



SOFTWARE USER MANUAL

NOTE TO USER

This is a guide to help users work through the 4 different types of project profiles. Two of these will be drafts, or what is known as income generating and non-income generating **profiles**, and the other two will be income generating and non-income generating **projects**.

Despite the differences, the software uses the same logic and the same approach to address **them**. So if you can not find your answer in one section, see the other. They may contain the answer you are looking for.

At all entry levels a help message will be displayed by clicking on the icon.

If you need information on definitions and concepts used by the software, see the RuralInvest technical manuals that more accurately describe the method and approach.

The software is regularly updated. This manual may not perfectly match what you have on the screen by opening the software. Do not hesitate to contact your administrator



NB: Please note that sections 4 & 5 act as a dialogue between the operation of administrators and users. Meaning that the sections will alternate. The links for these sections will bring you to the first page where the specific section is mentioned.

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1. Introduction

What is RurallInvest?

- RurallInvest is a set of four modules developed by FAO to support national technicians that help communities, groups or individuals to identify their needs, their priorities in terms of investment and prepare their projects for funding.
- RurallInvest software integrates with modules 2, 3 and 4.

What are the purposes and the functions of the software?

- The software enables the automation of many calculations required for the financial analysis of project proposals, and it makes sure that all elements are considered. Finally, it facilitates the comparison of these proposals and the monitoring and evaluation of all proposals.

What RurallInvest is not.

- The software processes the information, and can not guarantee that the information received is relevant. Or that proper alternatives and risks have been identified.
- **The relevance of the information is the technician's responsibility.**



2. Requirements for Installing the RurallInvest Software

The RurallInvest software is a freeware developed by FAO, and can be installed and used as many times as necessary.

It can be installed from an Internet connection, but also from a compressed file (on CD-ROM, USB memory or other) on any computer by the administrator of the organization using RurallInvest.

It is designed to be used with an Internet browser, either locally or on a network, regardless of the operating system (MS, Linux, Mac, OS2, ..).

RurallInvest requires only a standard browser (Mozilla Firefox, IE, Chrome among the most common). As well as Java Runtime Environment (Sun Microsystems) and a pdf file reader (eg Adobe Acrobat Reader).

However, for now, the installer will only work with a Microsoft Windows operating system (any version). Linux and Mac installer is in the process of being made.

For the best operating results, it is recommended to have the following :

- Windows Vista, 7 or 8
- 2 GB of RAM
- 200 Mb Available on the hard drive



2. Requirements for Installing the RurallInvest Software (continued)

Java Runtime Environment is essential for running RurallInvest as a virtual website (offline). It is included in the installation package of RurallInvest. However, if problems arise, you can download the latest version of Java on the Internet at:

<http://www.java.com>

A PDF reader is also required to open the reports generated by RurallInvest. You can download this for free at:

-<https://get.adobe.com/reader/>

-Firefox users may also use the link below.

-http://www.foxitsoftware.com/Secure_PDF_Reader/addons.php



3. Installing the Software

There are two user levels in the RuralInvest Software:

➤ **Administrator**

The administrator initially creates the local configuration settings of the system (see Part 13. System Setup). For consistency, only one person in your organization / institution should have this version to create and modify these settings.

➤ **User**

This is the version distributed by the local administrator to local users. It does not change the configuration settings.

The installation of the two versions "Administrator" and "User" software is identical to the opening session of the RuralInvest (Section 5. Login).



Installing the Software (continued)

- This slide is specifically for those who already have an earlier version of RurallInvest on their computer.
- If you DO NOT have RurallInvest on your computer, go to the next page to install the software (first installation).

If you have an earlier version of RurallInvest on your computer before doing the update (actualization) with the new version of the software, it is **highly recommended** that you:

- Open your session of RurallInvest.
- Export all your pre-projects and projects and save these files to your hard drive.

(Why? Because in case of problems, you may run the risk of losing all your work).

- Install the new version of RurallInvest
- Import your files in the new version at the end of the installation (see Part 5. Import Files).



3a. Installing the Software (first installation)

Make sure you have extracted all the files in the file RurallInvest-4.2.4-user.zip. To do this, open this file and click "Extract" (or its equivalent) in the directory of your choice. (eg C:\ RurallInvest).

Once the files are extracted you should see in your directory the following files:



Name	Date modified	Type	Size
configurations	15/05/2015 10:13	File folder	
jre	15/05/2015 10:13	File folder	
lib	15/05/2015 10:13	File folder	
QUICKSTART.html	15/05/2015 10:13	Firefox HTML Doc...	4 KB
readme.txt	15/05/2015 10:13	Text Document	2 KB
setup.bat	15/05/2015 10:13	Windows Batch File	1 KB
setup.exe	15/05/2015 10:13	Application	28 KB

Run program setup.exe

NOTE: You need administrator access to your computer for installation - If you do not have it, ask the IT manager of your institution.



3a. Installing the Software (first installation, continued)

The first window that will open will control the presence and if necessary install Java on your computer.

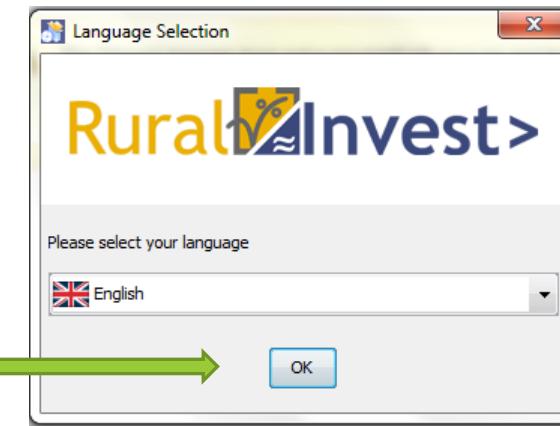


*Click here to install. Please note
that it may take a few minutes.*



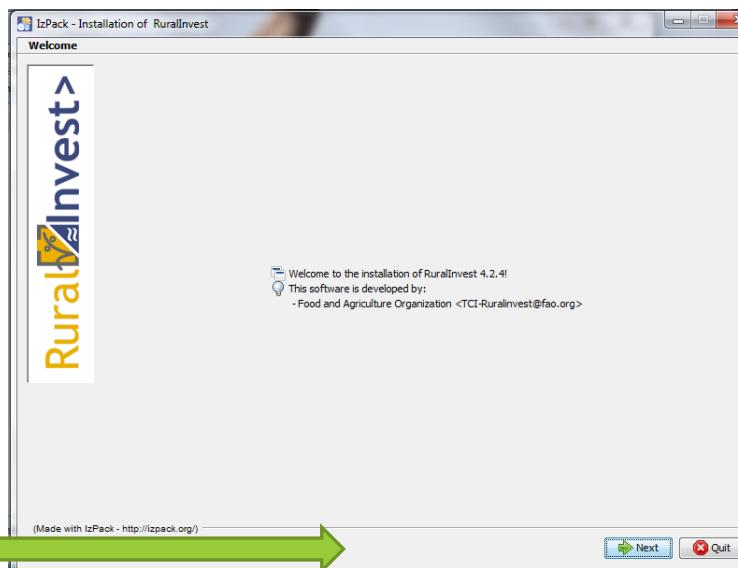
3a. Installing the Software (First installation, continued)

Select the language for installing the software. Then Click “OK”

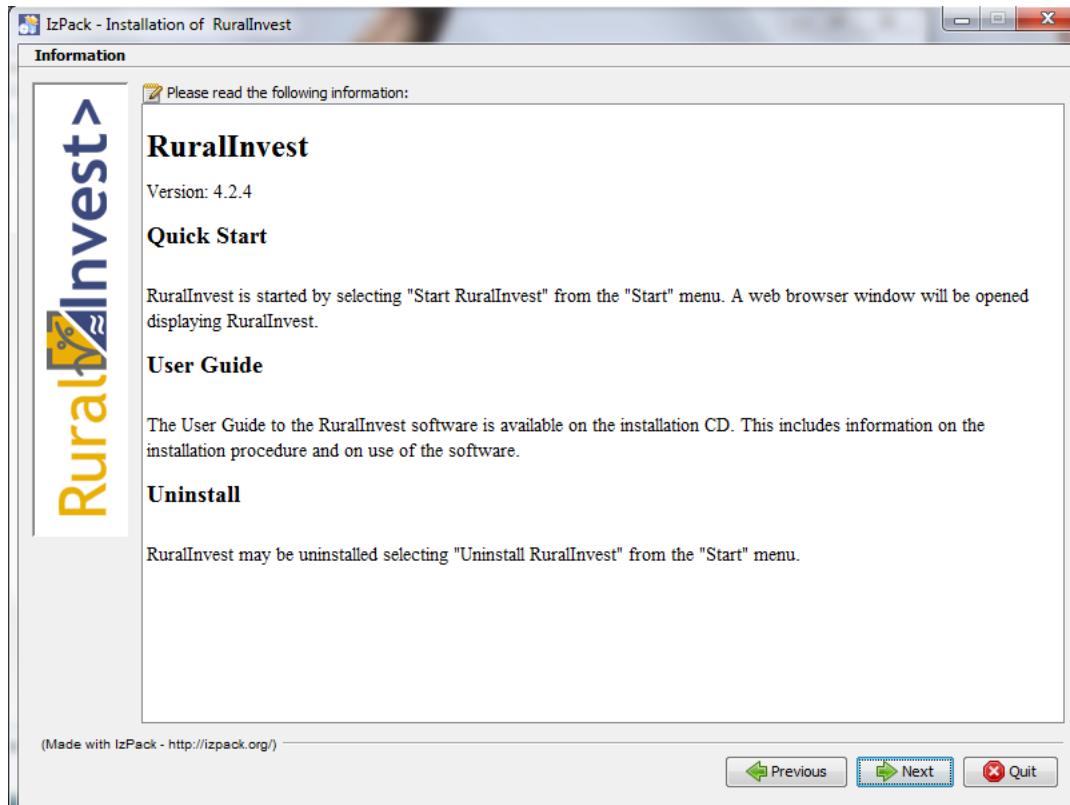


NOTE: The language for the software interface has been specified by the administrator in the Settings file you import at the end of the installation (see Part 4. System Setup). Here you select the language for the installation.

On the next screen click
“next”.



3a. Installing the Software (First installation, continued)



This screen only gives you some of the information that you can find in this manual.

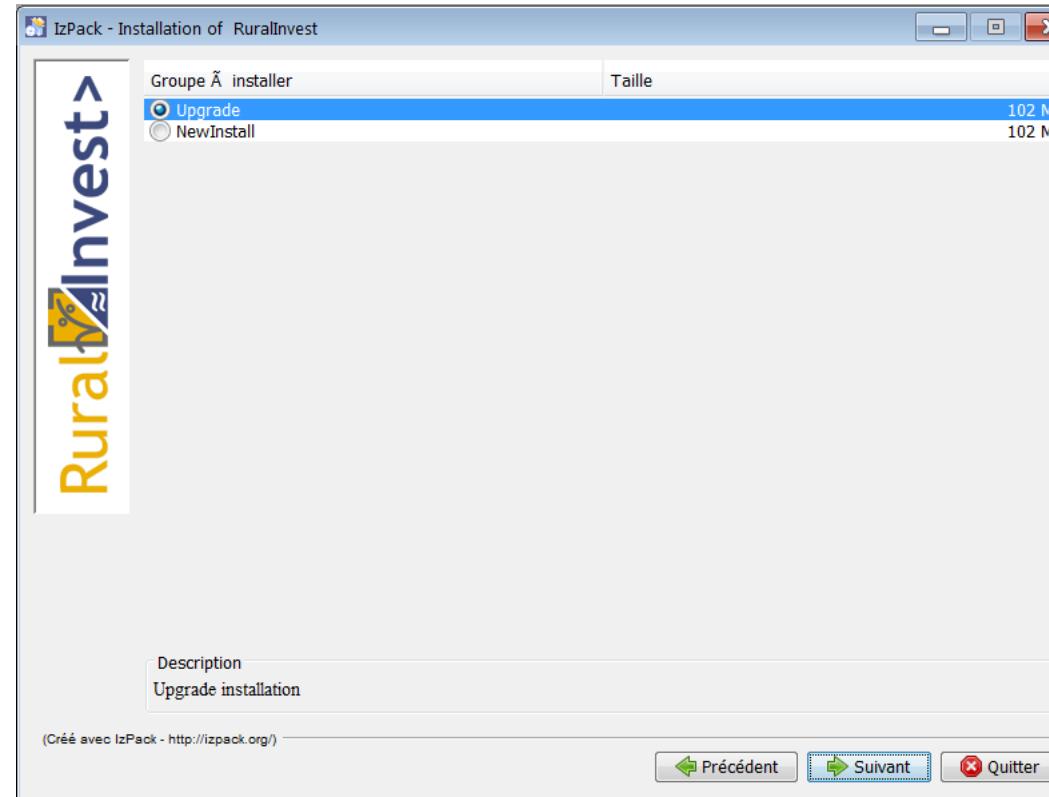
Click "Next"



3a. Installing the Software (First installation, continued)

At this point you can choose to install new software by clicking “NewInstall” or to upgrade your existing RuralInvest Software, by clicking “Upgrade”.

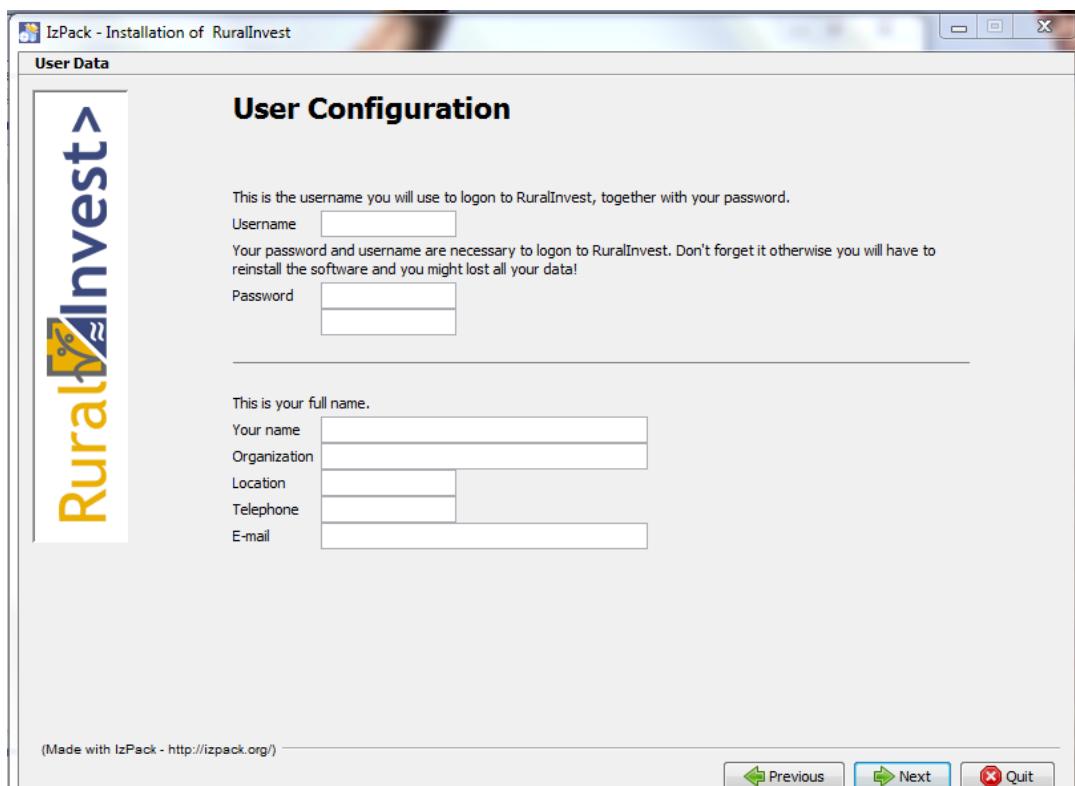
Warning: The "Newinstall" option installs the latest version of the software but erases all of your personal data (password, profiles and projects) in the process.



Click “Next”



3a. Installing the Software (First installation, continued)

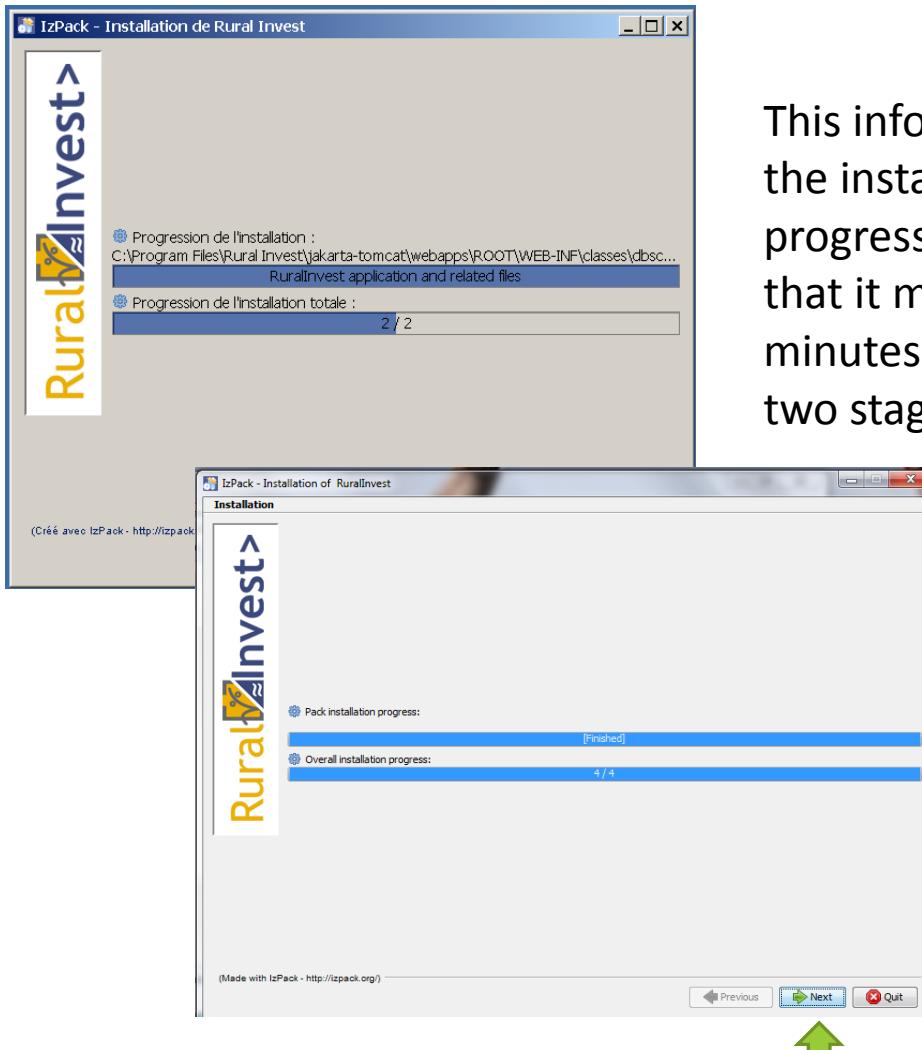


Note: The software
distinguishes between
upper and lower case.

Then enter your personal details ("your name" is the name that will appear as your signature when you create projects).



3a. Installing the Software (First Installation, continued)



This informs you of the installation progress. Please note that it may take a few minutes and occurs in two stages.

At this point, if you can not install the software, it may be because you do not have the right to install software on your computer ("administrative rights").

Contact the manager-computer network of your institution so that you install RuralInvest.



