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Login Screen

Go to www.ftfms.net

Enter your full e-mail address (such as kawest@USAID.gov)

Enter your password from last year. Or enter your temporary password if you are a new user or forgot your old password (see “forgot password” box below). A password reset screen will appear. FTFMS passwords last for 90 days.

Click the “Forgot Password” link to have a temporary password sent to your e-mail address. You will be asked to change your password when you log in with the temporary password.

Once the ‘Forgot Password’ link is clicked, FTFMS will prompt you to enter your Username, which is your full email address. Enter your Username and click ‘Send Email’ to have FTFMS send you a temporary password that must be changed after being used. See next screenshot for instructions for the ‘Change Password’ screen.
In the ‘Change Password’ screen, you must create a password that meets the password requirements listed on the screen. You can have the system auto-generate a new password that will meet the password criteria by clicking the ‘Auto-Generate’ button.
Use the menu to navigate from screen to screen, or click on the links at the bottom of the Home Page. *(You will only see the menu options you need.)*
Enter Mechanism Information Screen

Go to this option on the menu
Enter Mechanism Information Screen: Current Selection

--USAID Missions / Offices: Choose your Mission or Office from the drop-down menu (should be the only option) and click “Go.”

--Implementing partners: You will be able to select your IM (the one(s) assigned to you in your system user profile)....Email Support@FTFMS.net and copy your USAID contact to request additional access.

--Other USG Agencies: Select your office/post/project, as applicable. You will only be able to see projects in your Agency.

You can export the list of mechanisms to Microsoft Excel.
Enter Mechanism Information: IM List

**IM Details:** Each row in the list is a different IM / project / activity. Click on the pencil icon in the “IM Details” column to see more identifying information about each one. A pop-up screen will appear. See next screenshot.

**Mission users / Agency POCs:** Click on the green checkmark to hide an IM that is a duplicate or will not be used (e.g. “Program Support” or a similar IM), or is closed out. IMs can be recovered by selecting “display hidden projects” at the right.

<table>
<thead>
<tr>
<th>ID</th>
<th>Award Number</th>
<th>Implementing Mechanism</th>
<th>Prime Partner</th>
<th>Total Indicators</th>
<th>FY Created</th>
<th>IM Details</th>
<th>Configure Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td>X 4261</td>
<td>TBD</td>
<td>Agriculture Policy Support</td>
<td>TBD</td>
<td>0</td>
<td>2013</td>
<td></td>
<td></td>
</tr>
<tr>
<td>X 42234</td>
<td></td>
<td>Cassava III Supplement</td>
<td>International Institute of Tropical Agriculture, The</td>
<td>1</td>
<td>2012</td>
<td></td>
<td></td>
</tr>
<tr>
<td>X 42324</td>
<td>AID-023-A-09-00014</td>
<td>Farmers to Market (Paul Carlson Partnership)</td>
<td>The Paul Carlson Partnership</td>
<td>1</td>
<td>2009</td>
<td></td>
<td></td>
</tr>
<tr>
<td>X 42229</td>
<td>AID-023-C-11-00008</td>
<td>Food Production Processing and Marketing Activity (FPPM)</td>
<td>Development Alternatives, Inc.</td>
<td>0</td>
<td>2012</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
IM Details:

This screen appears after clicking on the pencil icon in the “IM Details” column (see “Enter Mechanism Information” screen – previous screenshot).

Make sure basic implementing mechanism information is correct.

**USAID staff:** You must enter updates or corrections in your Operational Plan (OP) in the NextGen system (formerly FACTSInfo), since our systems are connected. Then changes will appear in FTFMS the next day. Let us know if you need help communicating to your Program Office to make these changes.

**Other USG Agencies:** You can make updates/edits directly in FTFMS.

**Implementing Partners:** Alert your USAID POC if you notice any data here is incorrect or incomplete.

Please contact us at Support@FTFMS.net if you are unable to locate an implementing mechanism, activity, or project.
FOR USAID only:
Most IMs were transferred from your OU’s Operational Plan via NextGen (formerly FACTSInfo). For FACTSInfo-transferred IMs, fields with a red “*” are locked in FTMS. Edits to these fields must be made to your Mission’s 2016 OP in NextGen (NextGen pushes updates to FTMS daily).

