APEC Projects Administration System (APAS)

User Guide

Version updated 02 October, 2023

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1. APAS Overview

The APEC Project Administration System, or APAS, is an online system that automates the APEC project funding application process, which includes the submission of Concept Notes and Project Proposals, the quality assessment of the Project Proposals, and the approval and acceptance of funding.

Several roles are involved in the application process:

- **Project Overseer (PO)**—Applies for project funding through the submissions of Concept Notes and Project Proposals
- **Program Director (PD)**—Manages APEC fora and facilitates project funding applications
- **Program Executive (PE)**—Supports the Program Director in the facilitation of the project funding applications
- **Responsible APEC Forum (RAF)**—Responsible for a specific project funding source(s) and scores Concept Notes applying to that particular funding source(s)
- **Project Management Unit (PMU)**—Oversees and manages the overall application process and conducts Quality Assessments of Project Proposals

These are the key steps in the project funding application process, some of which involve the use of email as a form of communications between the users:

1. A Project Overseer (PO) submits a Concept Note via email for endorsement of the APEC forum.
2. Once the Concept Note is endorsed, the PO copies and pastes content from the endorsed Concept Note onto an APAS form and submits to the PD or PE. The PD or PE reviews the Concept Note and sends it to the PMU.
3. The PMU receives the endorsed Concept Note and initiates the scoring process in APAS. The RAF delegate provides the scores for the Concept Note in APAS.
4. The successful PO drafts the Project Proposal in APAS and submits it for endorsement by the APEC forum. Once it is endorsed, PO updates the endorsed Project Proposal in APAS and submits it to the PD or PE.
5. The PMU receives the endorsed Project Proposal and initiates the Quality Assessment process. The PO revises the Proposal until it receives a Satisfactory rating.
6. The PMU recommends the Proposal to the Budget and Management Body for final approval.
7. The PO signs the Letter of Acceptance in APAS.

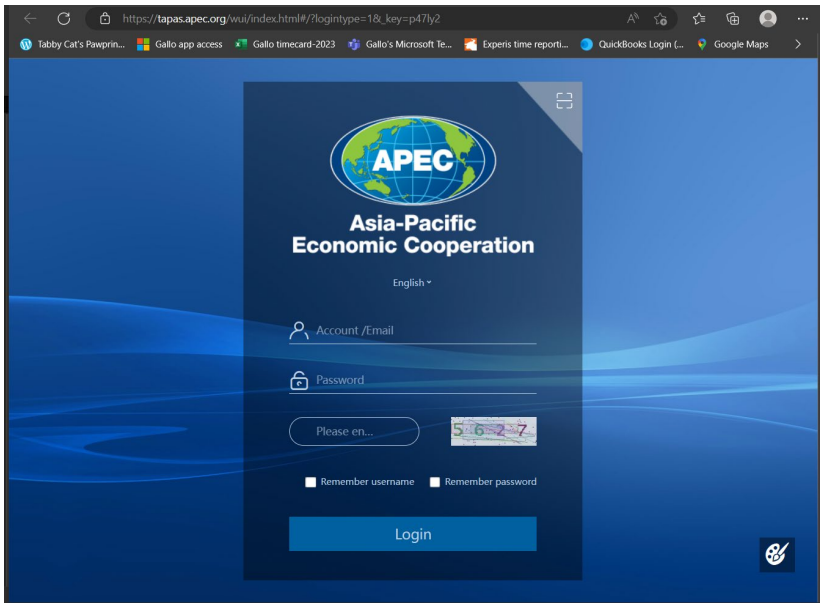
1.1 Accessing the APAS Website

APAS works best with the desktop versions of these web browsers:

- Google Chrome
- Microsoft Edge
- Safari for the Macintosh

To access the APAS website:

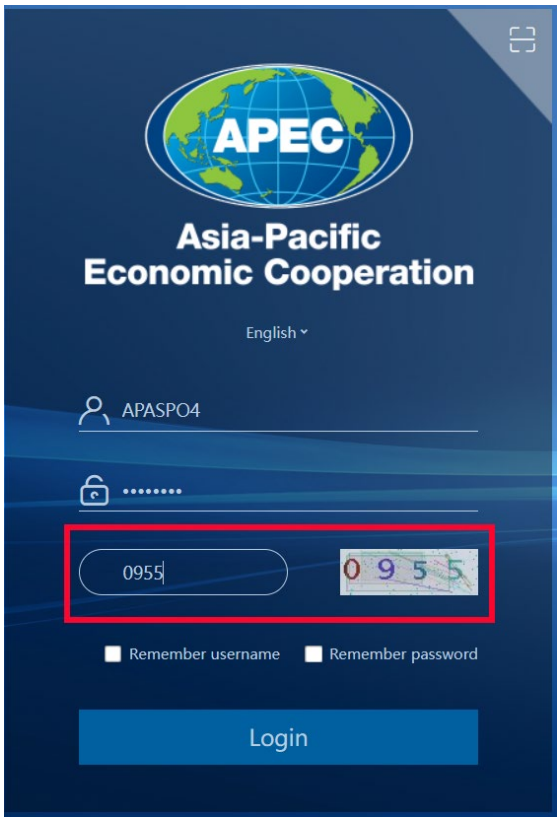
1. Launch the web browser on your desktop.
2. Navigate to https://apas.apec.org.



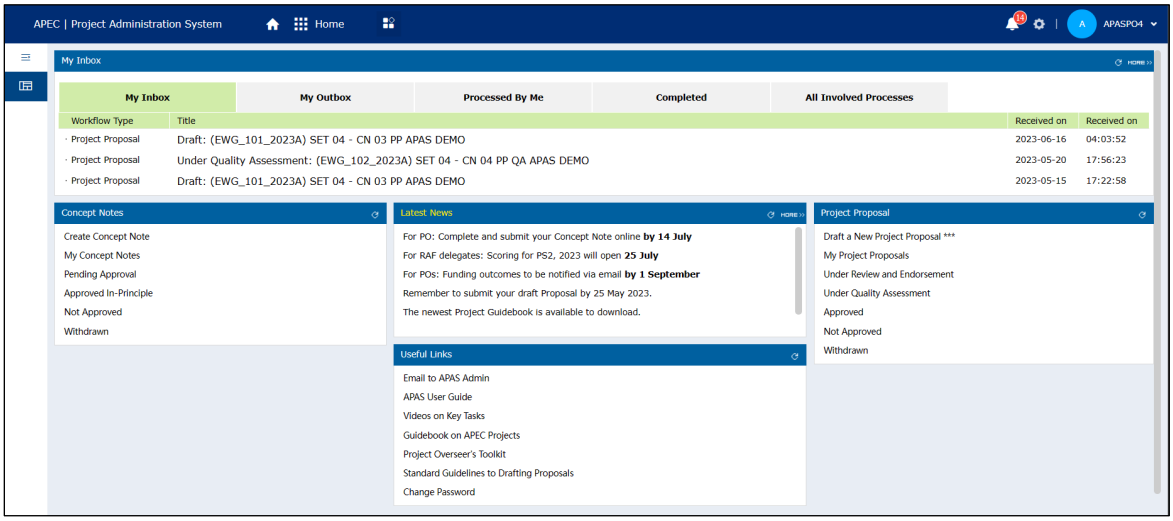
3. In the **Account/Email** field, enter your user ID.
4. In the **Password** field, enter your password.

   Note: If you are an APEC Collaboration System (ACS) user, your AIMP user ID and password are the same for APAS.

5. In the field below your password, enter the four-digit number shown in the gray box on the right.

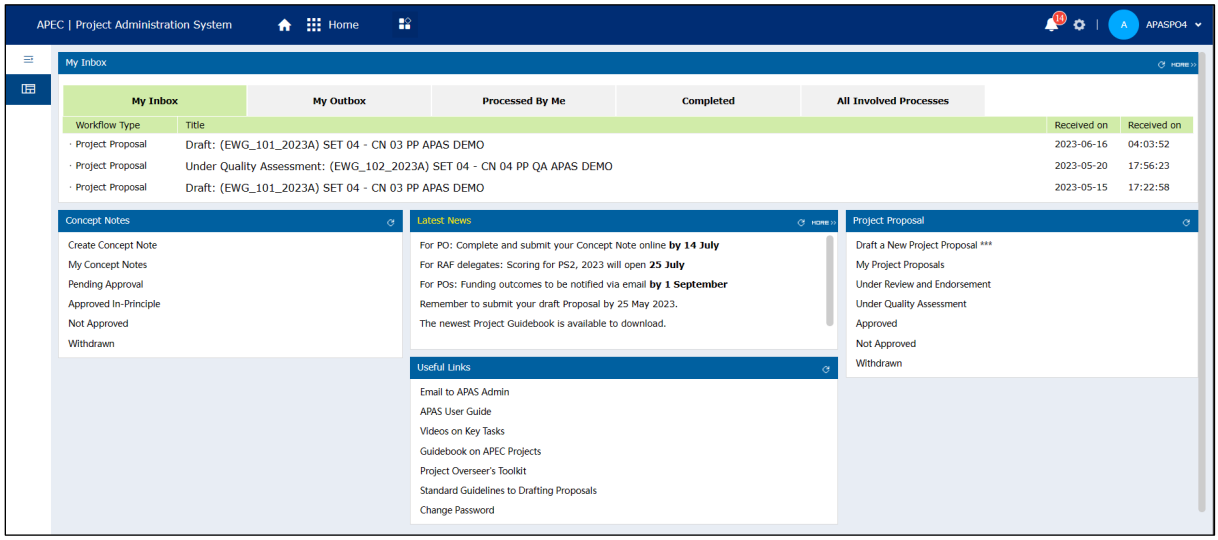


6. If you want APAS to remember your username and/or password the next time you log in, check one or both of these boxes:
   - **Remember username**
   - **Remember password**
7. Click **Login**. The Dashboard displays.



1.2 Navigating APAS and the Dashboard

After you log into APAS, you see the Dashboard. The Dashboard is like a home page on a website. This is where you can access all the tasks you need to complete for your role.



Your view of the Dashboard varies, depending on your role.

1.2.1 Useful Features in the Dashboard for All Users

These features in the Dashboard are available to all users:

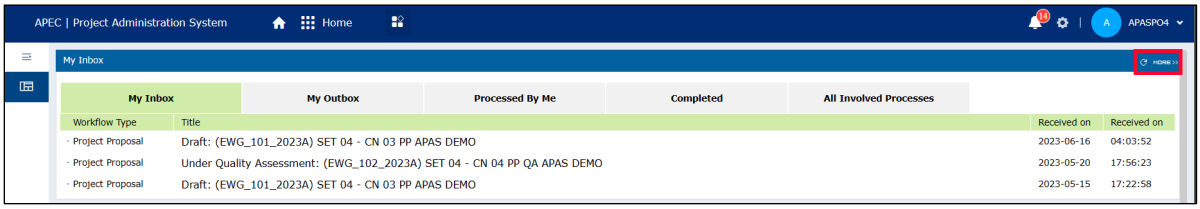
- Advanced Search
- Notification center
- Latest News
- Useful Links

1.2.1.1 Advanced Search

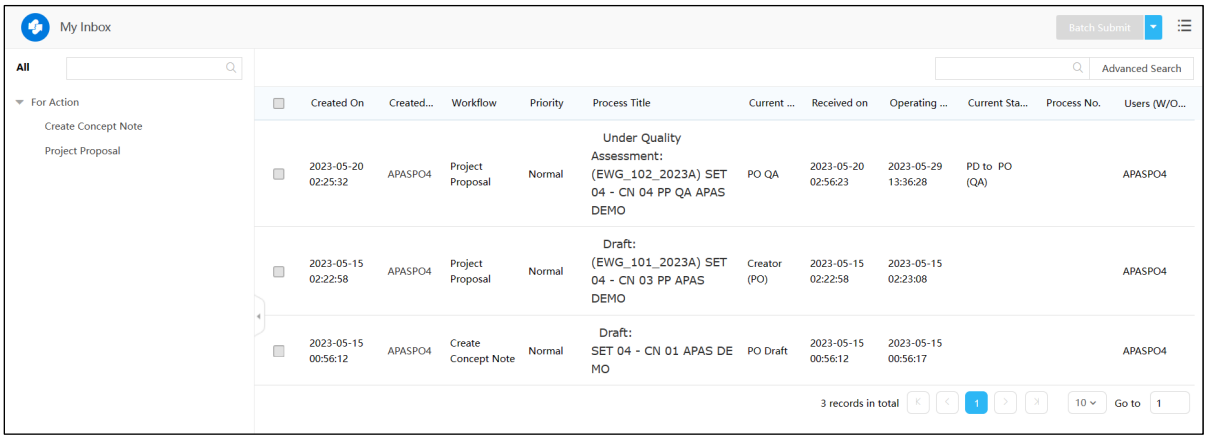
If you have many Concept Note or Project Proposal tasks, Advanced Search can help you find what you need easier and faster.

To use Advanced Search:

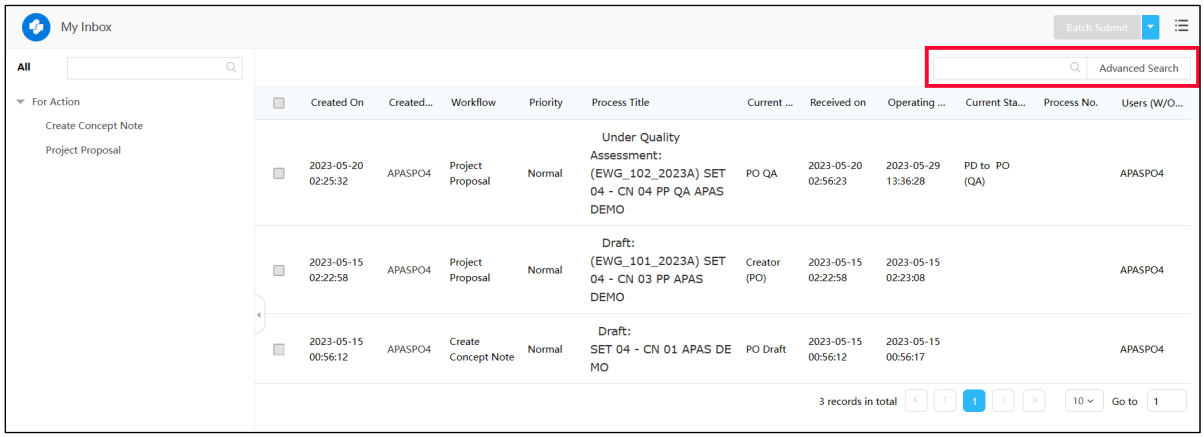
1. In the top right corner of the Dashboard, click the **More** button.



My Inbox displays in a new tab.

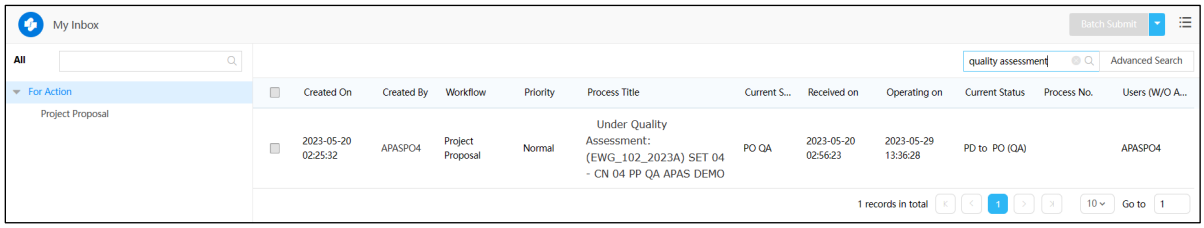


2. In the top right corner of **My Inbox**, enter a keyword in the **Advanced Search** field.



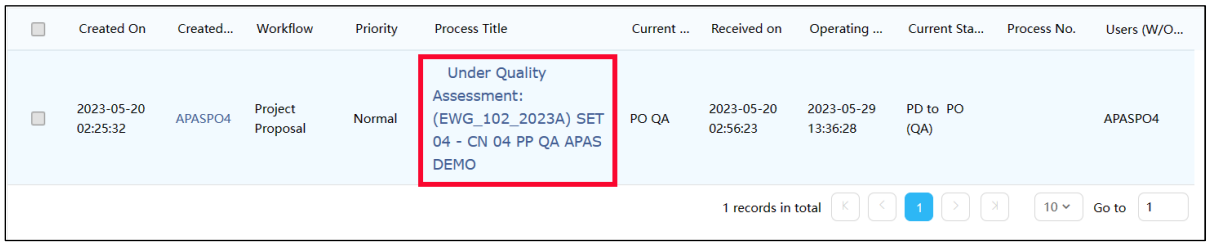
Here is an example of a keyword entered in the Advanced Search field.

3. Press **Enter**. The results of your search display in **My Inbox**.

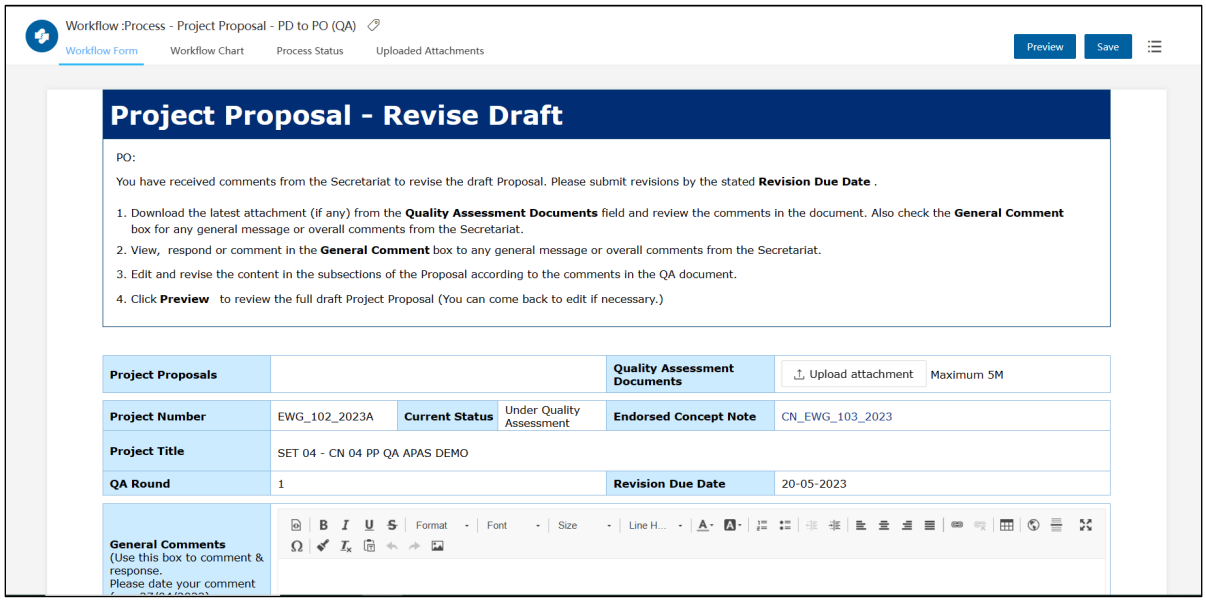


Tip: When your search displays several results, you can click on a column name to sort your results in ascending or descending order.

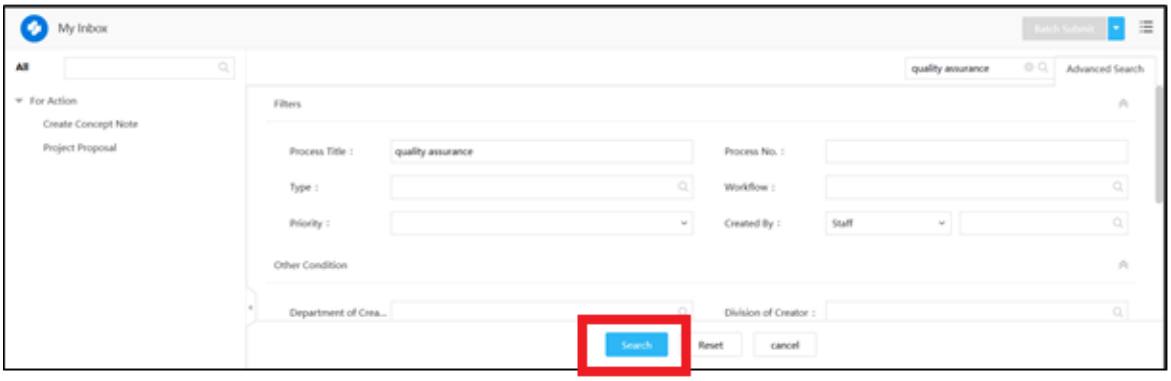
4. Open a process by clicking its title in the **Process Title** column.



The workflow page displays for the process in a separate tab in your web browser.



If you receive a lot of results, you might need to refine, or *filter*, your search. To do this, click the **Advanced Search** button to display a screen with more options. You can filter by the type of process, priority, process number, workflow, the name of the person who created the project, and a wide variety of other conditions.



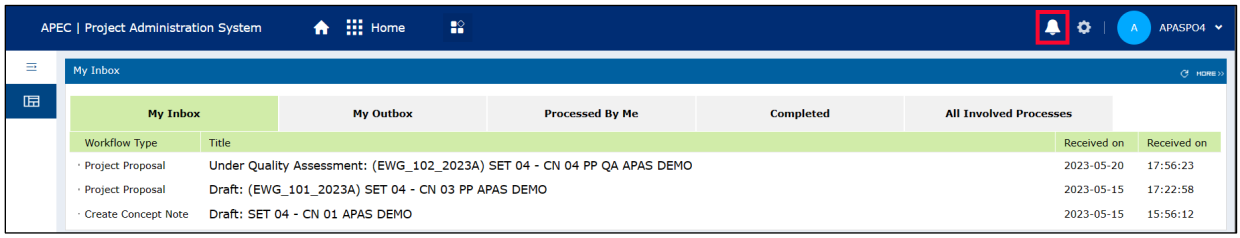
Enter the information you want to filter in the appropriate fields, and press the Search button to see the results.

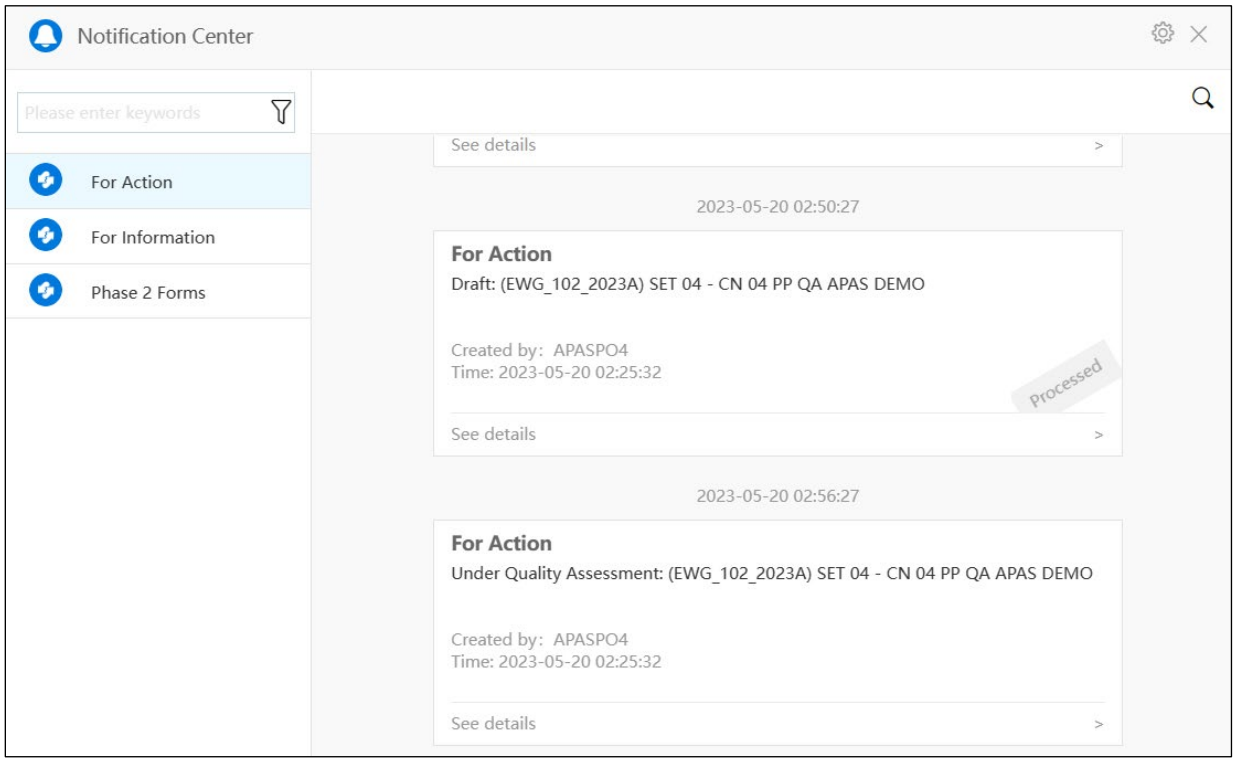
1.2.1.2 Notification Center

The Notification Center displays your messages in two categories:

- For Action
- For Information

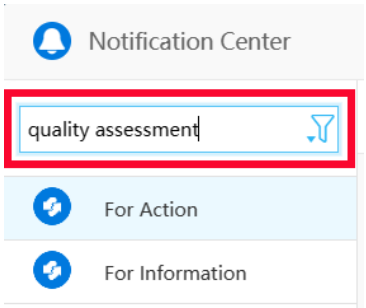
Click the bell in the top right corner of the Dashboard to open the Notification Center.



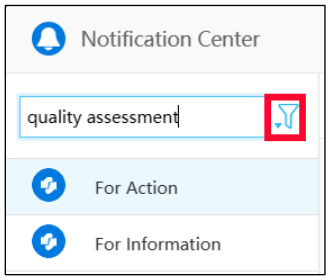


If you need to find a specific notification:

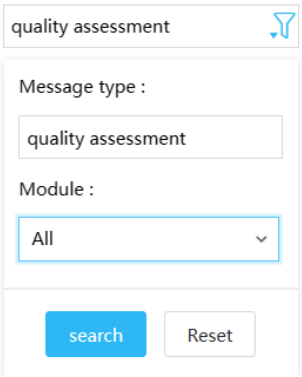
1. Enter a keyword in the **Filter** field in the upper left corner of the Notification Center.



