“Tools for” searching the GATEWAY

15 July 2010 (revised Oct 2013)

Background

This Quick Guide shows how to use the GATEWAY button to facilitate search for information and documents in the GATEWAY.

The button is located in every Fund, Project, Country, Participating Organization, and Donor Factsheet page to facilitate the search for information by limiting it to within that context’s data set. For example, when searching for documents using the Tools for button from the Project Factsheet, the search results will show documents uploaded under that specific project.

The Tools for dropdown options include searching for documents, voucher or contribution details; using the map to locate information by geographical location; or View the Progress Monitor for charting financial information. The dropdown options will vary depending on whether the search is on a Fund, Project, Country, Participating Organization, or Donor Factsheet page. Examples below are for Tools for options under Project and Donor Factsheets.

Step-by-step instruction:


2. Go to the selected Fund, Project, Country, Participating Organization, or Donor Factsheet page.

For this example, we will select a Country Factsheet from the drop down menu. The dropdown options here are: Search all documents to view country related documents; Search all projects to show country project info; View Progress Monitor to show country’s total budget, transfer and expenditures chart; Search payment voucher details to view transfers to projects in selected country.
(a) The **Search all documents** option shows all documents under that Factsheet (in this case Country). The number of records appear at the top of the table, with the most recent upload at top of list. The listing can be re-sorted by clicking on the column heading.

![Document search](image-url)

Under the Fund Factsheet **Search all documents** option, project documents under that fund will also appear on the list of documents.

(b) The **Search all projects** view provides detailed information for the selected Factsheet. Click on the **Project** field to include the project IDs, and on **Project status**. Click on **Refresh** to show results. Click on the field to include it in the data records.

![Projects](image-url)

(c) **View Progress Monitor** option shows budget, transfer and expenditure data as well as relevant documents.
The document links will default to show Annual and Quarterly Progress Reports. Click on the Document Types dropdown to select other document types to show.

(d) The Search payment voucher details will show latest payment vouchers from the MPTF Office for that Factsheet. This option is also available under Organization, Project and Fund Factsheets. The Transfer date will show date ranges for the selected results, and can be modified.

To move from one option under the “Tools for” to another option, please go back to the Factsheet page.

3. The Fund Factsheet page “Tools for” has added options such as Map where the funds are going, Map where the funds are coming from, as well as Search contribution details.
(a) The **Map where the funds are going** will provide info on geographical distribution of the funds, with options to filter for specific donor or agency. Click on the circle for information on the financial data in that location. Click on Projects to get project information.

(b) **Map where the funds are coming from** will locate the donor contributions on the map. Click on the circle for information on donor commitments and deposits.

(c) The **Search contribution details** provides donor contributions data, with added options to modify the date range and add account details to view any foreign exchange gain/loss.

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