Click "Next"

3a. Installing the Software (First installation, continued)

Congratulations! You're almost done
installing the software



IzPack - Installation of RuralInvest

Perform External Processes

Processing

6 / 6

```
C:\Program Files (x86)\RuralInvest4\service>set PR_STARTMETHOD=start
C:\Program Files (x86)\RuralInvest4\service>set PR_STARTPARAMS= -port 8085
C:\Program Files (x86)\RuralInvest4\service>REM Shutdown configuration
C:\Program Files (x86)\RuralInvest4\service>set PR_STOPMODE=jvm
C:\Program Files (x86)\RuralInvest4\service>set PR_STOPCLASS=org.fao.riv.service.Lau
C:\Program Files (x86)\RuralInvest4\service>set PR_STOPMETHOD=stop
C:\Program Files (x86)\RuralInvest4\service>REM Install service
C:\Program Files (x86)\RuralInvest4\service>prunsrv.exe //IS//RuralInvest4
C:\Users\Dell\Desktop\RuralInvest-4.2.4-user>NET START RuralInvest4
The RuralInvest4 service is starting.
The RuralInvest4 service was started successfully.
```

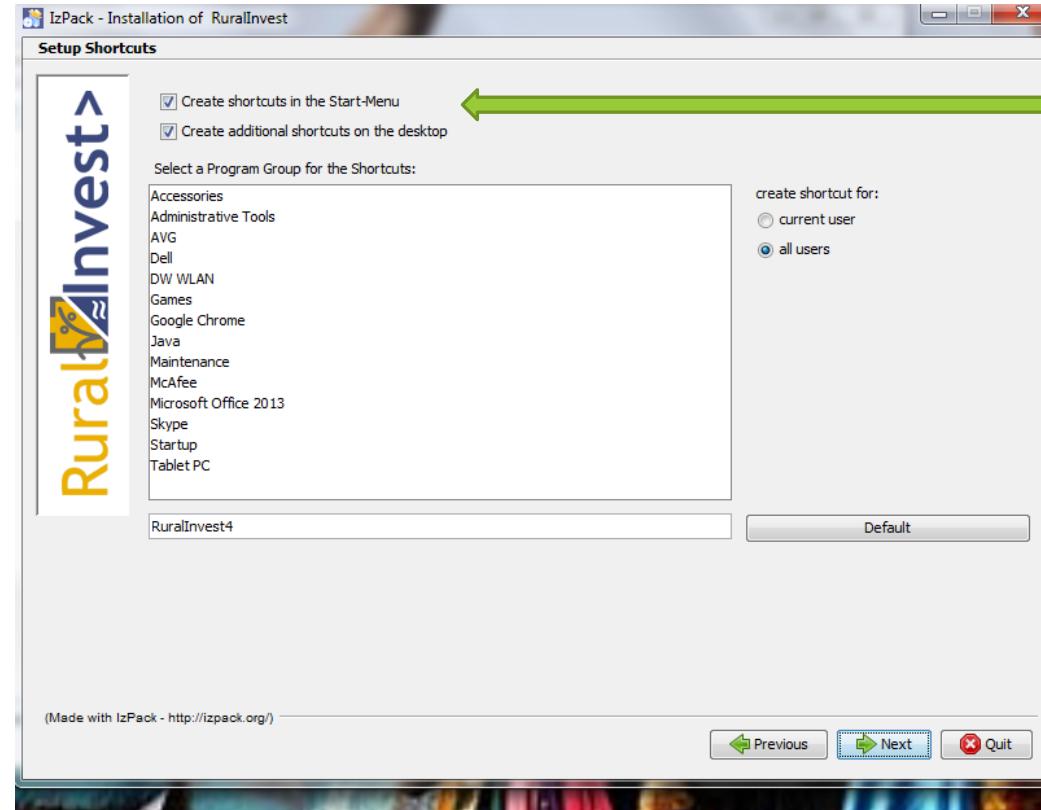
(Made with IzPack - <http://izpack.org/>)

Previous Next Quit

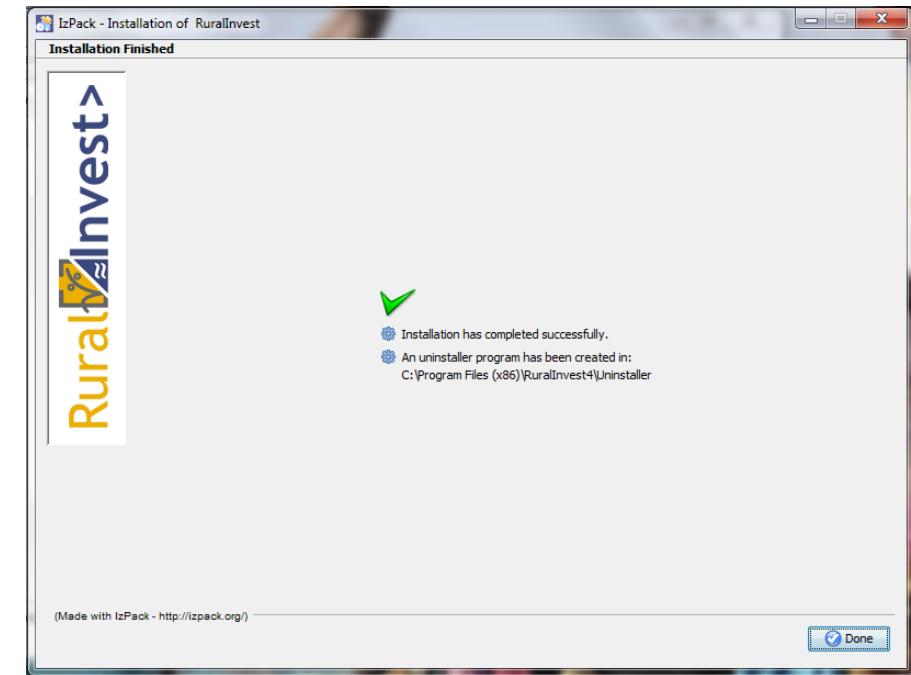
Click "Next"



3a. Installing the Software (First installation, continued)



Click on the two options
for the two shortcuts
(Start Menu & Desktop).

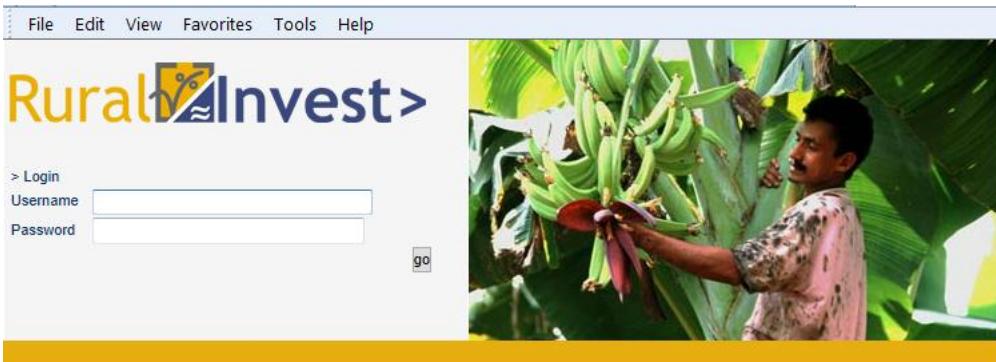


Click “*Done*” to
complete installation.



3a. Installing the Software (First Installation, continued)

After completing the installation, your browser will open with this window - Enter your username and password that you just created during installation - and click "Go"



The software will now ask you to import a configuration that is provided by your RuralInvest administrator.

A screenshot of a 'Import' dialog box. The title bar says 'Import' and the sub-instruction says 'Please select the file you would like to import.' Below this is a 'Choose File' button with the text 'No file chosen'. At the bottom right of the dialog is a dark blue 'Import' button.

Click “Choose File” and select the file labeled “Configuration”.

To import the file click “Import”



3a. Installing the Software (First installation, continued)

That's it! You have successfully installed and configured Rural Invest, you can now start preparing a profile, a project, or import one prepared by someone else.

Refer to the corresponding sections.

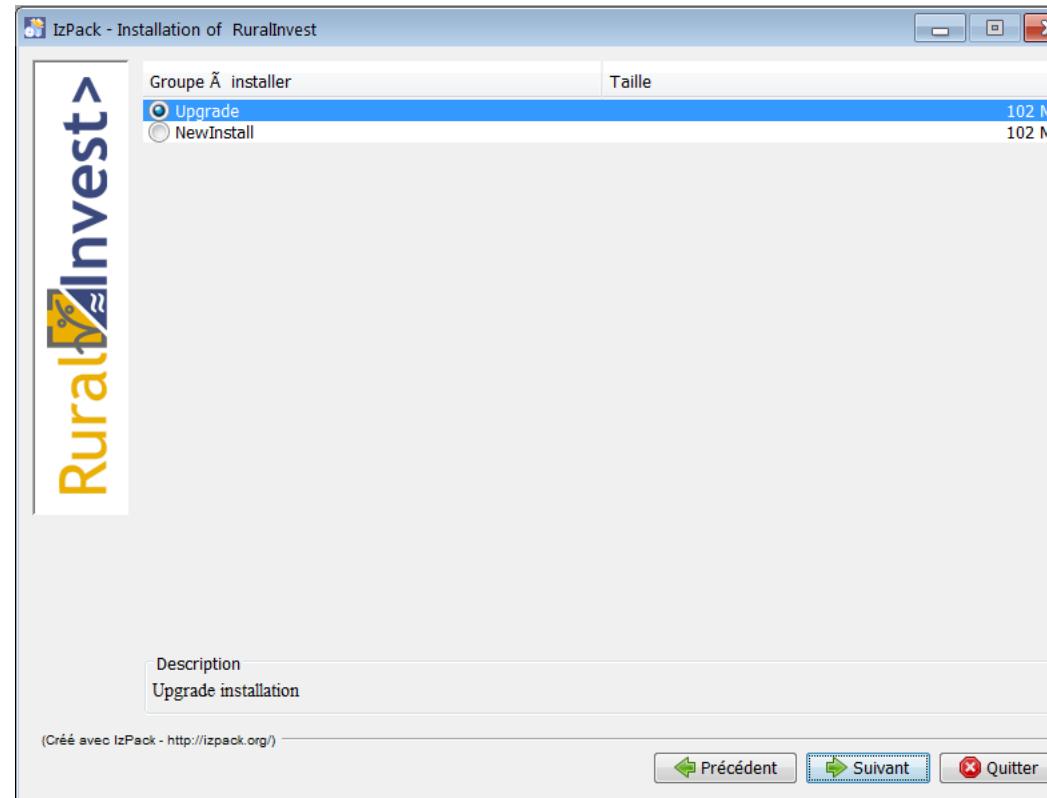
REMEMBER: In RURALINVEST, you must always validate your choices and information entered by clicking on the blue bar at the bottom right of each screen. So they will be saved.



3b. Installing & Updating the RuralInvest Software

Follow the instructions for installation in the previous slides but select “**Upgrade**” so your entire database will be retained.

Warning: The "Newinstall" option installs the latest version of the software but erases all of your personal data (password, profiles and projects) in the process.



3c. Installing the Software (Administrator)

To install the Administrator version of the RuralInvest software follow the same steps in the previous slides. The difference is that instead of asking to import one configuration to the opening session of Rural Invest, the software will open on the details page to create the configuration.

The screenshot shows the 'RuralInvest' software interface. The top navigation bar includes links for Home, Profiles (\$), Projects (\$), Search, Help, Configuration, Settings, Users, Field Offices, Categories, Beneficiaries, Environmental Categories, Project Statuses, Project Indicators, and Import. The main menu on the left is titled 'Configuration' and lists eight items: 1. Settings (selected), 2. Users, 3. Field Offices, 4. Categories, 5. Beneficiaries, 6. Environmental categories, 7. Project statuses, and 8. Project indicators. The 'Settings' page displays the 'General information' section. It features a logo placeholder for 'FAO' with the text 'FIAT PANIS' around it. Below the logo is a 'Change logo' section with a file input field ('Choose File') and a note ('gif/jpeg <70 kb'). The 'General information' section contains fields for 'Institution name' (set to 'FAO') and 'Default language' (set to 'English'). The 'Financial' section includes fields for 'Discount rate' (set to '3 in %') and 'Maximum project duration' (set to '30 year(s)'). The 'Currency' section has a field for 'Currency name' (set to 'Monetary Unit'). A green arrow points from the right side of the slide towards the 'Settings' page.

The administrator will enter the valid details.

It is also possible to import an existing version.
See Import Settings



4. System Configuration

The System Setup is composed of 8 categories and a tool (Import). These categories are used to change the information on the screen and customize for your organization / institution, certain settings.



The screenshot shows the top navigation bar of the RuralInvest software. The bar includes links for Home, Profiles (\$), Profiles (:), Projects (\$), Projects (:), Search, Help, and Configuration. A green arrow points to the 'Configuration' link. Below this, there is a secondary level of links: Settings, Users, Field Offices, Categories, Beneficiaries, Environmental Categories, Project Statuses, Project Indicators, and Import. The 'Categories' link is underlined, indicating it is the current page.

The RuralInvest software lets you customize and modify a set of settings so that the software is more responsive to the specific needs of the organization / user institution.

However, for most of these settings, it is important that all users of the same organization / institution (whether a development project, a bank, an MFI, a ministry) use the same standards. Otherwise, the software would not be able to compare projects with each other and combine the results for the monitoring and evaluation. It is for this reason that only the system administrator of the Central Bureau of organization / institution user can modify system configuration settings. Most of the following pages are therefore modifiable by the administrator of your organization and not by a user. The user can easily check against the values of these settings in the following pages.

WARNING. The local system configuration is usually defined in the beginning, before releasing the software to other users. If the administrator decides to change the initial system configuration later, the new settings must then be changed on all the computers of all users. To this end, the configuration file must be sent to all users who will reinstall the software with this new configuration. Depending on the types of changes made (deletion or addition) difficulties could arise to read the proposals created with the first configuration. It is therefore advised not to change these configuration settings often: additions can be made but must be avoided to delete categories



4. System Configuration (Administrator Only)

The Settings section allows the administrator to define a number of parameters including general information, financial parameters on the currency, loans, project location, and Internet links and project results options.

A user can then modify any of these parameters.

Export the current RuralInvest configuration

i. General information

Institution name: FAO
Default language: English

Logo:  (Change logo: Choose File, gif/jpeg <70 kb)

ii. Financial

Discount rate: 3%
Maximum project duration: 30 years

iii. Currency

Currency name: Monetary Unit
Currency symbol: MU
Exchange rate: 1 per US \$
No. of Decimals: 2

In the General section, the administrator specifies the name of the organization or institution. The RuralInvest user(s) can then insert the institutional logo and select a language of work (these elements are used for the production of reports). If you do not have a logo, an invisible white logo will be inserted automatically.



In the Financial section, the discount rate should be indicated as well as the maximum duration of a project.



In the currency section, will be the name of the local currency in which the projects will be analyzed, its symbol and the indicative exchange rate with the US dollar (how many units of local currency it take for \$ 1?). The value of this rate may be reviewed during each draft proposal or project depending on the evolution of exchange rates at the time of preparation.



5. Opening a Session

iv. Location	
② Geographical level 1	Province
② Geographical level 2	Range
② Geographical level 3	Village

The administrator also defines the names of three geographic levels in own country (eg Province - Range - Village).

v. Primary loan	
② Maximum duration	30 year(s)
② Grace period on capital payments	10 year(s)
② Grace period on interest payments	10 year(s)

The primary and secondary loans must be defined in terms of maximum duration, and maximum grace periods for the repayment of principal and interest.

vi. Secondary loan	
② Maximum duration	30 year(s)
② Grace period on capital payments	10 year(s)
② Grace period on interest payments	10 year(s)

When creating a project, the user will then indicate the settings of the loan for the specific project, that will be lower than these values.



5. Opening a Session (continued)

② vii. Quick links

Link 1 text

FAO Rural Invest Website (English)

Link 1 URL

<http://www.fao.org/investment/ruralinvest/rural-invest/en/>

Link 2 text

[Empty box]

Link 2 URL

[Empty box]

Link 3 text

[Empty box]

Link 3 URL

[Empty box]

Link 4 text

[Empty box]

Link 4 URL

[Empty box]

The Quick Links section allows the administrator to insert links to websites that will appear on the home page of the user session.

The administrator can specify the sites that include useful information for the technicians who make projects.

Examples: Site of the Organization / Institution, statistics of the website of the Ministry of Agriculture, the site the Ministry of Environment which includes environmental legislation, etc.).

⑧ Project indicators

Configuration

i. Project indicators

Choose the fields to be shown on the project search results table. If all fields are chosen, the results table may extend beyond the screen boundaries.

Technician	<input checked="" type="checkbox"/>
Field office	<input checked="" type="checkbox"/>
Status	<input checked="" type="checkbox"/>
Category	<input type="checkbox"/>
Beneficiary	<input type="checkbox"/>
Environ. category	<input checked="" type="checkbox"/>
Invest. total	<input checked="" type="checkbox"/>
Invest. own resources	<input checked="" type="checkbox"/>
Invest. donated resources	<input checked="" type="checkbox"/>
Invest. financed	<input checked="" type="checkbox"/>
Working capital total	<input checked="" type="checkbox"/>
Working capital own resource	<input checked="" type="checkbox"/>
Working capital donated resources	<input checked="" type="checkbox"/>
Working capital financed resources	<input checked="" type="checkbox"/>
Total costs	<input checked="" type="checkbox"/>
Total costs own resources	<input checked="" type="checkbox"/>
Total costs donated resources	<input checked="" type="checkbox"/>
Total costs financed resources	<input checked="" type="checkbox"/>

The **Project indicators** option in section 8 allows the administrator to select from a list of settings, that appear on the screen when the search results are displayed. These same settings appear (column) when you select **Show all** from in Projects in the main menu bar (see Sections 10 and 11).



4. System Configuration - Users

The screenshot shows the top navigation bar of the RuralInvest application. The menu items include Home, Profiles (\$), Projects (\$), Projects (:), Search, Help, Configuration, Settings, Users, Field Offices, Categories, Beneficiaries, Environmental Categories, Project Statuses, Project Indicators, and Import. The 'Configuration' and 'Users' buttons are highlighted with a red circle.

Users				
Name	Organization	Location	Telephone	E-mail
Fernanda Mayer Silveira Costa e Silva	FAO/AUR	Roma	=	fernandamayerscs@gmail.com
Kendra Schneider	FAO	Rome	=	kschneider5763@gmail.com

This screen shows all the users allowed to log on to this computer /Internet/intranet. Only the person who opened the session can change his own password and other personal details (by clicking the button corresponding to the name Edition).

A user can add other users on his own computer that can each open their own session.

The screenshot shows the 'Add user' form. It includes fields for Username, Password, Repeat password, Name, Language (set to English), Organization, Location, Telephone, and E-mail. A large green arrow points from the 'Add user' form towards the 'Users' table.

Attention: When deleting a user all drafts and projects will be erased. Use the delete button with caution!

Remember, these first two lines are then used to log on. Do not forget them!



4. System Configuration – Field Offices (Administrator only)

Field Offices		
Field Offices		
Description		
Adamaoua		
Centre		
Est		
Extrême Nord		
Generic field office		
Littoral		
Nord		
Nord-Ouest		
Ouest		
Sud		
Sud-Ouest		

Add field office



Only the administrator can add a new area or modify existing areas. Users can not modify this list.

The organization and the user institution RuralInvest can define its own Field Offices and areas according to its own structures. This then allows the central coordination that brings together proposals to sort them by Coordination / Management.



4. System Configuration - Project Categories (Administrator only)

Project categories	
Project categories	
Category	Type
Generic income-generating category	Income generating
Generic non-income-generating category	Non income generating
	Add category 

During the initial opening of the configuration settings, the administrator will define the list of project categories.

It shall state the project category (income- generating or non income generating).

Only the administrator can change the name of a project by clicking *Edit*, or create new projects or delete projects.

Once System defined by the administrator and distributed to users, it is recommended not to change its project categories. If it is absolutely necessary to create new categories, the new configuration file must be sent to all users.

- **Finally, you should never delete project categories as users who have chosen this category would lose their files when importing new settings.**



4. System Configuration – Beneficiaries (Administrator only)



Beneficiaries		
Beneficiaries		
Description		
Children		
General		
Generic beneficiary		
Men		
Women		

Add beneficiary

The types of beneficiaries are initially defined by the administrator.

For each project the user must then indicate which type of beneficiaries it is. This is particularly useful for monitoring and evaluating. Institutions then can specifically target certain categories of beneficiaries (eg veterans or indigenous communities).

REMEMBER: All entries must be saved before proceeding to the next stage.

Add beneficiary

Description	<input type="text"/>
-------------	----------------------



Save beneficiary



Only the administrator can change the name of each category of beneficiaries (by clicking Edit), create new beneficiaries or delete beneficiaries.

Once the initial system configuration set by the administrator and is distributed to the users, it is recommended not to change its project categories. If it is absolutely necessary to create new categories, the new configuration file must be sent to all users.

- **You should never delete categories of beneficiaries because users who have chosen this category will lose their files.**

4. System Configuration – Import & Export

Import

Please select the file you would like to import.

No file chosen

The Import section is available for the administrator and users.

As for users, a configuration file is created by an administrator and is imported during the software installation (see Part 5).

An administrator computer can also import a configuration file, but only during the first installation of the software, before any setting modification is performed manually.

- **Once the administrator has started to define its configuration settings, importing a configuration file is no longer possible.**

 Export the current RuralInvest configuration

i. General information

? Institution name

? Default language

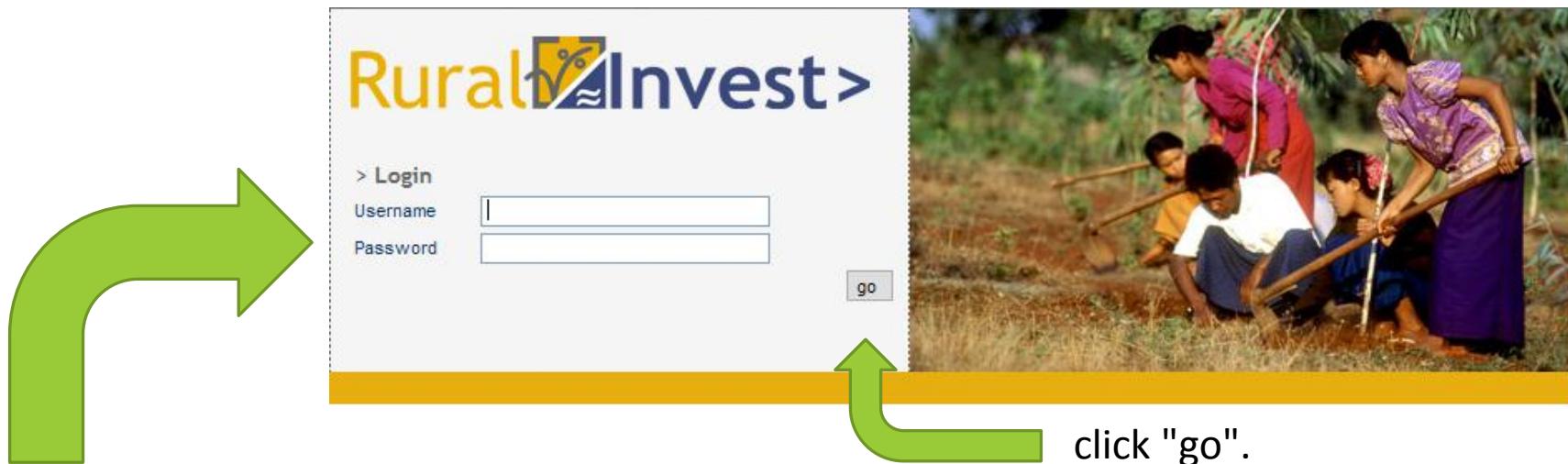
Logo



5. Opening a Session

The following window is normally open automatically during installation.