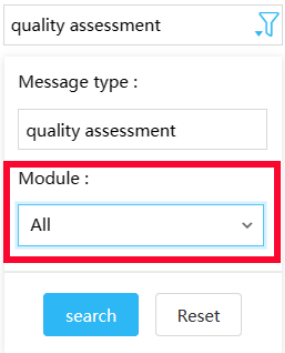
2. Click the **Filter** icon.



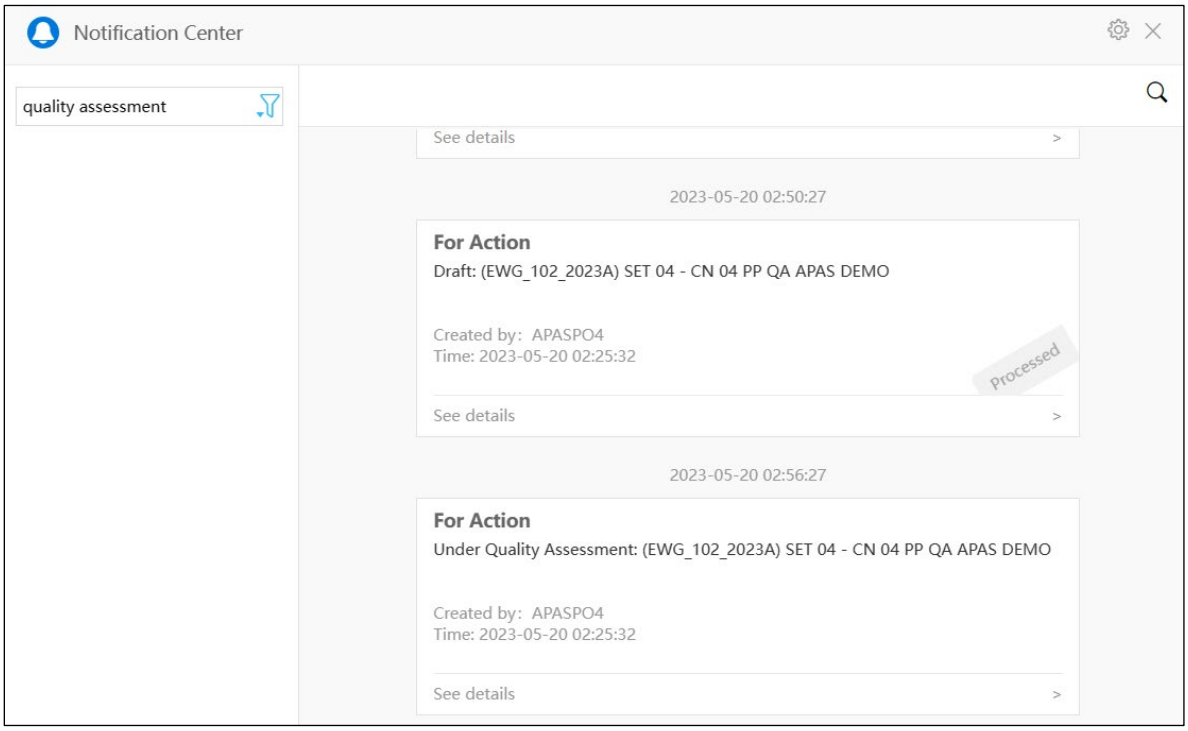
A box displays below the **Filter** field with your keyword in the **Message type** field.



3. Select the module where the notification is located from the **Module** dropdown. In this example, all modules are selected.

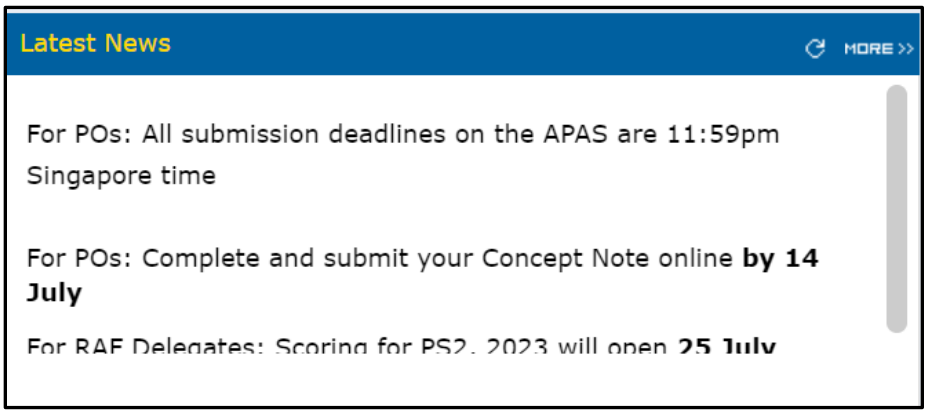


4. Click **Search** to display the results.



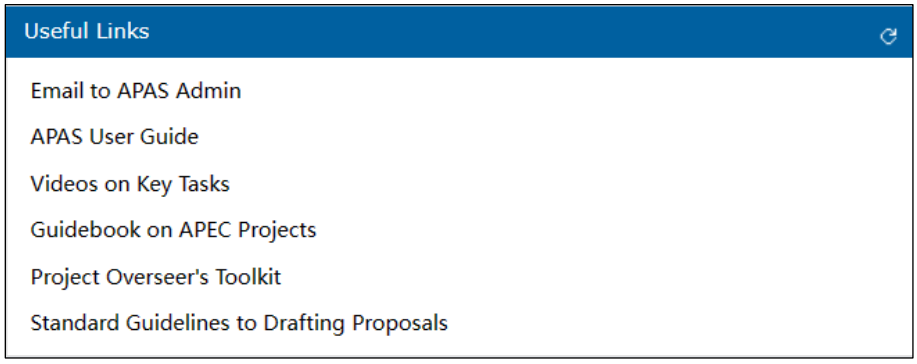
1.2.1.3 Latest News

The Latest News widget shows a list of important information, such as deadlines and key project guidelines. The first item always listed at the top of this widget is, “For POs: All Submission deadlines on the APAS are 11:59 pm Singapore time.” This reminds APAS users who reside outside of Singapore that they need to be aware of this new deadline guideline.



1.2.1.4 Useful Links

The Useful Links widget provides a list of resources that will help you complete your tasks. Access any resource in the list by clicking its name.

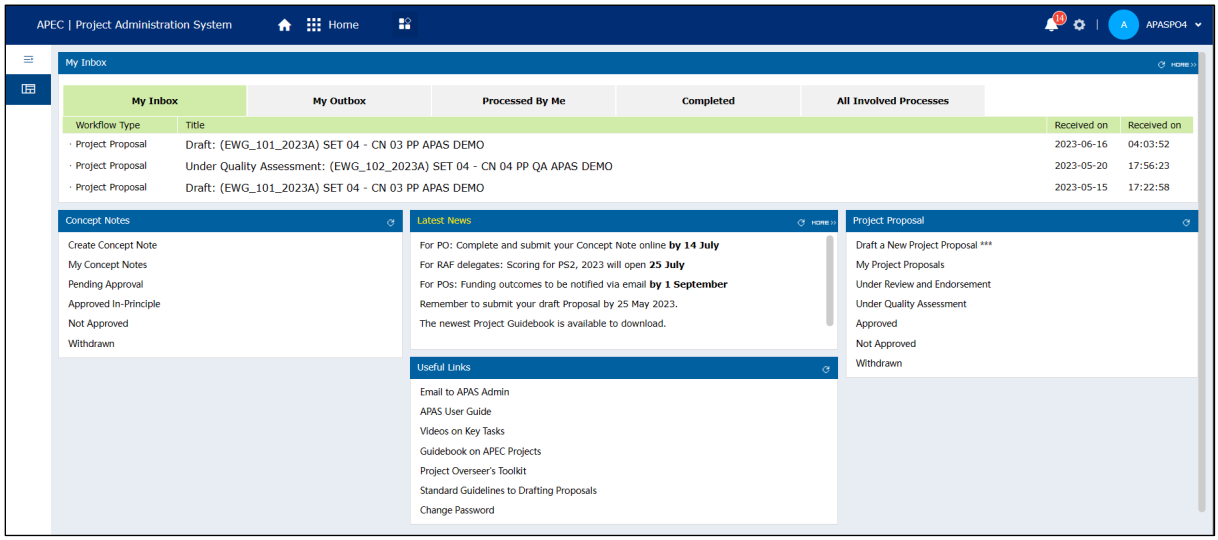


1.2.2 The Dashboard

Your view of the Dashboard varies depending on the role you have because each role has different tasks to complete. Look for your role in the subheadings below to get more details about what you will see on your Dashboard.

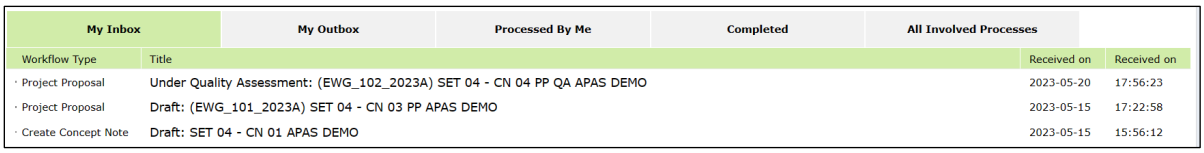
1.2.2.1 Dashboard for the Project Overseer (PO) Role

When you log into APAS as a PO, your view of the Dashboard will look like the picture below.

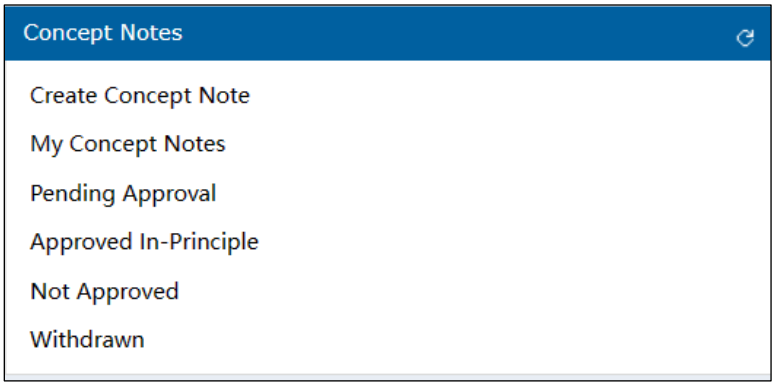


As a PO, you'll work the most with these features in the Dashboard:

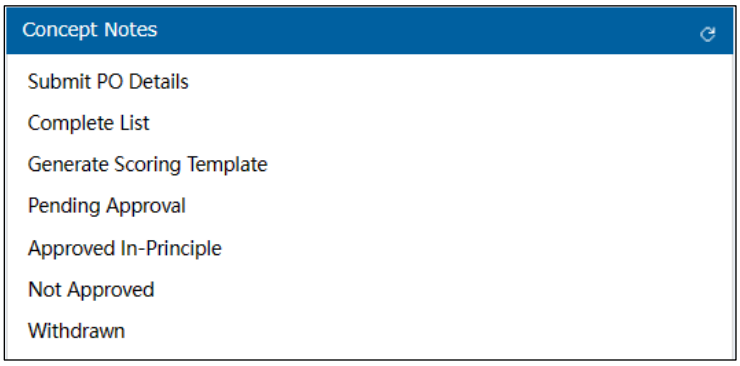
- **Inbox**—This is where you receive messages for the tasks assigned to you.



- **Processed By Me**—This tab, in the middle of the picture above, shows all the tasks you have acted upon.
- **Concept Note**—This widget has a list of all your tasks for completing a Concept Note. Access any task in the list by clicking its name.

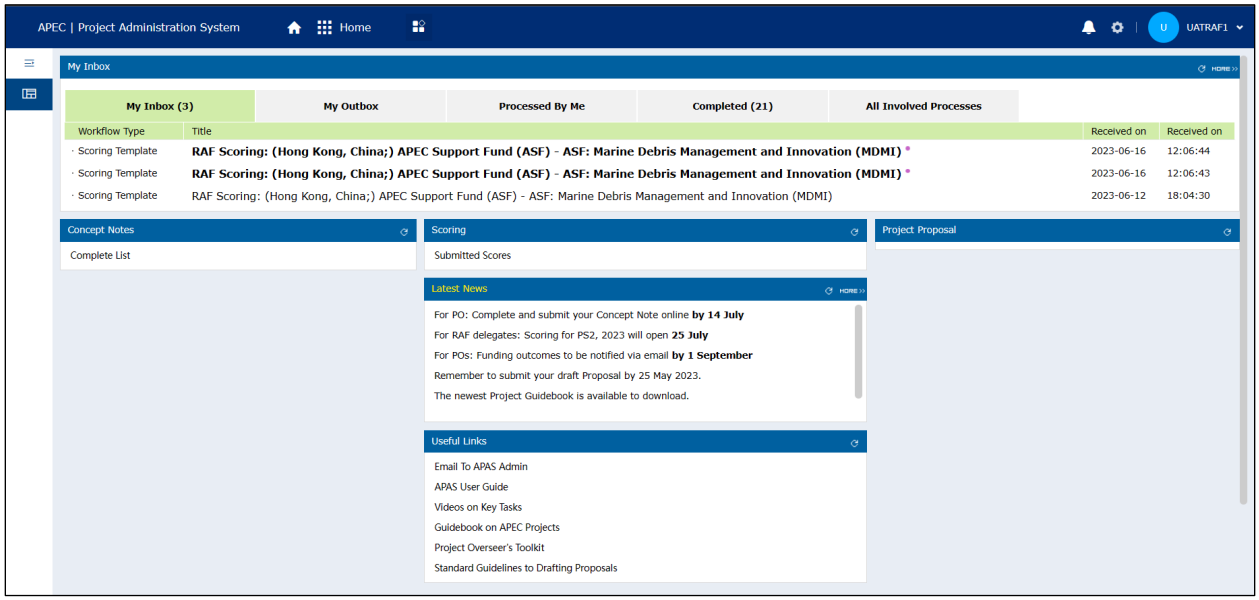


- **Project Proposal**—This widget has a list of all your tasks for completing a Project Proposal. Access any task in the list by clicking its name.



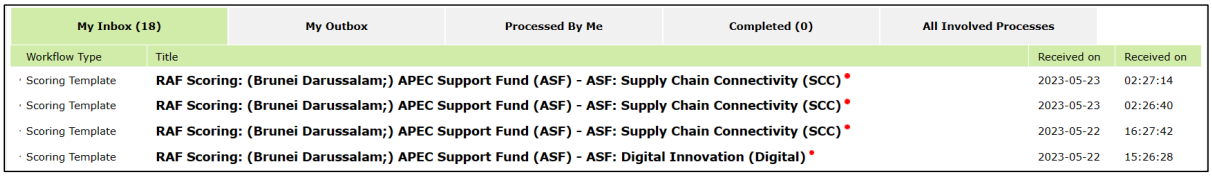
1.2.2.2 Dashboard for the Responsible APEC Forum (RAF) Role

When you log into APAS as a RAF delegate, your view of the Dashboard will look like the picture below.



As a RAF delegate, you'll work the most with these features in the Dashboard:

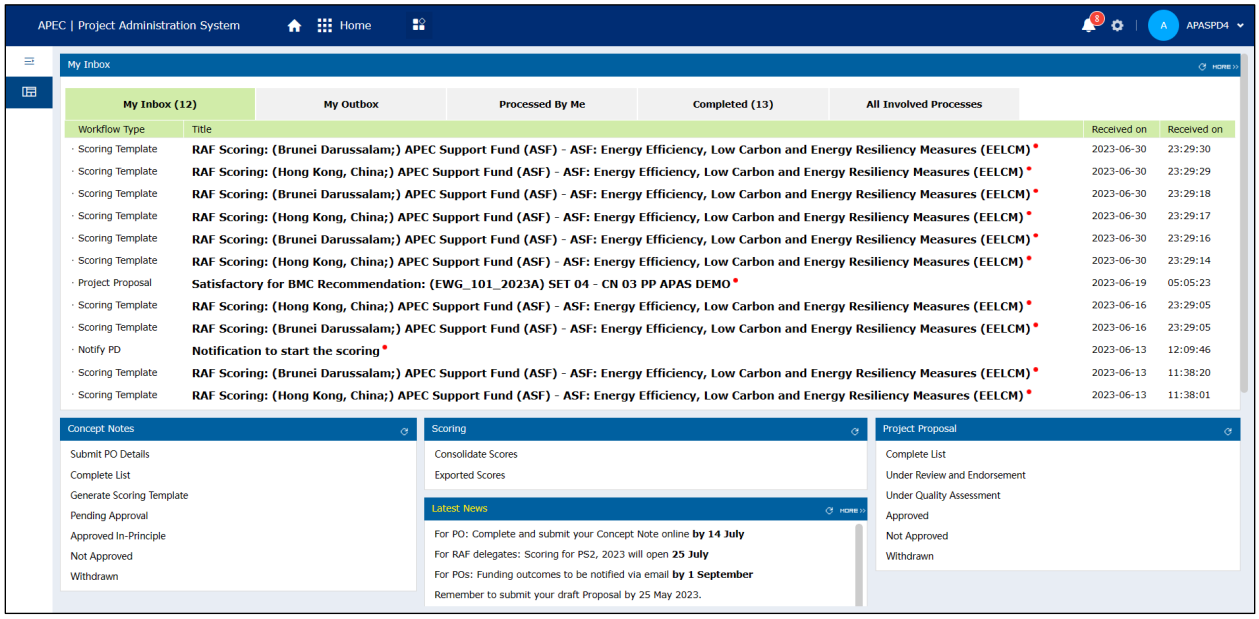
- **Inbox**—This is where you receive messages for the tasks assigned to you.



- **Processed By Me**—This tab, in the middle of the picture above, shows all the tasks you have acted upon.
- **Scoring**—This widget has a link to all the scores submitted for the projects assigned to you in a separate tab in your web browser.

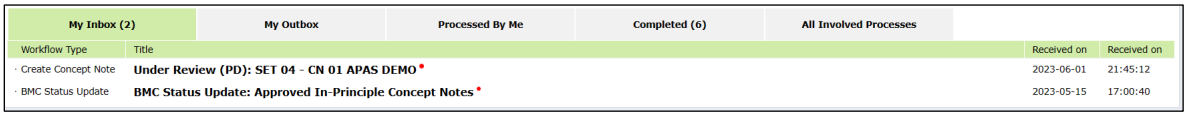
1.2.2.3 Dashboard for the Program Director (PD) and Project Executive (PE) Roles

When you log into APAS as a PD or PE user, your view of the Dashboard will look like the picture below.

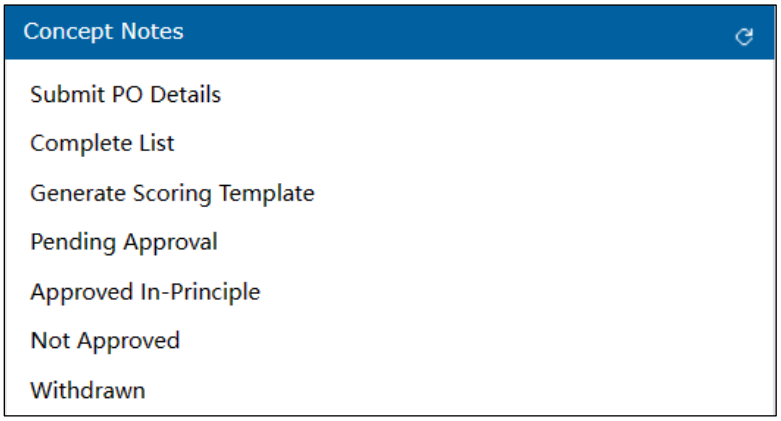


As a PD or PE user, you'll work the most with these features in the Dashboard:

- **Inbox**—This is where you receive messages for the tasks assigned to you.

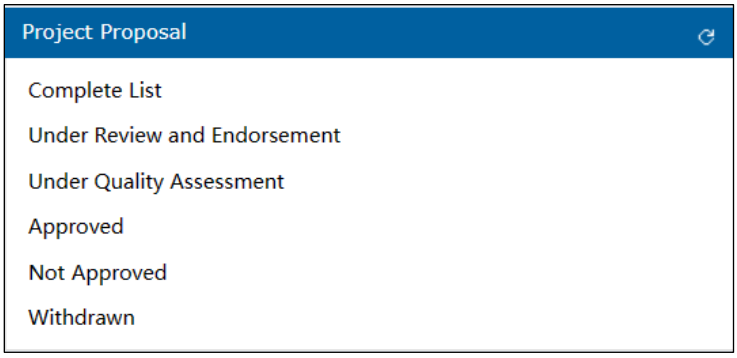


- **Processed By Me**—This tab, in the middle of the picture above, shows all the tasks you have acted upon.
- **Concept Note**—This widget has a list of all your tasks for completing a Concept Note. Access any task in the list by clicking its name.



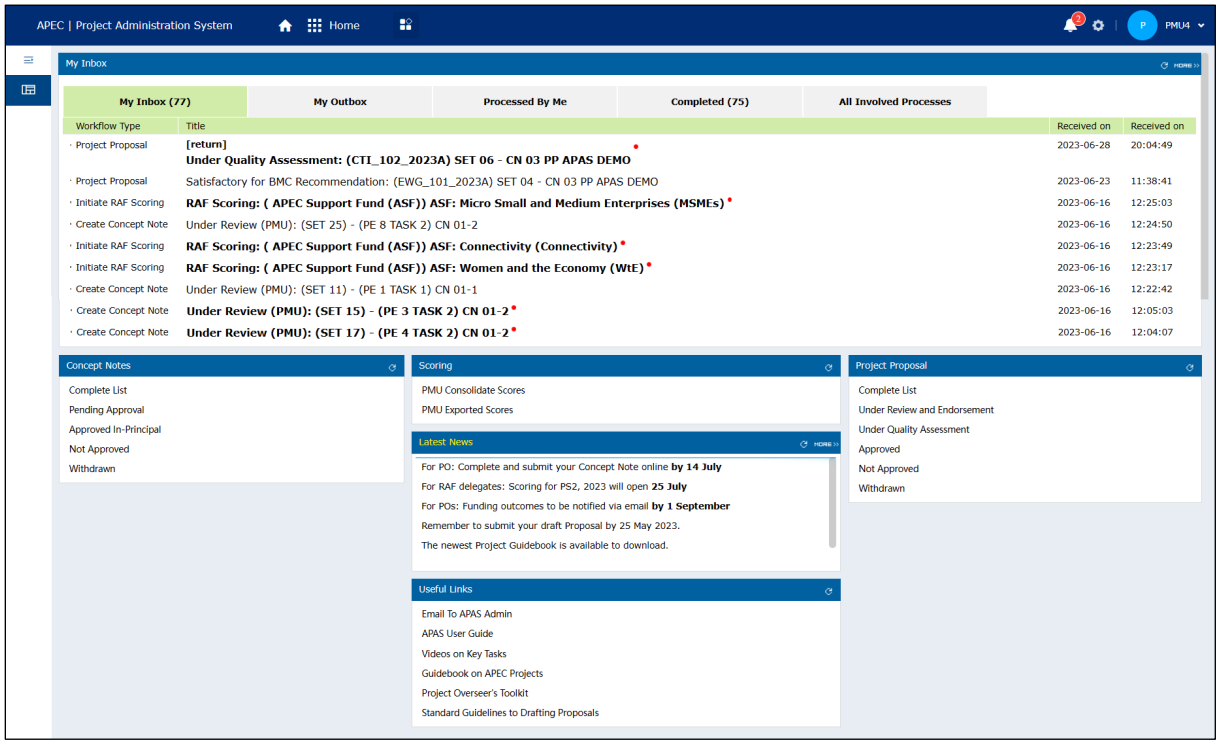
- **Scoring**—This widget has a link to all your tasks for completing the scoring. Access any task in the list by clicking its name.

- **Project Proposal**—This widget has a list of all your tasks for completing a Project Proposal. Access any task in the list by clicking its name.



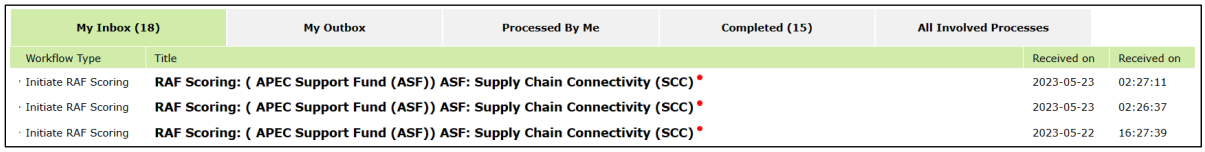
1.2.2.4 Dashboard for the Project Management Unit (PMU) Role

When you log into APAS as a PMU user, your view of the Dashboard will look like the picture below.

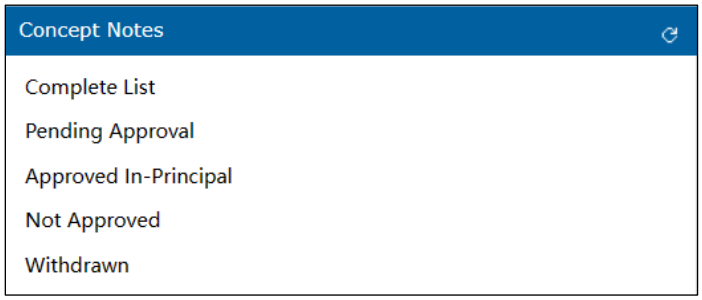


As a PMU user, you'll work the most with these features in the Dashboard:

- **Inbox**—This is where you receive messages for the tasks assigned to you.

