirmation of receipt via the ‘Upload receipt(s)’ option in the context menu ... = the 3 dots. Please upload your receipts in the documents tab beforehand. Then you can easily link them here.

Budget	Transfers	Expenditure	Transactions
	<a href="#">New</a>	<a href="#">Export to Excel</a>	
PAYMENT ID↓	PAYMENT REFERENCE	RECIPIENT	PAYMENT CURRENCY
PY0010443	ROF Balance P4010 to PCC	... ST10203 Presbyterian Church in Cameroon <a href="#">View</a> <a href="#">Upload receipt(s)</a>	EUR

# Report on expenditure

Start / Projects / WASH / Finance / Expenditure

Thanh211, Le (Thanh211Le@cbm365.onmicrosoft.com)

P00273 WASH

Overview Documents Tasks Finance Logframe Linked partner actions

Budget Transfers Expenditure Transactions

Year: 2023 Currency: EUR - Euro

NO	BUDGET LINE	BUDGET 2023	EXPENDITURE Q1-2023
1	Partner cost	18,000	
Total		18,000	

Report partner expenditure

Report expenditure  
2024 Jul - Sep

Reporting currency  
PKR - Pakistan Rupee

Exchange rates (PKR/EUR)  
0.0032452750

BUDGET CURRENCY (PKR)

NO	BUDGET LINE	BUDGET 2024	PREV. REPORTED EXP. YTD	EXPENDITURE 2024 JUL - SEP	EXPENDITURE TOTAL YTD	VARIANCE COMMENT
1	Partner Budget	63,144,650.20	16,304,337	0	16,304,337	46,840,313.20
Total		63,144,650.20	16,304,337	0	16,304,337	46,840,313.20

Linked documents

Comment

You can save as preliminary.

Your CBM contact will receive an e-mail and review and approve your report.

# Finance Tab - Correct expenditure

If you need to correct an expenditure entered "open a previous reporting period"

Report partner expenditure

Report expenditure Q2-2023      Reporting currency ETB - Ethiopian Birr      Exchange rates (ETB/EUR) 1      Open a previous reporting period

NO	BUDGET LINE	CURRENCY (ETB)		EXPENDITURE Q2-2023	EXPENDITURE TOTAL YTD	VARIANCE COMMENT
		BUDGET 2023	PREV. REPORTED EXP. YTD			
1	Partner cost	18,000	5,000	0	5,000	13,000
Total		18,000	5,000	0	5,000	13,000

Linked documents  
Select document(s)

Comment

B I U Ø ↻

Save and confirm   Save as preliminary   Cancel

A red arrow points from the text "Open previous reporting period" to the button "Open a previous reporting period".

**Open previous reporting period  
Then you can choose year and currency**

# Finance Tab - Transactions

You can see all transactions done on your projects

The screenshot shows the ProMIS software interface. At the top, there are navigation links: Start / Projects / WASH / Finance / Transactions. On the right, there are tabs for Projects (highlighted in red), Development & Approval, Implementation & Monitoring (highlighted in blue), Assessment and Review, and Closure. Below the tabs, the project ID P00273 WASH is displayed. The main content area has tabs for Overview, Documents, Tasks, Finance (which is selected and underlined), Logframe, and Linked partner actions. Under the Finance tab, there are sub-tabs: Budget, Transfers, Expenditure, and Transactions (which is selected and underlined). There is also an 'Export to Excel' button and a search bar. The data table below shows transaction details:

TRANSACTION DATE	CALENDAR YEAR	TRANSACTION NO.	RECIPIENT NAME	STAKEHOLDER ID	BANK ACCOUNT NUMBER	BC VENDOR NO	BANK STATEMENT TEXT/INVOICE NO.	PAYMENT CURRENCY	AMOUNT (PAYMENT CURRENCY)	AMOUNT (EUR)	PLANNING CURRENCY	AMOUNT (PLANNING CURRENCY)	EXCHANGE RATE TO PLANNING CURRENCY
30-06-2023	2023		Partner					ETB	200	20			

- The ‘Transactions’ sub-tab appears only on Projects and shows a read-only view of all payments for the project
- Shows both transfers created within ProMIS to your bank account as well as third-party payments processed.
- The list can be exported to excel

# Logframe Tab

# Logframe

You can see your project's logframe and export it  
You can also report on indicators in the indicator tracker

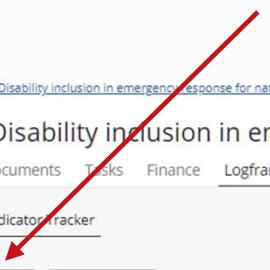
The screenshot shows the cbm promis TEST SYSTEM software interface. At the top, there are navigation links: Stars / Projects / Inclusive Livelihood Opportunities for persons with disabilities in India / Logframe / Logframe. On the right, there are buttons for Projects, Search, and other system functions. Below the header, the project title "P00407 Inclusive Livelihood Opportunities for persons with disabilities in India" is displayed. A breadcrumb trail shows Overview, Documents, Tasks, Finance, Logframe (which is underlined), and Linked partner actions. To the right, there are tabs for Development & Approval, Implementation & Monitoring (which is selected), Assessment and Review, and Closure. The main content area is titled "Logframe". It features a table with columns: LEVEL, NUMBERING, DESCRIPTION, INDICATOR, INDICATOR DEFINITION, STANDARD INDICATOR ID, INDICATOR TYPE, ASSOCIATED STANDARD INDICATOR, and MEANS OF VERIFICATION. There are three rows of data:

LEVEL	NUMBERING	DESCRIPTION	INDICATOR	INDICATOR DEFINITION	STANDARD INDICATOR ID	INDICATOR TYPE	ASSOCIATED STANDARD INDICATOR	MEANS OF VERIFICATION
Overall/General objective/Impact	1	Reducing poverty	...					
Output(Expected) Result	1	Safe Space for women with disabilities, 80% less gender-based violence	...					
Specific objective/Outcome	2	Reduced gender-based violence by 80% from baseline	...	Participants in community-level sensitisation activities on disability inclusion/rights  raised awareness, use of safe spaces, empowered women less feminicides	IND IHA 8008	Number	IND EHC 6000 Total persons reached by ear and/or hearing care services (screened/examined/treated)	monitoring report

At the top left of the Logframe section, there is a "Export to Excel" button.