If this is not the case, open a new window by clicking the RuralInvest shortcut on your desktop or Start / Programs / RuralInvest 4.2.



Enter the username and personal password that you have chosen.

Remember that the software distinguishes between lowercase and uppercase.



5. Opening a Session

Remember:

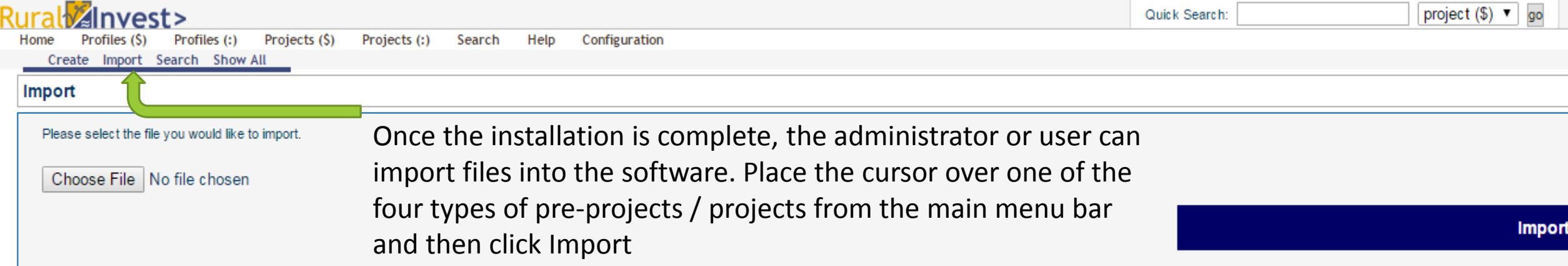
When installing an "Administrator" version of RuralInvest, the session opens with a configuration window and asks the administrator to create the local file settings configuration (see Part 4. System Settings) .

For the "User" version of RuralInvest, the session opens with a window asking to import the local configuration file created by the administrator (see Part 5. Import files). The software can only be used once this importation is made.

- Once done, it is possible to import files * .riv pre-projects and projects of other users, **provided that the files were created using the same configuration or in generic form** (see Part xx export projects).



6. Importing profiles and projects



The screenshot shows the RuralInvest software interface. At the top, there is a menu bar with options: Home, Profiles (\$), Profiles (:), Projects (\$), Projects (:), Search, Help, Configuration, Create, Import, Search, and Show All. A green arrow points from the text "Once the installation is complete, the administrator or user can import files into the software. Place the cursor over one of the four types of pre-projects / projects from the main menu bar and then click Import" to the "Import" button in the menu bar. Below the menu bar, there is a sub-menu titled "Import" with the instruction "Please select the file you would like to import." and two buttons: "Choose File" and "No file chosen". On the right side of the screen, there is a large blue button labeled "Import".

Once the installation is complete, the administrator or user can import files into the software. Place the cursor over one of the four types of pre-projects / projects from the main menu bar and then click Import

Locate the file to by selecting “Choose File”, the file name, and click Import. This import is possible from a CD, a USB key or a file sent by email that has been previously saved on your computer. The extension of the files is always RuralInvest .riv
Then confirm all the forms of the pre-project or project by clicking on the blue button at the bottom right of each form. This is necessary for the software checks whether any data is missing

- You can only import RuralInvest, pre-project or project, files that have been created with a computer that has the same configuration settings that is imported on your computer (ie by "affiliated" users to a single director or by the director himself), or generic files.



7. Key Symbols

All symbols activate their associated function by placing the cursor over it and clicking it.



The **Help** button gives additional information on the subject where it is placed.



The **Edit** button opens the item to which it is associated. If the person who created this draft or draft did not protect the file, you can make changes, even if it is another person who created it.



The **Delete** button removes the element to which it is associated. **Use with caution because once deleted, it is final. No turning back!**



Copy or **Clone** button allows you to make a copy of the item to which it is associated



The **Export Excel** button allows you to export data, charts or reports from RurallInvest in Excel format to be able to rework the software outside then if necessary.



The **Add Item** button adds a new element (text or numbers) to an existing section of a pre-project or project.



The **Add a block** lets you add an activity or product to a draft or a block in a project.



The **download / export** button allows you to export the draft or the complete project created with the RurallInvest software to your hard disk (creating a file .riv). This file can be retained as a backup, or be sent by email, USB key or other.



The **Convert to Project** button allows you to transfer text and some data already entered for a draft in a new project. As the project stage is more detailed, many fields must then be completed.

8. Home Page

Main menu bar



RuralInvest >

Home Profiles (\$) Profiles (:) Projects (\$) Projects (:) Search Help Configuration

Search RuralInvest

> Income generating... > Non income generating... > Useful weblinks

> Profile

Create new In progress (2)
Show completed (0)

> Project

Create new In progress (1)
Show completed (0)

> In progress

FAO 19/10/15
Fruit and Vegetable Proce... 04/09/15
Fruit and Vegetable Proce... 04/09/15

> Profile

Create new In progress (2)
Show completed (0)

> Project

Create new In progress (0)
Show completed (0)

The screenshot shows the RuralInvest website homepage. At the top is a navigation bar with links for Home, Profiles (\$), Profiles (,), Projects (\$), Projects (,), Search, Help, and Configuration. Below the navigation bar is a search bar labeled 'Search RuralInvest'. The main content area is divided into three columns. The left column contains links for 'Income generating...', 'Profile' (which is highlighted with a yellow background), and 'Project'. The middle column contains links for 'Non income generating...', 'Profile' (highlighted with a grey background), and 'Project'. The right column contains links for 'Useful weblinks' and 'In progress' (highlighted with a grey background). Each section includes sub-links for creating new entries or viewing existing ones. There are also images of people in agricultural settings: two children drinking from a container, a woman in a field, and a woman working in a field.

Main Section



When you log in, you will automatically go to the home page of RuralInvest. It allows you to access all the pre-projects and projects in progress or completed preparation contained in your local database. It also offers links to interesting websites.



8. Home Page – Main Menu Bar

The following two symbols are used to differentiate the types of pre-projects / projects:

(\$): Income generating **(:): Not income generating**



Home Profiles (\$) Profiles (:)

Projects (\$) Projects (:)

Search

Help

Configuration

By placing the cursor over the different sections of the main menu bar above, you can access the different categories of these sections. Click on one of these categories and you will access the corresponding screen.

RuralInvest considers **four** types of project proposals:

Income generating profiles (\$)

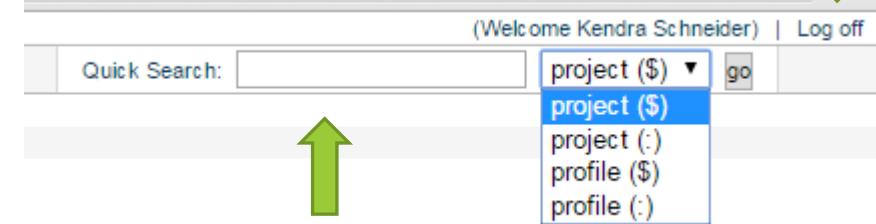
Non-income generating profiles (:)

Income generating projects (\$),

Non-income generating projects (:).

Note: Configuration can only be modified by the administrator but the user can consult.

Always remember to log out when you turn off your computer or change the task, otherwise RuralInvest will not be closed properly and could damage the files.



If you know the name (or partial name) of the draft or project, you can search for it here

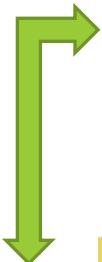
In this case, you must select the desired file type here.



8. Home Page – Main Section

Pre-projects and projects are also accessible from the main section of the home page.

The main section also provides a list of useful Internet links that are adaptable for each user.



All types of profiles and projects (non-income generating & income generating) can be selected according to their level of preparation:

New proposal that is to be created (**Create new**).

Proposal already started but not ended (**In progress**).

All completed proposals are accessed by clicking **Show complete**.

> Profile

Create new In progress (2)
Show completed (0)

> Project

Create new In progress (1)
Show completed (0)

In progress			
Profile name	Creation date	Last updated	
Fruit and Vegetable Processing Plant FAO	03/09/15 23:24 19/10/15 12:28	04/09/15 11:07 19/10/15 13:58	

The first column gives the name of the profile or project.

The second column indicates when the profile or project was created

The last column indicates when the draft of the file or the project has been modified for the last time



9. Income Generating Profiles (\$)

If you want to create a new profile, select “**Create New**” in the proposed profile section of the home page (main section) or Create in the Profile section (\$) from the main menu bar (see below below). If the draft was started but not completed, you can select it through the main section of the course home page.



The easiest way to check income generating profiles that have been completed selecting “**Profiles (\$)**” from the main menu bar, then “**Show All**”

The three symbols on the right let you edit, export or delete the selected profile. If you want to change the draft click the “Edit” button.

Income generating profiles (\$)									
Profile name	Technician	Status	Field office	Number of beneficiaries	Investment total	Investment own resources	Investment external resources	Net income after annual reserve	Years to recover investment
Fruit and Vegetable Processing Plant	Kendra Schneider	Proposal	Generic field office	250	45,950.00	42,035.00	3,915.00	206,100.00	0.2   
Sum				250.00	45,950.00	42,035.00	3,915.00	206,100.00	
Average				250.00	45,950.00	42,035.00	3,915.00	206,100	0.2
Total profiles:	1								

Export search results:   



9. Income Generating Profiles (\$)

When you select an existing profile (using the Edit button) or when you create a new profile, you access the first screen of a series of nine screens that will allow you to enter or change information concerning the profile.



When the profile opens, it will always lead to the first form 1. General Information.



You can then go directly to all other screens (forms) for which information has already been registered. For that, just click on the desired form on the left of the screen.



When you create a new draft, you must completely fill out each form in each screen before moving on to the next. The information you enter is saved by clicking the dark blue button at the end of the form in the bottom right. If you do not click this button you could lose data. You can exit the draft in preparation or after completing the first forms. The file will be saved and you can return to the last completed forms later by selecting the “Edit” button that is accessible through the main section of the home page Preliminary draft – “In progress”.



9. Income Generating Profiles (\$) – General

1 General Information



In the General form you complete the basic data such as project name, the exchange rate, the number of beneficiaries, location and status of the profile.

i. General Information

Profile name	<input type="text"/>
Exchange rate	<input type="text"/> Monetary Unit per US \$
Created by	Kendra Schneider (FAO)
Creation date	21/10/15 23:53
Last updated	
Number of beneficiaries	<input type="text"/> People
Households	<input type="text"/>
Does this profile distinguish between products "with" and "without" project?	
<input type="radio"/> Yes <input type="radio"/> No	

ii. Location

Field office	<input type="text"/> Generic field office ▾
Province	<input type="text"/>
Range	<input type="text"/>
Village	<input type="text"/>

In the first box, insert: the profile name, the current exchange rate of the local currency (how many units of local currency does it take to \$ 1?). The estimated number of beneficiaries

Some investments involve improving current operations and others involve completely new activities. When the investment improves on current activities, it is essential to evaluate the results of the situations "**without project**" and "**with project**" and then compare their results to see the benefit "additional" investment. All profits must indeed not be attributed to the investment in this case.

The software allows for the comparison automatically by selecting **Yes**.

Choose this option when you begin creating your profile.

Changing this option after completing Section 6, Products can generate error messages from the software.



9. Income Generating Profiles (\$) - General

When a profile has been prepared, it is possible to make a copy in order to build a similar proposal for comparison. For example to compare another beneficiary.

[Clone this profile](#) [Convert to project](#)

Once the first profile is completed, it is possible to go to the main project. The function "**Switch to the project stage**" enables the profile data to be transferred in the project form. This avoids having to re-enter some data. However, as a detailed formulation, the project form should be completed with any new information.

The RuralInvest local administrator will be defined prior to the dissemination of RuralInvest, geographical levels (here Department, District and Town) and the different areas (which correspond to the decentralized offices of the Organization / Institution). Choose from the list the office you work for (Area) and enter information about the location of the draft in the 3 boxes of 3 geographical levels



iv. Technician	
Name	Kendra Schneider
Organization	FAO
E-mail	kschneider5763@gmail.com
Telephone	=
Location	Rome

v. Sharing



Information about the person (technician) who created the draft appear automatically. The coordinates that appear correspond to the coordinates of the person who opened the RuralInvest section on the computer.

ii. Location	
Field office	<input type="text" value="Generic field office"/>
Province	<input type="text"/>
Range	<input type="text"/>
Village	<input type="text"/>



9. Income Generating Profile (\$) - General

The software allows the person creating the profile to decide whether or not other people can edit it . This is useful when working on the same network as a team (Intranet or Internet site). If you select **No**, your colleagues can review the profile but will not be able to change the data you have entered.

When you are not working on a common network but on the hard drive of your computer and you export a file on a USB stick for example, this option is not taken into account.

Thus the person importing your file can then modify the information. Furthermore, when this file is on his/her computer the file you created will not have your name under General Information section iii Technician.

[To Description](#)

When you have finished completing the General form, click on “**Description**”.

➤ **If you do not do this the entered data will be lost.**

If you are unable to move to the next form it is because you have not completed the information on the first form. In this case, you will see an error message. Or you may not have the right to change the data in the profile. In this case the dark blue box is grayed (see the sharing option to the above files).

> Error
Please check your data and correct the fields in red.

? Number of beneficiaries
This is a required field.

 People

9. Income Generating Profiles (\$) - Description

2 Description

Clicking 3 will bring up the help menu.

The description step allows you to describe the beneficiaries of the profile & its main objectives and activities. You must ensure at this stage that you and the recipients have much the same understanding of what the objectives and activities are of the profile.

② i. Name of beneficiary group or person
Test Community

② ii. Description of beneficiaries
Externally recruited plant manager and his family (1 man, 1 woman, 4 children).
Description of beneficiaries. For groups, describe the length of time the beneficiaries have worked together, whether they have undertaken any previous projects or shared efforts, whether they have a formal structure (e.g. President, Treasurer, Secretary etc.) and whether they have legal status. For all applicants, give information on their principal activities, income level and wealth.

② iii. Objective and Major Activities
Establish a small processing plant for fruits and vegetables grown on their land. Best market potentials are blackberry jam and mixed vegetable relish.

Each text box can contain as many lines as necessary, it will expand gradually as you write.

- Remember to always click on the dark blue button at the bottom of the form to save the data and move to the next form.

To Qualitative Assessment



9. Income Generating Profile – Qualitative Assessment

3 Qualitative Assessment

Market research is one of the most important steps when preparing a draft. If the beneficiaries do not know the market, help them find information on it. If you do not know how to assess the potential demand, check Manual 3 of the module or ask for specific training.

② Anticipated market

Believed that blackberry jam can be sold to wholesalers in a near by town at a price of 1,100 monetary units per case of 12 jars.

Pickled vegetables to be sold in restaurants in same town 325 monetary units per jar.

③ Environmental Impact

none foreseen



To Investment Costs

Do not forget to click on the dark blue button to save the data and move to the next form.

Although a detailed environmental impact analysis is not necessary in profile stage, the attention of the beneficiaries should be drawn to the potential negative effects of the draft on local natural resources (water, forests, soil , biodiversity, etc.) and the mitigation of impacts that are needed.



9. Income Generating Profile (\$) – Investment Costs

4 Investment Costs

Investments consist of goods, materials, labor costs and the other services. These expenditures will lead to benefits in the coming years, not just in the immediate future as production costs.
Insert all investments of the draft in one of these two categories

Click here to export the data entered in the Excel format screen, download the Excel spreadsheet model before returning the data, or import the data directly into RurallInvest using an Excel spreadsheet in the appropriate format.

The screenshot shows a software interface for managing investment costs. At the top, there are three buttons: 'Download Excel template' (unchecked), 'Export data' (unchecked), and 'Import from Excel' (unchecked). Below this is a tab bar with 'With project' (selected) and 'Without project'. The main area is divided into two sections: 'Goods & materials' and 'Labour & services'. The 'Goods & materials' section contains a table with the following data:

Description	Unit type	Unit number	Unit cost	Total cost	Own resources	External resources	Economic life cycle	Salvage value/unit	Annual reserve
Building Upgrade	lump sum	1	45,900.00	45,900.00	42,000.00	3,900.00	20	44,000.00	95.00
Rakes	unit	5	2.00	10.00	5.00	5.00	2	0.00	5.00
							100.00		

The 'Labour & services' section contains a table with the following data:

Description	Unit type	Unit number	Unit cost	Total cost	Own resources	External resources
Installation costs	Flat rate	1	40.00	40.00	30.00	10.00

At the bottom of each section are 'Add a new item' buttons.

To move an item, click the arrows to edit an already inserted item click the “Edit” button, to delete, click the “Delete” button.

To copy an item already inserted, click the “Copy” button.

To create a new item, click the “Add Item” button



9. Income Generating Profiles (\$) – Investment Costs, Goods & Materials

Each item has its own mini-form to fill out. The local currency (euros here) is that predefined by the administrator.

Investment Costs

Add a new item (Goods & materials)

Description: Rakes

Unit type: unit

Unit number: 5.0

Unit cost: MU 2.0 *

Total cost: MU 10.00

Own resources: MU 5.00 -

External resources: MU 5.00

Economic life cycle: 2.0 year(s)

Salvage value/unit: MU 0

Annual reserve: MU 5.00

Save item

toggle table

Click on the toggle table to change the view. By clicking the toggle table you will also be able to see the other items inputted.

The data in gray cells are calculated by the software, the user can not change.



9. Income Generating Profile (\$) – Good & Materials - References

From this step, the elements that will be repeated in the draft can be put in a table of references. To this we must check the Add this element in the table of references and create a link to this chart. A small paperclip symbol will appear next to the referenced item. To avoid re-typing the same elements, the elements referenced are introduced by clicking the link to the existing table of references. References can be created in the forms of investment costs, General and Products. The references are automatically created and linked to form 7. References.

Investment Costs

Add a new item (Goods & materials)

Description	Rakes
② Unit type	unit
② Unit number	5.0
Unit cost	MU 2.0 *
② Total cost	MU 10.00
② Own resources	MU 5.00 -
② External resources	MU 5.00
② Economic life cycle	2.0 year(s)
② Salvage value/unit	MU 0
② Annual reserve	MU 5.00

This item is not linked to the reference table.
[Link to an existing reference item.](#)

OR

Add this item to reference table and create link.



9. Income Generating Profiles – Investment Costs, Labor & Services

As for labor and services, the mini-form is quite similar as for goods and materials (only the useful life of the item and salvage value are not inputted here).

Fill in the blank boxes and the software will automatically calculate the results for the gray cells.

Add a new item (Labour & services)

Description	Installation costs	
Unit type	Flat rate	
Unit number	1.0	
Unit cost	MU	40 *
Total cost	MU	40.00
Own resources	MU	20 -
External resources	MU	20.00

Save item

After inserting all investment costs, click this button and go to the next form.



To General Costs



9. Income Generating Profiles (\$) – General Costs

Fill in the blank boxes, and the software will automatically calculate the results for the shaded boxes.

- General costs are usually calculated monthly, but not always.



General Costs

Add a new item (General Costs)

② Description	Buckets
② Unit type	10
② Unit number per year	15
Unit cost	MU 3,000 *
② Total cost	MU 45,000.00

When all general costs have been entered, save it by clicking this button.

Save item



General Costs				
Description	Unit type	Unit number per year	Unit cost	Total cost
Buckets	10	15	3,000.00	45,000.00
				45,000.00

[Add a new item](#)



9. Income Generating Profiles (\$) - Products

6 Products

A green arrow points down from the 'Products' section to the screenshot of the 'Products' form.

The screenshot shows the 'Products' form interface. At the top, there's a button to 'Télécharger le modèle de tableau Excel'. Below it, a section for 'embouche bétiers' (fatteners) is shown. It includes a table with columns for 'Description', 'Unité de production', 'Quantité', 'Durée du cycle', and 'Cycles'. A 'Copy product' button is also present. Below this, there are three tables: 'Recette - par bétier maigre chaque 2.0 mois', 'Coût intrants/matériaux - par bétier maigre chaque 2.0 mois', and 'Coûts de main d'œuvre et services - par bétier maigre chaque 2.0 mois'. Each table has columns for 'Produit', 'Unité', 'Unités vendues', 'Prix unitaire', 'Coût de transport/unité', and 'Total'. Buttons for 'Ajouter un élément' (Add an item) and 'Edit' are located at the bottom of each table.

If there are two similar products (eg natural cheese and cheese with herbs), the first product can be duplicated (Copy this) **and only the necessary data**.

The name of product must be changed to define the second product.



The elements can be created and modified, moved up or down or deleted as in the previous forms, using the “**Add an item**” and “**Edit**” buttons.



9. Income Generating Profiles (\$) – Product Description

For each product or activity resulting from the investment, shall be indicated:

- The unit of production (eg a hectare, a henhouse, a processing unit, etc.)
- The number of production units in the investment.
- The product life cycle of production or activity (which can be between 1 day and 12 months),

Corn, for example, can have a 4-month production cycle and be grown 2 times per year (2 cycles per year). Leather sandals can be produced in a workshop where costs and income are estimated on a monthly basis (cycle 1 month) with 12 cycles per year.

Description

Description	Shallots
Unit of Production	15 cases
Number of units	1.0
Length of cycle	6 month(s)
Cycles	1.0 per year

Download Excel template
 Export data
 Import from Excel

With project Without project

Goods & materials

Description	Unit type	Unit number
Building Upgrade	lump sum	1
Rakes	unit	5

Labour & services

Description	Unit type
Installation costs	Flat rate



9. Income Generating Profiles (\$) – Products, Costs of Inputs & Materials

For each product or activity, complete a new form for each item of income (goods & labor).
The product or the activity is always indicated in each form. Below is an example of Shallots.