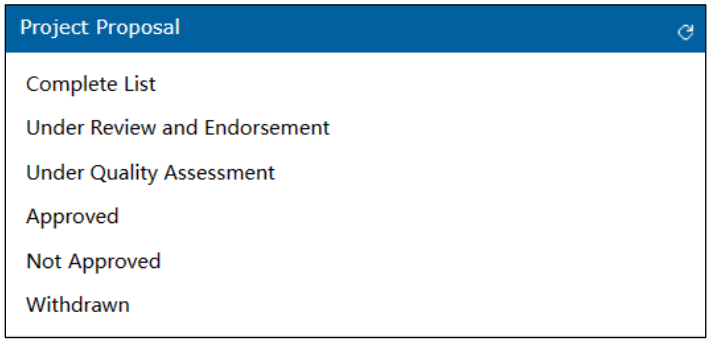


- **Processed By Me**—This tab, in the middle of the picture above, shows all the tasks you have acted upon.
- **Concept Note**—This widget has a list of all your tasks for completing a Concept Note. Access any task in the list by clicking its name.



- **Scoring**—This widget has a link to all the scores submitted for the projects assigned to you in a separate tab in your web browser.

- **Project Proposal**—This widget has a list of all your tasks for completing a Project Proposal. Access any task in the list by clicking its name.



1.2.3 The Internal Webpages

If you log in as PO and click on Create a Concept Note or Draft a New Project Proposal from the widgets, the webpages that launch should all have a header, instructions for the role inside the header box, an

icon that resembles an outline that if clicked, has more features, one of them being Print, where you can download documents in PDF format.

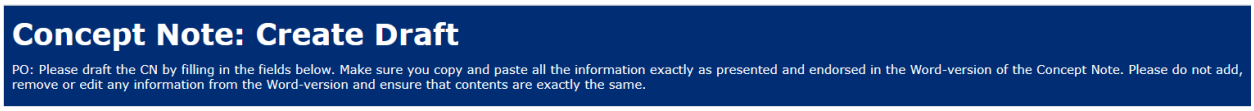
If you are a PO, here are several features that will be helpful when you are either creating a Concept Note or drafting a Project Proposal. You will find these features on these two pages in APAS:

- Concept Note: Create Draft
- Project Proposal – Create Draft

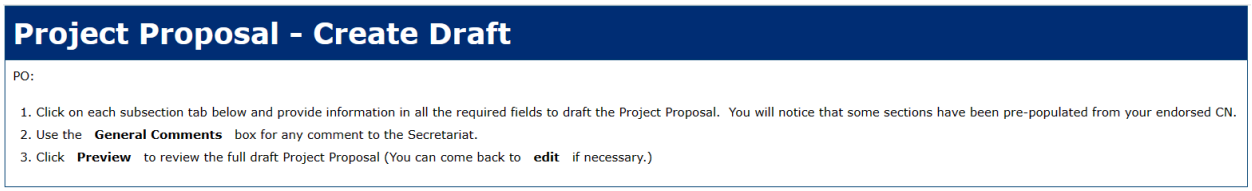
Header Box

The header box has instructions for creating a Concept Note or drafting a Project Proposal. Here are examples of these instructions from each of these pages:

Concept Note Header



Project Proposal Header



Buttons

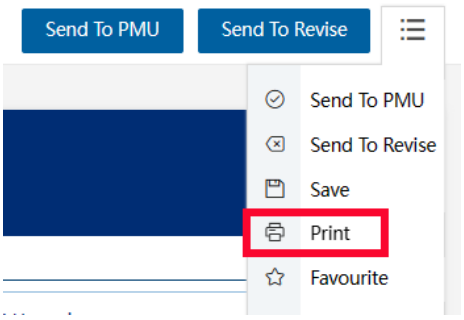
There are some buttons at the top right corner of these pages:

- **Submit**, on the **Concept Note: Create Draft** page only, lets you send the Concept Note to the PD or PE for review after you complete the draft.
- **Preview**, on the **Project Proposal – Create Draft** page only, lets you view a copy of the Project Proposal while you're working on it to review the content before it is submitted to the Secretariat.
- **Save**, on both pages, lets you save the work you have done for the Concept Note or Project Proposal. When you resume work later, you can start where you left off.

Dropdown Menu

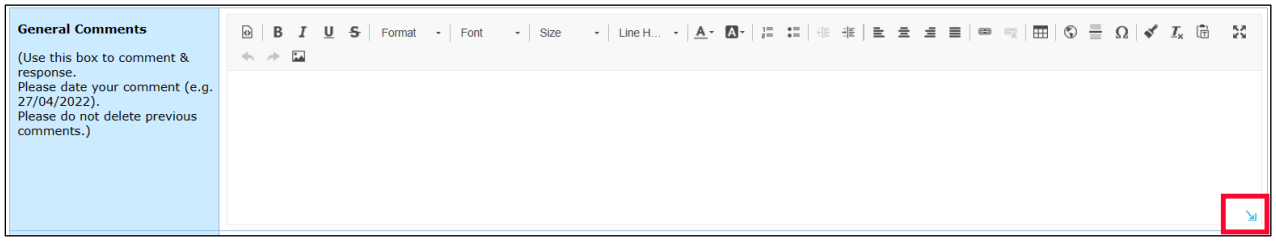
The dropdown menu is on the top right corner of the page, just to the right of the **Preview** and **Save** buttons. It's the icon that looks like a bulleted list. The options in this menu vary, depending on your role. For the PO login, the options in this menu are **Preview**, **Save**, and **Favourite**.

The most important option to note in this menu is **Print**, which is available for all logins. This option creates a downloaded file in PDF of the Concept Note or Project Proposal you created in APAS. You can then convert the PDF document to Microsoft Word to compare with the original Concept Note document.



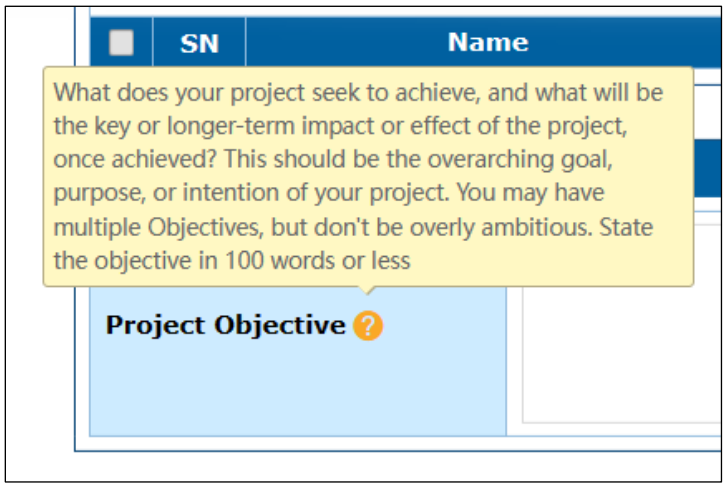
Expanding Fields

Here is another helpful feature when you're entering information in many of the fields in APAS. Whenever you see this icon in the bottom right corner of a field, you can click and drag the field to make it bigger. This is very helpful when you need to add a lot of text to a field.



Tooltips

Tooltips are also very helpful when you're working in APAS. Whenever you see a tooltip icon, you can hover your mouse pointer over it to display information or instructions related to the feature where the icon is located.



1.3 Managing User Accounts

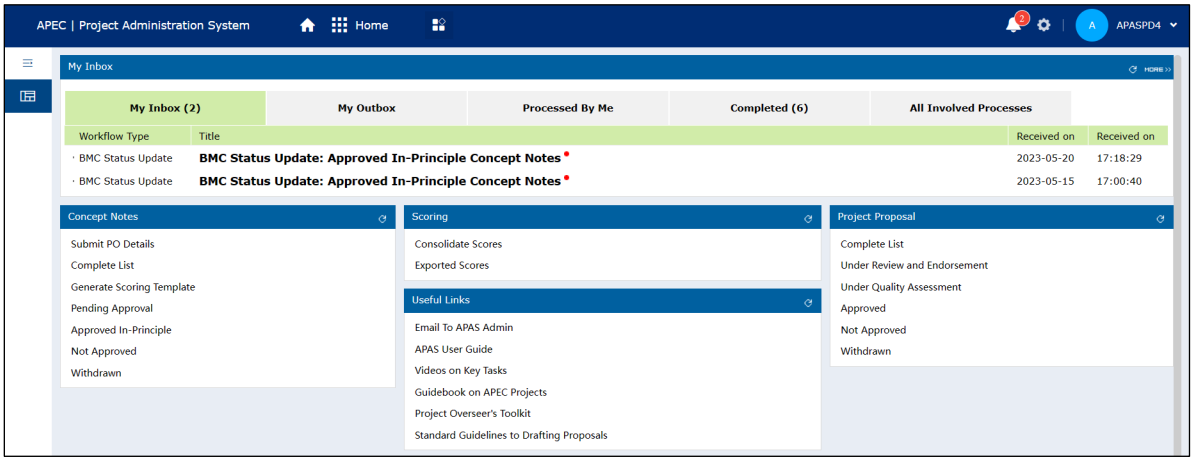
This section has the steps for creating accounts for the POs and focal point accounts for the RAFs.

1.3.1 Creating a PO Account

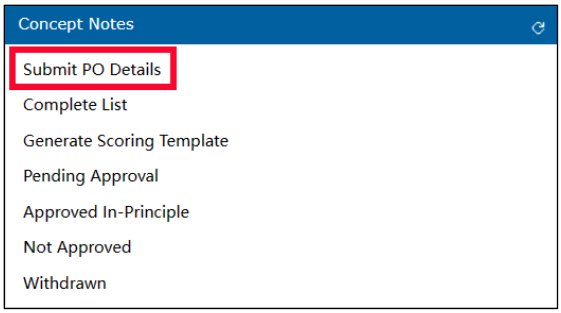
The PD or PE creates accounts for each PO who has an endorsed Concept Note. Any PO, whether new or existing, must have a unique APAS account to use APAS. The POs who have Concept Notes that are not endorsed will not have an account created for them.

To create a PO account:

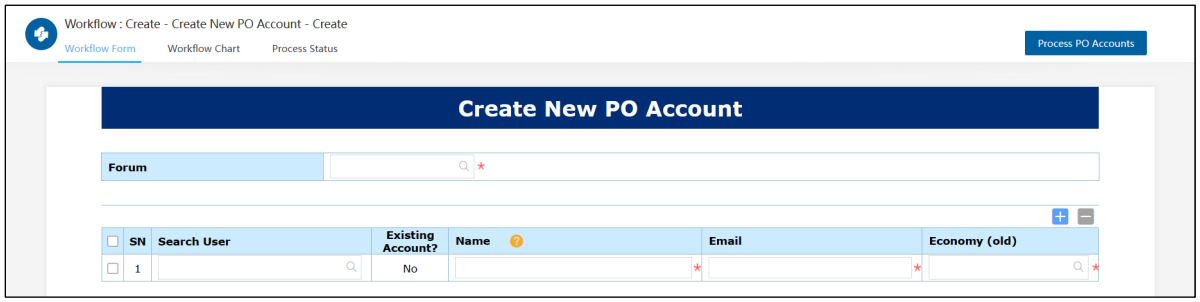
1. Log into APAS as a PD or PE user, if you're not logged in already. Your Dashboard displays.



2. In the **Concept Note** widget on the Dashboard, click **Submit PO Details**.

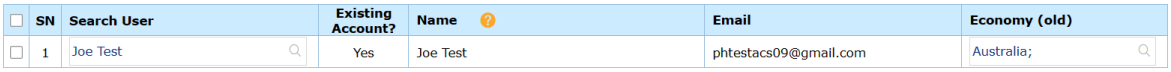


The Create New PO Account page displays in a new tab. You will extract and enter the relevant information that appear in the **Main PO** field in the endorsed Concept Note (Word document).

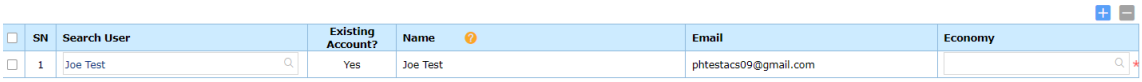


3. In the **Forum** field, enter the Proposing Forum name and press **Enter**. The name of the forum displays in a list. Select the forum by clicking on it, and then it displays in the **Forum** field.

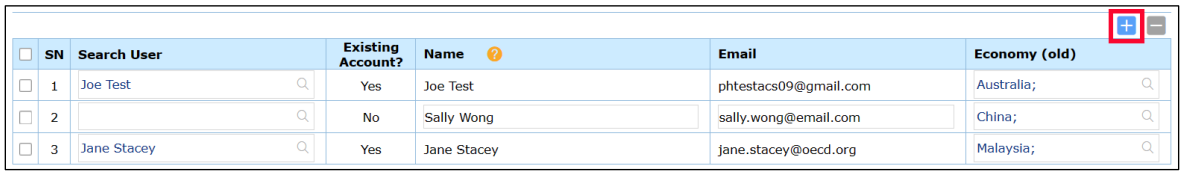
4. In the **Search User** column, enter the PO's name, and press **Enter**. If the name exists in the system, it displays in a list. Select the name by clicking on it, and then it displays in the row.



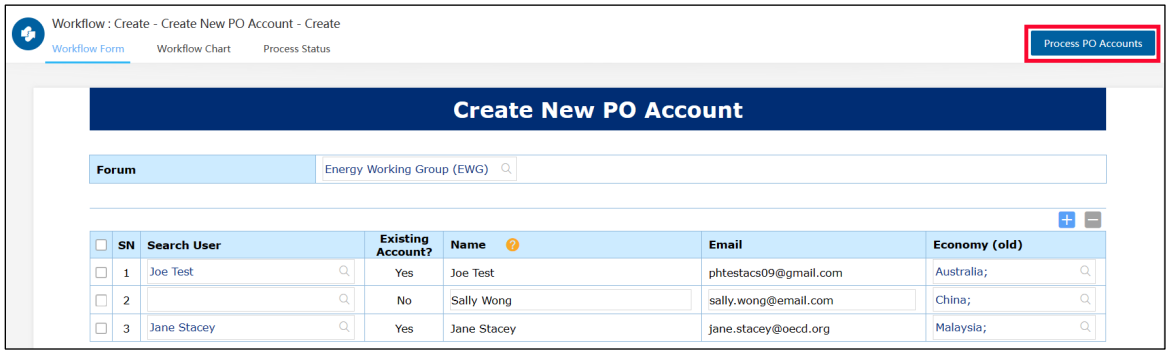
If the name does not exist, fill out the fields in the Name, Email, and Economy columns.



5. You may create multiple PO accounts from endorsed Concept Notes. To do this, click the **+** button at the top right of the table and repeat step 4.



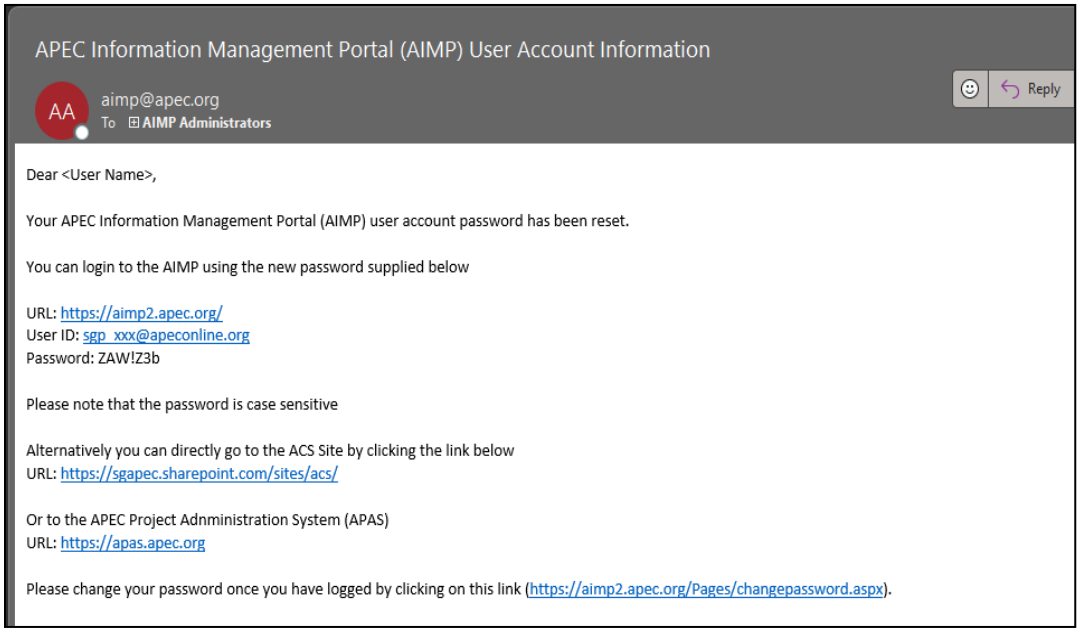
6. When you are finished adding POs, click the **Process PO Accounts** button to send the request to the ITU.



After you send the request, an email notification is sent to the POs to notify them that their account creation is in progress. A separate email notification is sent to the ITU to create the list of PO accounts. When the accounts are created, the ITU notifies the POs by email. The POs can now log in using their account information. This process may take up to 48 hours.

1.3.2 Logging in for the first time

After the ITU creates your PO account, you will receive an email notification that looks like this:


APEC Information Management Portal (AIMP) User Account Information

AA aimp@apec.org
To AIMP Administrators

Reply

Dear <User Name>,

Your APEC Information Management Portal (AIMP) user account password has been reset.

You can login to the AIMP using the new password supplied below

URL: https://aimp2.apec.org/
User ID: sgp_xxx@apeconline.org
Password: ZAW!Z3b

Please note that the password is case sensitive

Alternatively you can directly go to the ACS Site by clicking the link below
URL: https://sgapec.sharepoint.com/sites/acs/

Or to the APEC Project Adnministration System (APAS)
URL: https://apas.apec.org

Please change your password once you have logged by clicking on this link (https://aimp2.apec.org/Pages/changepassword.aspx).

When the you log into your account for the first time after receiving this email, you need to change your password.

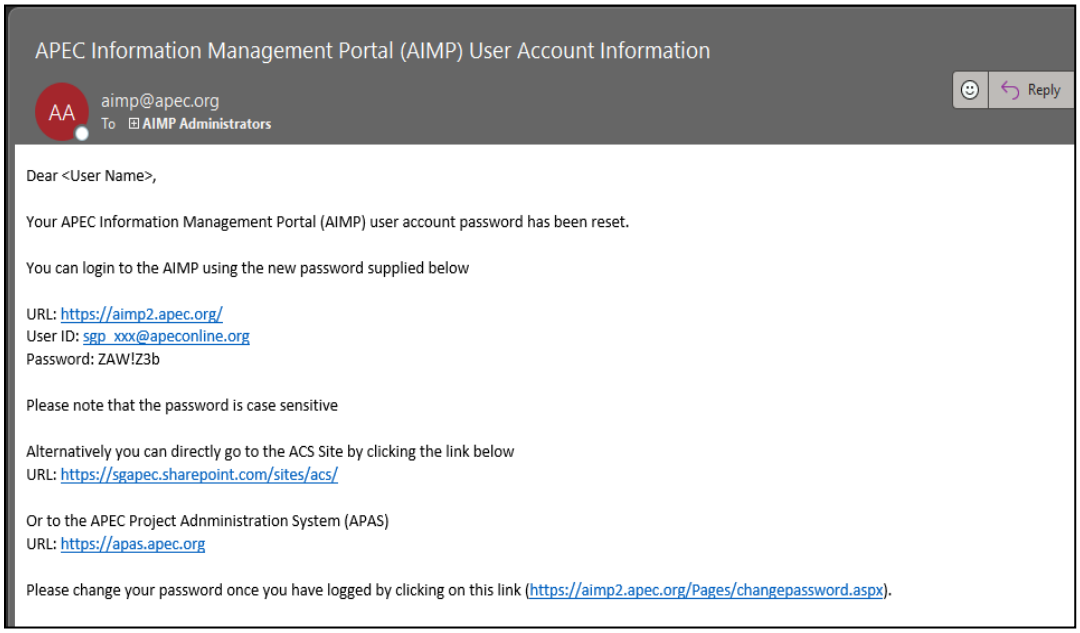
1.3.3 Creating a RAF Focal Point Account

This is the process for creating the RAF focal point accounts:

1. Each RAF economy from every APEC Funding Source will have one user account to score the Concept Notes. At the start of each project session, the PD or PE responsible for APEC Funding Sources sends an email notification requesting the RAF economies to provide one representing point of contact. Each economy submits one email address through an online form by a set deadline before the Scoring process begins.
2. The PMU collects and manages the list of RAF point of contact emails for each Project Session. The PD or PE monitors and requests submissions by economies in their responsible APEC Funding Sources.
3. The ITU creates RAF economy accounts from the submitted information and sends an email notification to the RAF economies once their APAS account is created.

1.3.4 Logging in for the first time

After the RAF accounts are created, an email notification with the account information is sent to each RAF economy. The email notification looks like this:



APEC Information Management Portal (AIMP) User Account Information

AA aimp@apec.org
To AIMP Administrators

Reply

Dear <User Name>,

Your APEC Information Management Portal (AIMP) user account password has been reset.

You can login to the AIMP using the new password supplied below

URL: https://aimp2.apec.org/
User ID: sgp_xxx@apeconline.org
Password: ZAW!Z3b

Please note that the password is case sensitive

Alternatively you can directly go to the ACS Site by clicking the link below
URL: https://sgapec.sharepoint.com/sites/acs/

Or to the APEC Project Adnministration System (APAS)
URL: https://apas.apec.org

Please change your password once you have logged by clicking on this link (https://aimp2.apec.org/Pages/changepassword.aspx).

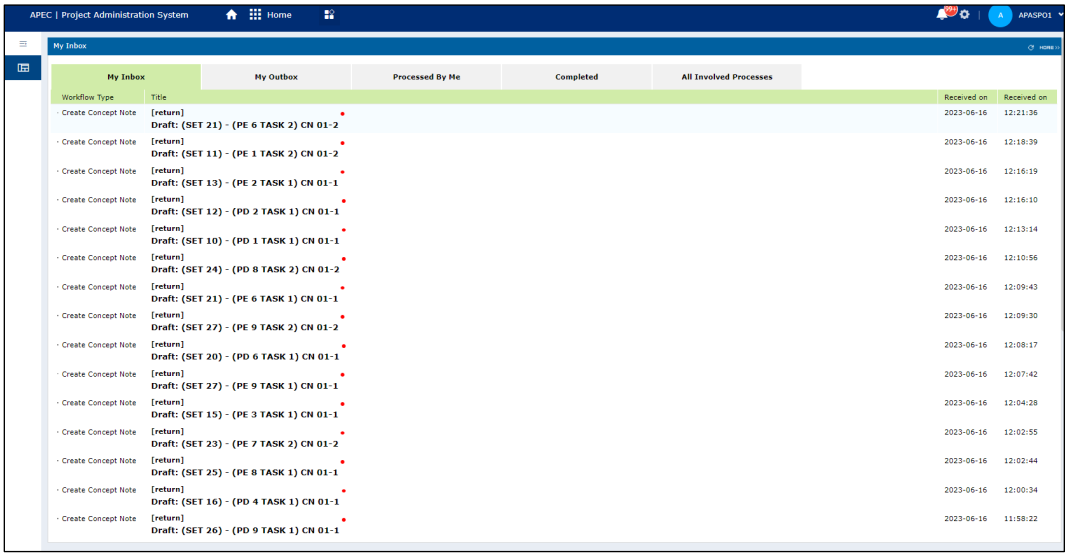
When you log into your account for the first time after receiving this email, you need to change your password.

1.4 Changing the Account Password

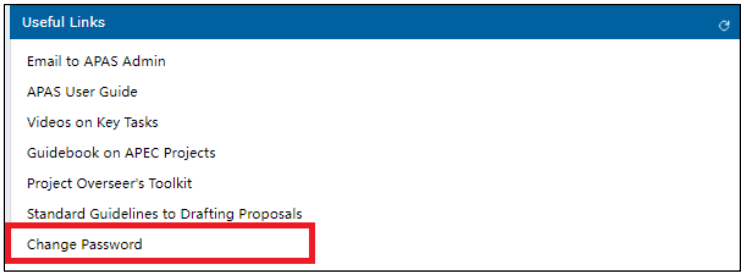
1.4.1 Changing an Account Password as a PO User

If you are a PO, when you receive a password from IT Admin, we recommend that you change it immediately by following these steps:

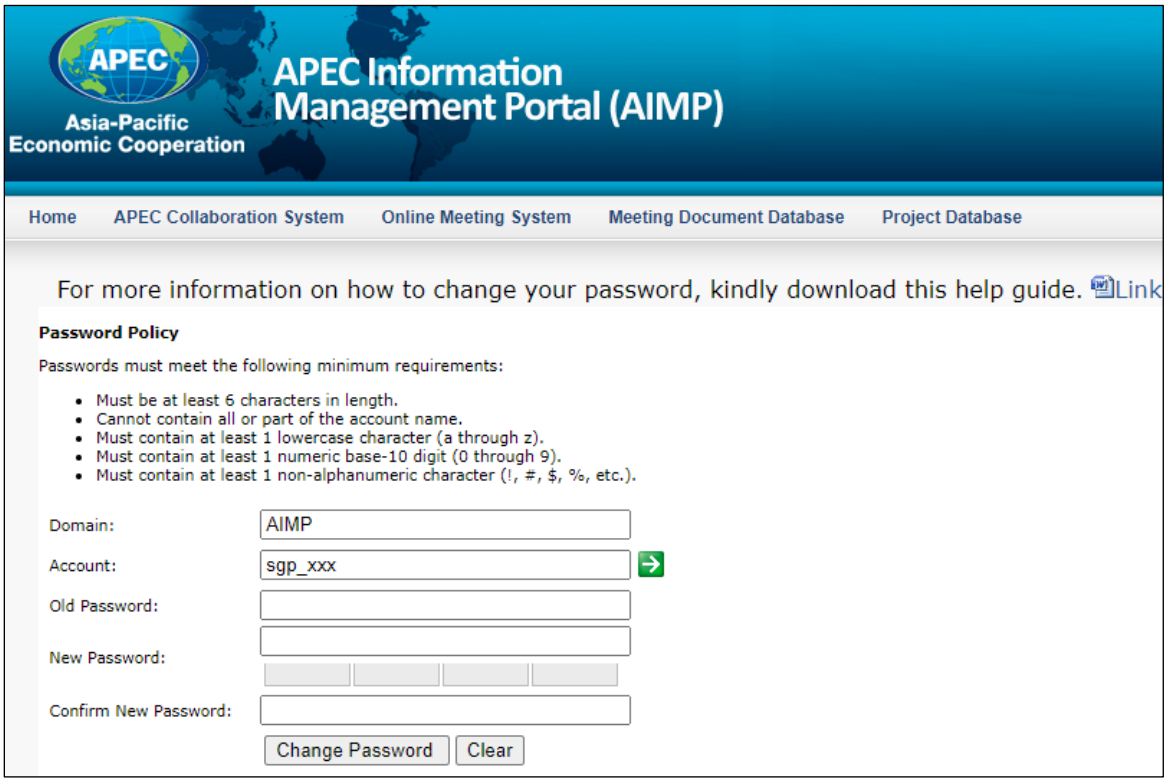
1. Log into your account with your username and current password. Your Dashboard displays.