Some IMs are created in FTMS directly. This is usually done to create a placeholder when an IM does not appear in the OP for some reason. In this case, fields with a red “*” will be unlocked and you can make updates directly.
LIFE OF IM:
Please be sure the first and last year of the IM/project/activity is listed here! This tells us when to expect results and out-year targets from you.
IM Details: Benefitting Country

All choices for these IM details on this screen in FTFMS are in the boxes on the left, and you must use the arrows in the middle to make selections and move them to the box on the right side.
IM Details: Locations
Please see the “Enter Location data” section for instructions on how to use the bulk location data upload tool.

LOCATIONS:
Please geotag ALL of your IMs using the Location feature here, as this enables us to map where our initiative is working and improve our data analysis by overlaying maps of where we work with climate change information, crop information, population or disease information, etc. for more informed policy decisions, programming priorities, establishing zones of influence, etc.

ADD NEW PROJECT LOCATION:
Hit “Add Location”, then choose the location of where this project is working down to as granular as you have for this IM/ project:
--Admin Level 0 (country)
--Admin Level 1 (state or province level)
--Admin Level 2 (district or county level)
--Other Admin levels as needed
Add all areas where the project is working. If working on national-level policies, just choose the country level (Admin 0).

Hit “Add”. You can hold the “shift” key to select multiple locations at once.
**IM CONTACT:**
Select contacts for each IM.

Select “Add Contact” and then choose what type of contact they are (see next screen shot). It’s very important that all USAID AOR/CORs are identified and labeled as such.

All previously entered contacts were placed in the “Other” category by default, but you should update them to their correct “Contact Type”.

**ADD NEW PROJECT CONTACT:**
Use the “filter” feature to more easily find contact names. Anyone with an FTFMS account is already populated in your list of options. Or you can hit “Create Contact” if a contact does not have an FTFMS account to create a contact.
IM Details: IM Tag and Key Issue

**Key Issue (USAID only):**
Key Issue selections (for USAID IMs only) come over from what was assigned in your Operational Plan (OP) in NextGen.

**IM Tags:**
Tags are helpful for labeling IMs/Projects/activities by a topic, cross-cutting theme, or other designation, such as all of USAID’s coffee-related efforts. Please select all tags that apply. If needed, create a new tag (select “create new”).
**LOCAL / NON-LOCAL PARTNERS LEVERAGED:**
Please list any partner organizations (local and non-local) other than the Prime Partner (which is already listed at the top). You can select from the lists or click on “create new” to enter a new partner. This information allows us to search by partner name and helps answer Front Office information requests.

**TRADING COUNTRIES (Regional USAID Missions only):**
Choose the countries here for the “intra-regional trade” indicator to populate correctly.

Click ‘Save’ once you have completed entering IM information!
Select Indicators and Commodities Screen

After you check / update the IM Details for each of your IMs / projects / activities, then go to the “Select Indicators & Commodities” screen, which is next on the dropdown menu.

**CORs/AORs/Project Managers:** Please make sure each of your IMs/projects has the correct selection of indicators for the IP to report on that year!

Choose the implementing mechanism / activity / project from the drop-down menu. Then hit “Go”.

USAID Mission users: select “all” to see all IMs

Leave this checked. FTFMS will send e-mails to the implementing partners once data entry is opened.

Click the “+” next to an IM name to see selected indicators for that project.
Click “add indicator” to select more indicators from a list of the FTF indicators.

You will see a similar option for indicators that require a commodity. Click the “+” sign next to the indicator and choose from a list of
Select Indicators and Commodities screen: Adding Indicators

Once the list of indicators appears, you can:

---Click the red “X” to **delete** indicators that this project no longer reports on (don’t worry, historical data is always saved!)