Income (Shallots)		
- per 15 cases per 6.0 month(s)		
② Item	Shallots	
② Sales unit	kg	
② Units sold	10	
② Unit sale price	MU	20.00
② Transport cost/unit	MU	5.00
<hr/>		
② Total	MU	150.00

Labour/Professional Services costs (Shallots)		
- per 15 cases per 6.0 month(s)		
② Item	Weeding	
② Unit type	monthly	
② Units used	4	
② Unit cost	MU	400.00
<hr/>		
② Total	MU	1,600.00

- The transportation costs you specify for the revenue and inputs are automatically removed from the unit prices for recipes and added to the unit prices for inputs.

Save item

Remember to always back up your data.



9. Income Generating Profiles (\$) Revenue, Costs of Inputs & Materials

Remember, you can change the presentation to see on the same screen other costs you have already indicated by clicking on the toggle table.

Input/Material cost (Shallots) - per 15 cases per 6.0 month(s)		
② Item	knives	
② Unit type	lump sum	
② Units used	50	
② Unit cost	MU 40.00	
② Transport cost/unit	MU 5.00	
② Total	MU 2,250.00	

toggle table



Input/Material cost - per 15 cases per 6.0 month(s)		
Item	Unit type	Units used
knives	lump sum	50.0000
weeding day 15.0000		
Input/Material cost (Shallots) - per 15 cases per 6.0 month(s)		
② Item	knives	
② Unit type	lump sum	
② Units used	50	
② Unit cost	MU 40.00	
② Transport cost/unit	MU 5.00	
② Total	MU 2,250.00	



9. Income Generating Profiles (\$) - References

The Reference form automatically logs all items referenced in the preceding forms.

7 Reference items

Reference items				
Income				
Income	Unit Type	Unit cost	Transport cost	
jam	jar	10.00	5.00	
Tomato	kg	20.00	5.00	
Goods and services				
Good/service	Unit type	Unit cost	Transport cost	
Building Upgrade	lump sum	220,000.00		
Building Upgrade	Lump sum	220,000.00		
Rakes	unit	2.00		
Buckets	10	3,000.00		
Jars	unit	100.00		
blackberries	month	700.00		
Fruit pectin	month	50.00		
beans	kg	10.00		
weeding	day	100.00	10.00	
knives	lump sum	40.00	5.00	
Labour				
Labour	Unit type	Unit cost		
accountant	monthly	500.00		

Whenever a reference is created for repeated elements in the forms of investment costs, general costs, & products, this element will appear in the Reference Form. A new reference can also be created in the form using the “**Add a New Item**” button. A mini form will open to add a new element.

Reference items	
Add a new item (Income)	
?	Income
?	Unit Type
?	Unit cost
?	Transport cost



9. Income Generating Profiles (\$) - Recommendations

The Recommendations form allows you to give your opinion on the investment project. It must be completed only after consulting the preliminary results in Section 9. Summary & Reports

8 Recommendations

Do not forget to sign your name in this form before you export the files to transmit to your colleagues via email or USB key (since in this case your name will no longer appear in the General section iii Technician).

There are three possible recommendations:

(a) Implement without preparing project: possible when the investment very simple and has limited investment amount, and if this possibility was discussed within your institution / organization.

(b) Reject the proposal: is not an option that the technician who makes the project should be using if he realizes that his proposal is not feasible, it would normally return to the promoter / beneficiary and review with them how modify its proposal to make it interesting or downright change project if the proposal is not appropriate;

(c) Approve for detailed project preparation: when the preliminary results show that the project is interesting. Justification In the box & analysis, explain why you think that the proposal should be supported and what are your main concerns about the project. Reason as if it were your own money that should be invested in the project. What could make that investment not produce the expected effects?

Recommendation	Date of recommendation <input type="text" value="25/10/2015"/> 
<input type="radio"/> Implement without preparing project	
<input type="radio"/> Reject proposal	
<input checked="" type="radio"/> Approve for detailed project preparation	
② Justification & analysis	

[To Summary & Reports](#)



9. Income Generating Profiles (\$) – Summary & Reports

9 Summary & Reports

Summary & reports can be viewed in the different stages of the analysis of the draft in a report format (PDF or Excel formats). You can use this feature to print the report of each completed section (from 1 to 7), or to generate the complete report with all sections, once the entire draft is completed. The Preliminary investment, income, & cost analysis is the section that provides the indicators to determine whether the draft is financially profitable or not.



To finish the profile, click “Finish”.

ATTENTION:

When you click to generate a report, if Adobe Reader does not open:

- Check that you have Adobe Reader on your computer.
- If this is not the case, download it on <http://www.adobe.com/products/acrobat/readstep2.html>
- First open Adobe Reader and then try to generate a report with RuralInvest.



Congratulations! You have successfully entered the income generating profile!

9. Income Generating Profiles (\$) – Summary & Reports

Preliminary estimate of the section of the Report presents some financial benefit indicators for the investment project. Here is a sample report in pdf format.

Costs of investment Goods and materials, and labor and services.

Status	Proposal
Field office	Generic field office
Investment total	220,050.00
Investment own resources	10,025.00
Investment external resources	210,025.00
Net income after annual reserve	-117,655.00
Years to recover investment	-2

The annual allowance for replacement investment is calculated on the basis of investment costs in goods and materials. (*Investment costs in labor and services are not included in the calculation of the annual retained earnings*).

The number of years to recover the investment is equal to the total investment (goods & materials and labor & services), divided by net annual income.

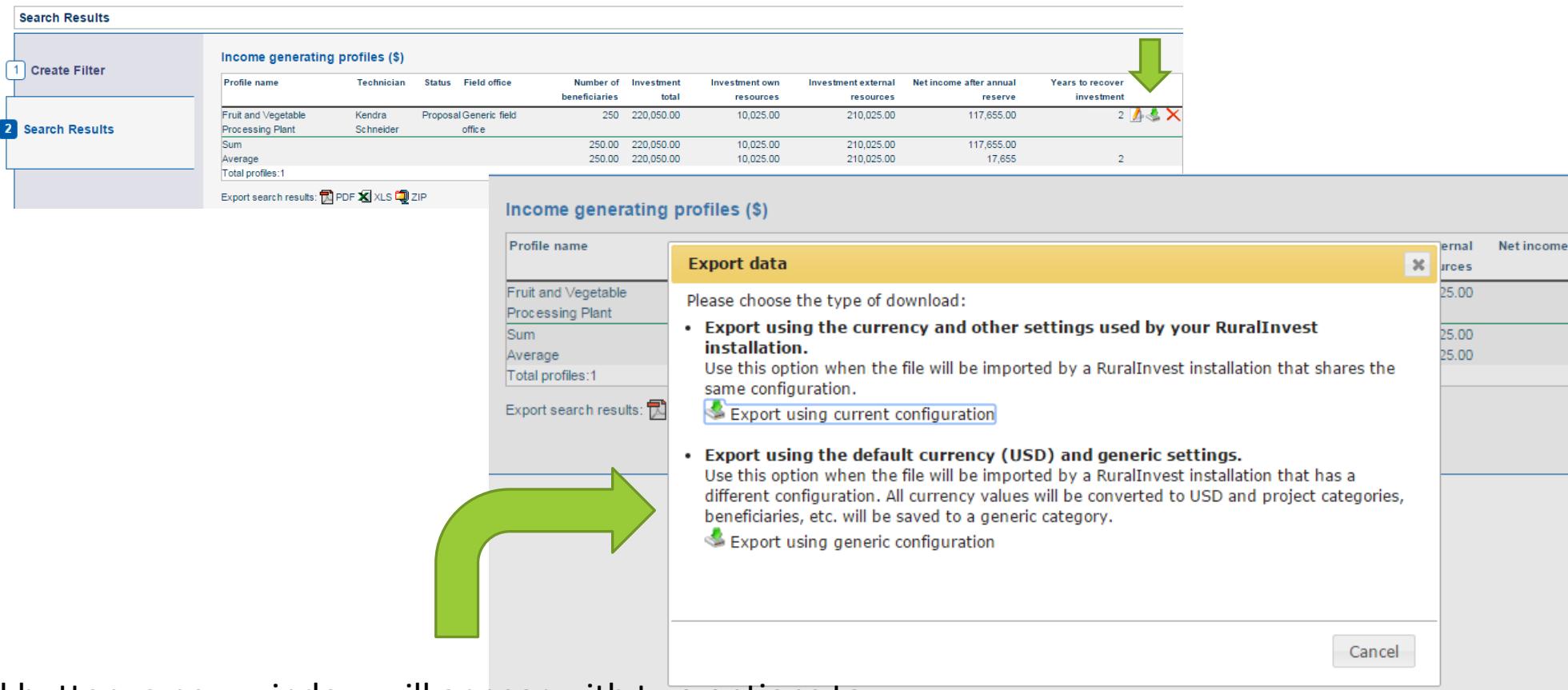
➤ Warning: if the income is negative as seen here, then the number is meaningless.



9. Income Generating Profiles (\$) - Exporting

Your profile can then be sent electronically to other people who have RuralInvest. To do this, select Profiles (\$) from the main menu bar, then View All. In the list of drafts, find the one you just finished and click on the 

Download button. Save the corresponding file (extension .riv) on your hard drive or USB key.



The screenshot shows the 'Search Results' screen for 'Income generating profiles (\$)'. It includes a 'Create Filter' button, a 'Search Results' section with a '2' icon, and a table with columns: Profile name, Technician, Status, Field office, Number of beneficiaries, Investment total, Investment own resources, Investment external resources, Net income after annual reserve, and Years to recover investment. The table contains rows for 'Fruit and Vegetable Processing Plant', 'Sum', 'Average', and 'Total profiles: 1'. Below the table are export options: PDF, XLS, and ZIP. A large green arrow points from the table area to a modal dialog titled 'Export data'. The dialog asks 'Please choose the type of download:' and lists two options: 'Export using the currency and other settings used by your RuralInvest installation.' (selected) and 'Export using the default currency (USD) and generic settings.' Both options include a 'Cancel' button.

After clicking the download button, a new window will appear with two options to export data:

- 1) Export data using the current configuration settings of your RuralInvest. Remember all users should have the same configuration that was distributed by the main user.
- 2) Export the data using the default currency (USD) and the basic configuration of RuralInvest.



10. Non-Income Generating Profiles (:)

Like income generating profiles (\$), completed non-income generating profiles (:) are accessible in three ways:

- In the main menu: by selecting Profiles (:) and then clicking Show All.
- From the main section of the home page by clicking Show completed non-income Generating Profiles.
- With the search engine, by selecting Profile (:).

Non income generating profiles (:)									
Profile name	Technician	Status	Field office	Number of beneficiaries	Investment total	Investment own resources	Investment external resources	Investment per beneficiary	Annual cost per beneficiary
Test Community	Kendra Schneider	Proposal	Generic field office	5,000	14,475.00	7,898.00	6,577.00	2.895	9,601.824   
Sum				5,000.00	14,475.00	7,898.00	6,577.00		
Average				5,000.00	14,475.00	7,898.00	6,577.00	2.895	9,601.824
Total profiles:1									

Export search results:  PDF  XLS  ZIP

Although some forms and screens are different, how to use the software and entering the data is the same, as in income-generating profiles.
Remember: the three symbols on the right let you edit, export and delete the profile.



10. Non-Income Generating Profile (:) – General Information

1 General Information

Complete all the boxes on the form. The names of geographical levels (by department, borough and town) will have been defined by your administrator. The information in Section iii. Technician match the coordinates of the person who opened the session RurallInvest. Finally, select the Sharing option that will be applied to working on a common network with colleagues.

→

i. General Information	iii. Status
Profile name Exchange rate Created by Creation date Last updated Number of beneficiaries Households	Status Proposal
Test Community 48 Monetary Unit per US \$ Kendra Schneider (FAO) 28/10/15 11:59 5000 People 2,468	
ii. Location	iv. Technician
Field office Province Range Village	Name Organization E-mail Telephone Location
Generic field office ▾	Kendra Schneider FAO kschneider5763@gmail.com = Rome
	v. Sharing
	Do you want allow other users to modify this profile? <input type="button" value="Yes"/> <input type="button" value="No"/>
	vi. Attached files You may attach an external file to this profile in this section once step 1 has been saved.

The number of beneficiaries is particularly important for this non-income generating profiles category because it will calculate certain socio-economic indicators.

Remember to save the information by clicking the dark blue button at the bottom right of the screen.

[To Description](#)



10. Non-Income Generating Profiles (:) - Description

2 Description

This form allows you to enter data about the beneficiaries, the objective of the investment project, its main activities and funding sources. Each box can contain as many rows as you need, and will expand gradually as you write. The objectives and activities you insert must come from your discussions with the promoters / beneficiaries and should relate their needs.

i. Name of beneficiary group or person
Youth Association

ii. Description of beneficiaries
Direct Beneficiaries:
The current members of the association total to 250 people.
Indirect Beneficiaries:

iii. Objective and Major Activities
Promoting educational & cultural activities within the community.

iv. Source of funds
Enterprise: Construction
Youth director: Supervision

[To Qualitative Assessment](#)

Remember to save your information by clicking here.



10. Non-Income Generating Profile (:) – Qualitative Assessment

3 Qualitative Assessment

Although investment products will not be sold, the project is only worth being supported if there is a demand for its products.

This applies whether it is a rural track, a school, a health center or a reforestation project that will take advantage of the investment and why?

② Anticipated demand

On the basis population size and data from similar centers in the country it is estimated that the clinic will receive approximately 98 patients per month, for a total of 1,176 patients per year. This is excluding vaccinations.

③ Environmental Impact

The environmental impact is foreseen to be minimal as there will be no significant waste or use of resources.

To Investment Costs

Start chatting with promoters / beneficiaries of the potential environmental impacts of their project(s). If the profile is then approved in the form of a detailed project, they will then provide more information regarding the environment. At this stage, describe what the potential impacts are of the investment project on the environment and natural resources.



10. Non-Income Generating Profile (:) – Investment Costs

4 Investment Costs

Click here to export the data entered in the Excel format screen, download the Excel spreadsheet model before returning to the data or import data directly into RuralInvest using an Excel spreadsheet in the appropriate format.

Download Excel template
 Export data
 Import from Excel



Description	Unit type	Unit number	Unit cost	Total cost	Own resources	External resources	Economic life cycle	Salvage value/unit	Annual reserve				
Building Upgrade	unit	1	10,000.00	10,000.00	5,900.00	4,100.00	25	6,000.00	160.00	  	  		
Equipment	unit	5	35.00	175.00	28.00	147.00	10	20.00	7.50	  	  		
Lighting	Unit	20	5.00	100.00	70.00	30.00	5	1.50	14.00	  	  		
				10,275.00	5,998.00	4,277.00			181.50				

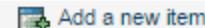


Goods & materials



Description	Unit type	Unit number	Unit cost	Total cost	Own resources	External resources	Economic life cycle	Salvage value/unit	Annual reserve				
Building Upgrade	unit	1	10,000.00	10,000.00	5,900.00	4,100.00	25	6,000.00	160.00	  	  		
Equipment	unit	5	35.00	175.00	28.00	147.00	10	20.00	7.50	  	  		
Lighting	Unit	20	5.00	100.00	70.00	30.00	5	1.50	14.00	  	  		
				10,275.00	5,998.00	4,277.00			181.50				

Labour & services



Description	Unit type	Unit number	Unit cost	Total cost	Own resources	External resources	Economic life cycle	Salvage value/unit	Annual reserve				
Accountant	unit	12	350.00	4,200.00	1,900.00	2,300.00				  	  		
				4,200.00	1,900.00	2,300.00							

Insert the details of the investment costs in one of two categories: **Goods and materials** or **labour and services**. Use the Add Item button to create a new item or the Edit button to edit an item. Additional buttons in the toolbar allow you to copy/clone or delete items.



10. Non-Income Generating Profiles (:) – Investment Costs

The content of the shaded cells is calculated automatically by the software, using the information entered above in the unshaded cells.

Investment Costs

Add a new item (Goods & materials)

Description	Building Upgrade
Unit type	unit
Unit number	1
Unit cost	MU 10,000.00 *
Total cost	MU 10,000.00
Own resources	MU 5,900.00 -
External resources	MU 4,100.00
Economic life cycle	25 year(s)
Salvage value/unit	MU 6,000.00
Annual reserve	MU 160.00

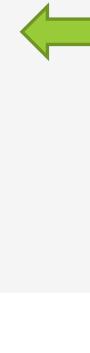
This item is linked to the reference table. Changes to the associated item in the table will be automatically made to this item.

Linked
Linked to: Building Upgrade

Link to a different reference item.

toggle table

toggle table



By clicking on the toggle table, you can view the same screen while viewing other investment items already entered.

Remember: an explanation for each box can be obtained on by selecting the symbol.

Remember to save each form before moving on.

Save item

From this step, the elements that will be repeated later in the profile can be linked to a table of references. To do this you must check the box labeled “Link” in the table of references which will create a link to this chart. A small paperclip symbol will appear next to the referenced item. This is to avoid re-typing the same information.



10. Non-Income Generating Profile (:) – Investment Costs

The Labour & Services form is in the same way as the Goods & Materials forms. Repeated elements can be referenced.

Investment Costs						
toggle table						
Labour & services						
Description	Unit type	Unit number	Unit cost	Total cost	Own resources	External resources
Accountant	unit	12	350.00	4,200.00	1,900.00	2,300.00

Add a new item (Labour & services)

Description	Accountant
② Unit type	unit
② Unit number	12
Unit cost	MU 350.00 *
② Total cost	MU 4,200.00
② Own resources	MU 1,900.00 -
② External resources	MU 2,300.00

This item is linked to the reference table. Changes to the associated item in the table will be automatically made to this item.

Linked
Linked to: Accountant

[Link to a different reference item.](#)

To General Costs

As before, each mini form must be saved before proceeding to the next step.

When all investment items have been entered, save the entire investment costs section by clicking on the General Costs.



10. Non-Income Generating Profiles (:) – General Costs

Inserting the General Costs is done in the same way as the investment costs. The general costs (overhead costs) are those that do not change (or have little change) with the level of output, whether it increases or decreases. For example: Staff salaries, rent, taxes on land, etc.

5 General Costs

General Costs					
Description	Unit type	Unit number per year	Unit cost	Total cost	
Rent	Month	12	500.00	6,000.00	
Salary	month	12	300.00	3,600.00	
Waste removal	weekly	48	5.00	240.00	
				9,840.00	

Add a new item

General Costs

Add a new item (General Costs)

② Description	Rent
② Unit type	Month
② Unit number per year	12
Unit cost	MU 500.00 *
② Total cost	MU 6,000.00

To insert an item select “Add a new Item”. To view or change a previously entered item, click on the Edit button.

Save each section after completion and save the entire General Costs section before moving on to the next section.

[To Activities](#)



10. Non-Income Generating Profiles (:) - Activities

A non-income generating profile may have several activities. For example a health center may (i) deliver care services and (ii) organize an annual immunization campaign for children.

Each activity must be named and defined before the items relating to cost and other information can be inserted into the form.

6 Activities

Add new activity

Annual exams (Check-ups)

Description	
Activity name	Annual exams (Check-ups)
Unit of Activity	patient
Number of units	190
Length of cycle	1 month(s)
Cycles	12 per year

Export data
Edit description
Clone this activity
Import from Excel
Delete activity

Charge - per patient per 1.0 month(s)

Item	Sales unit	Units sold	Unit sale price	Total
Check-up	per visit	215	15.00	3,225.00
				3,225.00

Add a new item

Input/Material cost - per patient per 1.0 month(s)

Item	Unit type	Units used	Unit cost	Transport cost/unit	Total
Scale	unit	2	10.00	3.00	26.00
bandages	case	200	15.00	5.00	4,000.00
					4,026.00

Add a new item

Labour/Professional Services costs - per patient per 1.0 month(s)

Item	Unit type	Units used	Unit cost	Total
Nurse	Week	40	350.00	14,000.00
				14,000.00

Add a new item

Use the **Add New Activity** button at the top right of the screen activity to create a new activity.

When two activities are similar, it is possible to copy an already defined activity and only then change the necessary elements to define the second activity (name of activity in particular). **Click Clone this activity.**



10. Non-Income Generating Profiles (:) – Activities, Description

Description	
Description	Annual exams (Check-ups)
② Unit of Activity	patient
② Number of units	190
② Length of cycle	1 month(s)
② Cycles	12 per year

The number of cycles times the duration of the cycle, can not exceed 12 (months). If a cycle lasts 4 months, the maximum number of cycles is thus 3. However, not all production activity lasts all year (e.g. 2 cycles of maize of 4 months each)



Help is available by clicking this symbol  next to item where more information is needed.

Clicking Add a new activity, can be accessed from the form description of the new activity.

Fill in the boxes and save before going to another screen.



10. Non-Income Generating Profiles (:) – Activities, Costs of Materials & Inputs

Although non-income generating projects are not evaluated according to revenue generated, some may include user fees that cover some of the expenses necessary for the operation of such a structure.

If it is planned to request charges to users for the service provided, insert them in this form.

Charge (Annual exams (Check-ups)) - per patient per 1.0 month(s)		
② Item	Check-up	
② Type of unit	per visit	
② Number of units	215	
② Charge/unit	MU 15.00	
② Total	MU	3,225.00

Labour/Professional Services costs (Annual exams (Check-ups)) - per patient per 1.0 month(s)		
② Item	Nurse	
② Unit type	Week	
② Units used	40	
② Unit cost	MU 350.00	
② Total	MU	14,000.00

All projects have costs associated with their operation (roads, reforestation project, etc.).
Specify the costs that vary with the extent of activity in the forms Cost inputs / materials or labor cost.