2. In the **Useful Links** widget on the Dashboard, click **Change Password**.



3. The APEC Information Management Portal webpage launches.



a. Enter the old password in the **Old Password** field.
b. Enter your new password twice: Once in the **New Password** field and again in the **Confirm New Password** field.

   Your new password must meet these minimum requirements:

   - The password must be at least six characters.
   - The password can't contain all or part of an account name.
   - The password must contain at least one lowercase character (a-z).
   - The password must contain at least one number (0-9).
   - The password must contain at least one special character like !, #, $, or %.

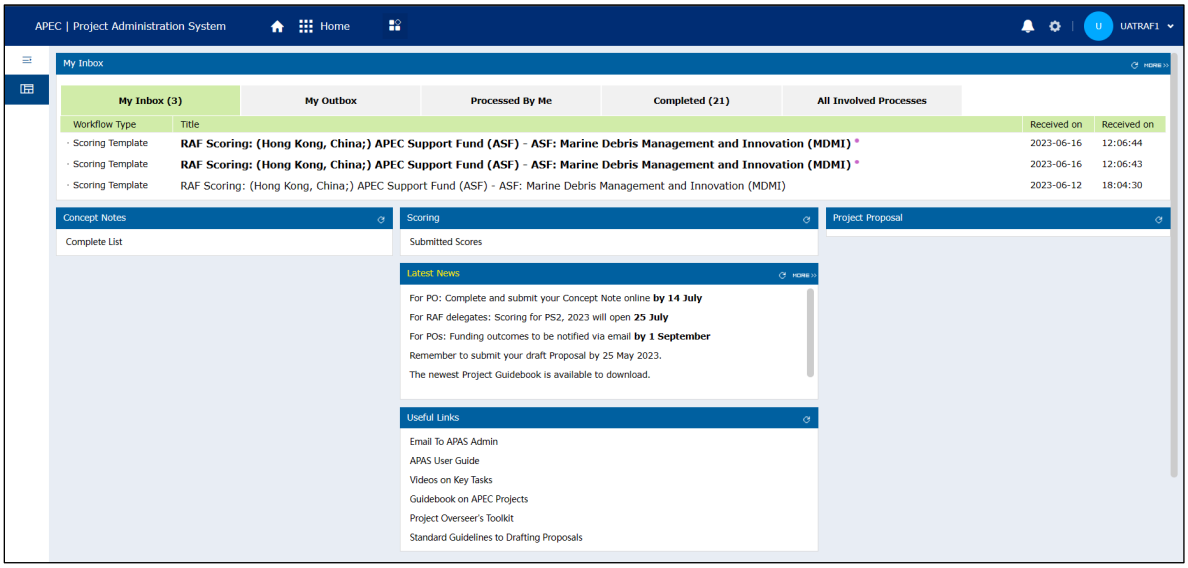
c. Click the **Change Password** button.

Note: If you forget your old password, send an email to apas@apec.org to request a new password.

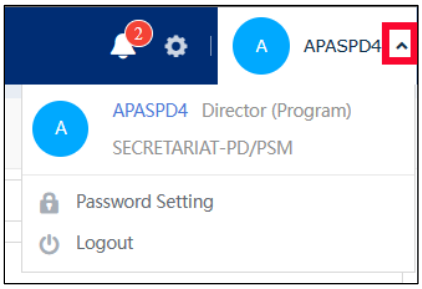
1.4.2 Changing an Account Password as a RAF Delegate User

If you are a RAF delegate, when you receive a password from IT Admin, we recommend that you change it immediately by following these steps:

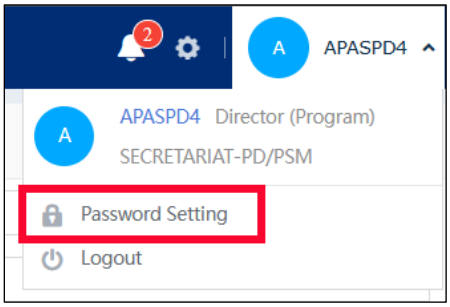
1. Log into your account with your username and current password. Your Dashboard displays.



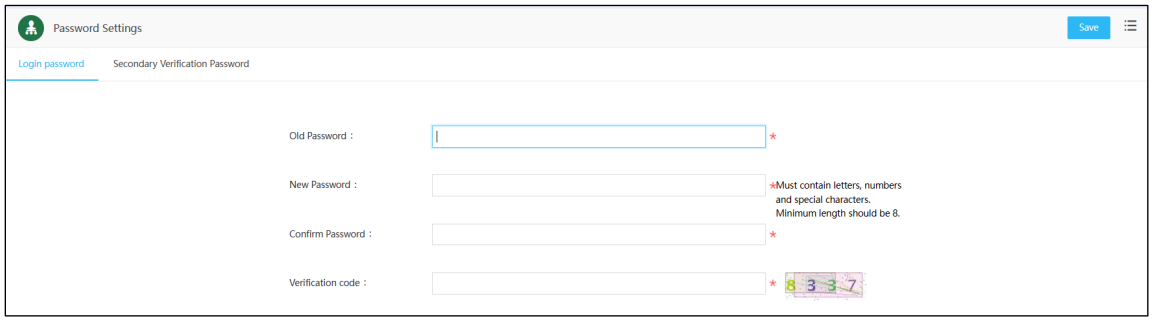
2. In the top right corner of the Dashboard, click the up arrow next to the user ID.



3. Select **Password Setting** from the menu that drops down.

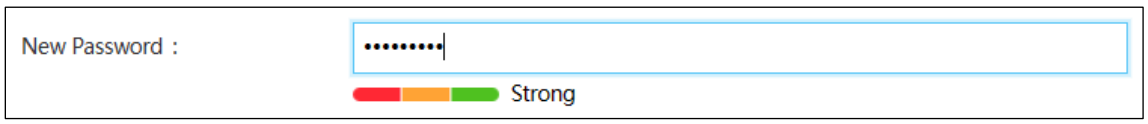


The Password Settings page displays in a separate tab in your web browser.



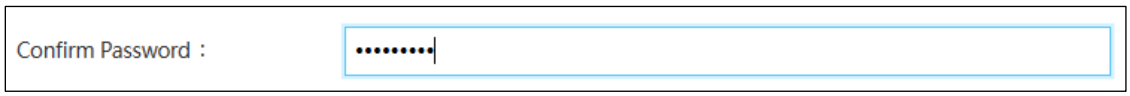
4. Enter your current password in the **Old Password** field.

5. Enter your new password in the **New Password** field. Your new password must be at least eight characters long and contain letters, numbers, and special characters like $, @, #, %, %, , etc.

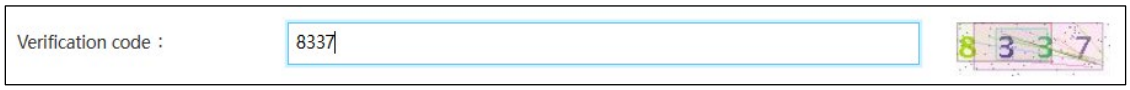


The strength of your password displays in a color code below the **New Password** field. Red means the password is weak, yellow means it's average, and green means it's strong. Make your password strong so others can't guess it.

6. Type your new password again in the **Confirm Password** field.



7. Enter the four-digit code shown at the right of the **Validation code** field in the **Validation code** field.

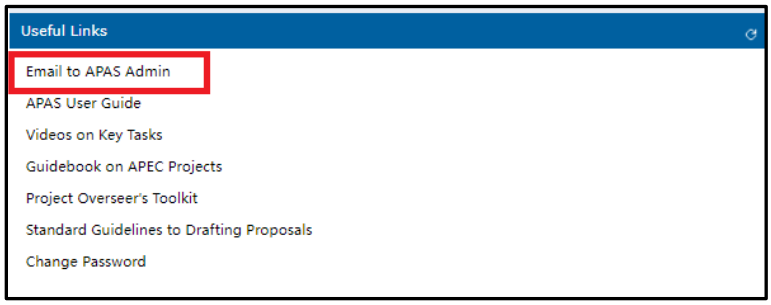


8. Click the **Save** button at the top right corner of the **Password Settings** page.

1.5 Updating User Emails

If you want to change the email that is registered in your APAS account, you need to request APAS Admin support. To do this, follow these steps:

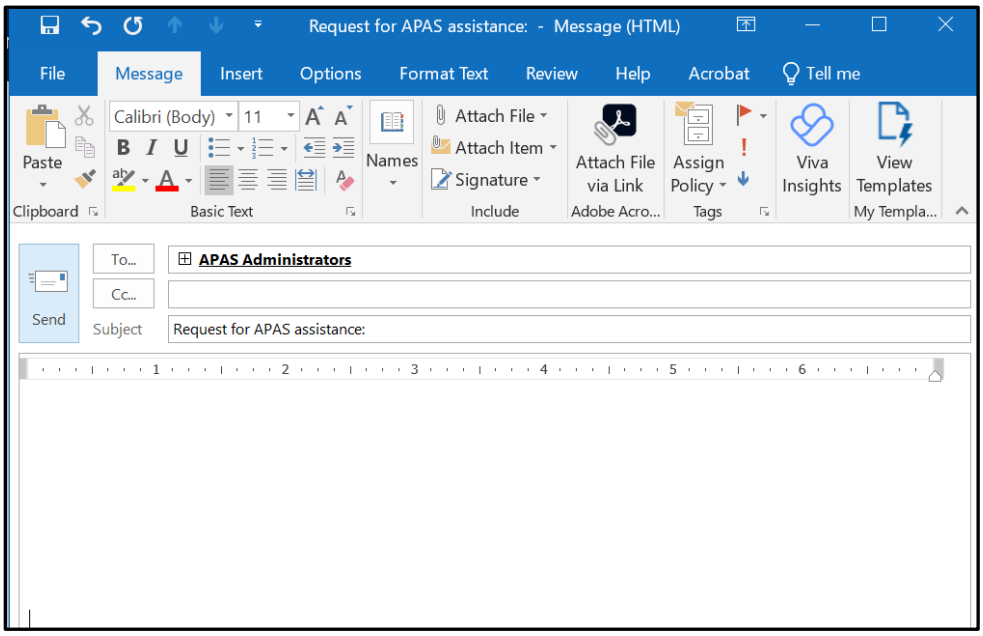
1. In the **Useful Links** widget on your Dashboard, click **Email to APAS Admin**.



   An email form launches from your default email system (such as Outlook).

2. Write your email change request in the email form and click **Send**.

If an email form does not launch, email apas@apec.org with your email change request.



2. The Concept Note

2.1 Overview of the Concept Note Process Flow

These are the steps for the creation and approval of a Concept Note:

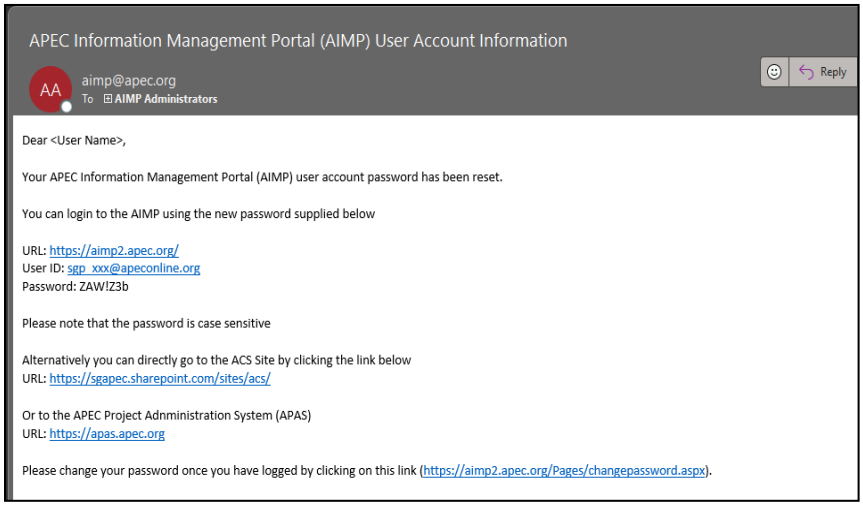
1. The PO downloads the Concept Note Template (in Word format) from apec.org and creates a draft Concept Note.
2. The PO emails the draft (Word document) to the PD or PE to review and submit to the APEC Forum for their endorsement.
3. Once the Concept Note is endorsed, the PO logs into APAS and fills in the online form based on the endorsed document and sends it to the PD or PE to review.
4. The PD or PE compares the Word version of the Concept Note with the version created in APAS to verify they match. Then the PD or PE submits the APAS version to the PMU.
5. The PMU accepts the Concept Note and notifies the PD or PE to start the scoring process.
6. The PD or PE generates a template for scoring the Concept Notes in APAS and notifies the RAFs to complete the scoring.
7. The RAFs download and review the Concept Notes, determine whether the Concept Note is eligible for funding, and provides scores in APAS before a set deadline.
8. The PD or PE consolidates all the scores and sends them to the PMU.
9. The PMU ranks the Concept Notes based on their scores and determines the top Concept Notes to be funded based on the amount available in each APEC Funding Source.
10. The PMU recommends the selected Concept Notes to the BMC via email and updates the Project In-Principle Approval status in APAS.

2.2 Submitting a Concept Note

2.2.1 Creating a Concept Note from an Endorsed Version in APAS

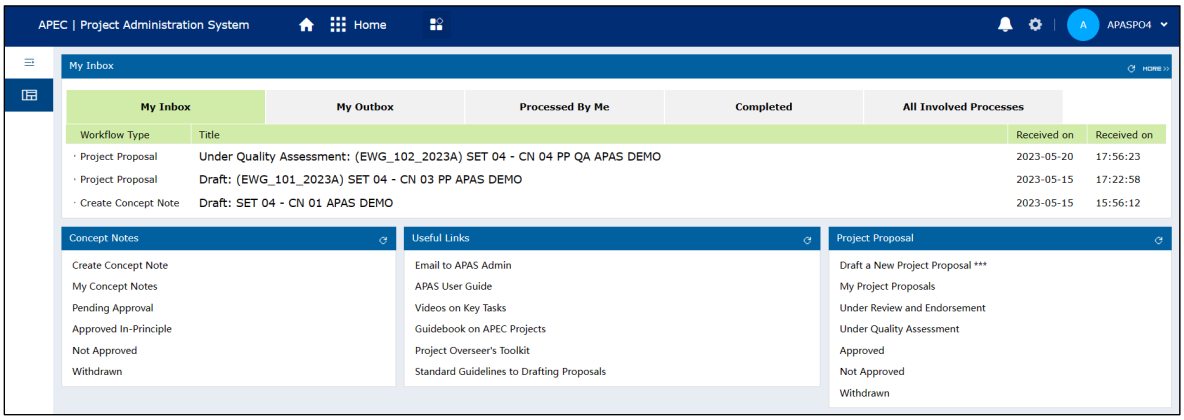
After the Concept Note is created and endorsed offline, the PO logs into APAS and opens the online Concept Note form. Then the PO uploads the endorsed Concept Note (Word document) and all the co-sponsorship confirmation emails, and then copies and pastes the information from the endorsed Concept Note (Word document) into the online template.

When a Concept Note is ready to be created in APAS, the PO receives an email notification similar to the example below:

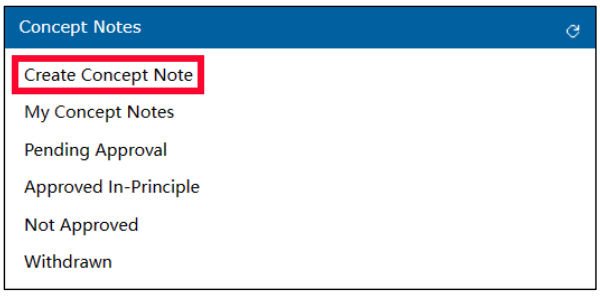


Then the PO follows these steps to create a Concept Note in APAS:

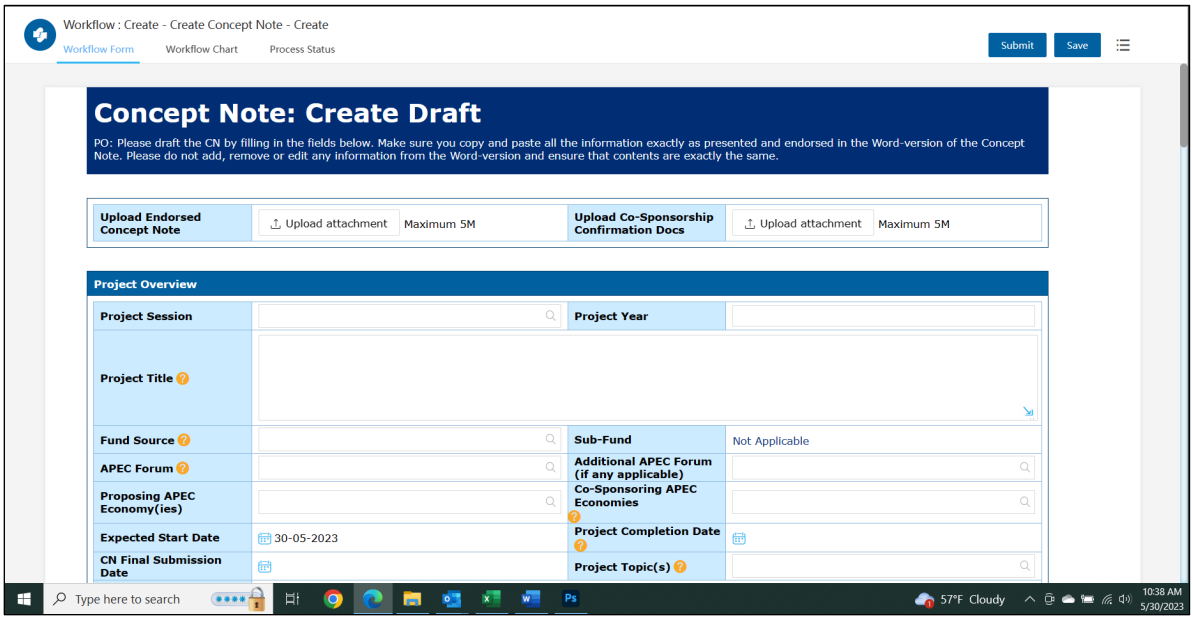
1. Log into APAS as a PO user, if you're not logged in already. Your Dashboard displays.



2. In the **Concept Notes** widget on the Dashboard, click **Create Concept Note**.

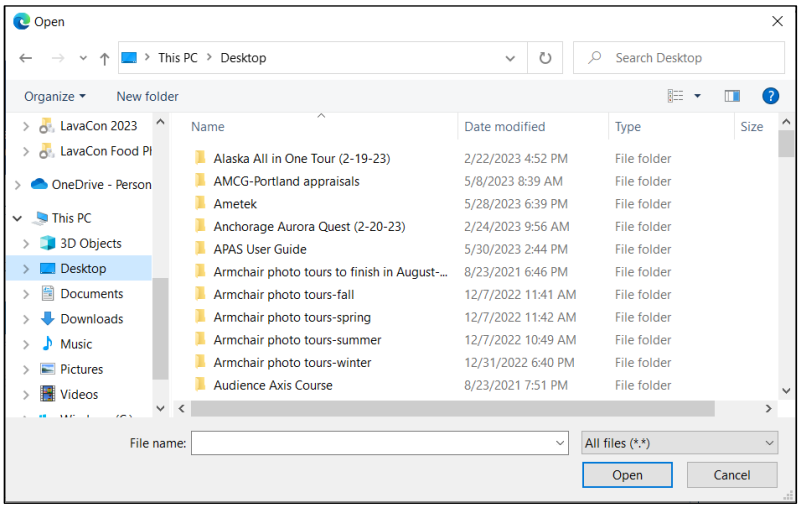


The Concept Note template displays in a separate tab in your web browser.

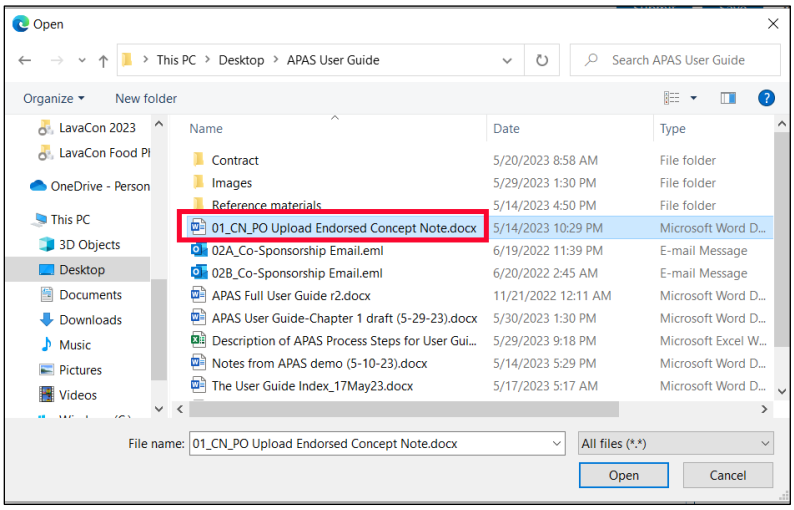


3. In the top section, follow these steps:
   a. In the **Upload Endorsed Concept Note** field, click the **Upload attachment** button.

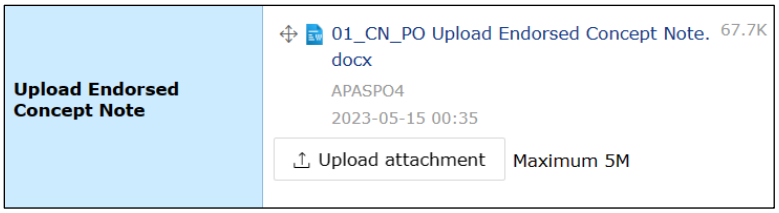
The Open window displays on your computer.



b. Navigate to the Word version of the endorsed Concept Note on your computer, and select the Endorsed Concept Note (Word Document) emailed to you by the PD or PE.
Note: The file size limit is 5 MB.



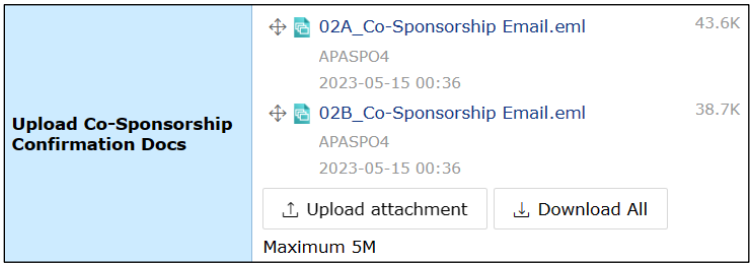
c. Click the **Open** button to finish the upload. The file displays in the **Upload Endorsed Concept Note** field.



d. In the **Upload Co-Sponsorship Confirmation Docs** field, repeat steps a-c to upload the two (or more) sponsorship confirmation emails.

Note: You should upload all the emails containing the co-sponsorship agreement by the co-sponsoring economies listed in your Concept Note.

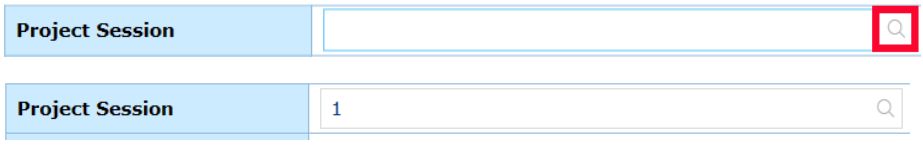
When you're finished, the uploaded emails display in this field as shown in the example below.



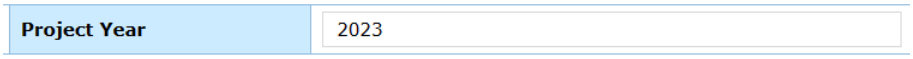
4. Open the Concept Note Word document on your computer, and follow steps 7-17 to enter the information from the Concept Note Word document into the template.

Important: Remember that you must enter the information exactly as it is from the Word document. Do not add new or different information.

5. In the **Project Overview** section of the Concept Note template, follow these steps:
   a. Click the magnifying glass icon at the right of the **Project Session** field and select number 1 or 2 from the list that pops up.

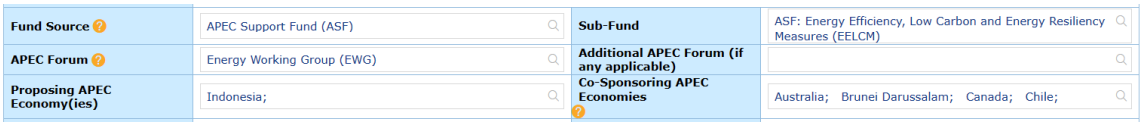


   b. Enter the year in the **Project Year** field.