---Add indicators for this project to report on by clicking “Add indicator” at the bottom and a pop-up window will appear from which you can select from a list of all the FTF indicators.
Select Indicators and Commodities screen: Adding Commodities

You will see a similar option for indicators that require a commodity. Click the “+” sign next to the indicator, and then “Add Commodity” will appear and you can then choose from a list of commodities.
Select Indicators and Commodities screen: Add Commodities Screen

Choose from the commodities at the left and click the middle arrow to move your selections to the right-hand box.

Click “Add”.

Once you hit “Add”, your commodity will now appear back under the indicator.
List of Commodity Indicators, the following indicators require an Assigned Commodity

You will need to add commodities (just like shown above) for all commodity-related indicators, which include:

2016 Set of Commodity-related indicators:
- EG.3-6, -7, -8: Farmer’s gross margin per hectare, per animal or per cage obtained with USG assistance (RAA)
- EG.3.1-a: Percent change in value of intraregional trade in targeted agricultural commodities (RAA) (for regional OUs)
- EG.3.2-17: Number of farmers and others who have applied improved technologies or management practices with USG assistance (RAA) (WOG)
- EG.3.2-18: Number of hectares of land under improved technologies or management practices with USG assistance (RAA) (WOG)
- EG.3.2-19: Value of small-holder incremental sales generated with USG assistance (RAA)
- EG.3.2-23: Value of targeted agricultural commodities exported with USG assistance (RAA)
- EG.3.3-a: Prevalence of women of reproductive age who consume targeted nutrient-rich value chain commodities (O)
- EG.3.3-b: Prevalence of children 6-23 months who consume targeted nutrient-rich value chain commodities (O)
- EG.3.3-11: Total quantity of targeted nutrient-rich value chain commodities produced by direct beneficiaries with USG assistance that is set aside for home consumption (RAA)

NEW! 2018 set of Commodity-related indicators:
- EG.3-10, 11, 12: Yield of targeted agricultural commodities among program participants with USG assistance
- EG.3.1-c: Value of targeted agricultural commodities exported at a national level
- EG.3.2-26: Value of annual sales of farms and firms receiving USG assistance
- EG.3.2-a: Proportion of producers who have applied targeted improved management practices or technologies
- FTF Context-11: Yield of targeted agricultural commodities
- EG.3.2-24: Number of individuals in the agriculture system who have applied improved management practices or technologies with USG assistance
- EG.3.2-25: Number of hectares under improved management practices or technologies with USG assistance
Select Indicators and Commodities screen: Start Data Entry

VERY IMPORTANT

After you’ve confirmed / updated the indicator selections for each of your IMs/projects, you need to hit “Start Data Entry” to open the Implementing Mechanism (IM) for data entry. Implementing Partners (IPs), or anyone else, will not be able to enter data until this step is completed.
Enter Indicator Data Screen (Part 1)
Now you can go to the “Enter Indicator Data” option in the dropdown menu.

You can get to this same screen by choosing the icon next to an IM’s name (AFTER the “Start Data Entry” button has been clicked.)
Once on the “Enter Indicator Data” screen, choose your Implementing Mechanism (IM) / project / activity from the drop down menu if it is not already selected, and hit “Go”.

**VERY IMPORTANT**

**Implementing Partners:** After data entry is complete (steps for that discussed in next section), come back to this orange status bar, select “Submit to OU” from the dropdown menu of “Available Actions” and click “Go”. This action sends your reported data to the USAID Mission, Office, or USG Agency HQ for review.

**USAID Mission Staff:**
Data entry will be locked for you until one of two things happen:
1. The implementing partner enters data and submits it to you.
2. You bypass the implementing partner stage (because the implementing partner is not using FTFMS). Bypass the implementing partner stage by selecting “Submit to OU” for them and click “Go.”
When your data entry and review is complete, select “Data Approved by OU” and click “Go” to send the data to BFS.