10. Non-Income Generating Profiles (:) - References

7 Reference items

Whenever a reference is created for repeated elements in the forms of investment costs, general costs or activities, this element will appear in the Reference Form. A new reference can also be created in the form using the **Add a New Item** button. A mini form will open to add a new element.

Reference items			
Income			
Income	Unit Type	Unit cost	
Check-up	per visit	5.00	   
Check-up	per visit	15.00	   
Flu shot	vaccine	35.00	   
Add a new item			
Goods and services			
Good/service	Unit type	Unit cost	Transport cost
Building Upgrade	unit	10,000.00	   
Lighting	Unit	5.00	   
Rent	Month	500.00	   
Salary	month	300.00	   
Reference items			
Add a new item (Income)			
② Income	<input type="text"/>		
② Unit Type	<input type="text"/>		
② Unit cost	<input type="text"/> MU		
Save item			

Save each form after completing and save the entire reference section before moving on to the next section.

[» To Recommendations](#)



10. Non-Income Generating Profiles - Recommendations

8 Recommendations

Recommendation

Implement without preparing project
 Reject proposal
 Approve for detailed project preparation

Date of recommendation

2 Justification & analysis

[To Summary & Reports](#)

The Recommendations form allows you to give your opinion on the investment project. It must be completed only after consulting the preliminary results in Section 8. Summary & Reports.

- Do not forget to sign your name this form. If you export the files to transmit to your colleagues via email or USB key your name will no longer appear in the General section under Technician.



10. Non-Income Generating Profiles (:) – Summary & Reports

9 Summary & Reports



The Summary & reports allows you to view and print the different stages of the analysis of the draft in a report format. You can use this feature to print the report of each completed section (from 1 to 7), or to generate the complete report with all sections, once completed the entire draft. The section Preliminary benefits calculation is the section that provides the indicators to determine whether the profile is financially stable.

To complete the profile, click Finish.

Congratulations! You have successfully entered a non-income generating profile!



10. Non-Income Generating Profile (:) – Preliminary Estimate of Beneficiaries

The Preliminary estimate of beneficiaries has some financial indicators for the investment project.

Investment of Goods & Materials costs & Labour and Services.

The annual investment reserve is calculated on the basis of investment costs in Goods & Materials only.

Investment Costs of Labour & Services are not included in the calculation of the annual allowance.

The annual cost per beneficiary is equal to the annual expenditure ($D + E$) divided by the number of beneficiaries (G).

Test Community	Non income generating profile (:)
Preliminary benefits calculation	
Total investment (A+B)	14,475
Investment covered by external resources (A)	6,577
Investment covered by own resources (B)	7,898
Total annual charge (C)	14,353,000
Annual operation cost (D)	47,999,280
Annual general cost (E)	9,840
Net annual balance (C-D-E)	-33,656,120
Annual investment reserve (F)	182
Net balance minus annual investment reserve (C-D-E-F)	-33,656,302
Number of beneficiaries (G)	5000
Annual cost per beneficiary ($(D+E)/G$)	9,602
Investment per beneficiary ($(A+B)/G$)	3

The investment per beneficiary is equal to the total investment ($A + B$) divided by the number of beneficiaries (G).



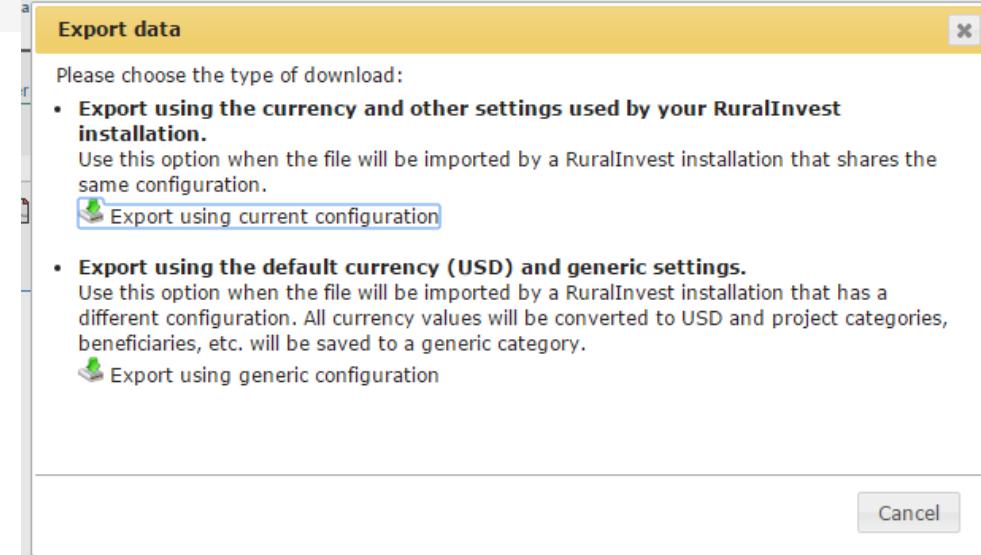
10. Non-Income Generating Profiles (:) - Exporting

Your draft can then be sent electronically to other people who have RuralInvest. To do this, select Drafts (:) from the main menu bar, then Show All. In the list of drafts, find the one you just finished and click on the Download button. Save the corresponding file (extension .riv) on your hard drive or USB key.

The screenshot shows the RuralInvest application window. At the top, there's a navigation bar with links like Home, Profiles (\$), Projects (\$), Search, Help, and Configuration. Below the navigation bar is a search bar labeled 'Quick Search: project (\$)' with a 'go' button. On the left, there's a sidebar with two sections: 'Create Filter' (numbered 1) and 'Search Results' (numbered 2). The 'Search Results' section contains a table titled 'Non income generating profiles (:)' with columns for Profile name, Technician, Status, Field office, Number of beneficiaries, Investment total, Investment own resources, Investment external resources, Investment per beneficiary, and Annual cost per beneficiary. The table shows three rows: 'Test Community', 'Sum', and 'Average'. At the bottom of the sidebar, it says 'Total profiles: 1' and 'Export search results: PDF XLS ZIP'. A green arrow points upwards from the 'Search Results' section towards the top of the page. Another green arrow points downwards from the same section towards the bottom right where the export dialog is located.

After clicking the Download button, a new window will appear with two options to export data:

- 1) Export data using the configuration settings of your RuralInvest, which applies to all users have the same configuration.
- 2) Export the data using the default currency (USD) and RuralInvest basic configuration.



11. Income Generating Projects (\$)

A detailed project can be:

- Created directly using the Create option in the Projects category (\$) in the main menu bar;
- Created from a proposed profile that already exists. In this case you must click on Go to the project in the General Section 1 of the profile (see Part 8. income generating profile (\$) - General). Some data of the profile will be automatically transferred to the draft project (these are indicated in the following by the symbol), but many sections then require adding additional information.
- Created from a proposal for a similar project (see next page copy this project).

The columns that appear on the screen when you click on the Show All option (Project Name, Zone, Status, Total investment, etc. above) depend on the selected system configurations (see Part 13. Configuration system parameters, results of Options).

Search Results											
1 Create Filter		Income generating profiles (\$)									
2 Search Results		Profile name	Technician	Status	Field office	Number of beneficiaries	Investment total	Investment own resources	Investment external resources	Net income after annual reserve	Years to recover investment
Fruit and Vegetable Processing Plant	Kendra Schneider	Proposal	Generic	field office		250	45,950.00	42,035.00	3,915.00	206,100.00	0.2   
Sum						250.00	45,950.00	42,035.00	3,915.00	206,100.00	
Average						250.00	45,950.00	42,035.00	3,915.00	206,100	0.2
Total profiles: 1											
Export search results:  PDF  XLS  ZIP											



11. Income Generating Projects (\$) – General Information

1 General Information

i. General information

- Project name
- User code
- Exchange rate
- Annual rate of inflation
- Start-up month
- Beneficiary
- Environ. category
- Duration
- Category
- Created by
- Creation date
- Last updated

Fruit and Vegetable Processing Plant
1 Monetary Unit per US \$
7 in %
Jan ▾
Generic beneficiary ▾
Generic environmental category ▾
12 year(s)
Generic income-generating category ▾
Kendra Schneider (FAO)
04/09/15 13:32
04/09/15 16:00

The project form asks you to enter additional information in relation to the draft. This includes:

User code: if the organization or institution that you work uses a code to classify the proposals received, enter it in this box.

Current exchange rate: of the local currency against the US dollar (how many units of local currency does it take to \$ 1?).

Annual inflation rate: ask to your administrator if you do not know.

Start Month: the month that the project will start. It is very important for seasonal activities and it will estimate the need for working capital.

Check with the developer what is the most appropriate.

Environmental Category: Environmental analysis that you will make in Section 5 - Durability will determine the environmental category of your proposal.

Beneficiary: choose from the categories that have been predefined by your administrator (see Part 13. System Setup).

Duration: the project duration is the length of time the investment will produce profits. It will calculate in particular the internal rate of return (IRR). Ask your administrator if you do not know how to evaluate it.

- When the entire project is completed, it can be copied in its entirety to establish a similar proposal (click the Copy button in the top right of the project screen 1. General). Once made, change the name of the new project and the information necessary to match the requirements of the new promoter / beneficiary.



11. Income Generating Projects (\$) – General Information

ii. Location

Field office

Generic field office ▾

Province

Rangmati Zila

Range

Bagaichhari Upazila

Village

Boro Durnchhari

Your administrator will have defined the 3 geographical levels (here province, Range and Village) and the different areas (which correspond to the decentralized offices of the Organization / Institution).

Choose from the list, the office that you work for (Field Office) and enter information about the project location in the 3 boxes of 3 geographical levels.

iv. Technician

Name

Kendra Schneider

Organization

FAO

E-mail

kschneider5763@gmail.com

Telephone

=

Location

Rome

Information about the technician who created the project will appear automatically. The information that appears corresponds to the information of the person who opened the RuralInvest section on the computer.

The software allows the person creating the project to decide whether other people can edit it or not. This is useful when working on the same network as a team (Intranet or Internet site). If you select No, your colleagues can consult the draft but will not change the data you have entered.

When you are not working on a common network but on the hard drive of your computer and you export a file on a USB stick for example, this option is not taken into account. Thus the person importing your file can then modify at will, whatever the sharing option chosen initially. On the other hand, when that person imports the file that you created on his/her computer his/her name is the name that will appear in Section iii-technician and not yours.



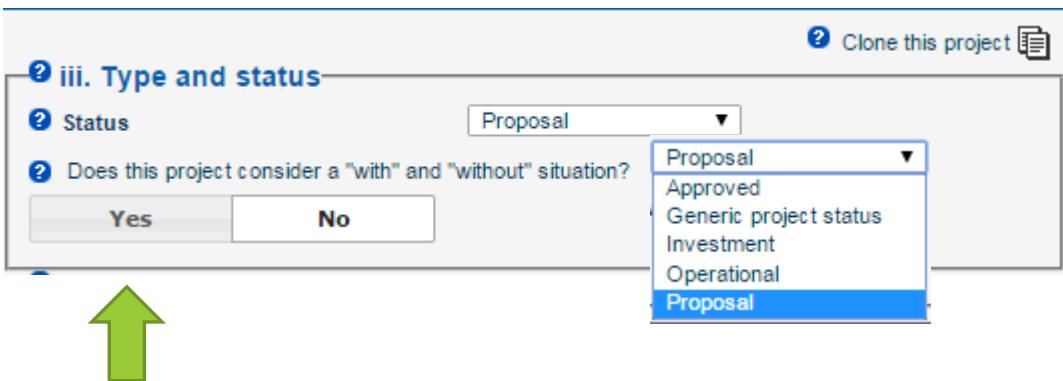
11. Incoming Generating Projects (\$) – General Information

② iii. Type and status

② Status

② Does this project consider a "with" and "without" situation?

Proposal
Approved
Generic project status
Investment
Operational
Proposal



Select project status from the 5 possible statuses (Proposal, Approved, Generic project status, Investment, & Operational).

All projects begin with a proposal. Once approved by the Organization / Institution, you can change their status, which is then used to sort the proposals with this criteria. During the stage of investments, the status is Investment. Which indicates that operational activities are ongoing.

Some investments involve improving existing activities and others require completely new activities. When the investment improves on current activities, it is essential to estimate the results of the situations "**without project**" and "**with project**" and then compare their results to see the benefit "additional" investment. All profits can indeed be attributed to not only investment in this case.

The software allows for the comparison automatically by selecting Yes. Choose this option from the start. Selecting this option in the future (especially after creating a first block in Section 9.) can generate error messages from the software

Save your data by clicking the dark blue button and continue.

To Beneficiaries & donors



11. Income Generating Projects (\$) – Beneficiaries & Donors

2 Beneficiaries & donors

Examples of direct and indirect beneficiaries are given in the help messages of these two categories

② i. Beneficiary group or person
Plant Manager and Women's Development Association members and families

② ii. Direct beneficiaries

Men	41
Women	46
Children	124
Total	211
Households	46

② iii. Indirect beneficiaries

Men	220
Women	290
Children	780
Total	1290
Households	200

② iv. Description of beneficiaries
The project will take place in the city of Santa Cruz that has an estimated number of 300 families. The plant will also serve smaller villages around the city by delivering goods and services.

The description box of beneficiaries will grow as you type the text. However, the length is limited to 10,000 characters.

To Description

Click “To Description” to save your information and continue.



11. Income Generating Projects (\$) - Description

3 Description

The description form includes 3 sections to complete:

- The background and justification of the investment project (how and why this project idea emerged?)
- The project objective (what is the purpose of investment? How Did They will help achieve?)
- The main activities that will be developed through investment (precisely will the project do? What activities will it achieve the get the above results?)

These aspects should be the subject of discussions and exchanges with proponents / recipients to be sure that you understand.

② i. Background and justification

The current production factory has been in use for 20 years and needs to be updated in order to meet the demands of the community.

② ii. Project objective

Increase production and open a market in surrounding areas.

② iii. Principal activities of the project

The company will offer multiple versions of canned fruits and vegetables.

To Technology and training



11. Income Generating Projects (\$) – Technology & Training

4 Technology and training

② i. Technology to be utilised

Technology to be utilised. If the project will utilise any form of technology (e.g. machinery or equipment), describe it and note whether the technology is familiar to the applicants. Are there repair or maintenance facilities available in the area?

② ii. Technical assistance and training requirements

Technical assistance and training requirements. Define any expected training or technical assistance needs, whether in specific skills (e.g. machinery operation, book-keeping, marketing) or in overall management of the project

The information you enter in this section should allow the committee to approve or reject projects & to understand why the technologies proposed for the project are the most appropriate for this project (compared to other technologies available). It should also be noted if the beneficiaries / promoters will know how to use the chosen technology.

Indicate whether they will need technical assistance or specialized training to properly and sustainably use and proposed technologies that will be provided to them. This will of course be discussed with the beneficiaries / promoters. Also include training in management, marketing, hygiene, etc. which is necessary for the proper implementation of the project.

➤ **The costs of these courses will then be included in the project costs.**

To Sustainability



11. Income Generating Projects (\$) - Sustainability

5 Sustainability

② Environmental sustainability/impact

The project should have little direct environmental impact, but it may encourage more settlement which may result in the loss of forests.

③ Anticipated market

The anticipated market will primarily be small vendors and restaurants.

To Organisation & risk

The analysis of the project sustainability is crucial. If an investment is not sustainable, the beneficiaries / promoters will not receive benefits for a short period and soon they will find themselves in the same situation as they were at before the project can be in an even worse situation, since they will be indebted for nothing.

The sustainability analysis includes many aspects, especially environmental impact analysis, market analysis, which ensures that there is indeed a market for products, and analysis of aspects organizational (see next section).



11. Income Generating Projects (\$) – Organization & Risk

6 Organisation & risk

② Organisation and management

The assets will be controlled and owned by a local company, which will run the service under full time management.

You have shown how the promoters / beneficiaries wish to implement and manage the project. This is a crucial aspect.
View Manual Module 3 for more information.

② Principal assumptions and risks

The principal risk is that there may not be enough rain in the dry season to water the crops. Which will result in the loss of products.

To Investment costs

A project always involves risk and therefore assumptions. Thinking about these issues at this stage of project preparation prevents future problems.

What would happen if other producers began to produce the same product as what the project plans? If prices fell sharply? If the equipment does not benefit all members of the organization? If the animals succumbed to an epidemic? There are a lot of questions "what if? "That may arise.

From the analysis of these risks, there can be provided mitigation measures in the project budget, eg. specific technical training of the promoter / beneficiaries to enable them to manage the equipment, management training for the association, etc.



11. Income Generating Projects (\$) – Investment Costs

7 Investment costs

Compared to the profile form, the project form distinguishes an additional cost category: professional services.

This includes for example the cost of an engineer to design investment, technical training or management promoters / beneficiaries, etc.

Add an item or edit an existing item by clicking “Add New Item” or the “Edit” button

Investment costs											
Assets											
Description	Unit type	Number of units	Unit cost	Total cost	Own resources	Donated resources	Financed resources	Economic life (years)	Annual maintenance cost/unit	Salvage value/unit	Replace Yes
Building Upgrade	1	1	220,000.00	220,000.00	10,000.00	0.00	210,000.00	20	11,000.00	44.00	Yes
				220,000.00	10,000.00	0.00	210,000.00				
Add a new item											
Labour											
Description	Unit type	Number of units	Unit cost	Total cost	Own resources	Donated resources	Financed resources	Year begin			
1	p/year(s)	1	3,331.00	3,331.00	6.00	10.00	3,315.00	1			
				3,331.00	6.00	10.00	3,315.00				
Add a new item											
Professional services											
Description	Unit type	Number of units	Unit cost	Total cost	Own resources	Donated resources	Financed resources	Year begin			
8888	88888	88,888	8.00	711,104.00	8,888.00	88,880.00	613,336.00	1			
				711,104.00	8,888.00	88,880.00	613,336.00				
Add a new item											

To General costs

NB: if you have created your project from an existing draft, in terms of costs and revenue, no data is transferred because the information to return are much more detailed.



11. Income Generating Projects (\$) – Investment Costs, Assets

Investment costs

Add a new item (Assets)

?	Description	Storage shed
?	Unit type	unit
?	Number of units	1
?	Unit cost	MU 1,000
?	Total cost	MU 1,000.00
?	Donated resources	MU 500.00
?	Own resources	MU 500
?	Financed resources	MU 0.00
?	Economic life (years)	10
?	Annual maintenance cost/unit	MU 100
?	Salvage value/unit	MU 0
?	Replace	<input checked="" type="checkbox"/>
?	Year begin	1 ▾

Save item

Remember, the toggle table button will allow you to also view the mini form the elements of the investment costs already entered.

The Mini form for project's investment costs is very similar to the profile stage but needs to provide additional information such as: sources of funding (grant, own resources,etc.) and annual maintenance investment costs (they appear under the Maintenance section in the financial tables of results).

The software allows to take into account the replacement of the investment at the end of its useful life by clicking the “Replace” box.

The investment “**Year begin**” box allows you to specify the year the investment is made (default 1 year). The renewal of the investment is financed from own resources, or whatever the grant initially received.

Remember to save before to the next step.



11. Income Generating Projects (\$) – Investment Costs, Labour

The Labour form allows you to enter information on the amount of manpower required in terms of number of night / person person / week/ month / year. This information enables the software to automatically calculate the labour used (jobs created) by the project (the same calculation is made for overheads and production costs).

Investment costs

Add a new item (Labour)

② Description	1
② Unit type	p/year(s)
② Number of units	1
② Unit cost	MU 3,331.00
② Total cost	MU 3,331.00
② Donated resources	MU 10.00
② Own resources	MU 6.00
② Financed resources	MU 3,315.00
② Year begin	1

Save item

As for the goods and professional labour required for the investment that does not start in year 1, this can be adjusted in the “Year begin” box.



11. Income Generating Projects (\$) – General Costs

8 General costs

The mini form for general costs (overheads) in the project stage is very similar to the profile form, but needs to provide additional information on the type of expenses (supplies and services or Personal) and sources, indicative, financing (resources own or external).

- Remember, overhead costs are project costs that do not vary (or little) no matter the level of production.

General costs						
Supplies & services						
Description	Unit type	Number of units	Unit cost	Total cost	Own resources	Cash Cost
6666	6666	666	666.00	443,556.00	666.00	442,890.00
				443,556.00	666.00	442,890.00

Personnel						
Description	Unit type	Number of units	Unit cost	Total cost	Own resources	Cash cost
555	p/year(s)	555	555.00	308,025.00	555.00	307,470.00
				308,025.00	555.00	307,470.00



Own resources corresponding to the resources (ie that do not require monetary payment) available to the promoter to cover part of its general costs, every year are not included in the liquidity plan. To specify a working capital grant (to cover the first year, a portion of overhead costs), refer to Chapter 10. Financial data.

The various elements are entered using mini-forms. To create a new item or modify an already inserted item, click “**Add a new Item**”, or the “**Edit**” button.



11. Income Generating Projects (\$) – General Costs

General costs

Add a new item (Personnel)

② Description	Manager
② Unit type	p/year(s)
② Number of units	1
② Unit cost	MU 555.00
② Total cost	MU 555.00
② Own resources	MU 555.00
② Cash cost	MU 0.00

Mini Personal form to enter information about the amount of labour required in terms of number of person(s) per night / week / month or / year.

General costs

Add a new item (Supplies & services)

② Description	Rent
② Unit type	6666
② Number of units	1
② Unit cost	MU 666.00
② Total cost	MU 666.00
② Own resources	MU 666.00
② Cash Cost	MU 0.00

Each mini form must be saved before proceeding to the next. When all the elements have been entered, save the entire General costs section.