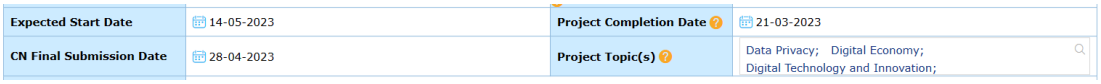


   c. Enter the title of the Concept Note in the **Project Title** field.

   d. Click the magnifying glass icon at the right of these fields and select the appropriate item from the list that pops up:
      - **Fund Source**
      - **APEC Forum**
      - **Proposing APEC Economy(ies)**
      - **Sub-Fund**
      - **Additional APEC Forum (if any applicable)**
      - **Co-Sponsoring APEC Economies**

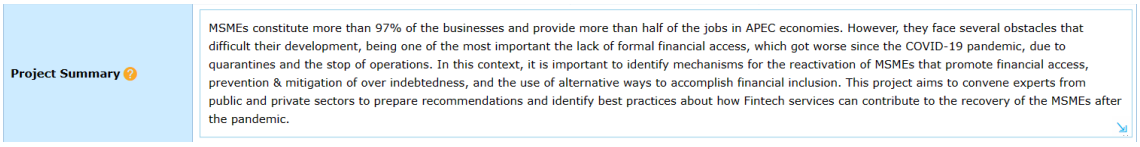


   e. Click the calendar icon at the left of these fields and select the dates from the calendar that pops up:
      - **Expected Start Date**
      - **Project Completion Date**

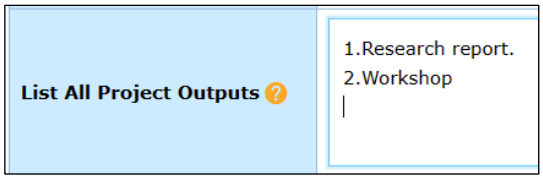


   f. Click the magnifying glass icon at the right of the **Project Topic(s)** field. From the list that pops up, select the topic(s) mostly relevant to your project theme.

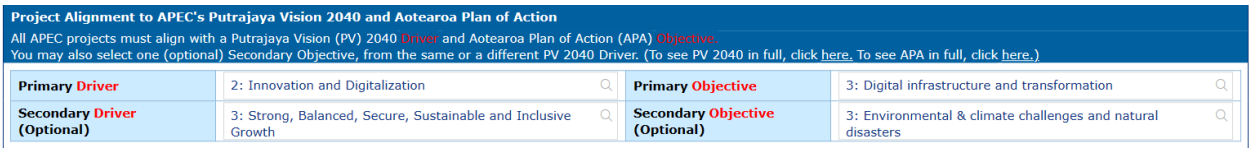
g. Copy the summary of the project from the Word document and paste it into the **Project Summary** field.



h. Copy the list of project outputs from the Word document and paste it into the **List All Project Outputs** field. Remember to number the Outputs in the chronological order they are produced.

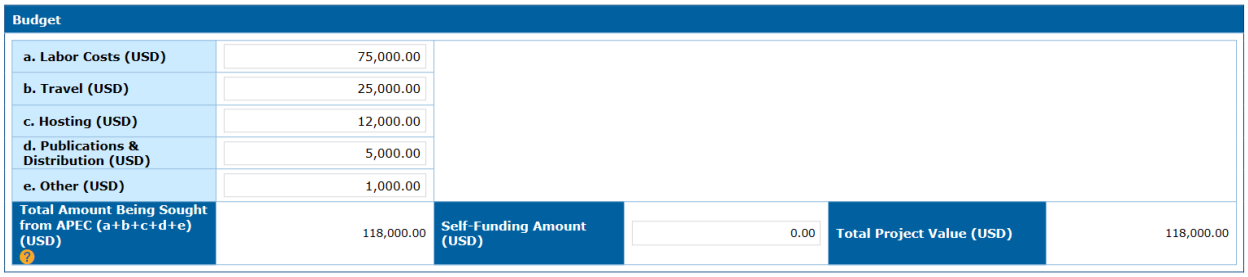


6. In the **Project Alignment to APEC's Putrajaya Vision 2040 and Aotearoa Plan of Action** section of the Concept Note template, refer to the Annex page of the Word Document and identify the driver(s) and objective(s) you selected. Then in APAS, click the magnifying glass icon at the right of these fields and select the appropriate item from the list that pops up:
   - **Primary Driver**—Select number 1, 2, or 3 and then a **Primary Objective**.
   - *(optional)* **Secondary Driver**—Select number 1, 2, or 3 and then a **Secondary Objective**.



7. In the **Budget** section, enter these costs in U.S. dollars in the corresponding fields. They must follow the exact numbers in the endorsed Word document.
   a. Labor
   b. Travel
   c. Hosting
   d. Publications and Distribution
   e. Other

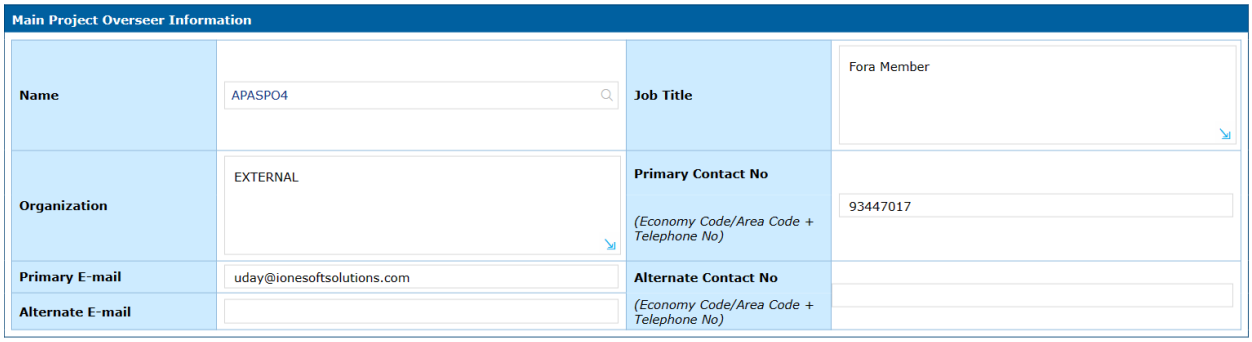
   As you enter these numbers, the total costs calculate automatically in the **Total Amount Being Sought** from **APEC and Total Project Value** fields at the bottom of the **Budget** section.



   If any self-funding is committed to your project, enter the amount in U.S. dollars in the **Self-Funding Amount** field.

8. In the **Main Project Overseer Information** section, the **Name**, **Organization**, **Primary E-mail**, **Job Title**, and **Primary Contact No** fields are filled in automatically with your information from your APAS account.

   Note: if the main contact is not the Main Project Overseer, enter the email address of the main contact. This email address will receive all email and task notifications from APAS. If there are several members on the PO's team or multiple POs for the same project, the login information for the Main PO needs to be shared.

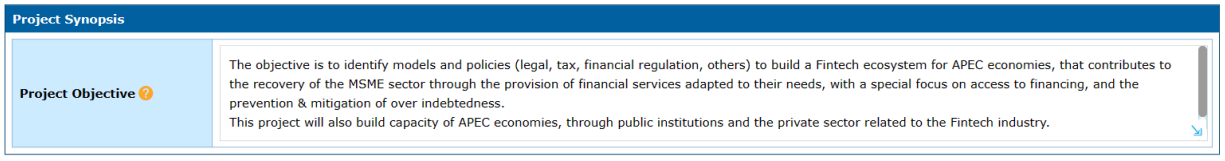


   If there is an alternate contact for the project, enter their email in the **Alternate E-mail** field and their phone number in the **Alternate Contact No** field.

   Note: The **Alternate E-mail** owner will not receive email notifications from APAS. All email and task notifications from APAS are sent to the email address of the main contact.

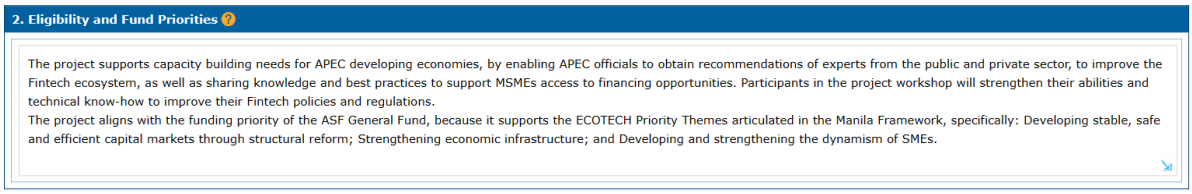
9. *(optional)* If you need to add a secondary Project Overseer, click the **+** at the top right corner of the **Additional Project Overseer Information** section. Add the person's name, job title, organization, contact number (phone), and email in the corresponding columns.

10. In the **Project Synopsis** section, copy the objective of the project from the Word document and paste it into the **Project Objective** field.

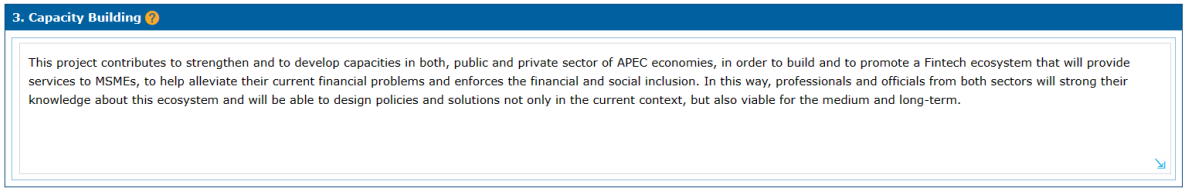


11. In the **Relevance** section, follow these steps:
    a. Copy the issues from the Word document and paste them into the **Issues** field.
    b. Copy the alignment to APEC information from the Word document and paste it into the **Alignment to APEC** field.
    c. Copy the alignment to Forum information from the Word document and paste it in the **Alignment to Forum** field.

12. Copy the priorities for eligibility and food from the Word document and paste it in the empty box in the **Eligibility and Food Priorities** section.



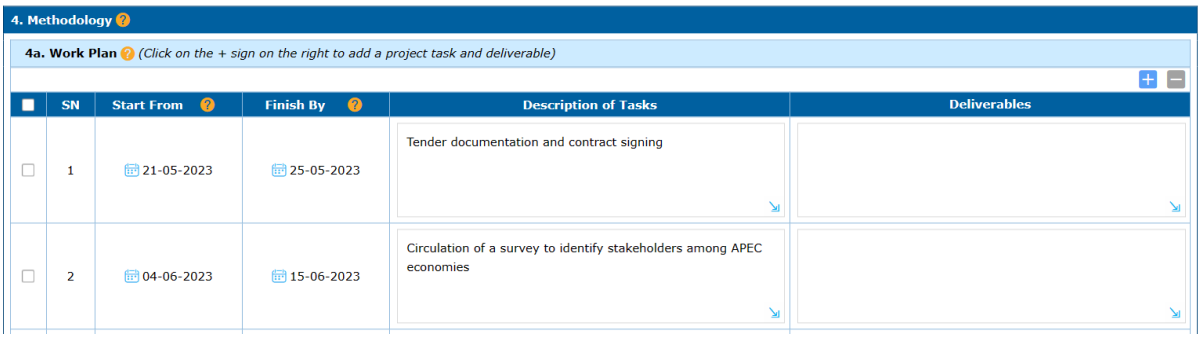
13. Copy the capacity building information from the Word document and paste it in the empty box in the **Capacity Building** section.



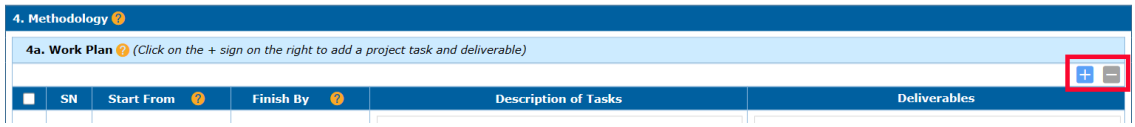
14. In the **Methodology** section, follow these steps:
    a. Click the calendar icon in the **Start From** and **Finish By** fields and select these dates from the calendar that pops up.

       Note: it is preferred that a task starts on the first day of the selected month and end by the last day of the selected month.

    b. Copy the task from the Word document and paste it in the **Descriptions of Tasks** field.
    c. Copy any deliverables for the task from the Word document and paste it into the **Deliverables** field.
    d. Repeat steps 14a-c to add another task.

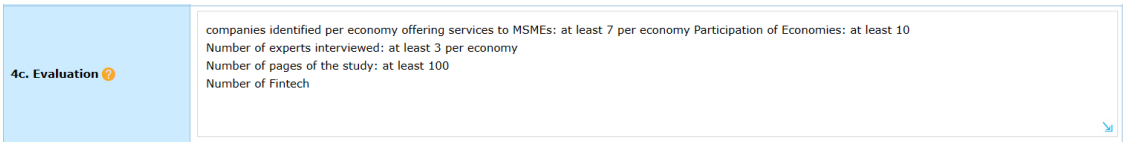


e. If you need to add another task, click the **+** button at the top right corner of the **Methodology** section. Delete a task by checking the box at the left of the task and clicking the **–** button.

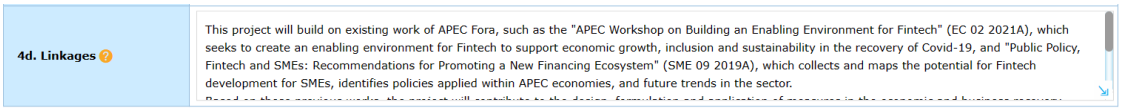


f. Copy the beneficiaries information from the Word document and paste it in the **Beneficiaries** field.

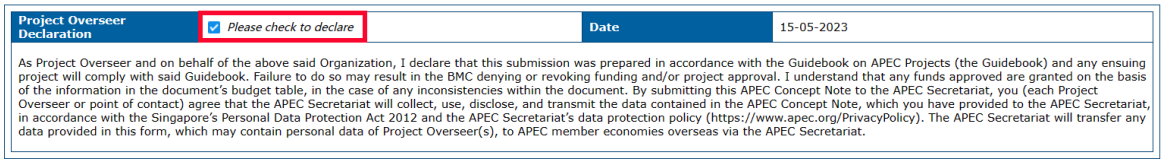
g. Copy the evaluation from the Word document and paste it in the **Evaluation** field.



h. Copy the linkages information from the Word document and paste it in the **Linkages** field.

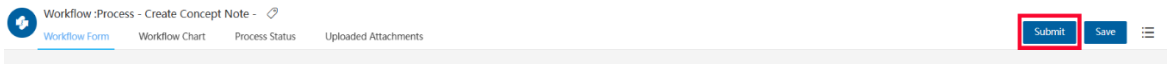


15. In the **Project Overseer Declaration** section, read the text and click the **Please check to declare** box to accept the declaration. A check mark displays in the box. Today's date automatically displays in the **Date** field.

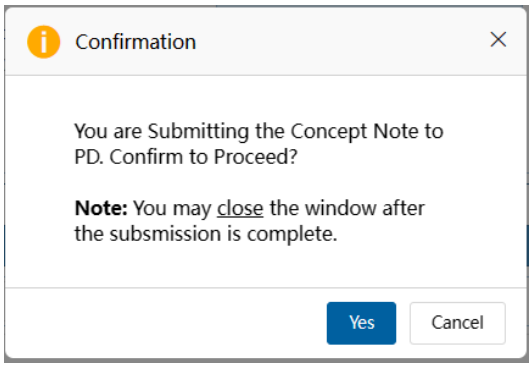


16. *(optional)* If you need to stop working on the Concept Note and return to it later, click the **Save** button in the top right corner of the Concept Note template.

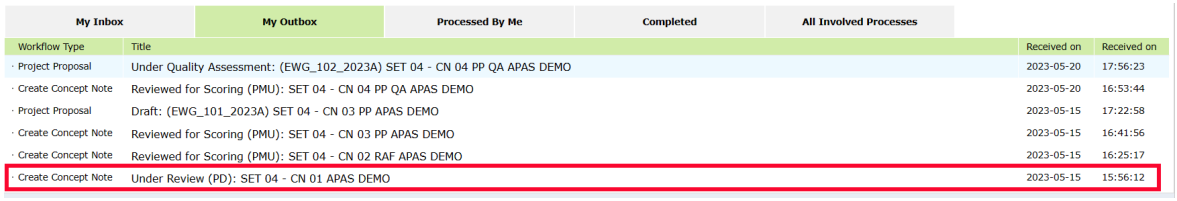
17. When you're finished filling out the Concept Note template, click **Submit** in the top right corner of the Concept Note template to send the Concept Note to the PD or PE.



A confirmation message displays. Click **Yes** to verify you want to submit the Concept Note.



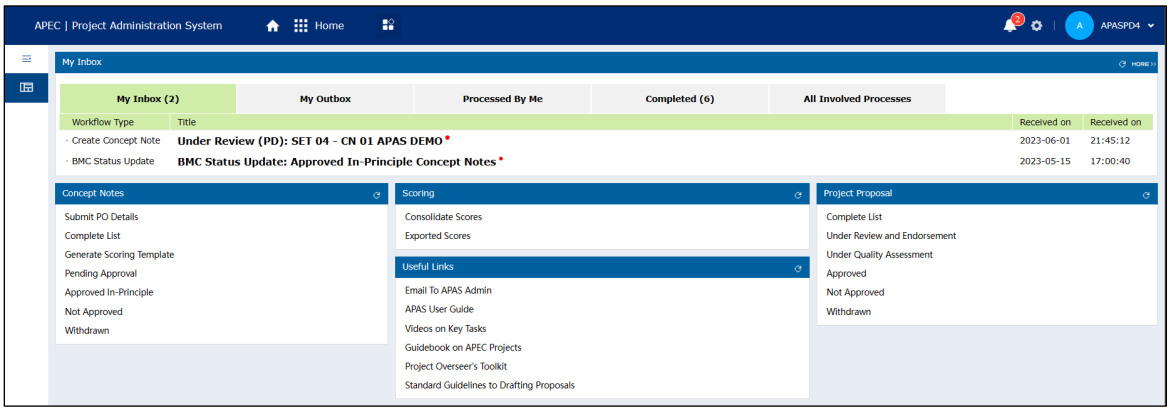
The message, "Submitting your Concept Note. Please wait," displays. When the Concept Note is submitted to the PD or PE, it moves from the **My Inbox** tab to the **My Outbox** tab in your Dashboard. The title changes to "Under Review."



2.2.2 Reviewing an Endorsed Concept Note

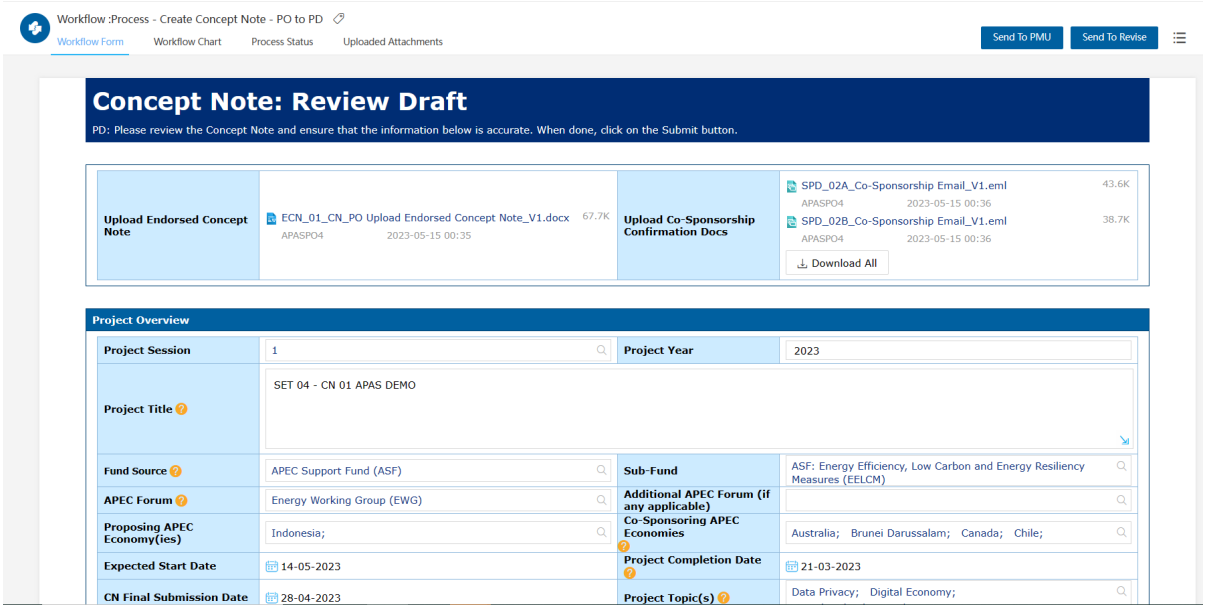
After the PO submits the endorsed Concept Note to the PD or PE, the PD or PE will review and verify that the APAS version matches the endorsed Word version. The PD or PE will download and compare the two versions by following these steps:

1. Log into APAS as a PD or PE user, if you're not logged in already. Your Dashboard displays.



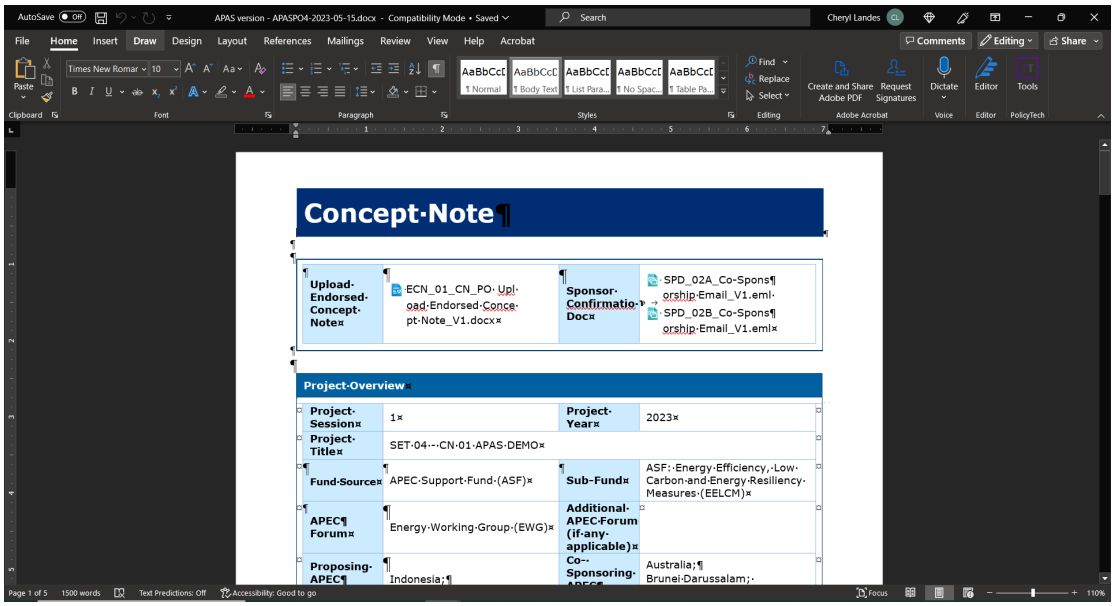
2. In the **Inbox**, look for the Concept Note message and click its title.

The Concept Note displays in a separate tab in your web browser.

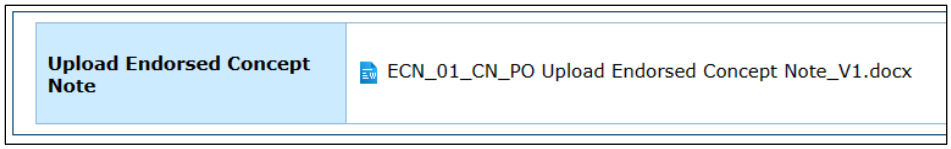


3. Verify the fields in the Concept Note are filled in.

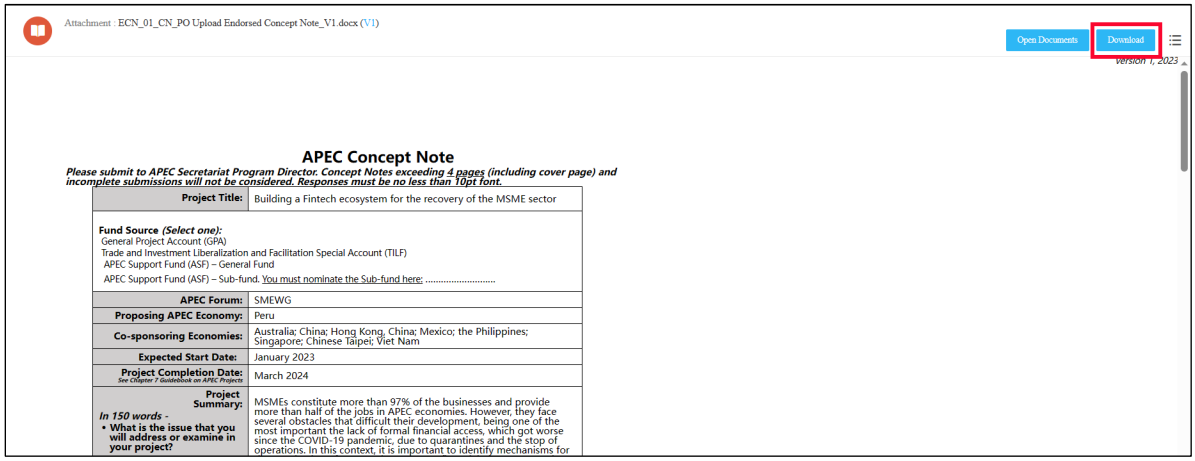
Note: The PDs or PEs use the downloaded emails as verification of the economies who signed up as co-sponsors for the project. See the field, **Co-Sponsoring APEC Economies**. For example, if four economies are listed, then the PO should upload four emails.



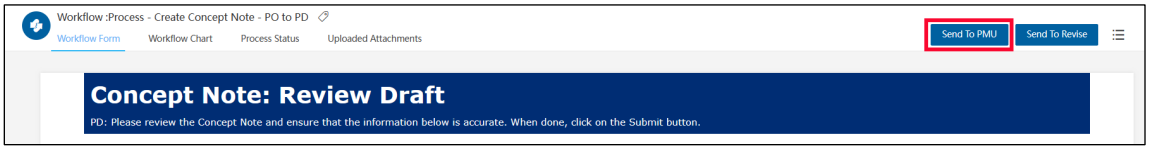
4. At the top of the **Concept Note** page, look for the endorsed concept document in the **Upload Endorsed Concept Note** field and click on it.