**Interagency:** You have the same workflow steps, even though you use different terms / organizational levels. There is still data entry, data review, and data submission, and you can work out the exact process specific to your Agency.
Enter Indicator Data Screen: Data Entry Screen

Once you’re ready to enter data, select your IM from the dropdown menu (if it’s not already selected), and its indicators will appear underneath for reporting.

<table>
<thead>
<tr>
<th>Indicator / Disaggregation</th>
<th>2017 Actual</th>
<th>Baseline Year</th>
<th>Baseline Value</th>
<th>2017 Target</th>
<th>2018 Target</th>
<th>2019 Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type of loan recipients</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Producers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local traders/assessors</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wholesalers/processors</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Disaggregates N &amp; N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sex of recipient</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Joint</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>n/a</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Disaggregates N &amp; N</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Choose the implementing mechanism from the drop-down menu if it is not already selected. Hit “Go”.

Indicators selected for the IM will appear. Move between indicators using the drop-down menu.

Please note that the total for each disaggregate category must match (e.g. total number entered by Sex should match total number entered by “type of loan recipient”). FTFMS will alert you if they do not match.

Enter data in the yellow cells:

--FY17 actual (FY17 target column will be un-editable because you set targets for this last year)

--FY18/19/20 out-year targets

FTFMS will sum the disaggregates for you and populate the blue/gray total cells. Hit the “Calculate Totals” button to see the sum FTFMS is calculating.

Click “Add” to enter a deviation narrative or indicator comment (different from an IM comment, which is at the bottom!)

Type the deviation narrative/indicator comment into the box that will appear. FTFMS will alert you to enter a deviation narrative for results that are 10% above or below target (unless you already entered it).

Do not add deviation narratives or indicator comments here. Only enter comments that apply to the entire implementing mechanism.

Deviation Narratives and indicator comments go above next to indicator title.
After you enter your data for each indicator, hit "SAVE" and then move to the next indicator.

See how the $100 in loans to male recipients + the $200 in loans to female recipients adds up to a total of $300 in loans. This $300 also matches the other disaggregate above ("Type of loan recipient"), which indicates that out of the $300 total loans amount received, $200 of it went to people who are producers and $100 of it went to people who are local traders. Again, for a matching total of $300.
Enter or View Narratives Screen

In addition to reporting indicator data, narrative reporting is also required. See page 12 of this guidance.

As a reminder, FTFMS requires four different narratives

- **The Deviation Narratives** and **Indicator Comments** are done in the indicator data entry screen as shown above.

- **IM Performance Narratives** and the **FTF Key Issue Narratives** are done in the “Enter or View Narratives” screen in FTFMS.

<table>
<thead>
<tr>
<th>TYPE OF NARRATIVE</th>
<th>WHO’S RESPONSIBLE</th>
<th>PURPOSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indicator deviation narratives</td>
<td>Implementing Partners (IPs)</td>
<td>Required if the FY18 actual deviates +/- 10% from the FY18 target. Deviation narratives may be short (two or three sentences), but must directly address the deviation and its cause.</td>
</tr>
<tr>
<td>Indicator comments</td>
<td>IPs</td>
<td>To provide details on a specific indicator, list public-private partnerships, explain unique circumstances or outline data collection challenges. (Refer to the indicator PIRS to determine if specific comment is required for an indicator.)</td>
</tr>
<tr>
<td>IM performance narratives</td>
<td>IPs</td>
<td>To explain what the IM is doing, explain the context not evident in the numerical data, discuss successes and challenges, etc.</td>
</tr>
<tr>
<td>IM performance narratives</td>
<td>IPs</td>
<td>To explain what the IM is doing, explain the context not evident in the numerical data, discuss successes and challenges, etc.</td>
</tr>
<tr>
<td>FTF Key Issue narratives</td>
<td>OUs</td>
<td>To provide an overall picture of the OU’s efforts in the FTF Initiative and discuss overarching goals, ZOI selection, overall country context, and to help interpret FTFMS data and prepare for the FTF Portfolio Reviews.</td>
</tr>
</tbody>
</table>
Enter or View Narratives Screen: Add Narrative

**IM Performance Narratives:** Ensure the IM for which you want to enter narratives is selected, if it’s not already. Click “Go”.