Save item

To Blocks



11. Income Generating Projects (\$) - Blocks

The notion of block is a fundamental concept of RuralInvest. A block reflects activities with production costs and revenue during the same time period. This concept is described in detail in the Manual of Module 3.

9 **Blocks**

A

Production block description

Unit of production	unit
Length of cycle	9 month(s)
Cycles	1 per year
Production cycles (first year)	1 per year
Payment cycles (first year)	1 per year

Production chronology for the first year

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Production/Activity												
Harvest/Sale												
Receipt of Payment												

Production pattern

Year	1	2	3	4	5	6	7	8	9	10	11	12
Number of units of production per cycle	2	4	6	8	10	12	12	12	12	12	12	12

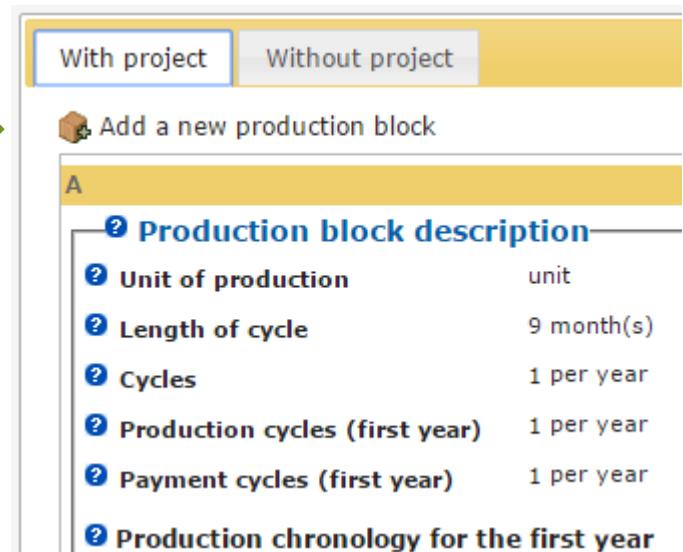


11. Income Generating Projects (\$) - Blocks

9 Blocks

If you want to compare the situation "with project" the situation "without project" (see section iii Type & status under General Information), specify the block type (with or without project).

Click Add a new production block to create a block.



With project Without project

Add a new production block

A

② Production block description

② Unit of production unit

② Length of cycle 9 month(s)

② Cycles 1 per year

② Production cycles (first year) 1 per year

② Payment cycles (first year) 1 per year

② Production chronology for the first year

Choose a relatively short name if it does not appear in full in the reports table.



Production block description

② Production block Corn

② Unit of production unit

② This block has cycles

② Length of cycle 9 month(s)

② Cycles 1 per year

② Production cycles (first year) 1 per year

② Payment cycles (first year) 1 per year

Then describe the characteristics of the block. The cycle time can not exceed one year. Use 12 months as cycle time for permanent crops and non-seasonal activities. The cycle time multiplied by the number of cycles per year obviously can not exceed 12 months, but may be lower than 12 months.



11. Income Generating Projects (\$) - Blocks

The chronology of the production gives a graphic description of the periods of production, harvesting and sale and payment receipts for the first year. This information will be used to calculate the working capital needs for the first year. For simplification of issues, production costs are spread evenly over the entire production period (first line of the calendar). Revenues are attributed to them when the period specified in the third line (payment).

- Remember, the choice of project start month (indicated in 1. General) is crucial to the treasury plan for the first year and the calculation of the need for working capital.

② Production chronology for the first year

Click the calendar to select/deselect chronology items

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Production/Activity (select all)												
Harvest/Sale (select all)												
Receipt of Payment (select all)												

② Production pattern

Year	1	2	3	4	5	6	7
Number of units of production per cycle	2	4	6	8	10	12	12

In the production profile specify the number of block production units that are produced per cycle every year for the duration of the project. You can enter numbers with many decimal places as necessary due to the unit with which you work.

- For example, if the project is to plant fruit trees, you can set 3 blocks production each with a cycle time of 12 months: (i) the seedlings without the production, (ii) the seedlings early production (between 3 and 6 years for example) and (iii) in full production plants (plants from 7 years of age). For the last block production, the number of production units for the year 1-6 is zero. For the year 7, enters the number of seedlings planted in year one, which then enter into full production phase.

The module manual 3 shows the production of block and concepts in more detail production units.



11. Income Generating Projects (\$) - Blocks

As in the Products section of the profile, each block must have information entered about revenues, costs of inputs / materials and the cost of labour. The data must be input per unit of production and production cycle.

Sales income - per unit per 9.0 month(s)								
Item	Sales unit	Units produced	Unit sale price	Quantity used internally (not sold)	Units sold	Transport cost/unit	Total income	Total cash income
Canned Corn	case	500	55.00	50	450	5.00	25,000.00	22,500.00
							25,000.00	22,500.00
Add a new item								
Input/Material cost - per unit per 9.0 month(s)								
Item	Purchase unit	Units used	Unit cost	Quantity drawn from own resources	Quantity purchased	Transport cost/unit	Total cost	Total cash cost
Cans	case	500	175.00	430	70	5.00	90,000.00	12,600.00
							90,000.00	12,600.00
Add a new item								
Labour cost - per unit per 9.0 month(s)								
Item	Unit type	Units used	Unit cost	Quantity drawn from own resources	Quantity purchased	Total cost	Total cash cost	
Quality control managers	p/month(s)	3	1,000.00	0	3	3,000.00	3,000.00	
							3,000.00	3,000.00
Add a new item								



11. Income Generating Projects (\$) - Blocks

The project will depend on the revenues from the sale of its products to cover its expenses and create profits.

The name of the block is indicated here in parenthesis.

Sales income (Corn) - per unit per 9.0 month(s)		
② Item	Canned Corn	
② Sales unit	case	
② Units produced	500	
② Quantity used internally (not sold)	50	
② Units sold	450	
② Unit sale price	MU 55.00	
② Transport cost/unit	MU 5.00	
② Total income	MU 25,000.00	
② Total cash income	MU 22,500.00	

If the sale price indicated here is the market price of the neighboring town, also specify the transport costs per unit to this locality. The transport cost will be deducted from the market price for the calculation of revenues.



11. Income Generating Projects (\$) - Blocks

The information to complete the form is similar to the profile. One difference is that it is necessary to indicate here inputs and labour from the own resources of the promoter, which does not require any monetary payments (eg hand of family labor, crop residues for animals from operating cultures, etc.). Remember transportation costs for items purchased away from the production site.

Remember that the labour must be specified in one of the preset units (eg person/month(s)).

Labour cost (Corn) - per unit per 9.0 month(s)		
② Item	Quality control managers	
② Unit type	p/month(s) ▼	
② Units used	3	
② Quantity drawn from own resources	0	
② Quantity purchased	3	
② Unit cost	MU	1,000.00
② Total cost	MU	3,000.00
② Total cash cost	MU	3,000.00

Input/Material cost (Corn) - per unit per 9.0 month(s)		
② Item	Cans	
② Purchase unit	case	
② Units used	500	
② Quantity drawn from own resources	430	
② Quantity purchased	70	
② Unit cost	MU	175.00
② Transport cost/unit	MU	5.00
② Total cost	MU	90,000.00
② Total cash cost	MU	12,600.00

Save each mini-form when it is completed, and the entire block before moving on to another section.

Save item

» To Reference items



11. Income Generating Projects (\$) – Financial Data

11 Financial data

These forms are used to enter the necessary financial data to calculate the debt service on the basis of equal installments (interest and capital). The administrator will have pre-defined maximum values of certain parameters (eg the maximum duration of the loans of the grace period). You can view these values in Part 13. Configurations

② Primary loan

② Amount	MU	33,600.00
② Annual interest rate		12 %
② Loan duration		10 year(s)
② Grace period - capital		2 year(s)
② Grace period - interest		0 year(s)

The amount of investments to be covered by a loan is automatically shown in the First loan amount. This loan is done automatically in Year 1. If you want a part of this amount is covered by the Second loan, this amount indicated in Second loan and the amount of the First loan will be reduced automatically.

Second loan can also be used to cover investment then occurring (eg expansion of the workshop in the 4th year).

② Secondary loan

② Amount	MU	10,000
② Annual interest rate		12 %
② Loan duration		5 year(s)
② Grace period - capital		1 year(s)
② Grace period - interest		1 year(s)
② Year of Investment		1 ▾

For the interest rate, you must enter the nominal interest rate (paid by the beneficiary), the real interest rate is automatically calculated by the software from the inflation rate entered in Form 1. General Information

When a figure is at second loan for the first year of investment, the amount of the first loan is automatically reduced.



Remember, the grace period does not reduce the cost of a loan, it differs payments resulting in higher payments later.

11. Income Generating Projects (\$) – Financial Data

Most working capital characteristics are calculated automatically by the software, based on the chronology of the production for the first year and the costs and revenue of the various blocks. The term of this loan is 12 months.

You must indicate in addition the annual interest rate short-term loans for working capital (consult your administrator if necessary) and the amount of a possible grant working capital. The subsidized amount is automatically deducted from the amount that will need to borrow.

Working capital	
How is first year working capital estimated?	MU 33,600.00
Amount required	MU 33,600.00
Amount financed	12 month(s)
Financing period	0 %
Annual interest rate	MU 0.00
Capital donated	MU 0.00
Own resources	

Attention: Investments subsidies should not be entered here (they are indicated in the mini forms of investment costs). The sources of funding (investment and working capital) must be specified in the section Organization and risk - Main risks and assumptions.

As always, remember to save.

[To Recommendations](#)



11. Income Generating Projects (\$) - Recommendations

12 Recommendations

Recommendation	Date	
<input type="radio"/> Implement project	01/11/2015	
<input type="radio"/> Reject proposal		
<input type="radio"/> Further review required		

As detailed project is the final stage of preparation, only two options are possible for Recommendations: Implement or reject the proposal. The last should be selected only rarely because the proposal appears infeasible and should be discussed again with the promoters / beneficiaries and revised to be appropriate and feasible (by reducing investment costs, choosing the most appropriate technology, staggering investment, etc.) or simply abandoned if it is not possible to improve.

3 Justification and analysis

Justification and Analysis section should include a sensitivity analysis. This includes changing the value of some key parameters of the project (eg the yield, the selling prices, costs of some inputs, etc.) in order to estimate the sensitivity of the project results to these parameters. If for example a 10% change in prices that the project is no longer profitable, it means that there are significant risks to its implementation. It is then necessary to examine the assumptions. Indicate the results of your sensitivity analysis in this section. Sign at the end of your text with your name and function.

[To Summary & Reports](#)



11. Income Generating Projects (\$) – Summary & Reports

A detailed project is much more complex than a draft, so there are many more reports. Each section has its importance in the analysis of the proposal. The key ratios of financial analysis are: (i) Cash flow shows that if the project will generate enough cash flow to pay all expenses (interest loans and renewal of equipment included) and allow a profit to the promoter, and (ii) financial profitability which presents the results of calculating the internal rate of return of the project and the net present value (used by banks, governments, international organizations to evaluate a project) from financial flows, calculated by considering the costs total investment and the residual value of investments.

Reports

- PDF Excel - Project summary
- PDF Excel - General description of the project
- PDF Excel - Investment detail
- PDF Excel - General costs detail
- PDF Excel - Production pattern
- PDF Excel - Chronology of production
- PDF Excel - Operations income and cost details by block
- PDF Excel - Financial parameters
- PDF Excel - Cash flow (first year)
- PDF Excel - Cash flow
- PDF Excel - Financial profitability
- PDF Excel - Recommendation
- PDF Excel - Complete report

Reports can be generated in two formats: PDF and Excel. Excel format reports can then be used to rework the data if needed (eg for monitoring and evaluation).

Summary tables

- With-project operational income and costs summary
- Donation summary
- Working Capital calculation
- Cash flow
- Financial profitability

Congratulations, you have completed the preparation of a project proposal!

Finish



11. Income Generating Projects (\$) – Summary & Reports

This first report provides a summary of key project indicators (amount, composition and type of investment, finance, job creation, etc.)

FAO

Fruit and Vegetable Processing Plant Income generating project (\$)

Project summary

Location

Field office	Generic field office
Province	Rangmati Zila
Range	Bagaichhari Upazila
Village	Boro Durjhari

Category

generic IG category

Generated employment (persons/equivalent year) 

Investment	1
General	1
Operation (in final year)	3
Total	5

Financial indicators 

IRR (Total investment)	Undefined
NPV (Total investment)	13,639.50
IRR ((applicant))	Undefined
NPV ((applicant))	4,249.50

IRR and NPV are calculated without taking into account subsidies possibly received for investments or the initial working capital (before financing).

The Creation of jobs related to investments (initial and renewal) is calculated from the labor force which came under 7. Investment costs / Labor.

The Creation of jobs related to the cost of production is calculated from the input labor in at 8. Blocks / main cost of work (per unit of production and cycle). It is calculated for the last year of the project.

In the case of a project where a situation "with project" exists, creating jobs in the situation "without project" (calculated from blocks of workforce data "without project") is subtracted from the job creation in the situation "with project" to obtain the additional project creation.

The number of years with a negative cash flow is calculated using cash flow (see Cash Flow Report 1 year) after financing potential investment loans (line balance after funding).

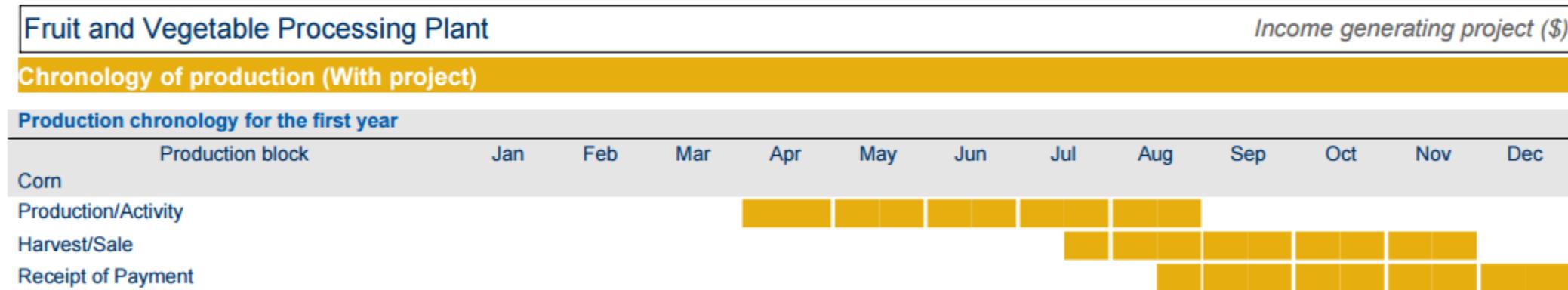


11. Income Generating Projects (\$) – Chronology of Production

This report summarizes the production profile and timing of production of all blocks defined in the project.



FAO



11. Income Generating Projects (\$) – Summary & Reports

The Revenue and Total monetary costs are calculated here. Non-monetary items have been entered as costs in own resources forms.

Operations income and cost details by block (With project)							
Production block: Corn							
Unit of production	unit	Cycles	1 per year	Production cycles (first year)	1 per	1 per	
Length of cycle	9.0 month(s)			Payment cycles (first year)			
Sales income - per unit per 9.0 month(s)							
Item	Sales unit	Units produced	Quantity used internally (not sold)	Unit sale price	Transport cost/unit	Total income	Total cash income
Canned Corn	case	500	50	55.00	5.00	25,000.00	22,500.00
						25,000.00	22,500.00
Input/Material cost - per unit per 9.0 month(s)							
Item	Purchase unit	Units used	Quantity drawn from own resources	Unit cost	Transport cost/unit	Total cost	Total cash cost
Cans	case	500	430	175.00	5.00	90,000.00	12,600.00
						90,000.00	12,600.00
Labour cost - per unit per 9.0 month(s)							
Item	Unit type	Units used	Quantity drawn from own resources	Unit cost		Total cost	Total cash cost
Quality control	p/month(s)	3	0	1,000.00		3,000.00	3,000.00
						3,000.00	3,000.00



11. Income Generating Projects (\$) – Summary & Reports, Cash Flow year 1

General/Overhead costs

Only monetary costs of overheads are taken into account here. The amount in the form Overhead - Own resources (Overheads provided in kind) have been deducted.

Other costs

This line corresponds to the maintenance costs of the investments entered in the mini forms Investment costs - Property - Annual Maintenance Cost

Cash flow (first year) (With project)													
Production block	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Operation income													
Corn	0	0	0	0	0	0	0	5,000	10,000	10,000	10,000	10,000	45,000
Subtotal	0	0	0	0	0	0	0	5,000	10,000	10,000	10,000	10,000	45,000
Operation costs													
Corn	0	0	0	6,240	6,240	6,240	6,240	6,240	0	0	0	0	31,200
Subtotal	0	0	0	6,240	6,240	6,240	6,240	6,240	0	0	0	0	31,200
Other costs													
Maintenance	925	925	925	925	925	925	925	925	925	925	925	925	11,100
General	0	0	0	0	0	0	0	0	0	0	0	0	0
Subtotal	925	925	925	925	925	925	925	925	925	925	925	925	11,100
Monthly cash flow	-925	-925	-925	-7,165	-7,165	-7,165	-7,165	2,165	9,075	9,075	9,075	9,075	2,700
Cumulative cash flow	-925	-1,850	-2,775	-9,940	-17,105	-24,270	-31,435	3,600	24,525	15,450	6,375	2,700	

Operation income and Operation costs

Each line to revenues and production costs is equal to a block of the situation WITH project. Only monetary data is included here (value of home consumption & excluding internal transfers). The revenues and production costs situation WITHOUT project (if it has been entered) are not included in calculations as Cash is a fictional situation only for calculating profitability.



11. Income Generating Projects (\$) – Summary & Reports, Cash flow

Cash flow (With project)								
	1	2	3	4	5	6	7	8
Income								
Main income								
Sales	45,000	90,000	135,000	180,000	225,000	270,000	270,000	270,000
Salvage	0	0	0	0	0	0	0	0
Subtotal	45,000	90,000	135,000	180,000	225,000	270,000	270,000	270,000
Financing sources								
Donation for investment	89,390	0	0	0	0	0	0	0
Own resources for investment	19,394	0	0	0	0	0	0	0
Loans for investment	826,651	0	0	0	0	0	0	0
Loan for working capital	33,600	0	0	0	0	0	0	0
Working capital donation	0	0	0	0	0	0	0	0
Working capital own resources	0	0	0	0	0	0	0	0
Subtotal	969,035	0	0	0	0	0	0	0
Total income	1,014,035	90,000	135,000	180,000	225,000	270,000	270,000	270,000
Expenses								
Investment costs								
Initial investment	935,435	0	0	0	0	0	0	0
Replacement	0	0	0	0	0	0	0	0
Subtotal	935,435	0	0	0	0	0	0	0
Recurrent costs								
Operation	31,200	62,400	93,600	124,800	156,000	187,200	187,200	187,200
General	0	0	0	0	0	0	0	0
Maintenance	11,100	11,100	11,100	11,100	11,100	11,100	11,100	11,100
Subtotal	42,300	73,500	104,700	135,900	167,100	198,300	198,300	198,300
Financing payments								
Working Capital - capital	33,600	0	0	0	0	0	0	0
Working Capital interest	0	0	0	0	0	0	0	0
Primary capital	0	0	85,521	89,797	94,287	99,001	103,952	109,149
Primary interest	40,833	40,833	40,833	36,556	32,067	27,352	22,402	17,205
Secondary capital	0	0	0	0	0	0	0	0
Secondary interest	0	0	0	0	0	0	0	0
Subtotal	74,433	40,833	126,354	126,354	126,354	126,354	126,354	126,354
Total expenses	1,052,168	114,333	231,054	262,254	293,454	324,654	324,654	324,654
Profit before financing	-932,735	16,500	30,300	44,100	57,900	71,700	71,700	71,700
Profit after financing	-38,133	-24,333	-96,054	-82,254	-68,454	-54,654	-54,654	-54,654
Cumulative cash flow	-38,133	-62,465	-158,519	-240,773	-309,226	-363,880	-418,534	-473,187

Sales, Production Costs and Overhead: this data matches the monetary data only (value of consumption, internal transfers, excluding contributions in kind).

Resale value: resale value of investments at the end of their useful life (data entered into investment costs - resale value). grant to the need for working capital if it exists (data entered in Financial Data - Working Capital).

Grant:

Replacement: cost of investment renewal at the end of their useful life (data entered in the form of investment costs - replacement).

Investments made in year 1: The investment costs are shown in the year to cover the expenditure is made. If the cost is covered by loans, the amount is indicated the principal repayment annum (after the table) if they are covered by own resources or 1 year grant, in terms of cash balance is zero and therefore does not appear in the table (balance = Expenses: the amount of investment - Recipes: own resources or grant = 0).



11. Income Generating Projects (\$) – Summary & Reports, Cash Flow

Working capital: It is assumed that the working capital requirement is covered by a short-term loan, and repaid in less than 12 months, so only the interest will appear in this table. Revenue generated in year 1 must be put towards refunding the project if the funding remains in a negative balance.

Capital first / second loan: This amount represents the repayment of capital (data entered under Financial Data - First / Second loan).

First / second loan interest: This amount represents the interests of refund (data entered under Financial Data - First / Second loan).

Reminders: the first loan is only for the investment (the amount is automatically calculated based on the initial investment costs not covered by own resources and subsidies). The second loan can cover other investments made in year 1 or investments made later. Furthermore, the software assumes that the annual fees for each loan (principal + interest) are constant.