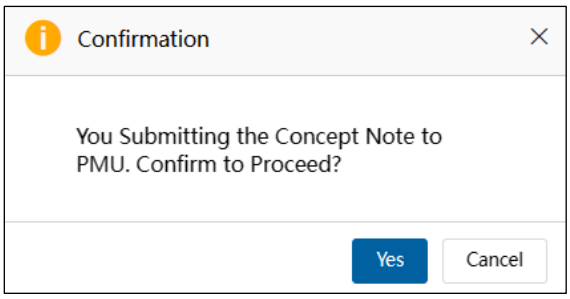
The endorsed Concept Note displays in a separate tab in your web browser. Click the **Download** button in the top right corner of the tab.



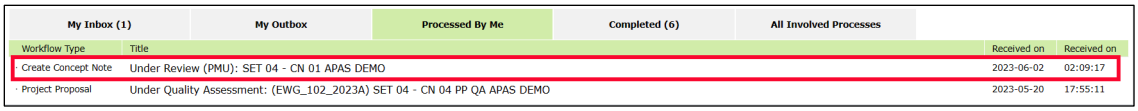
5. Open the downloaded the endorsed Concept Note. Compare the first page (Cover Page) and the third Page (Annex – Drivers and Objectives) against the corresponding sections in APAS. Make sure that the content is the same. If there are incorrect changes made in APAS:
   a. **Option 1** - Correct these changes on APAS on PO's behalf. Make a note of these changes in an email (using Outlook) for the PO. On APAS, click **Send to PMU**.



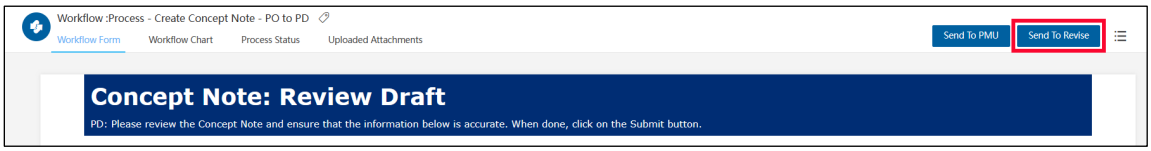
A confirmation message displays. Click **Yes** to continue.



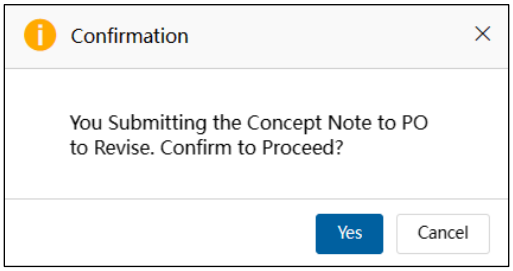
The message, "Submitting your Concept Note. Please wait," displays. When the Concept Note is submitted to the PD or PE, it moves from the **My Inbox** tab to the **Processed by Me** tab in your Dashboard. The title changes to "Draft."



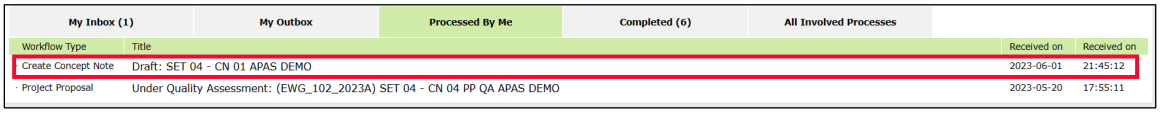
b. **Option 2** - Make a note of these changes in an email (using Outlook) for the PO. When you're finished, click the **Send to Revise** button at the top of the Concept Note in APAS. Then send the email with the changes to the PO.



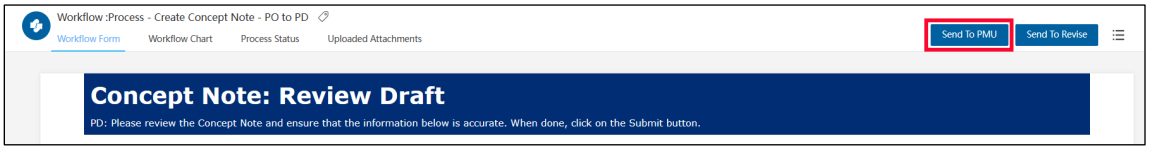
A confirmation message displays. Click **Yes** to continue.



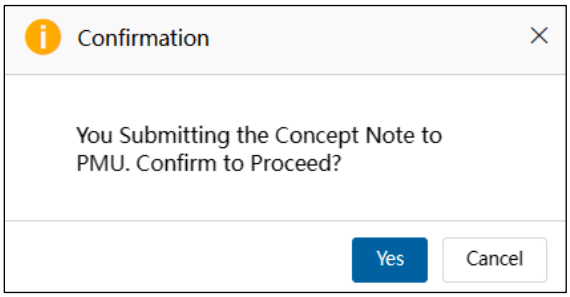
The message, "Submitting your Concept Note. Please wait," displays. When the Concept Note is submitted to the PD or PE, it moves from the **My Inbox** tab to the **Processed by Me** tab in your Dashboard. The title changes to "Draft."



If the document does not have any tracked changes, then you can forward the Concept Note to the PMU for approval. Click the **Send to PMU** button to finish this task.



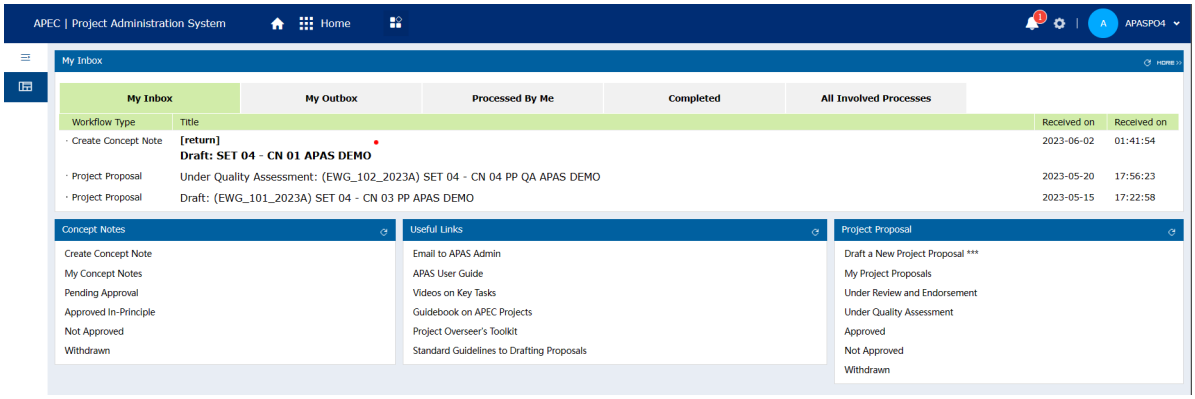
A confirmation message displays. Click **Yes** to continue.



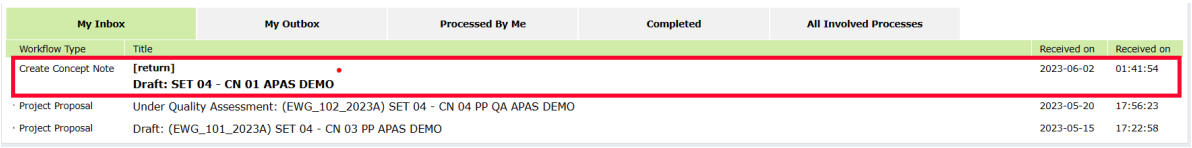
2.2.3 Revising an Endorsed Concept Note

If an endorsed Concept Note is sent back to be revised, the PO receives an email notification from APAS. The PO follows these steps to make the revisions:

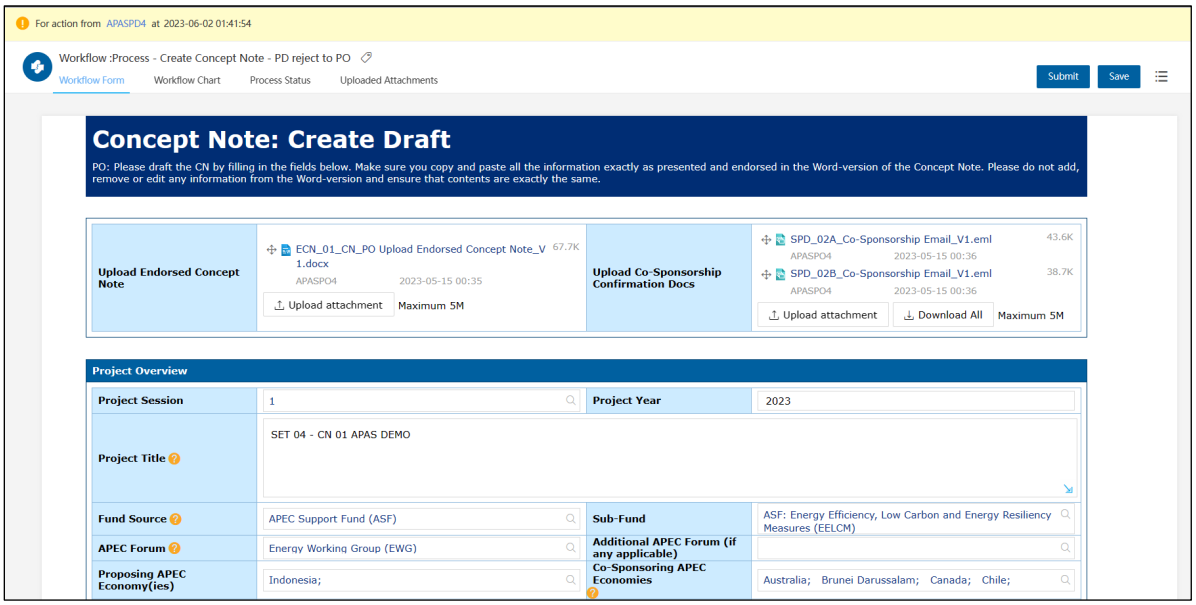
1. Log into APAS as a PO user, if you're not logged in already. Your Dashboard displays.



2. In your inbox, look for the Concept Note that needs to be revised and click the message to open it.

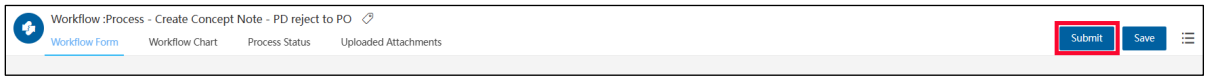


The Concept Note opens in a new tab.

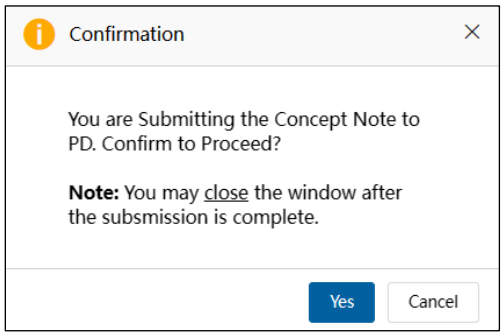


3. Read the PD's or PE's comments in the email they sent to you and make the changes requested in the Concept Note.

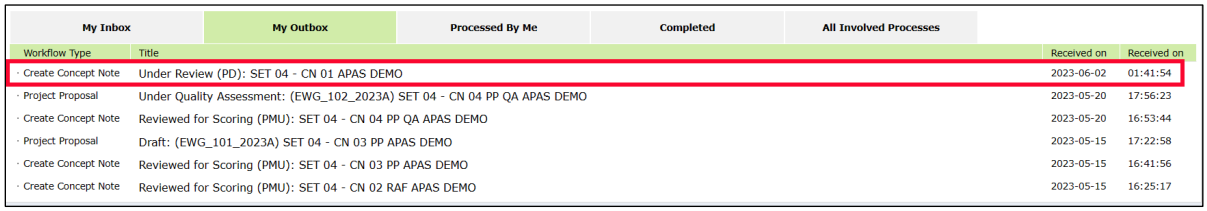
4. Click **Submit** to send the updated Concept Note to the PD or PE for approval.



A confirmation message displays. Click **Yes** to continue.



The message, "Submitting your Concept Note. Please wait," displays. When the Concept Note is submitted to the PD or PE, it moves from the **My Inbox** tab to the **My Outbox** tab in your Dashboard. The title changes to "Under Review."

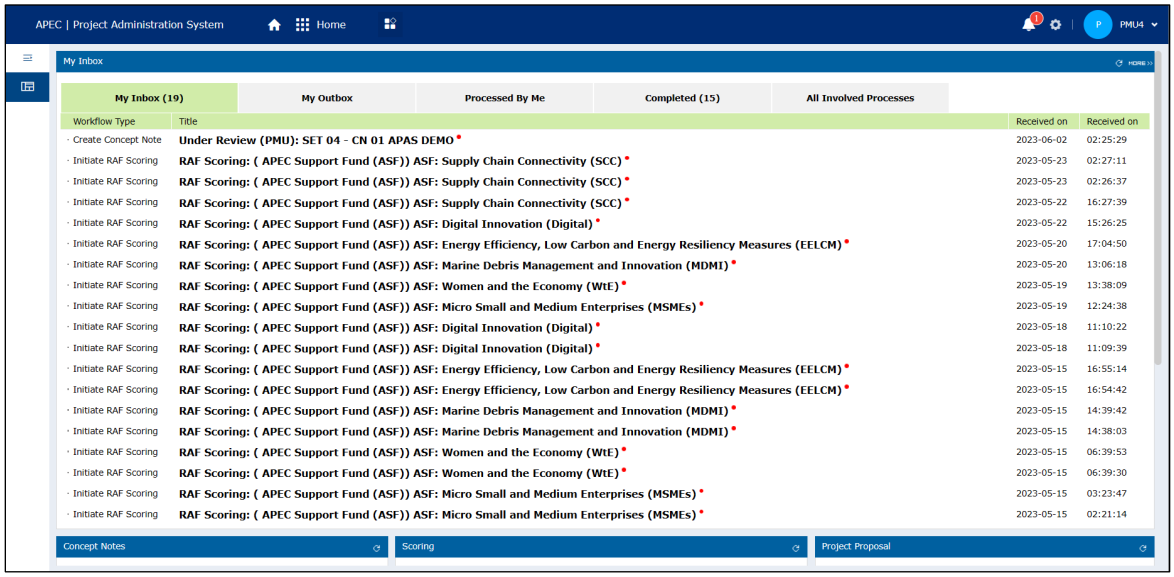


5. The PD or PE confirms the changes were made by following the steps in the section, 2.2.2 Reviewing an Endorsed Concept Note. After the changes are verified, the PD or PE submits the Concept Note to the PMU for approval.

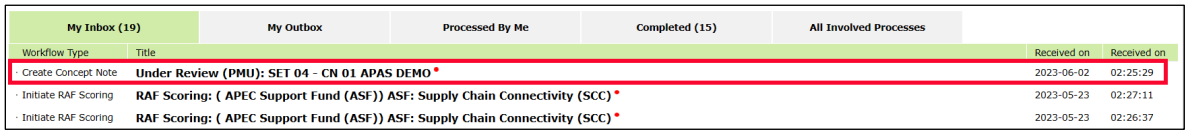
2.2.4 Accepting an Endorsed Concept Note

When the PD or PE notifies the PMU that a Concept Note is ready for approval, the PMU follows these steps to finish this task:

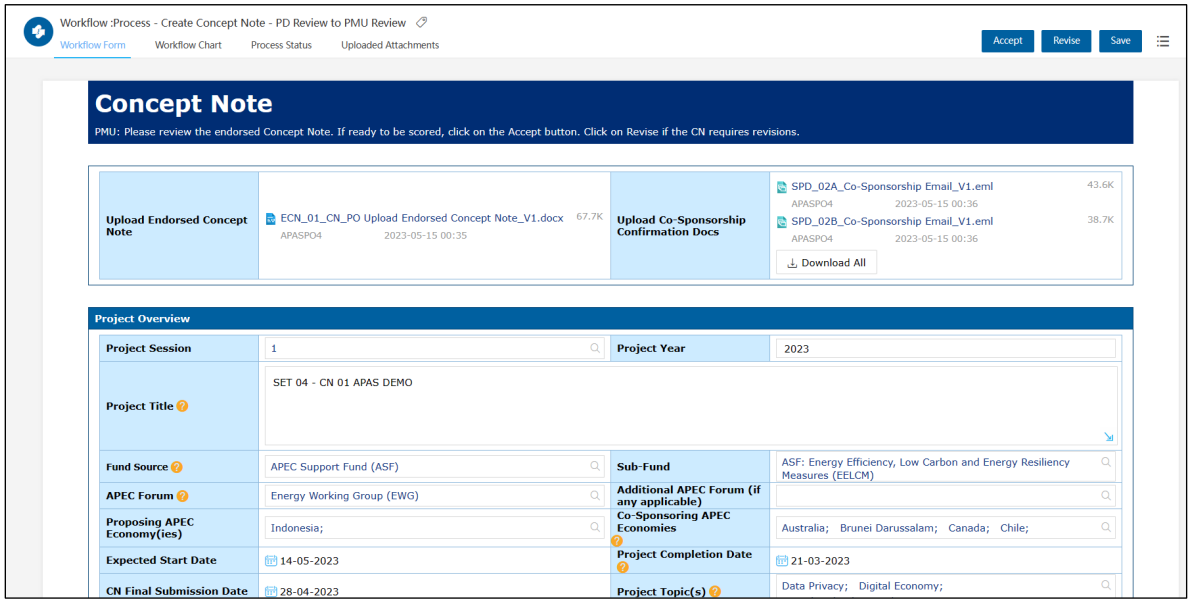
1. Log into APAS as a PMU user, if you're not logged in already. Your Dashboard displays.



2. In your inbox, look for the Concept Note that's ready for approval to move to scoring and click the message to open it.



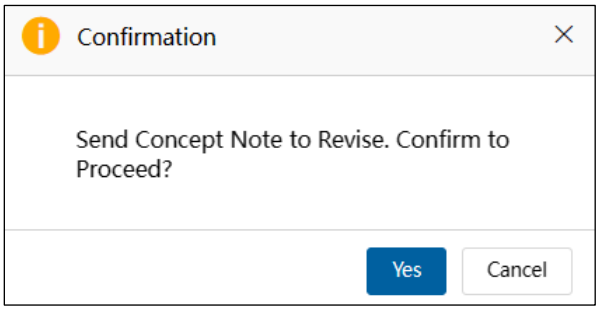
The Concept Note displays in a separate tab in your web browser.



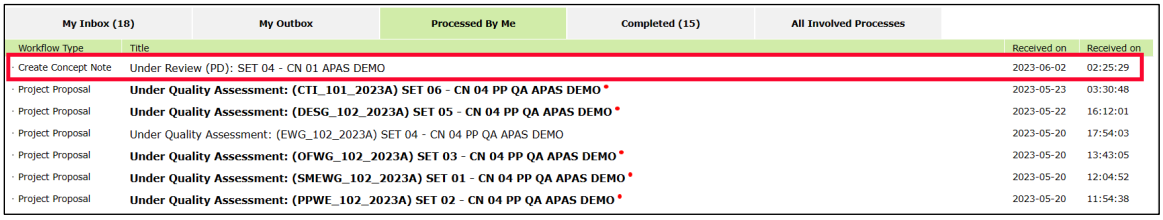
3. Verify that the fields in the Concept Note are filled in.
4. Follow the steps in section 2.2.2 Reviewing an Endorsed Concept Note.
5. *(optional)* If you need to stop reviewing the Concept Note and return to it later, click the **Save** button in the top right corner of the Concept Note.

6. *(optional)* If changes are needed:
   a. List the required changes in an email for the PD or PE.
   b. In APAS, click the **Revise** button in the top right corner of the Concept Note.

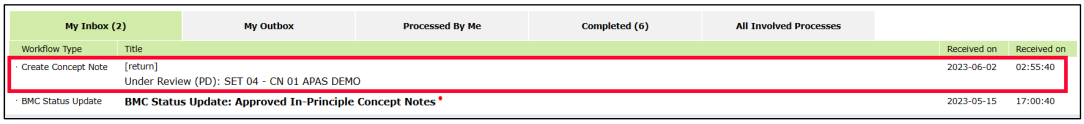
A confirmation message displays. Click **Yes** to continue.



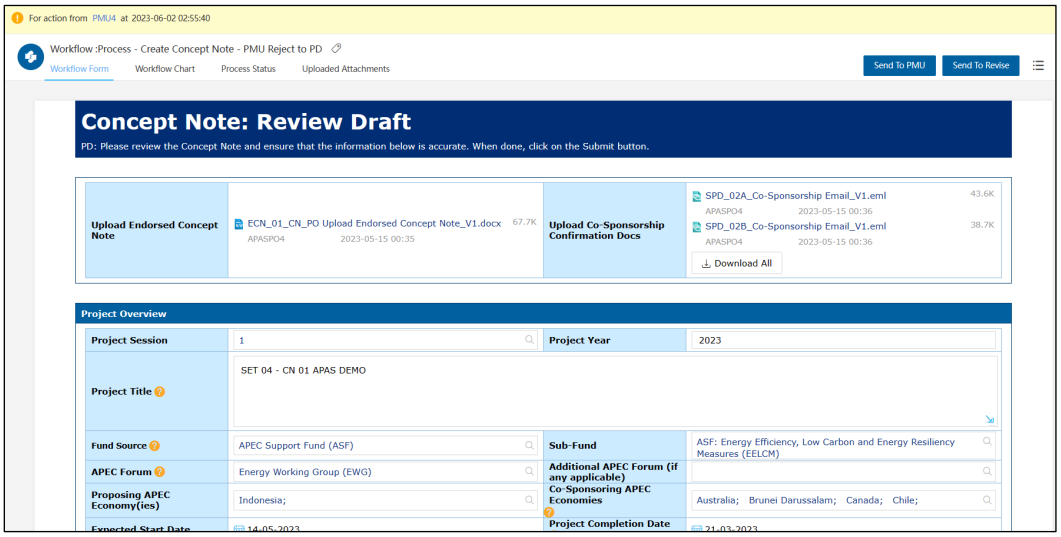
The message, “Submitting your Concept Note. Please wait,” displays. When the Concept Note is submitted to the PD or PE, it moves from the **My Inbox** tab to the **Processed by Me** tab in your Dashboard. The title changes to “Under Review.”



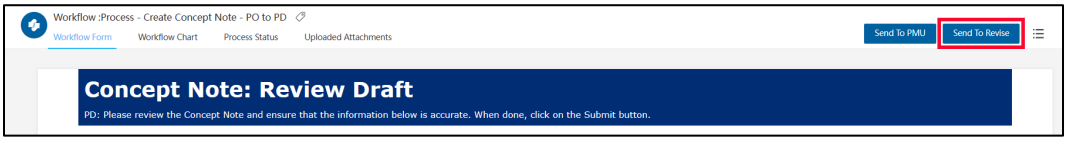
   c. Send the email to the PD or PE, who completes the following steps:
      i. The PD or PE opens the email with the Concept Note in their inbox.



The Concept Note displays in a separate tab in your web browser.



ii. The PD or PE reviews the information in the Concept Note and sends the Concept Note to the PO to correct by clicking the **Send to Revise** button in the top right corner of the Concept Note.



iii. The PD or PE also forwards the email from the PMU with the changes requested.

iv. The PO follows the steps in the section, 2.2.3 Revising an Endorsed Concept Note, to incorporate the changes into the Concept Note.

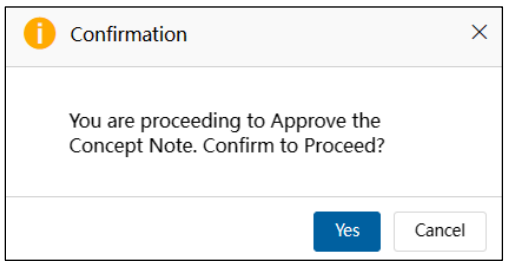
v. When the PO completes the changes, they send the Concept Note back to the PD or PE.

vi. The PD or PE confirms the changes were made by following the steps in the section, 2.2.2 Reviewing an Endorsed Concept Note. After the changes are verified, the PD or PE submits the Concept Note to the PMU for approval.

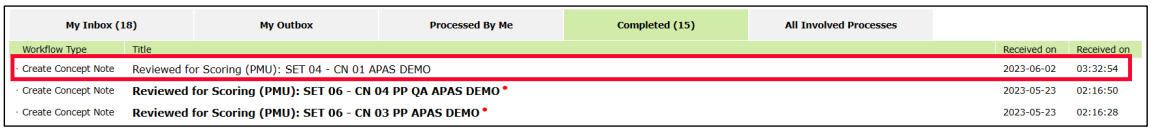
vii. The PMU continues with step 7 to approve the Concept Note.

7. If no changes are needed, click the **Accept** button in the top right corner of the Concept Note.

A confirmation message displays. Click **Yes** to continue.



The message, “Submitting your Concept Note. Please wait,” displays. When the Concept Note is submitted to the PD or PE, it moves from the **My Inbox** tab to the **Completed** tab in your Dashboard. The title changes to “Reviewed for Scoring.”