**USAID Mission users:** To enter your Mission FTF Key Issue Narrative, be sure to select the IM titled “High-level Indicators – xx country name” (for Focus Countries) or “FTF Key Issue/Smallholders” (for Aligned Countries).

There are three tabs on this screen:
1. the “Performance Narratives” tab = IM Performance and FTF Key Issue Narratives
2. the “Planning Narratives” tab = Imported narrative from the OP in NextGen – for your reference only;
3. the “Other Reporting Documents”, where you can upload Annual Reports, photos, etc.

Click “Add Narrative” to open the box here. **Select the template you need:**

- IPs should be doing IM Performance Narrative [one per IM];
- USAID Mission staff should be doing FTF Key Issue Narratives [one per Focus Country OU]
Enter or View Narratives Screen: IM Performance Narrative

IM Performance Narratives in FTFMS:

- Type the narrative in the text box (or cut/paste from a Word/Google doc – formatting will be preserved) – but you must paste each part under its respective tab.

- Click on each tab to show the data entry field where you should type.

- The sections of the narrative should be entered on different tabs in FTFMS so we can extract them separately later.

- Click “Save”.

For reference, an example narrative is included on the FTFMS Resources Website: https://www.agrilinks.org/ftfms. Please fill in all six tabs / sections below.
Enter or View Narratives Screen: FTF Key Issue

FTF Key Issue Narratives in FTFMS:

The sections of the narrative should be entered on different tabs in FTFMS so we can extract them separately later.

Click on each tab to show the data entry field where you should type.

Type the narrative in the text box (or cut/paste from a Word/Google doc – formatting will be preserved) – but you must paste each part under its respective tab.

Click “Save”.

Narratives can be re-edited and/or deleted if necessary. Narratives submitted in prior years can be seen at the bottom.
Download Reports and Check Data Entry Status Screen

After indicator and narrative data entry, you can also download reports in FTFMS (with data as far back as 2011!). Navigate to this screen in the menu:

Several tabs are available:

- **Export Data by IM**: Use the “Export Data by IM” tab to export data for a specific IM exactly as the data appear on the data entry screen.
- **By Status**: The “By Status” tab tells you the actions taken by the implementing partner and the mission. (Submitted, approved, etc.)
- **Generate PPR Report**: Generate PPR Report (USAID OU staff only): This tab allows you to export your OU’s FTFMS PPR Report. Make sure your mission/office is selected and click “Go.” Click “Export to MS Excel File” for current data (FY16 actuals and FY17-19 targets). “Export historical data to Excel” will include all data since FY11, including current data.
- **Portfolio Report**: The “Portfolio Report” creates a Word or PDF file of all the IM details (tags, key issues, start date, COR, etc.) and the IM performance narratives. BFS uses this for the BFS Portfolio Reviews and for project fact sheets.
- **Export Narratives**: Click this tab to export IM Performance Narratives. It is a Word-compatible file. All narratives for an OU can be exported in a single file.
- **Custom Reports**: Click this tab to create custom reports. See next screenshot.
Download Reports Screen: Custom Reports

After going to the “Custom Reports” tab, there are two options of interest:

- The “Indicator by Data Source Report”, which pulls the indicator results data in a variety of formats;

- The “IM Detail Report”, which pulls a list of IMs / activities / projects for your Mission or office with all of their identifying info, such as ID number, Award number, AOR/COR contact, etc. No indicator data is included in this report.
This report is configured by moving options from boxes on the left side to the boxes on the right side to mark your selections.

**Indicator Filter:** Choose from the drop-down menu if you only want to see certain types of indicators.

**Indicators:** Select as many indicators as desired (use “shift” to choose more than one at a time). If indicators are not selected, all indicators will be selected by default.