# Logframe - Indicator Tracker

You can access the indicator tracker and report on indicators



Screenshot of the CBM Christian Blind Mission Project Management System showing the Logframe - Indicator Tracker page for project P00003.

The page title is "P00003 Disability inclusion in emergency response for natural disaster in Quang Ngai".

Top navigation tabs include: Start, Projects, Disability inclusion in emergency response for natural disaster in Quang Ngai, Logframe, Indicator Tracker, Overview, Documents, Tasks, Finance, Logframe, Linked partner actions, Dev & Approval, Implementation & Monitoring, Assessment and Review, and Closure.

The "Indicator tracker" tab is selected.

Below the tabs are two buttons: "Report on indicators" and "Export to Excel".

Filter options include: Level (dropdown menu) and Sort order (Numbering dropdown).

The main table displays data across columns: LEVEL, DESCRIPTION, NUMBERING, INDICATOR, INDICATOR TYPE, BASELINE DATA, TARGET (2020, 2021, 2022, 2023, END OF PROJECT), ACTUALS, and COMMENT.

Row 1: Overall/General objective/Impact, Testing Overall objective, 01.

Row 2: Output/(Expected) Result, Testing a Result level, 02.

Row 2 details:

- INDICATOR TYPE: Text
- BASELINE DATA: Number (100, 150, 200, 150, 100, 600)
- TARGET: 2020, 2021, 2022, 2023, END OF PROJECT
- ACTUALS: END OF PROJECT
- COMMENT: END OF PROJECT

Row 2 notes:

- \*IND CBID 2004 Participants in the community trained for therapeutic, rehabilitation or personal assistance support
- Women with and without disabilities
- Men with and without disabilities
- Non-binary/others - adults with and without disabilities
- Girls with and without disabilities
- Boys with and without disabilities
- Non-binary/others - children with and without disabilities

# Indicator Tracker – report on indicators

Edit actuals

Reporting period

2020 Jan - Jun

[Open previous reporting periods](#)

LEVEL	INDICATOR	REPORTING FREQUENCY	INDICATOR TYPE	BASELINE	TARGET 2020	ACTUALS 2020 JAN - JUN	DISAGGREGATION	COMMENT 2020 JAN - JUN
Overall/General objective/Impact 01 Testing Overall objective								
Output/(Expected) Result 02 Testing a Result level	Participants in the community trained for therapeutic, rehabilitation or personal assistance support	Semi-annually	Number	100	150	120	<a href="#">Breakdown</a>	
	Testing custome indicator	Semi-annually	Text			This is text.	<a href="#">Breakdown</a>	

Linked documents

[Select document\(s\)](#)

[Add review](#)

Comments

[+ Add comment](#)

Approval

Assigned to \*

Bui Thanh, Le

Assigned to (Step 2) \*

Bii, Nelly

[+ Add approve](#)

[x Remove appr](#)

Approval due date \*

28-06-2023

[Send for approval](#)

Created 28-06-2023 by Thanh211, Le  
Modified 28-06-2023 by Thanh211, Le

[Save as draft](#) [Cancel](#)

**1<sup>st</sup> Step:** Click **breakdown** and enter disaggregated data. The total amount will be automatically calculated.

If the actual data is significantly higher or lower than the target, please use **Comment field** to explain why. You may also enter any other relevant information here. **Then “save as draft”**

**2<sup>nd</sup> Step:** Please go to **add review**. Upload and attach the DCT and select CBM staff to revise your data.

**Do not send for approval.** Your CBM contact will send your data entries for approval to CBM's Country director.

# Linked Partner Actions Tab

# Linked Partner Actions

You can see but not edit the linked partner actions  
refer to the partner assessment

The screenshot shows the cbm promis TEST SYSTEM interface. At the top, there are navigation links: Start / Projects / Inclusive Livelihood Opportunities for persons with disabilities in India / Linked partner actions. On the right, there are tabs for Development & Approval, Implementation & Monitoring (which is selected), Assessment and Review, and Closure. The main content area displays a table titled 'P00407 Inclusive Livelihood Opportunities for persons with disabilities in India'. The table has columns for Action No., Date Added, Category, Action to be Taken, Action by Who, Action by When, Priority, Relevant Project(s), Source Page, Responsible Person, and Status. One row is shown, detailing an action related to MOA amendments. To the right of the table, there is a 'PARTNER ASSESSMENT' section with details like Partnership status (Active), Assessment completed (Yes), and Overall assessment rating (Green). A callout box highlights the 'Partner Assessment Box from the linked Partner'.

Action No.	Date Added	Category	Action to be Taken	Action by Who	Action by When	Priority	Relevant Project(s)	Source Page	Responsible Person	Status
AP00237	17-04-2023	Finance	As meetings are not in line with MOA, partner to take steps to bring meetings in line with MOA or make the required amendments in the MOA	Partner	05-10-2023	Medium	P00407 Inclusive Livelihood Opportunities for persons with disabilities in India	ST00468 Anchalik Samrudhi Sadhana Anusthan (ASSA)	Bag. Nirad	Active

You can see the details on the tab  
Linked partner actions  
as well as  
The Partner Assessment Box

Partner Assessment Box  
from the linked Partner