Expenses				
Investment costs				
Initial investment	0	0	0	0
Replacement	0	0	1,000	0
Subtotal	0	0	1,000	0
Recurrent costs				
Operation	187,200	187,200	187,200	187,200
General	0	0	0	0
Maintenance	11,100	11,100	11,100	11,100
Subtotal	198,300	198,300	198,300	198,300
Financing payments				
Working capital - capital	0	0	0	0
Working capital interest	0	0	0	0
Primary capital	114,607	120,337	0	0
Primary interest	11,747	6,017	0	0
Secondary capital	0	0	0	0
Secondary interest	0	0	0	0
Subtotal	126,354	126,354	0	0
Total expenses	324,654	324,654	199,300	198,300
Profit before financing				
Excess	71,700	71,700	70,700	71,700



11. Income Generating Projects (\$) – Summary & Reports, Financial Profitability

FAO									
Fruit and Vegetable Processing Plant									Income generating project (\$)
Financial profitability (With project)									
	1	2	3	4	5	6	7	8	9
Income									
Sales	50,000	100,000	150,000	200,000	250,000	300,000	300,000	300,000	300,000
Salvage	0	0	0	0	0	0	0	0	0
Residual	0	0	0	0	0	0	0	0	0
Total	50,000	100,000	150,000	200,000	250,000	300,000	300,000	300,000	300,000
Costs									
Operation	186,000	372,000	558,000	744,000	930,000	1,116,000	1,116,000	1,116,000	1,116,000
Replacement	0	0	0	0	0	0	0	0	0
General	1,221	1,221	1,221	1,221	1,221	1,221	1,221	1,221	1,221
Maintenance	11,100	11,100	11,100	11,100	11,100	11,100	11,100	11,100	11,100
Investment	935,435	0	0	0	0	0	0	0	0
Total	1,133,756	384,321	570,321	756,321	942,321	1,128,321	1,128,321	1,128,321	1,128,321
Net income before donation	-1,083,756	-284,321	-420,321	-556,321	-692,321	-828,321	-828,321	-828,321	-828,321
Donations									
Working capital	0	0	0	0	0	0	0	0	0
Investment	89,390	0	0	0	0	0	0	0	0
Net income after donation	-994,366	-284,321	-420,321	-556,321	-692,321	-828,321	-828,321	-828,321	-828,321

Sales, production and Overhead Costs: These data correspond to the total costs, monetary and non-monetary (value of consumption, internal transfers, including contributions in kind).

Resale value: resale value of investments at the end of their useful life (data entered into investment costs - resale value).

Residual value: value of the investments at the end of the project analysis period.

Replacement: cost of investment renewal at the end of their useful life (data entered in the form of investment costs - replacement).

Investment: capital costs are indicated in the year they are made and not the year they are paid (data entered in the form of investment costs - Investment Year).

Grants (investment and working capital) and financial expenses (related to loans) are not taken into account in calculating financial profitability because it is made before funding.



11. Income Generating Projects (\$) – Summary & Reports, Excel Reports

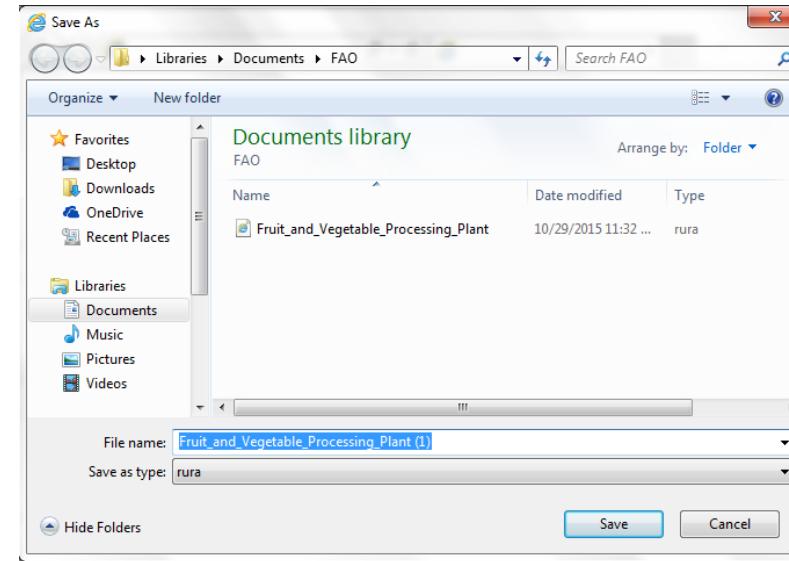
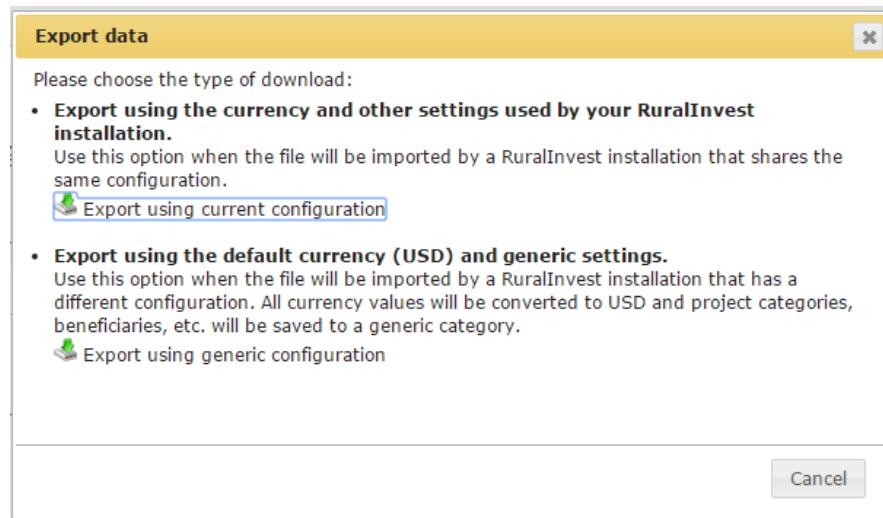
The software also allows you to generate reports in Excel format. Click on the Excel symbol to open a report in this format.

A1	X	✓	fx	Financial profitability (With project)											
1	A	B	C	D	E	F	G	H	I	J	K	L	M		
1	Financial profitability (With project)														
2	Year	1	2	3	4	5	6	7	8	9	10	11	12		
3	Income														
4	Sales	50,000.00	100,000.00	150,000.00	200,000.00	250,000.00	300,000.00	300,000.00	300,000.00	300,000.00	300,000.00	300,000.00	300,000.00	300,000.00	
5	Salvage	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
6	Residual	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	88,826.40	
7	Total	50,000.00	100,000.00	150,000.00	200,000.00	250,000.00	300,000.00	300,000.00	300,000.00	300,000.00	300,000.00	300,000.00	300,000.00	388,826.40	
8															
9	Costs														
10	Operation	186,000.00	372,000.00	558,000.00	744,000.00	930,000.00	1,116,000.00	1,116,000.00	1,116,000.00	1,116,000.00	1,116,000.00	1,116,000.00	1,116,000.00	1,116,000.00	
11	Replacement	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,000.00	0.00	
12	General	1,221.00	1,221.00	1,221.00	1,221.00	1,221.00	1,221.00	1,221.00	1,221.00	1,221.00	1,221.00	1,221.00	1,221.00	1,221.00	
13	Maintenance	11,100.00	11,100.00	11,100.00	11,100.00	11,100.00	11,100.00	11,100.00	11,100.00	11,100.00	11,100.00	11,100.00	11,100.00	11,100.00	
14	Investment	935,435.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
15	Total	1,133,756.00	384,321.00	570,321.00	756,321.00	942,321.00	1,128,321.00	1,128,321.00	1,128,321.00	1,128,321.00	1,128,321.00	1,128,321.00	1,129,321.00	1,128,321.00	



The version of current software is universal and therefore uses dots to separate decimal numbers.

11. Income Generating Projects (\$) – Exporting Files



Your project can then be sent electronically to other people who have RuralInvest. To do this, select **Project (\$)** from the main menu bar, then **Show All**. In the project list, find the one you just completed and click the Download button to export it. Select one of the 2 options shown above for exporting.

Save the corresponding file (extension .riv) on your hard disk or a USB key (by clicking Save). You can then send this file via email, for example, burn it to a CD or transfer by USB key.

- When you save the file the project name will be the default save name. All project proposals must be submitted electronically to the central office of your organization or project. This will feed the database for monitoring and evaluation system (see Part 12. RuralInvest search engine).



12. Non-Income Generating Projects (:)

A detailed project can be:

- Created directly using the Create option in the Projects category (:) in the main menu bar;
- Created from a proposed profile that already exists. In this case you must click on Go to the level project in Section 1. Overview of the draft (see Part 8. Before non-income generating projects (:) - General). Some of the data of the draft will be automatically transferred to the draft project (these are indicated in the following by the symbol), but many sections then require adding additional information.
- Created from a proposal for a similar project (see next page).

Search Results

1 Create Filter

Non income generating projects (:)

Project name	User code	Technician	Field office	Status	Environ. category	Invest. total	Invest. own resources	Invest. donated resources	Invest. financed	Annual employment	Investment per direct beneficiary	Investment per indirect beneficiary	Direct beneficiaries	Indirect beneficiaries
Test Community	Kendra Schneider	Generic	Proposal field office	Generic	environmental category	2,200.00	800.00	1,125.00	275.00	2.17	22.00	22.00	100	100
Sum						2,200	800	1,125	275	2	22	22	100	100
Average						2,200	800	1,125	275	2	22	22	100	100
Total projects	1													

2 Search Results

Export search results: PDF XLS ZIP



12. Non-Income Generating Projects (:) – General Information

The project group asked to enter additional information in relation to the Project. This includes:

User code: if the organization or institution that you work uses a code to classify the proposals received, enter it in this box.

Current Exchange rate: of the local currency against the US dollar. Ask to your administrator for the annual inflation rate if you do not know.

Start Month: the month when the project will start. It is very important for seasonal activities and it will estimate the need for working capital. Analyze with the developer what is the most appropriate.

Environmental Category: Environmental analysis that you will make in section 5. Sustainability will determine the environmental category of your proposal.

Beneficiary: Choose from the categories that have been predefined by your administrator (see Part 13. System Setup).

Duration: the project duration is the project analysis period. This is the time during which investments will produce profits. Ask your administrator if you do not know how to evaluate it.

i. General information

Project name

Test Community

② User code

1 Monetary Unit per US \$

② Exchange rate

Jan

② Start-up month

Generic beneficiary

② Beneficiary

Generic environmental category

② Environ. category

15 year(s)

② Duration

Generic non-income-generating category

② Category

Kendra Schneider (FAO)

② Created by

04/11/15 11:11

② Creation date

Last updated



12. Non-Income Generating Projects (:) – General Information

Your administrator will have defined prior to the dissemination of RurallInvest, the 3 geographical levels (Province, Range, and Village) and the different areas (which correspond to the decentralized offices of the Organization / Institution).

Choose from the list the under Field office and select where you work. Then enter information about the project location in the 3 boxes of 3 geographical levels.

Select project status from the 5 possible statuses (Approved, Generic project status, Investment, Proposal).

All projects begin with a proposal. Once approved by the Organization / Institution, you can change their status, which is then used to sort the proposals with this criterion. During the creation of investments, the status is **Investment**, which indicates that operational activities are ongoing.

ii. Location

Field office	Generic field office ▼
Province	Sainyabuli
Range	Luang Prabang
Village	Phitsanulok

iii. Type and status

>Status

Proposal
Approved
Generic project status
Investment
Operational
FAO

iv. Technician

Name

Organization



12. Non-Income Generating Projects (:) – General Information

② iii. Type and status-

② Status	Proposal ▾
----------	------------

② iv. Technician

Name	Kendra Schneider
Organization	FAO
E-mail	kschneider5763@gmail.com
Telephone	=
Location	Rome

② v. Sharing

Do you want allow other users to modify this project?

Yes	No
-----	----



Information about the person (technician) who created the project will appear automatically. The information that appears corresponds to the information of the person who opened the RurallInvest section on the computer.

The software allows the person creating the project to decide whether or not other people can edit it. This is useful when working on the same network as a team (Intranet or Internet site). If you select No, your colleagues can consult the draft but will not change the data you have entered.

When you are not working on a common network but on the hard drive of your computer and you export a file on a USB stick for example, this option is not taken into account. Thus the person importing your file can then modify at will, whatever the sharing option chosen initially. On the other hand, where that person imports the file on his computer that you created is the name that will appear in the section iii Technician and not yours.



12. Non-Income Generating Projects (:) - Beneficiaries

2 Beneficiaries & donors

② i. Beneficiary group or person
Test

② ii. Direct beneficiaries

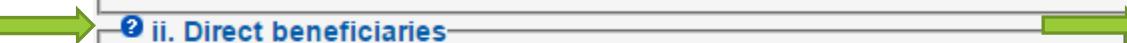
Men	20
Women	20
Children	60
Total	100
Households	20

③ iii. Indirect beneficiaries

Men	20
Women	20
Children	60
Total	100
Households	20

④ iv. Description of beneficiaries
Testing

The description box of beneficiaries will gradually increase as you type text, the length is limited to 10,000 characters.



To Description

Save when done.



12. Non-Income Generating Projects (:) - Description

3 Description

i. Background and justification

Testing

Background and justification. Describe the reasons for which the project is being proposed, what benefits it is expected to bring to the applicant(s) and why it is considered worth funding

ii. Project objective

Testing

Project objective. Briefly describe the principal objective or purpose of the project

iii. Principal activities of the project

Testing

Principal activities of the project. Describe the major activities or elements of the proposed project.

The description form has 3 sections:

The **background and justification** of the investment project (how and why this project idea emerged?)

The **project objective** (what is the purpose of investment? How Did They will help achieve?)

The **main activities** that will be developed through investment (precisely will the project? What activities will achieve the above results?)

These aspects should be the subject of discussions and exchanges with proponents / recipients to be sure that you understand.

To Technology and training



12. Non-Income Generating Projects (:) – Technology & Training

4 Technology and training

Test

?

i. Technology to be utilised

Test

Technology to be utilised. If the project will utilise any form of technology (e.g. machinery or equipment), describe it and note whether the technology is familiar to the applicants. Are there repair or maintenance facilities available in the area?

?

ii. Technical assistance and training requirements

Test

Technical assistance and training requirements. Define any expected training or technical assistance needs, whether in specific skills (e.g. machinery operation, book-keeping, marketing) or in overall management of the project

The information you enter in this section should allow the committee to approve or reject projects, and to understand why the technologies proposed for the project are the most suitable for this project (compared to other technologies available), and if the beneficiaries know and are able to use them.

Indicate whether they will need technical assistance or specialized training to properly and sustainably use and proposed technologies that would be provided to them. This will of course be discussed with the beneficiaries. Also include training in management, marketing, hygiene, etc. All that is necessary for the proper implementation of the project. The costs of these courses will then be included in the project costs.

To Sustainability



12. Non-Income Generating Projects (:) - Sustainability

5 Sustainability

② Operational sustainability (source of funds)

Test.

Operational sustainability (source of funds). Unless user charges are very substantial, once in operation the project will require additional regular resources to keep functioning and meet costs. Where will these resources come from? What guarantees exist that the assumed sources of funds (community, local government, charities etc.) will meet their obligations?

② Environmental sustainability/impact

Test.

Environmental sustainability/impact. Explain whether the project is expected to have any environmental impact, through its effect on forest or tree cover, water resources, land use, wildlife etc. What might be the severity of that impact?

② Anticipated demand

Test.

Anticipated demand. Describe what is known about the demand for the service or product which will be provided by the project. Why is it not being provided already? What are people doing without it? How do you know that there is demand?

The analysis of the project sustainability is a crucial point. For a non-income generating project, three aspects should be considered:

The first aspect is the **operational sustainability** that will be needed to cover the costs of the project, once the investment made. Who will pay for the maintenance of a rural track? Who will pay the nurses of a health center?

The second aspect is **environmental sustainability/impact**. The environmental impact analysis identifies and thus prevent the negative effects on the environment.

- Finally, the analysis of the **demand anticipated**. It ensures that there is a demand for services is meant to bring. Who is the applicant? How applicants will commit to the project?

To Organisation & risk



12. Non-Income Generating Project (:) – Organization & Risk

6 Organisation & risk

2 Organisation and management

Organisation and management. Describe how the project management and control will be structured so as to ensure project sustainability. Who will take the day-to-day decisions? How will that person be supervised? What role will the applicant group play?

Show how the promoters / beneficiaries wish to implement and manage the project. This is a crucial aspect. More information is located in the Module 3 manual.

2 Principal assumptions and risks

Test

Principal assumptions and risks. The feasibility of all projects rest upon key assumptions as to such areas as raw material supply, costs, sales prices, demand and operations. Consider carefully which assumptions are most important for the success of this project and describe why that is so

A project always involves risk and therefore assumptions. Thinking about these issues at this stage of project preparation helps prevent any future problems. We can ask many questions like: "what if this happened, what impact would that have on the project?".

From the analysis of these risks, there can be provided mitigation measures in the project budget, eg specific technical training promoter / beneficiaries to enable them to manage the equipment, management training for the association, etc.

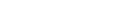
To Investment costs



12. Non-Income Generating Projects (:) – Investment Costs

Compared to the form in the profile, the project form distinguishes an additional category of costs: Professional Services. This includes for example the cost of an engineer to design investment, technical or management training for beneficiaries, etc.

Investment costs												
Assets												
Description	Unit type	Number of units	Unit cost	Total cost	Own resources	Donated resources	Financed resources	Economic life (years)	Annual maintenance cost/unit	Salvage value/unit	Replace Yes	Year begin
Desks	Lump sum	100	10.00	1,000.00	400.00	500.00	100.00	25	100.00	5.00	Yes	2
				1,000.00	400.00	500.00	100.00					

Labour												
Description	Unit type	Number of units	Unit cost	Total cost	Own resources	Donated resources	Financed resources	Year begin				
Building maintainence	p/month(s)	2	350.00	700.00	200.00	350.00	150.00	2				
				700.00	200.00	350.00	150.00					

Professional services												
Description	Unit type	Number of units	Unit cost	Total cost	Own resources	Donated resources	Financed resources	Year begin				
Training sessions	Course	10	50.00	500.00	200.00	275.00	25.00	1				
				500.00	200.00	275.00	25.00					

Attention: If you created your project from an existing draft, in terms of costs and revenue, no data is transferred because the information to return are much more detailed.



12. Non-Income Generating Projects (:) – Investment Costs, Assets

Investment costs

Add a new item (Assets)

?	Description	Desks
?	Unit type	Lump sum
?	Number of units	100
?	Unit cost	MU 10.00
?	Total cost	MU 1,000.00
?	Donated resources	MU 500.00
?	Own resources	MU 400.00
?	Financed resources	MU 100.00
?	Economic life (years)	25
?	Annual maintenance cost/unit	MU 100.00
?	Salvage value/unit	MU 5.00
?	Replace	<input checked="" type="checkbox"/>
?	Year begin	2 ▾

toggle table

Remember, the **toggle table** button allows you to also show the items of the investment costs already entered.

The mini form for the project's investment costs is similar to that of income-generating projects.

It needs to provide the funding sources (own resources or grant) and annual maintenance costs of the investments, the software deducting financing needs to search.

The software allows to take into account the replacement of the investment asset at the end of its useful life by clicking the **Replace** box.

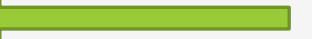
The **Year begin** box is to specify the year the investment is made (default year 1). The renewal of the investment is financed from own resources, whatever the grant initially received.



12. Non-Income Generating Projects (:) - Labour

Investment costs

Add a new item (Labour)

② Description	Building maintainence	
② Unit type	p/month(s) ▼	
② Number of units	2	
② Unit cost	MU	350.00
② Total cost	MU	700.00
② Donated resources	MU	350.00
② Own resources	MU	200.00
② Financed resources	MU	150.00
② Year begin	2 ▼	

The **Labour** form allows you to enter information about the amount of manpower required in terms of per person night / day / week / month / year. This information enables the software to automatically calculate the labour used (jobs created) by the project (the same calculation is made for the cost of production).

As for the **Professional Services**, the labour required for the investment does not necessarily begin in year 1. This can be changed in this box.

To General costs



12. Non-Income Generating Projects (:) – General Costs

8 General costs

General costs						
Inputs/materials						
Description	Unit type	Number of units	Unit cost	Total cost	Donated resources	Total amount of uncovered resources
electricity	month	12	12.00	144.00	70.00	74.00
				144.00	70.00	74.00
						 
						 Add a new item
Labour						
Description	Unit type	Number of units	Unit cost	Total cost	Donated resources	Total amount of uncovered resources
Receptionist	p/month(s)	12	300.00	3,600.00	2,500.00	1,100.00
				3,600.00	2,500.00	1,100.00
						 
						 Add a new item
General costs/maintenance						
Description	Unit type	Number of units	Unit cost	Total cost	Donated resources	Total amount of uncovered resources
Cleaning	week	40	15.00	600.00	450.00	150.00
				600.00	450.00	150.00
						 
						 Add a new item

The General Costs form requires additional information on the sources of funding (public funds, other funding sources and own resources) and type of overheads (Inputs /materials, Labour, & General costs/maintenance). Remember, general (overhead) costs are project costs that do not vary (or vary little) whatever the level of production. Investment maintenance costs need not be shown here because they have already been given in Section 7. Investments.



12. Non-Income Generating Projects (:) – General Costs

For each cost component, remember that this cost is not covered by public funds (central government or local authority) or by another funding source (NGOs, etc.) the cost will be covered by the own resources of recipients (in kind or in monetary terms).