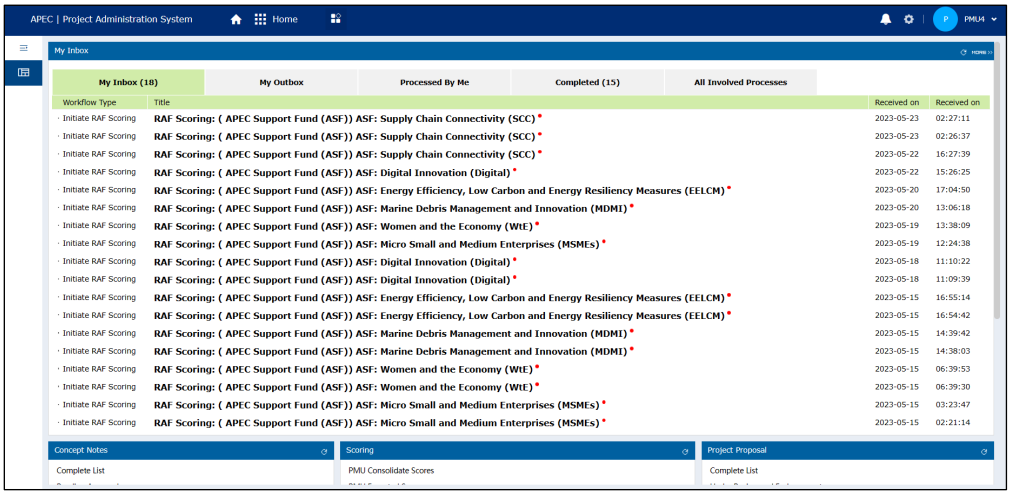
2.3 Scoring a Concept Note

The score for a Concept Note determines whether the project will be funded for a given Project Session. The maximum number any Concept Note can receive is 60. For more information about the criteria used to score a Concept Note, go to the section, 2.3.3 Viewing and Amending the Scores.

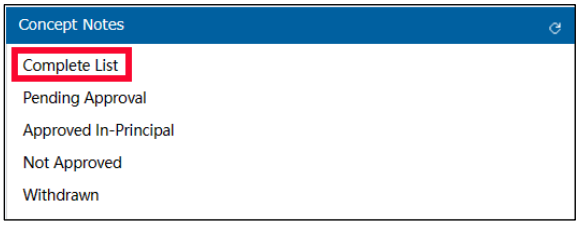
2.3.1 Generating a Scoring Template

When a Concept Note is ready to be scored, the PMU starts the scoring process by generating a scoring template. The PMU follows these steps to generate the template:

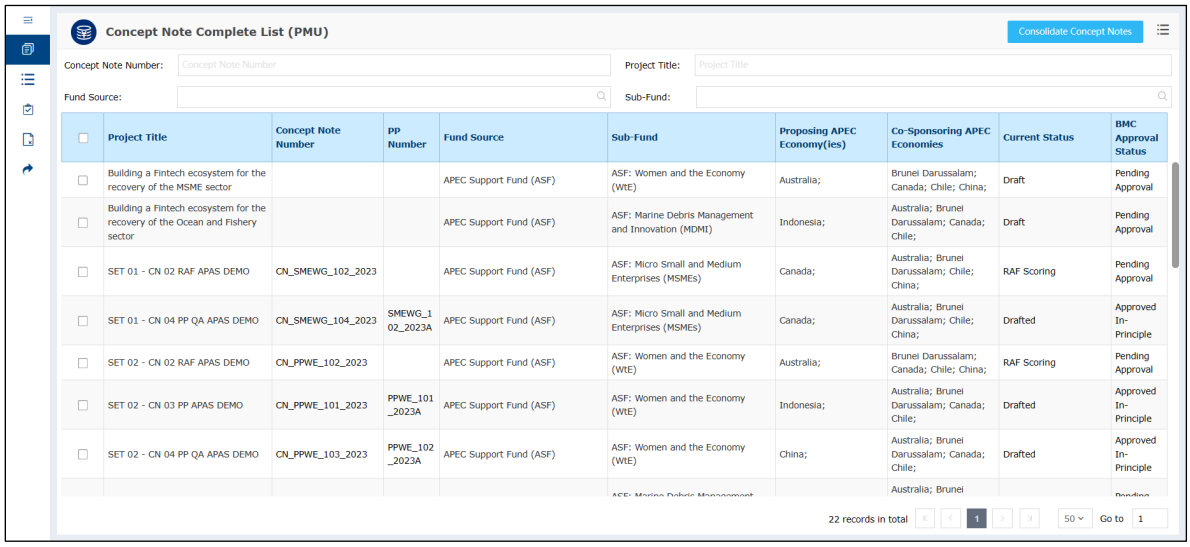
1. Log into APAS as a PMU user, if you’re not logged in already. Your Dashboard displays.



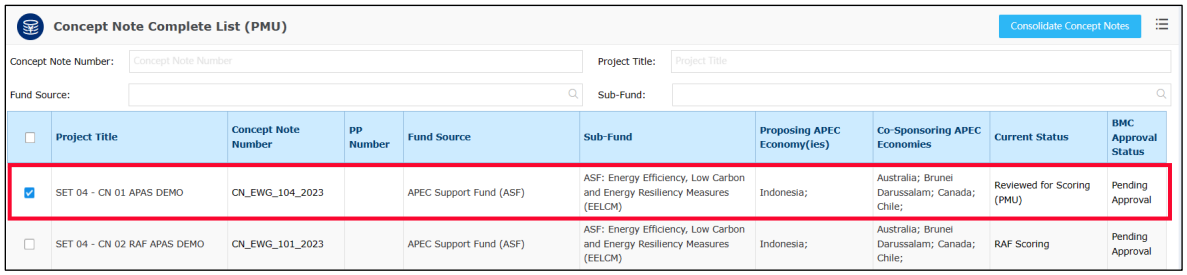
2. On the Dashboard in the **Concept Notes** widget, click **Complete List**.



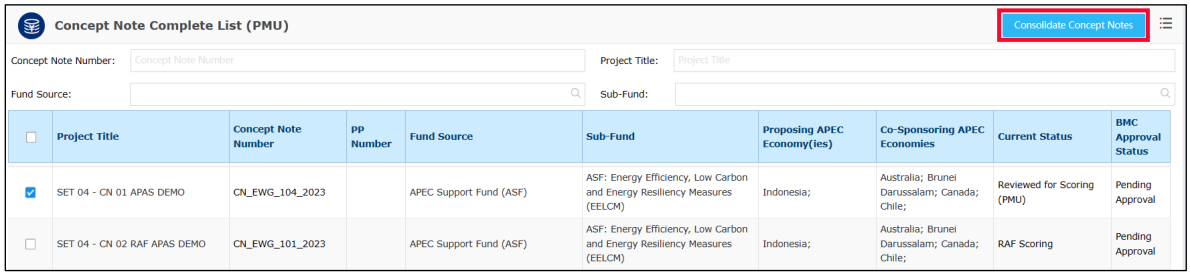
The Concept Note Complete List (PMU) displays in a separate tab in your web browser.



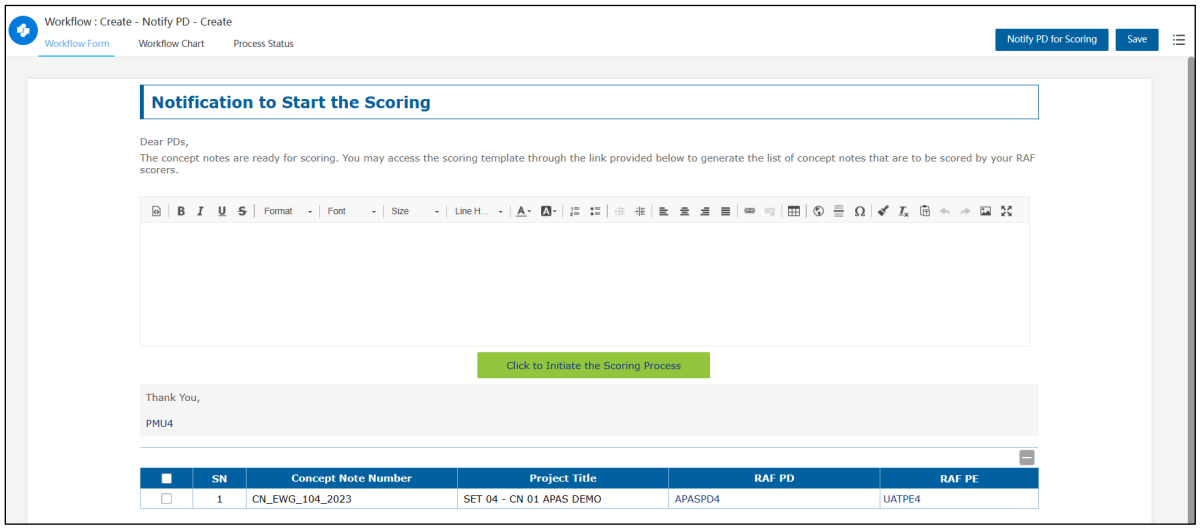
3. Select the Concept Note ready to be scored by checking for **Reviewed for Scoring (PMU)** in the **Current Status** column. Check the box at the left of its **Project Title**. If more than one Concept Note is ready to be scored, you can check each one in the list. In the example below, only one Concept Note is selected.



4. Click the **Consolidate Concept Notes** button in the top right corner of the Concept Note list.

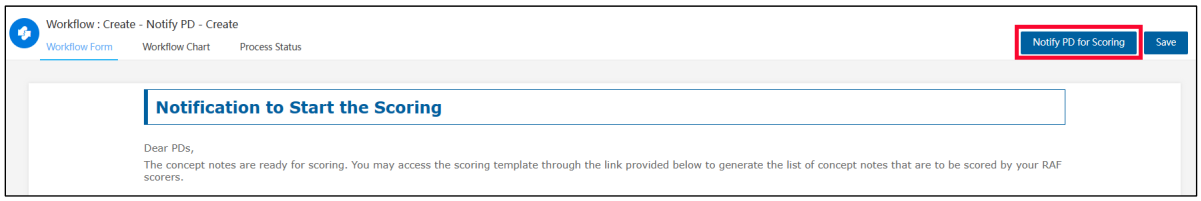


The Notification to Start Scoring displays in a separate tab in your web browser.

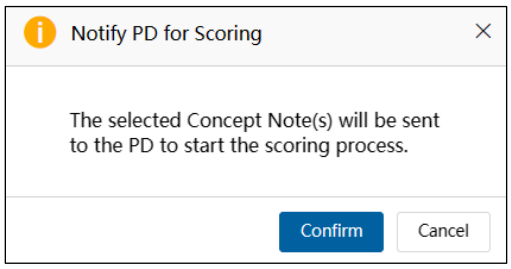


5. Click the **Notify PD for Scoring** button to initiate the scoring.

Note: Do not click the green button, **Click to Initiate the Scoring Process**.

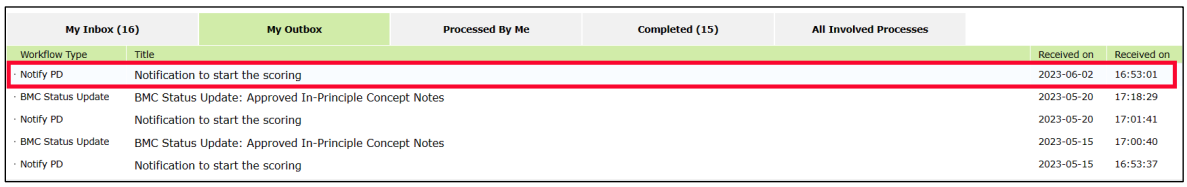


A confirmation message displays. Click **Confirm** to continue.



The Notification to Start the Scoring tab closes and the **Concept Note Complete List (PMU)** displays. The Concept Note you selected for scoring has been removed from the list.

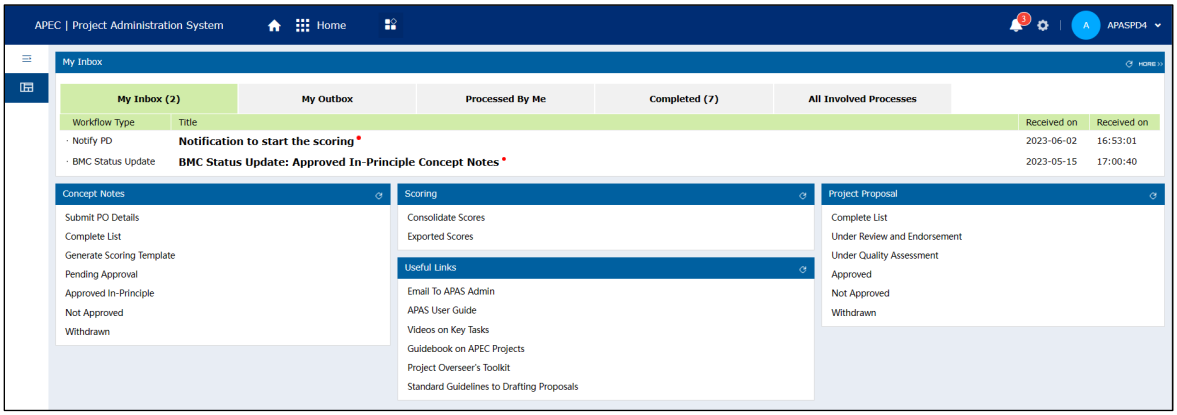
In the Dashboard, the message sent to the PD or PE to start the scoring displays in the **Outbox** tab.



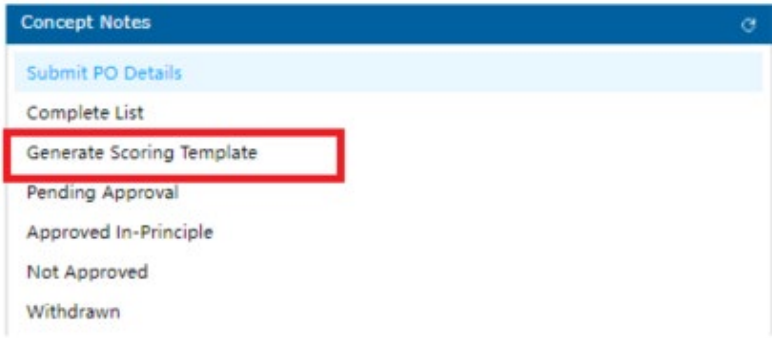
2.3.2 Scoring a Concept Note

When the PD or PE receives an APAS email notification that a concept is ready to be scored, the PD or PE follows these steps to generate a scoring template for the RAFs:

1. Log into APAS as a PD or PE user, if you're not logged in already. Your Dashboard displays.

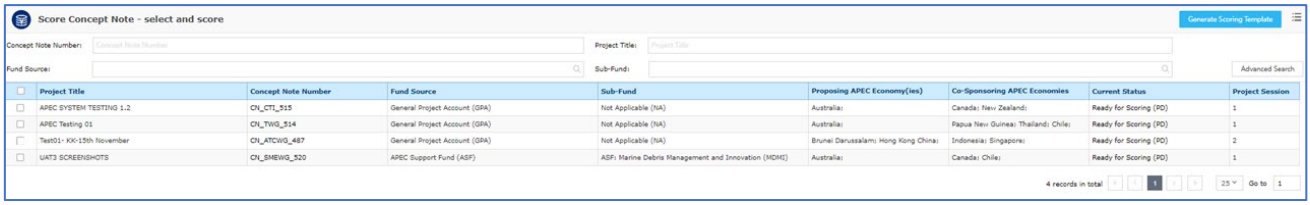


2. Under the Concept Note widget, click **Generate Scoring Template**.

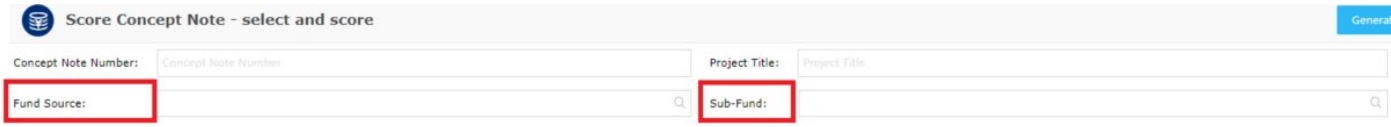


The notification displays in a separate tab in your web browser.

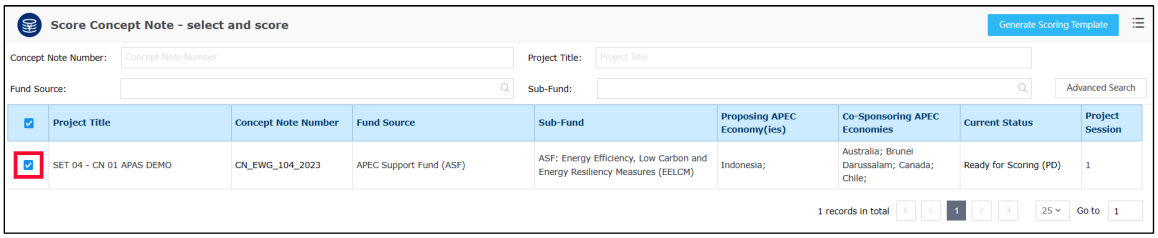
3. The **Score Concept Note – select and score** page opens in a new tab.
The full list of Concept Notes for all the Fund Accounts displays.



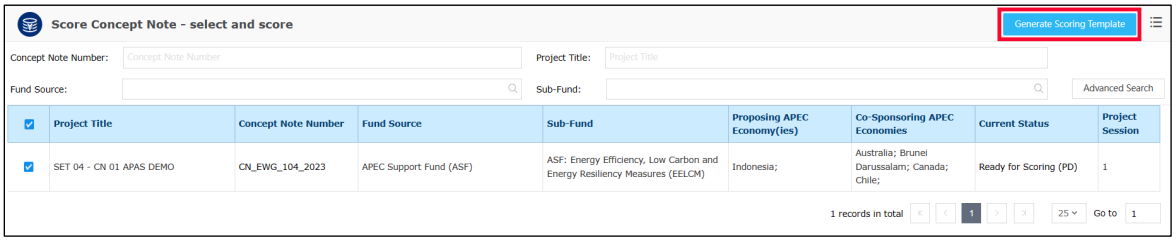
4. Use the filters at the top to find or list Concept Notes by the Number, Project Title, Fund Source and Sub-Fund.
   Note that all Scoring Templates are generated by Fund Sources.



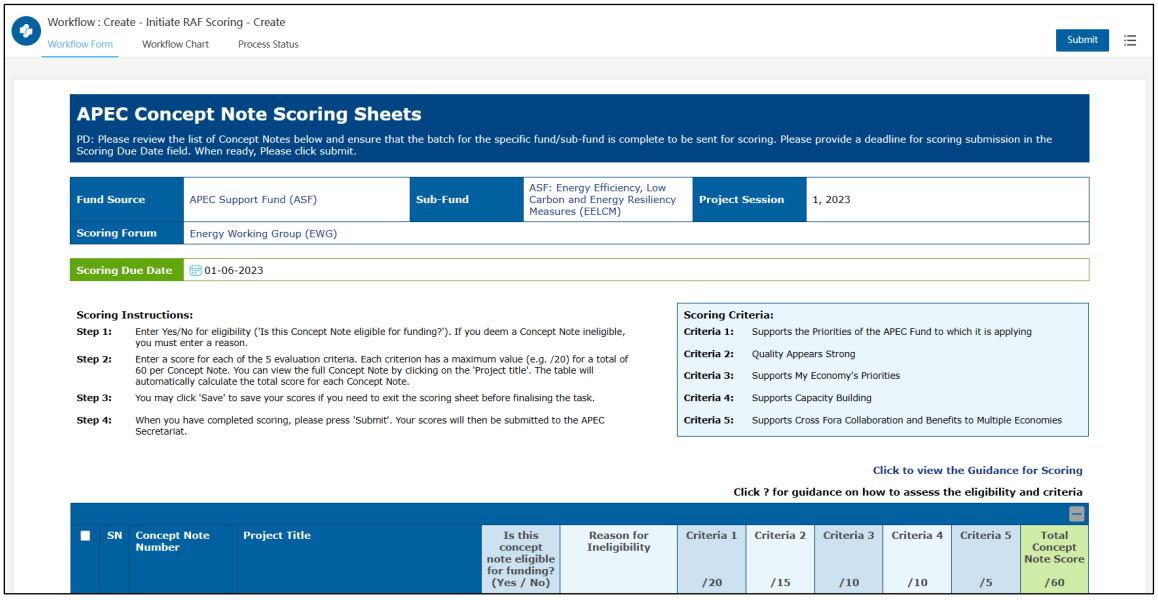
5. To select all the Concept Notes in the lists, check the box in the header column. Otherwise, check the box at the left of the **Project Title** of specific Concept Notes to be scored.



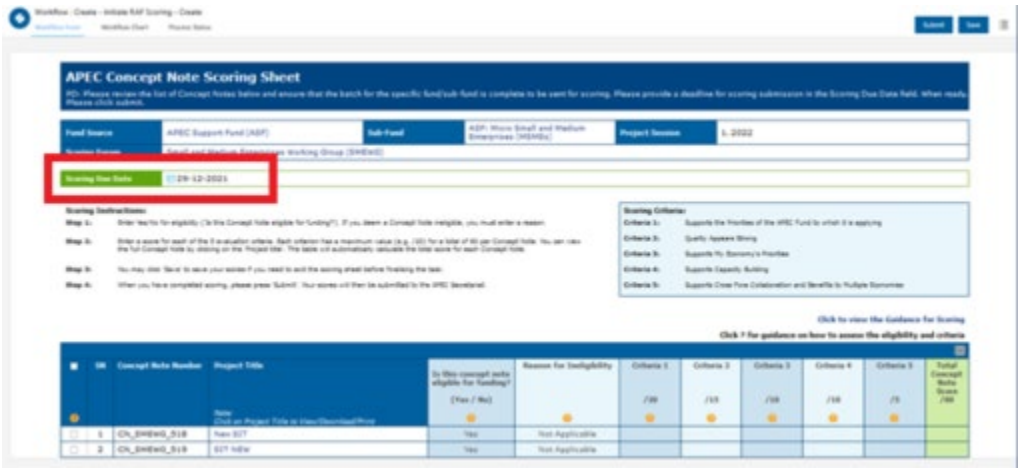
6. Click the **Generate Scoring Template** button.



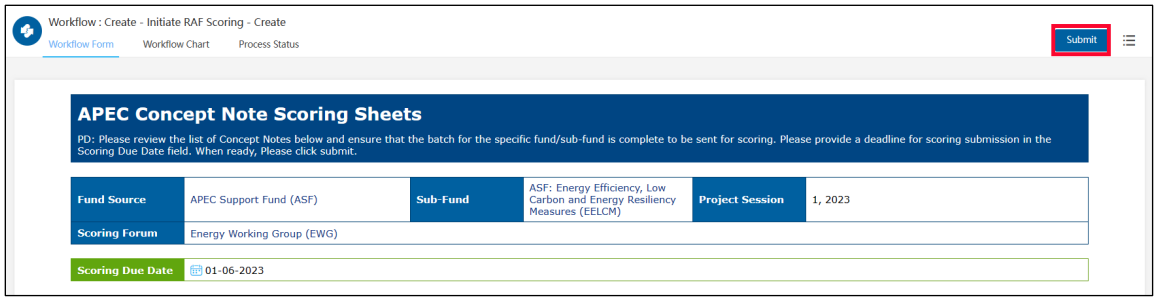
The APEC Concept Note Scoring Sheets page displays in a separate tab in your web browser. This is the scoring template.



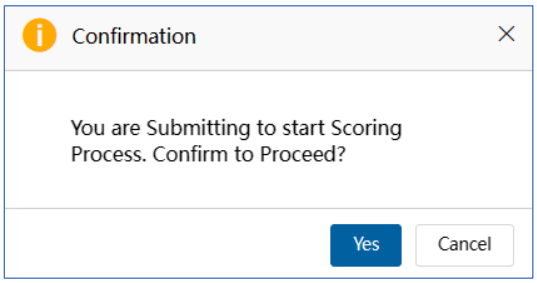
7. Make sure that all Concept Notes for the specific APEC Funding Source are listed in the table, found at the bottom of this screen.
8. **Important:** You must enter correct the scoring deadline in the **Scoring Due Date** field. The default date is always the current date. For example, if the scoring deadline is 14 August, 2023, make sure 14-08-2023 is displayed.



9. Then click the **Submit** button in the top right corner of the **APEC Concept Scoring Sheets** page.

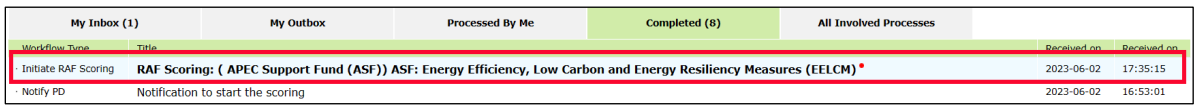


A confirmation message displays. Click **Yes** to continue.



The APEC Concept Note Scoring Sheets page closes and the **Score Concept Note – select and score page** displays.

In the Dashboard, the initiate RAF scoring message displays in the **Completed** tab.



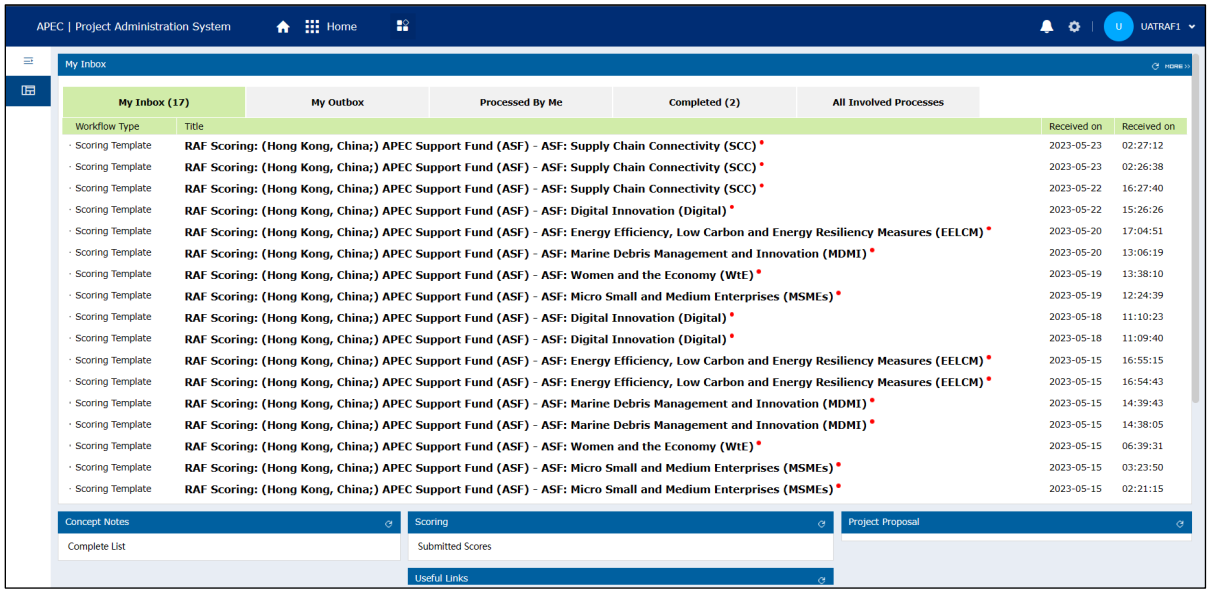
2.3.3 Viewing and Amending the Scores

The highest score a Concept Note can receive is 60 points, which is broken down among the criteria listed below.