**Commodity:** Filter by commodity if you want (but this NARROWS the report output). All commodities will be displayed by default.

**Groupings:** This determines how the report output will be organized (e.g. an indicator with all IMs contributing underneath, or an IM first, with all its indicators underneath, etc.). The report will be grouped by the top grouping. Use “move up” or “move down” buttons to arrange.

**Years:** FY11 is the first year of FTFMS data, but older data may be available for Africa OUs.
Download Reports Screen (continued…) → Custom Reports → Indicator by Data Source Report – part 2

Values: Choose which of the indicator data entry columns you want to see in the report.

Tags: Choose tags to filter/narrow the report to only show those IMs with the selected tag. See NEW geographic-related tags at the bottom of the list.

The bottom of the screen provides a variety of options for what you want to be included / displayed in the report, including:

- Choose “Include All” to ensure closed-out (but legitimate) projects are included in the report totals.
- “Show Disaggregates” (for more detail) or “Hide Disaggregates” (for less detail and faster reports).
- Use the checkboxes next to “Include FFP IMs” or “Include Non-FFP IMs” if you want to only see FFP data or see all but FFP data. By default, both “regular” FTF and FFP results will be included (i.e. both are checked).

“Show life of activity” will add a row with start/end dates;

“Show IM number” will add another row with the NextGen / FACTSInfo ID number (unique ID number per IM – same here as in F’s system).

The other options simply add a column in the FTFMS report output to include whichever information you choose, including “Show Prime Partner”, “Show IM Locations”, “Show IM Tags”, “Show IM/Activity Comments”, etc.

Submit and Export: Click “Submit” once the report is configured. Click the Excel icon (will be at the top right of the screen) to export to Excel.

Large reports can take several minutes (to an hour!) to run so only choose what you need to see.
Download Reports Screen (continued...) → Custom Reports → IM Details Report

The other option is the IM Details Report, which displays lists of IM with details (but no indicator data)
Choose the “universe” you want to see in the report (you will only have access to those projects allowed in your user profile).

Again, see the options on the left and move your selection to the right-hand box. Leave “Tags” and “Key Issues” blank unless you want to narrow the report by those filters.

Choose the IM Details you’d like in the report, or choose “Show All Columns” for each of these pieces of info to show.

For “Contact”, you can choose to show only certain types, like a list of AORs/CORs, if you want. Just choose from the dropdown. All Contact Role Types are included by default.

After you make your selections, hit “Submit” to generate the report. A preview appears at the bottom of the screen, but hit the Excel icon (top right of screen) to export to Excel.
Entering Location Data in FTFMS

(1) Click on Enter Mechanism Information in the drop-down menu under Home Page

(2) Select appropriate Reporting Organization, Bureau, OU and Prime Partner (if applicable) from the drop-down menus then click Go
(3) Click on the pencil icon under the Implementing mechanism you want to add location information to.
(4) Enter Implementing Mechanism (IM) Location information as applicable
(5) BULK UPLOADS: Click the Download Template button
(5a) **BULK UPLOADS**: Enter Implementing Mechanism (IM) Location information in the Latitude and Longitude columns and/or select Admin Unit from the dropdowns – if facility enter “Yes” in the Facility column, if not enter “No” – add comments. Save your spreadsheet on your local machine.

![Spreadsheet](image-url)

<table>
<thead>
<tr>
<th>IM</th>
<th>Title</th>
<th>Website</th>
<th>Contacts</th>
<th>PrimePart Awarded</th>
<th>Facility</th>
<th>Admin 1</th>
<th>Admin 2</th>
<th>Admin 3</th>
<th>Admin 4</th>
<th>Admin 5</th>
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<th>Longitude</th>
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(5c) BULK UPLOADS: Click “Import Location Data"
(5d) BULK UPLOADS: Follow the on screen instructions in order from 1 – 3, to
1) Choose the template (excel file you previously saved)
2) Validate the data on the template
3) Import data to FTFMS. After importing the data, FTFMS will save the data.