The institution which finances the investment does not always contribute to financing general (overhead) costs as it were recurring costs.

General costs		
Add a new item (Inputs/materials)		
② Description	electricity	
② Unit type	month	
② Number of units	12	
② Unit cost	MU	12.00
② Total cost	MU	144.00
② Donated resources	MU	70.00
② Total amount of uncovered resources	MU	74.00

[To Activities](#)

Each form must be saved before proceeding to the next. When all the elements have been entered and saved, click on **To Activities**.



12. Non-Income Generating Projects (:) - Activities

A non-income generating project can include a number of activities.

It is necessary to identify the costs of each activity. If it is intended to charge a user fee to cover the general costs it is important to indicate it here.

- Make sure that beneficiaries understand the concept of user fee before including them in the project.

Writing Course

Activity description

Unit of Activity	week
Length of cycle	20 week(s)
Cycles	2 per year

Activity pattern

Year	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Number of units of activity per cycle	1	1	1	1	1	0	1	1	1	1	1	1	1	1	1

User charge - per week per 20.0 week(s)

Description	Type of unit	Number of units	Charge/unit	Total
Class in writing	semester	2	45.00	90.00
				90.00

Add a new item

Input/Material cost - per week per 20.0 week(s)

Item	Purchase unit	Units used	Unit cost	Quantity drawn from own resources	Quantity purchased	Transport cost/unit	Total cost	Total donated resources	Total cash cost
Notebooks case	5	20.00		2	3	5.00	100.00	25.00	50.00
							100.00	25.00	50.00

Add a new item

Labour cost - per week per 20.0 week(s)

Item	Unit type	Units used	Unit cost	Quantity drawn from own resources	Quantity purchased	Total cost	Total donated resources	Total cash cost	
Teacher	p/month(s)	1	1,500.00		1	0	1,500.00	0.00	0.00
							1,500.00	0.00	0.00

Add a new item



12. Non-Income Generating Projects (:) - Activities

Activity description							
② Activity	Writing Course						
② Unit of Activity	week						
② This block has cycles	<input checked="" type="checkbox"/>						
② Length of cycle	20						
② Cycles	2 per year						
② Activity pattern							
Year	1	2	3	4	5	6	7
Number of units of activity per cycle	1	1	1	1	1	0	1

Each project activity should be defined by a name, a unit of the activity, duration of the production cycle and the number of cycles per year. The unit of activity can be by client, job within the business, or for the whole activity. To define it, consider how the costs will be expressed or royalty of users. The user fee is usually expressed per person or client. For many services, the cycle is the month because it is at this date that are usually paid costs (electricity, salaries, etc.).

You must then indicate the number of units per production cycle for each year. When the unit is the customer, this means insert at how many people it is intended to deliver the service cycle for each year.

Save item



12. Non-Income Generating Projects (:) - Activities

As for the investment costs, a mini-form can be opened for each type of user fee or cost relating to the activity.

An activity can have multiple types of user fees (eg in case of medical treatment, a fee for children and one for adults).

User charge (Writing Course) - per week per 20.0 week(s)		
② Description	Class in writing	
② Type of unit	semester	
② Number of units	2	
② Charge/unit	MU	45.00
② Total	MU	90.00



Input/Material cost (Writing Course) - per week per 20.0 week(s)		
② Item	Notebooks	
② Purchase unit	case	
② Units used	5	
② Quantity drawn from own resources	2	
② Quantity purchased	3	
② Unit cost	MU	20.00
② Transport cost/unit	MU	5.00
② Total cost	MU	100.00
② Total donated resources	MU	25.00
② Total cash cost	MU	50.00

If inputs are purchased outside the local area, transport costs must be added.



12. Non-Income Generating Projects (:) - Contributions

10 Contributions

Annual contributions

Add a new item

② Description	Sorority
② Contributor	Not specified ▾
② Unit type	year
② Unit number	1
② Unit amount	MU 10,000.00
② Total contribution	MU 10,000.00

Non-income generating projects bring in little/no money & to produce enough resources to cover the costs of their activities (even by levying user charges), it is necessary to detail all contributions received to determine whether activities related costs are to be covered .

This form specifies all the contributions that the project hopes to receive to cover costs related to the activities listed in Section 9. Activities.

Please note, contributions to general costs (overheads) do not have to be listed here, they should be referred directly to section 8. Overheads (Amount of public funds of state and Sources of funding).

Annual contributions

Description	Contributor	Unit type	Unit number	Unit amount	Total contribution					
Sorority	Not specified	year	1	10,000.00	10,000.00					
Fraternity	Not specified	year	1	10,000.00	10,000.00					
				20,000.00						

To Reference items



12. Non-Income Generating Projects (:) – Reference Items

As with other types of projects, whether pre-projects or projects, the technician who supports the formulation of the proposal must indicate his opinion in this section and if he thinks that the project should be funded or not.

Sign at the end of your text with your name and function.

Given the importance of production costs and annual overhead for such non-income generating projects, expand if the identified external contributions have already been the subject of an agreement or not (sources of financing, etc.).

12 Recommendations

Recommendation

Implement project Date

Reject proposal

Further review required

② Justification and analysis

Justification and analysis. Explain why, in your opinion, the project is worth financing and implementing. This section should ALWAYS include a brief summary of the results of changing assumptions as to investment and operating costs, demand and output prices, among other things. Such changes are readily made using RuralInvest by modifying key costs, prices and other indicators and noting the change in returns and profitability

To Summary & Reports



12. Non-Income Generating Projects (:) – Summary & Reports

The Summary & Reports section allows you to generate reports in PDF or complete section. Project Sustainability The report will indicate if the more royalties contributions sufficient to cover the estimated costs.

13 Summary & Reports

Reports

- PDF Excel - Project summary
- PDF Excel - General description of the project
- PDF Excel - Investment detail
- PDF Excel - General costs detail
- PDF Excel - Activity pattern
- PDF Excel - Operations income and cost details by activity
- PDF Excel - Contributions
- PDF Excel - Operational Sustainability
- PDF Excel - Recommendation
- PDF Excel - Complete report

Summary tables

- With-project operational income and costs summary
- Donation summary
- Operational Sustainability

Finish



12. Non-Income Generating Projects (:) – Summary & Reports

This first report provides a summary of key project indicators (amount, composition and type of investment, job creation, etc.)

FAO

Test Community	Non income generating project (:)
Project summary	
Location	
Field office	Generic field office
Province	Sainyabuli
Range	Luang Prabang
Village	Phitsanulok
Category	
generic NIG category	
Generated employment (persons/equivalent year)	
Investment	1
General	1
Operation (in final year)	0.1667
Total	2.1667

The creation of jobs related to investments (initial and renewal) is calculated from the labor force seized 7. Investment costs /labour.

Creating activity costs related jobs is calculated from the labor amount. Or Activities / main cost of work (per unit of activity per cycle). It is calculated for the last year of the project.



12. Non-Income Generating Project (:) – Operational Sustainability

This report takes into account the project costs and revenues available outside of the costs and revenue associated with investment (initial investment costs, renewal, maintenance costs and possibly related subsidies).

Test Community		Non income generating project (:)								
Operational Sustainability										
	1	2	3	4	5	6	7	8	9	10
Income										
Investment: Donated	625	500	0	0	0	0	0	0	0	0
Investment: Own resources	400	400	0	0	0	0	0	0	0	0
Salvage	0	0	0	0	0	0	0	0	0	0
User charges	1,600	1,600	1,600	1,600	1,600	0	1,600	1,600	1,600	1,600
Contributions to general costs	3,020	3,020	3,020	3,020	3,020	3,020	3,020	3,020	3,020	3,020
Contributions	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000	20,000
Total	25,645	25,520	24,620	24,620	24,620	23,020	24,620	24,620	24,620	24,620

The data of the first three lines are from the Section 7. Investment costs.

Contributions to general costs corresponds to external contributions entries under 8. Overheads (Amount of public funds of state and Sources of funding).

The data regarding user charges is from Section 9. Activities

Contributions is from section 10.



12. Non-Income Generating Projects (:) – Operational Sustainability

Costs										
Investment costs	1,200	1,000	0	0	0	0	0	0	0	0
Replacement	0	0	0	0	0	0	0	0	0	0
Investment maintenance	0	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
Operation	3,250	3,250	3,250	3,250	3,250	0	3,250	3,250	3,250	3,250
General costs	4,344	4,344	4,344	4,344	4,344	4,344	4,344	4,344	4,344	4,344
Total	8,794	18,594	17,594	17,594	17,594	14,344	17,594	17,594	17,594	17,594
Net balance	16,851	6,926	7,026	7,026	7,026	8,676	7,026	7,026	7,026	7,026

The data of the first three lines are from the Section 7. Investment costs

Operation data is from Section 9. Activities

General costs data comes from Section 8. General costs. This is the total expenditure, including contributions.



12. Non-Income Generating Projects (:) – Summary & Reports, Excel

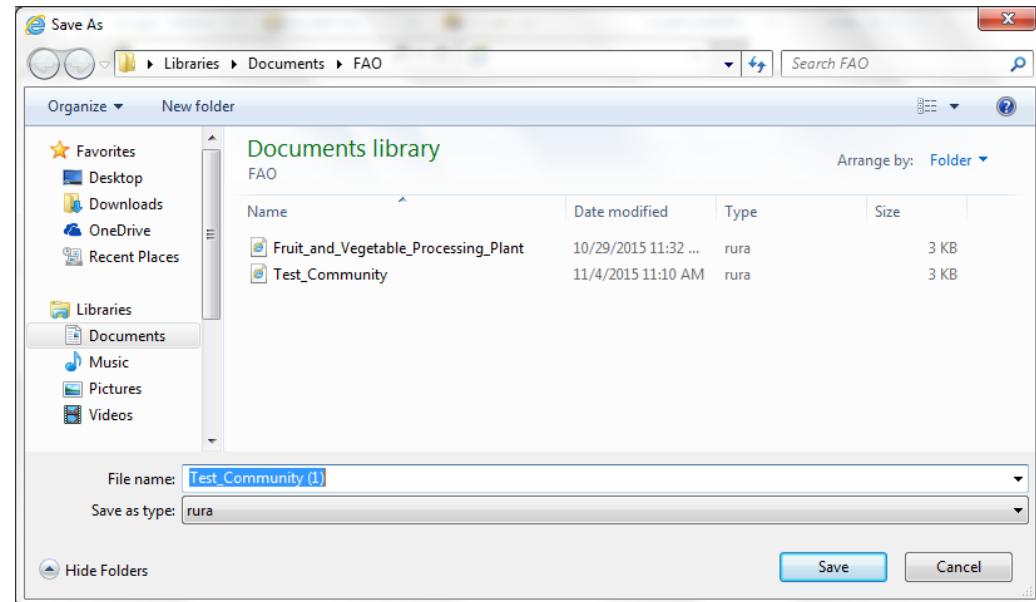
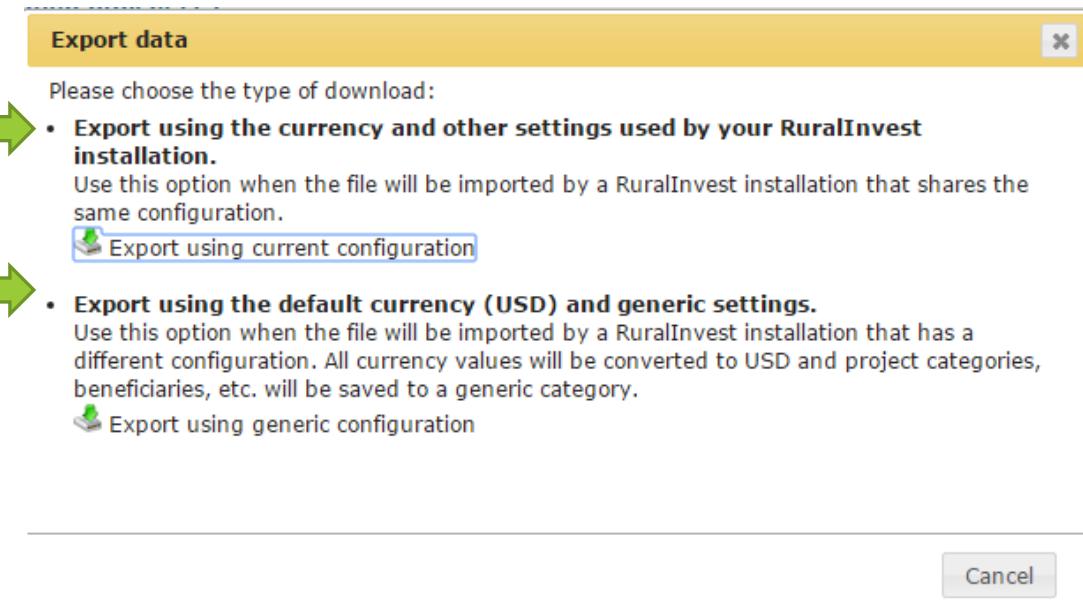
The software also allows you to generate reports in Excel format.
Click on the Excel symbol to open a report in this format.

A	B
1 Preliminary benefits calculation	
2 Total investment (A+B)	14,475.00
3 Investment covered by external resources (A)	6,577.00
4 Investment covered by own resources (B)	7,898.00
5 Total annual charge (C)	14,353,000.00
6 Annual operation cost (D)	47,999,280.00
7 Annual general cost (E)	9,840.00
8	
9 Net annual balance (C-D-E)	-33,656,120.00
10 Annual investment reserve (F)	181.50
11 Net balance minus annual investment reserve (C-D-E-F)	-33,656,301.50
12	
13 Number of beneficiaries (G)	5000
14 Annual cost per beneficiary ((D+E) / G)	9,601.82
15 Investment per beneficiary ((A+B) / G)	2.90



The version of current software is universal and therefore uses dots to separate decimal numbers.

12. Non-Income Generating Projects (:) – Exporting



Your project can then be sent electronically to other people who have RuralInvest. To do this, select **Project (:)** from the main menu bar, then **Show All**. In the project list, find the one you just completed and click the Download button to export it. Then choose one of the 2 options shown above for exporting a project. Save the corresponding file (extension .riv) on your hard disk or a USB key (by clicking Save). You can then send this file via email, for example, burn it to a CD or transfer by USB key. The default name will be the name you named your project in the section **General Information**. All project proposals must be submitted electronically to the central office of your organization or project. This will feed the database for monitoring and evaluation system (see Part 12. RuralInvest search engine).



13. Search Engine

The search engine can be accessed directly from the main menu bar by clicking Search in RurallInvest or select Create Filter from the screens accessed by clicking on Show All.

1 Create Filter

2 Search Results

Non income generating projects (:)

Project name	User code	Technician	Field office	Status	Environ. category	Invest. total	Invest. own resources	Invest. donated resources	Invest. financed	Annual employment	Investment per direct beneficiary	Investment per indirect beneficiary	Direct beneficiaries	Indirect beneficiaries
Test Community	Kendra Schneider	Generic	Proposal field office	Generic environmental category	2,200.00	800.00	1,125.00	275.00	2.17	22.00	22.00	22.00	100	100
Sum					2,200	800	1,125	275	2	22	22	22	100	100
Average					2,200	800	1,125	275	2	22	22	22	100	100
Total projects	1													

Export search results: [PDF](#) [XLS](#) [ZIP](#)

The search engine allows the user to sort the projects according to certain criteria such as the location, the type of projects, type of beneficiary or project status. This is very useful for the central level who will make a lot of follow when evaluating projects were created but also for the regional level for monitoring and management.



13. Search Engine

The search engine allows the user to sort the projects according to certain criteria such as the location, the type of projects, type of beneficiary or project status. This is very useful for the central level who will make a lot of follow when evaluating projects were created but also for the regional level for monitoring and management.

Search by keyword can be combined with the filters below.

Search filter used to select certain values open filters, in which case the software considers all categories of the filter (no special selection).

Using the CTRL key you can select multiple criteria in the same list (for example in select North and South Zone).

The screenshot shows the 'Search & Reports' interface. On the left, there are two main sections: '1 Create Filter' and '2 Search Results'. A green arrow points from the 'Create Filter' section to the search criteria area. The 'Search Criteria' section includes a search bar with dropdown options for 'project (\$)', 'profile (\$)', and 'profile (:)' under 'Search for:'. Below this are several filter dropdowns: 'Filter by:' (Field office: Adamawa, Centre, Est, Extrême Nord), 'Status' (Approved, Generic project status, Investment, Operational), 'Technician' (Kendra Schneider, Fernanda Mayer Silveira), 'Category' (Generic income-generating, Generic non-income-gen), 'Beneficiary' (Children, General, Generic beneficiary, Men), and 'Environ. category' (Generic environment). At the bottom, there are fields for 'IRR', 'NPV', 'Invest. total', and 'Invest. donated resources' with their respective values (MU 0.0, MU 0.0, MU 0.0).

Profiles and projects can be searched using one or more words in their name. It is often a fast and efficient way to find a proposal.



13. Search Engine

Search Criteria

Search for: project (\$) ▾

Filter by:

Field office: Adamaoua, Centre, Est, Extrême Nord

Status: Approved, Generic project status, Investment, Operational

Technician: Kendra Schneider, Fernanda Mayer Silveira

Category: Generic income-generati, Generic non-income-gen

Beneficiary: Children, General, Generic beneficiary, Men

Environ. category: Generic environm

IRR, NPV, Invest. total, Invest. donated resources

equal to, greater than or equal to, less than or equal to

MU, MU, MU

Use CTRL key for multiple selection and to deselect

Use CTRL key for multiple selection and to deselect

If the project is selected, the selection of filters is more complete.

The last part of the filter allows the user to search for projects that have a rate of return equal to, above or below a certain level to be indicated (10 indicated 10% for example). The same can be done for the net present value, the total investment and the subsidized investment.

The research results are available in PDF and Excel formats.



14. Assistance



Home Profiles (\$) Projects (\$) Projects (:) Search Help Configuration
User Manuals Frequently Asked Questions (FAQ) About

User manuals

1 User manuals

2 Frequently Asked Questions (FAQ)

3 About

User Manuals

Each Technical Manual (Modules 1-3) can be downloaded from your session. These manuals describe the investment project formulation method of small to medium size. Annex 2 2 Manual in electronic format as well as this user's manual of the software are also available in this section.

Frequently asked questions

Quick answers to a number of frequently asked questions are available in this section.

About

This section provides a quick summary of the objectives of RuralInvest method.



14. Assistance

When using the software, in case of occurrence of an error message, immediately take a screenshot by pressing Ctrl and Prnt Scrn (Screen Printing).

Then open your picture / photo software (eg Windows Paint in Start / Programs / Accessories / Paint). Paste your screen image (Edit / Paste) and then save it as JPG (File / Save As).

Then send the file to the focal point of your organization forward in FAO. Specify well under what exact circumstances occurred this error message.

The RuralInvest FAO team will endeavor to solve your problem. Thank you for your comments on the software that will enable us to improve.



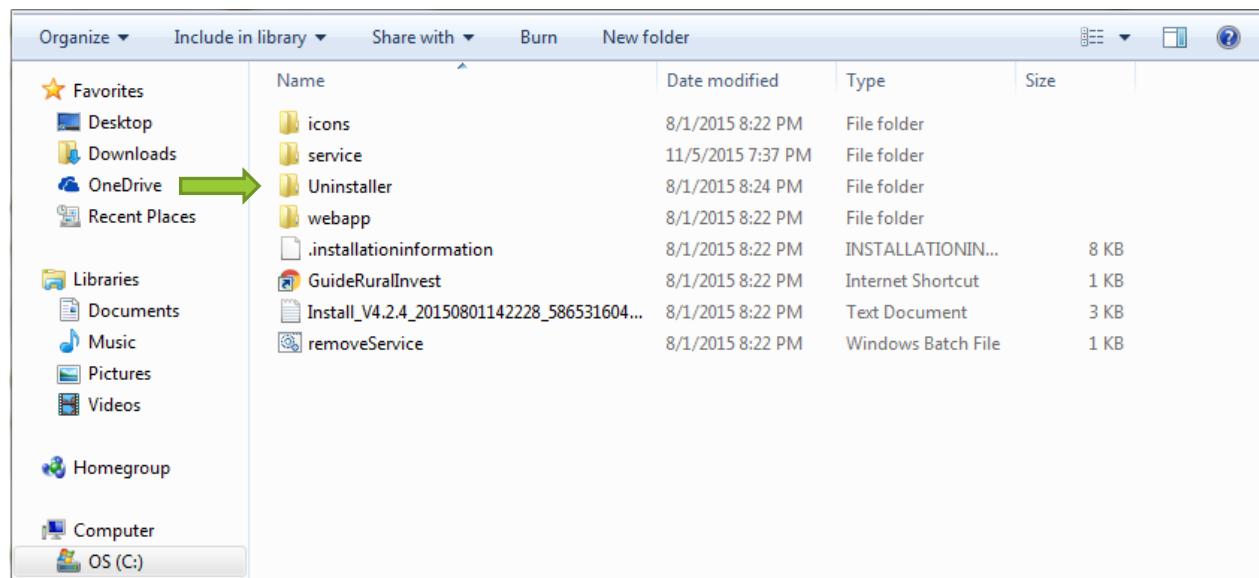
15. Uninstalling the Software

If necessary, you can uninstall the RuralInvest software.

ATTENTION: the uninstallation removes the database that stores your profiles and projects. Before uninstalling, it is necessary prior to export all your files and save them on your hard drive (see Section 3. Installation).

On your computer, look for \ RuralInvest \ Uninstaller (usually in C:\ Program Files, locate and click `uninstaller.jar`.

This confirmation screen will appear:



If this window appears, you will need an IT administrator to uninstall RuralInvest.