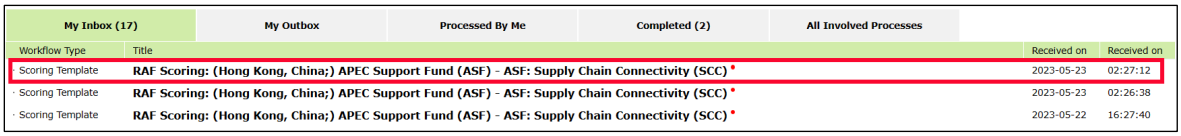
- **Criteria 1** supports the priorities of the APEC fund selected for the project. The maximum score is 20 points.
- **Criteria 2** is the quality of the project appears strong. The maximum score is 15 points.
- **Criteria 3** supports My Economy's priorities. The maximum score is 10 points.
- **Criteria 4** supports capacity building. The maximum score is 10 points.
- **Criteria 5** supports the cross-For a collaboration and benefits to multiple economies. The maximum score is five points.

The RAFs follow these steps to view and score the Concept Notes:

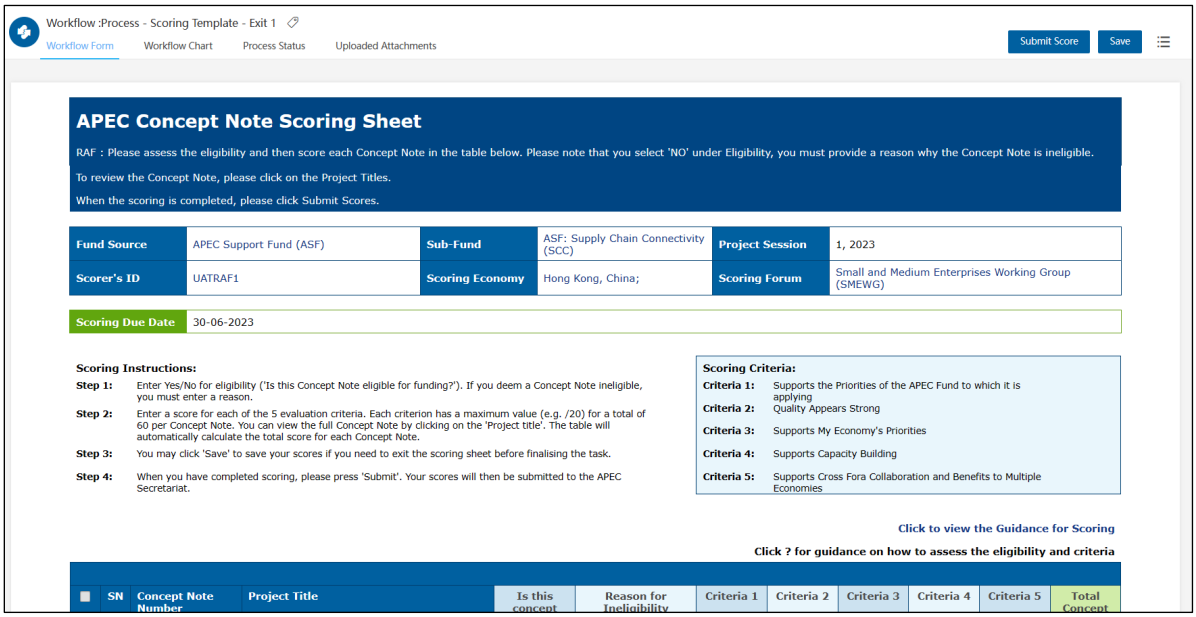
1. Log into APAS as a RAF, if you're not logged in already. Your Dashboard displays.



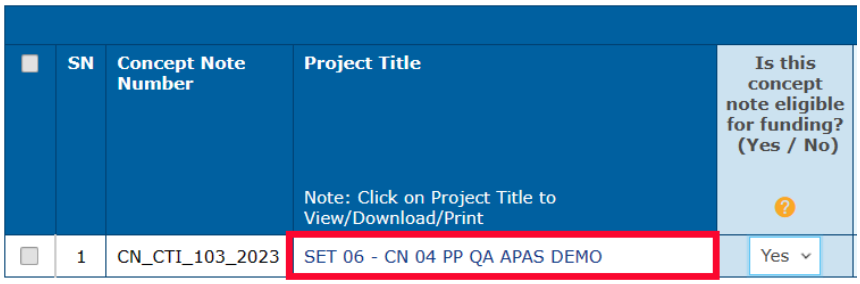
2. In your inbox, click the message with the scoring sheet.



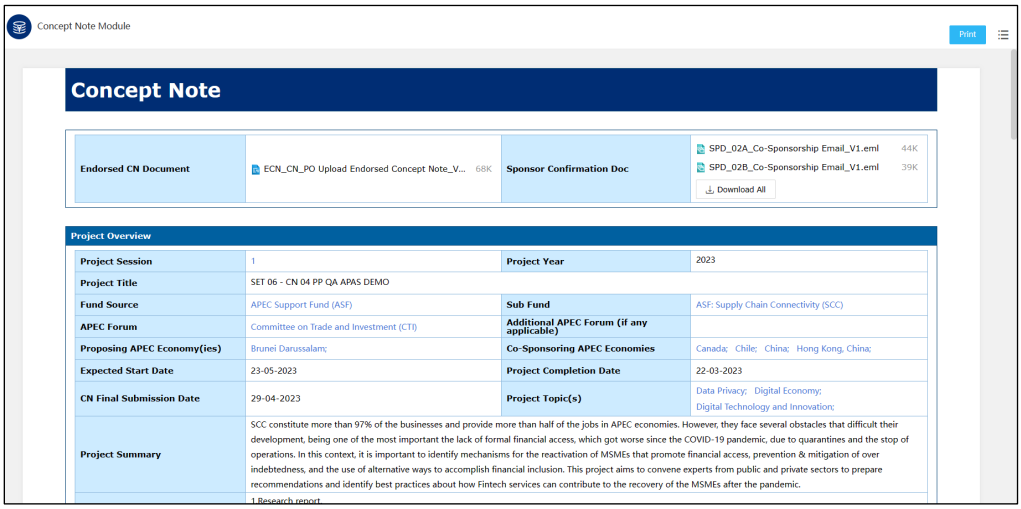
The scoring sheet for the Concept Note displays in a separate tab in your web browser.



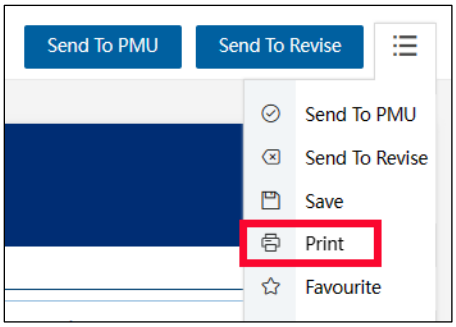
3. Scroll down to the bottom of the scoring sheet, where the scoring table is located. All the Concept Notes with requests for the specific APEC Funding Source should be listed in the table.
4. **Note:** If you see only one or too few Concept Notes, it may be that your screen display is scaled at too high (more than 125%).
   Go to your computer **settings > display**, set the display scale lower to see all the Concept Notes.
5. In the **Project Title** column, click the title of the Concept Note to view it.



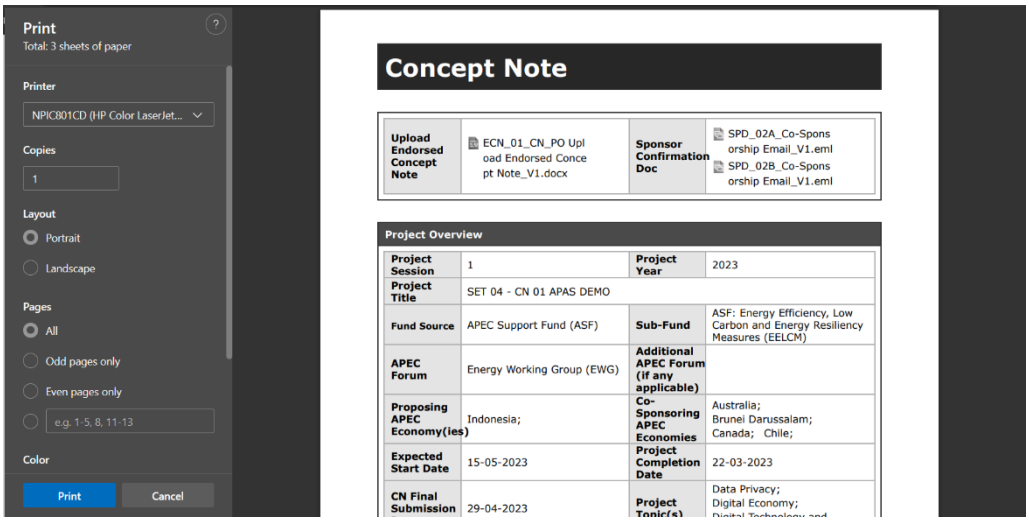
The Concept Note displays in a separate tab in your web browser.



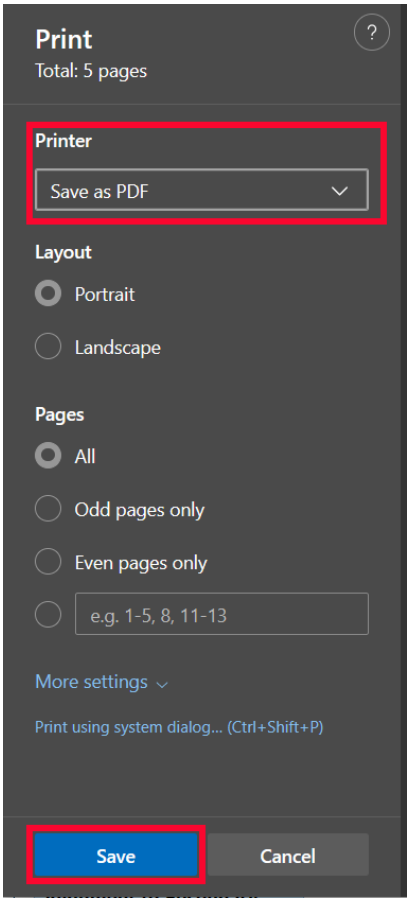
6. Download the Concept Note to read it offline or share with the relevant agencies by following these steps:
   a. In the top right corner of the Concept Note, click the bulleted list icon and select **Print** from the menu that drops down.



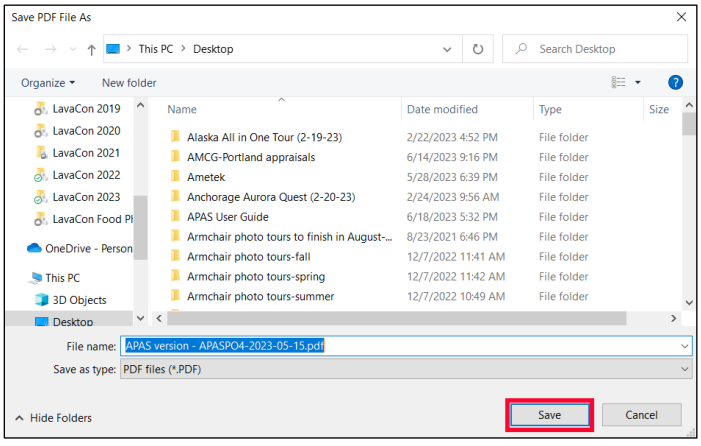
The Print window displays with a preview of the Concept Note on the right.



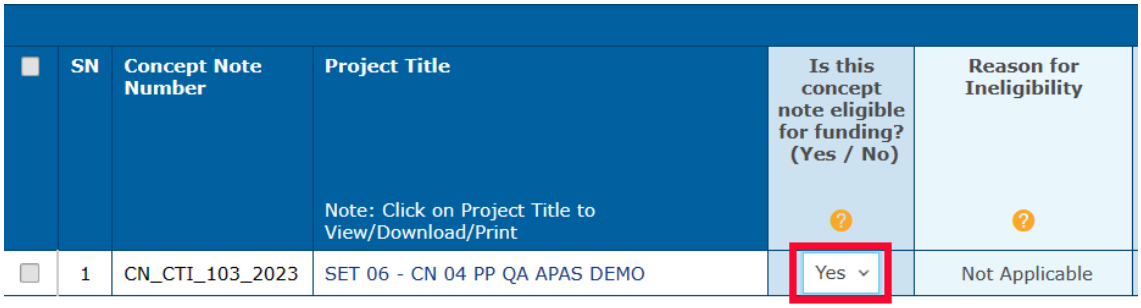
b. In the **Printer** list on the left side of the **Print window**, click the down arrow and select **Save as PDF**. Then click the **Save** button.



The **Save As** window displays. Navigate to the location where you want to save the PDF version of the Project Proposal. Then change the file name to **APAS version – <*project title*>.pdf,** and click the **Save** button.



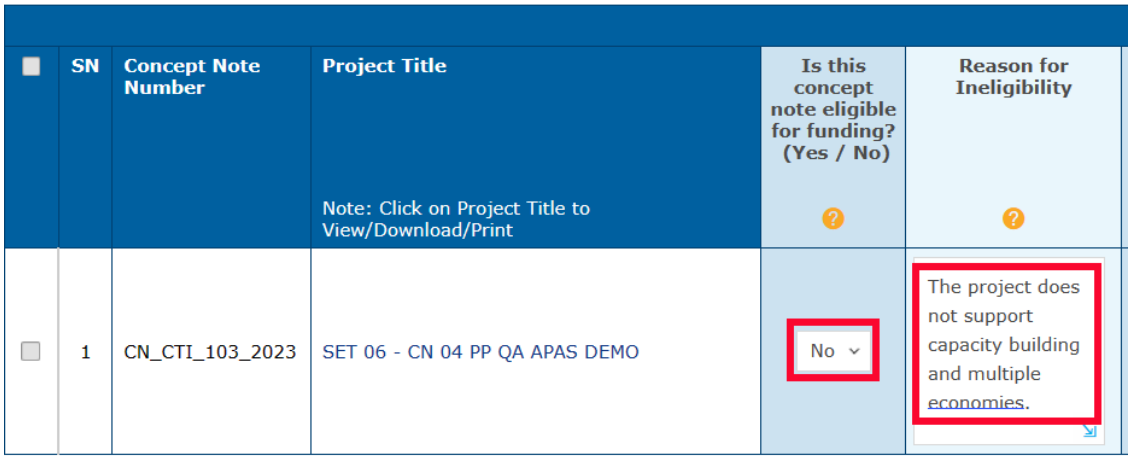
7. When you're ready to score, log into APAS and find a Concept Note to score. Determine whether the project is eligible for funding in the **Is this Concept Note eligible for funding? (Yes / No)** field. **Yes** is selected by default.



	SN	Concept Note Number	Project Title Note: Click on Project Title to View/Download/Print	Is this concept note eligible for funding? (Yes / No)	Reason for Ineligibility
☐	1	CN_CTI_103_2023	SET 06 - CN 04 PP QA APAS DEMO	Yes	Not Applicable

If you do not believe the Concept Note is eligible for funding based on the eligibility criteria for the funding source, click the down arrow in the **Is this Concept Note eligible for funding? (Yes / No)** field and select **No**. You must enter a reason the Concept Note is not eligible in the **Reason for Ineligibility** field.

To enter longer texts, click on the blue arrow on the bottom right corner of the text field and pull it downward and to the right, in order to expand the text field.



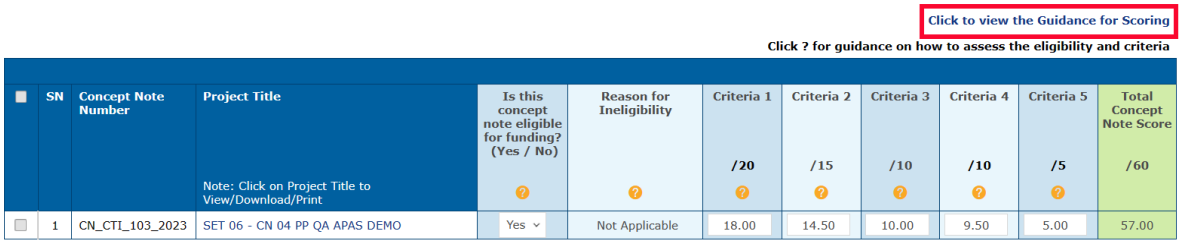
	SN	Concept Note Number	Project Title Note: Click on Project Title to View/Download/Print	Is this concept note eligible for funding? (Yes / No)	Reason for Ineligibility
☐	1	CN_CTI_103_2023	SET 06 - CN 04 PP QA APAS DEMO	No	The project does not support capacity building and multiple economies.

For more guidance on eligibility, click the tool tip (the orange circle with a question mark) under the column heading, **Is this Concept Note eligible for funding (Yes / No)**.

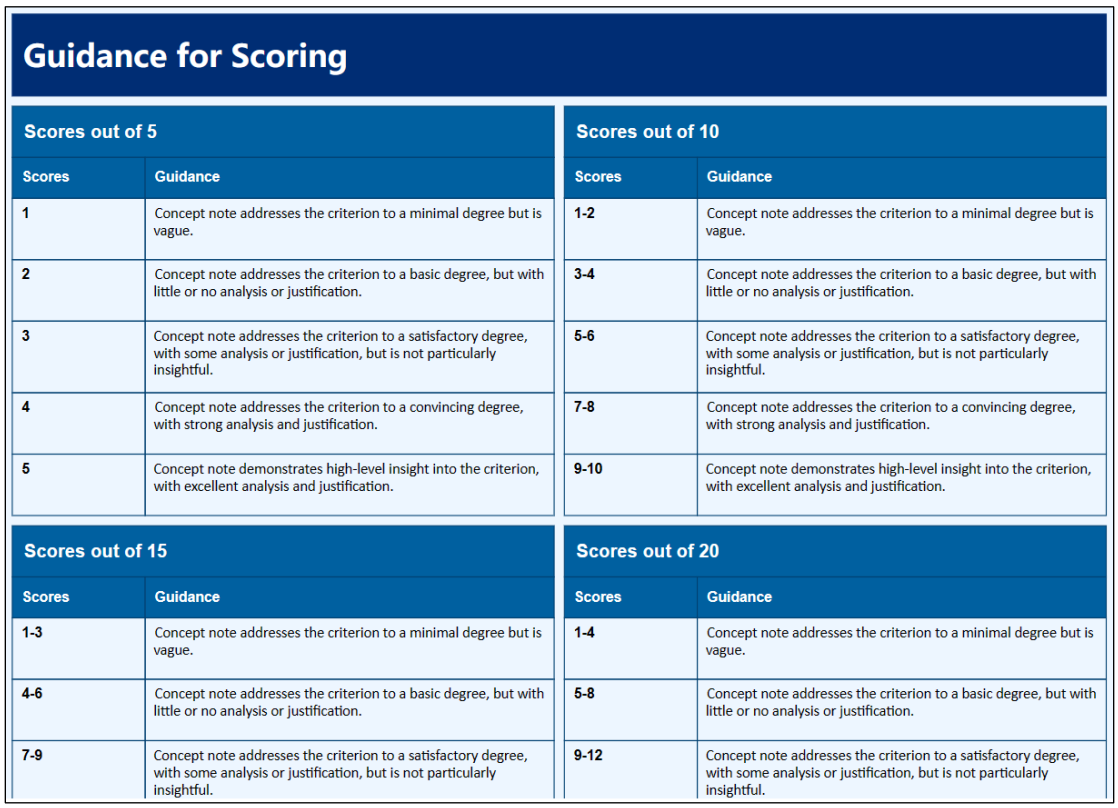
Note: You can only add scores in each field in the **Criteria** columns when **Yes** is selected in the **Is this Concept Note eligible for funding? (Yes / No)** field. The total score calculates automatically.

Criteria 1 /20	Criteria 2 /15	Criteria 3 /10	Criteria 4 /10	Criteria 5 /5	Total Concept Note Score /60
18.00	14.50	10.00	9.50	5.00	57.00

(optional) If you need help determining the scores for each criterion, click the **Click to view the Guidance for Scoring** link above the scoring table.



The scoring guide displays in a separate tab in your web browser.



Guidance for Scoring

Scores out of 5

Scores	Guidance
1	Concept note addresses the criterion to a minimal degree but is vague.
2	Concept note addresses the criterion to a basic degree, but with little or no analysis or justification.
3	Concept note addresses the criterion to a satisfactory degree, with some analysis or justification, but is not particularly insightful.
4	Concept note addresses the criterion to a convincing degree, with strong analysis and justification.
5	Concept note demonstrates high-level insight into the criterion, with excellent analysis and justification.

Scores out of 10

Scores	Guidance
1-2	Concept note addresses the criterion to a minimal degree but is vague.
3-4	Concept note addresses the criterion to a basic degree, but with little or no analysis or justification.
5-6	Concept note addresses the criterion to a satisfactory degree, with some analysis or justification, but is not particularly insightful.
7-8	Concept note addresses the criterion to a convincing degree, with strong analysis and justification.
9-10	Concept note demonstrates high-level insight into the criterion, with excellent analysis and justification.

Scores out of 15

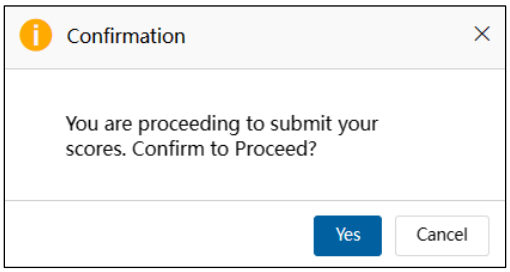
Scores	Guidance
1-3	Concept note addresses the criterion to a minimal degree but is vague.
4-6	Concept note addresses the criterion to a basic degree, but with little or no analysis or justification.
7-9	Concept note addresses the criterion to a satisfactory degree, with some analysis or justification, but is not particularly insightful.

Scores out of 20

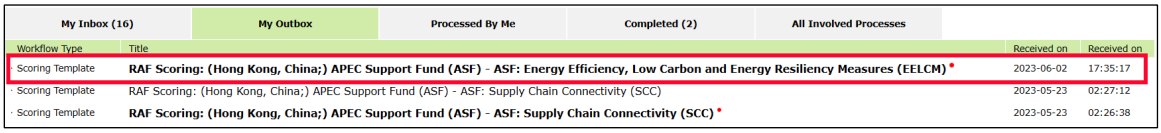
Scores	Guidance
1-4	Concept note addresses the criterion to a minimal degree but is vague.
5-8	Concept note addresses the criterion to a basic degree, but with little or no analysis or justification.
9-12	Concept note addresses the criterion to a satisfactory degree, with some analysis or justification, but is not particularly insightful.

5. Click the **Submit Score** button in the top right corner of the scoring sheet.

A confirmation message displays. Click **Yes** to continue.

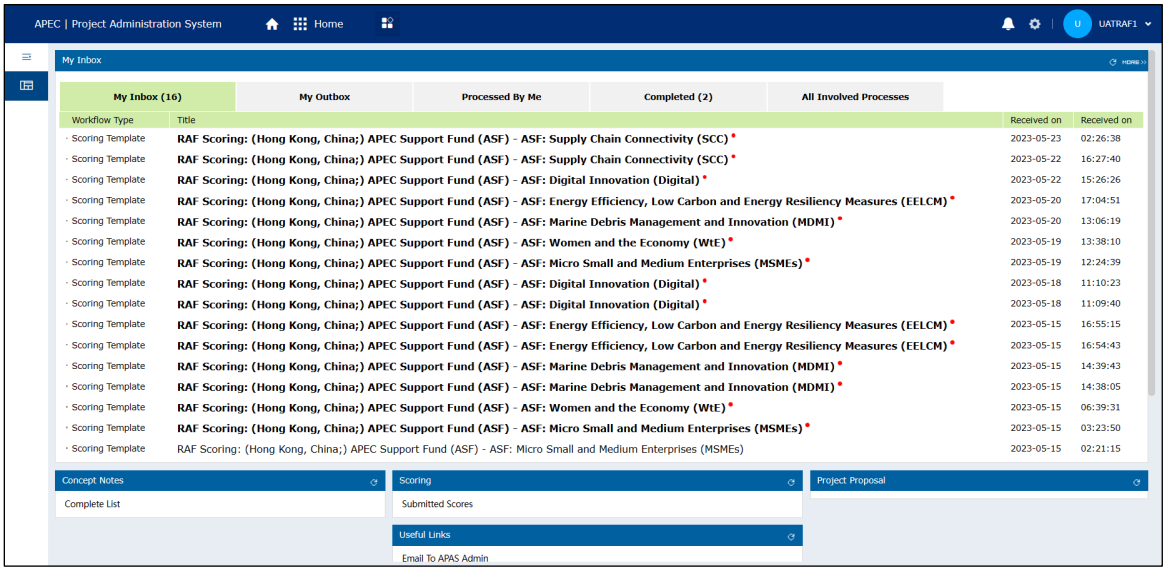


The message, "Submitting your scores. Please wait," displays. The scoring sheet closes, and your Dashboard displays. A message confirming you submitted scores for the Concept Note displays in the **My Outbox** tab.



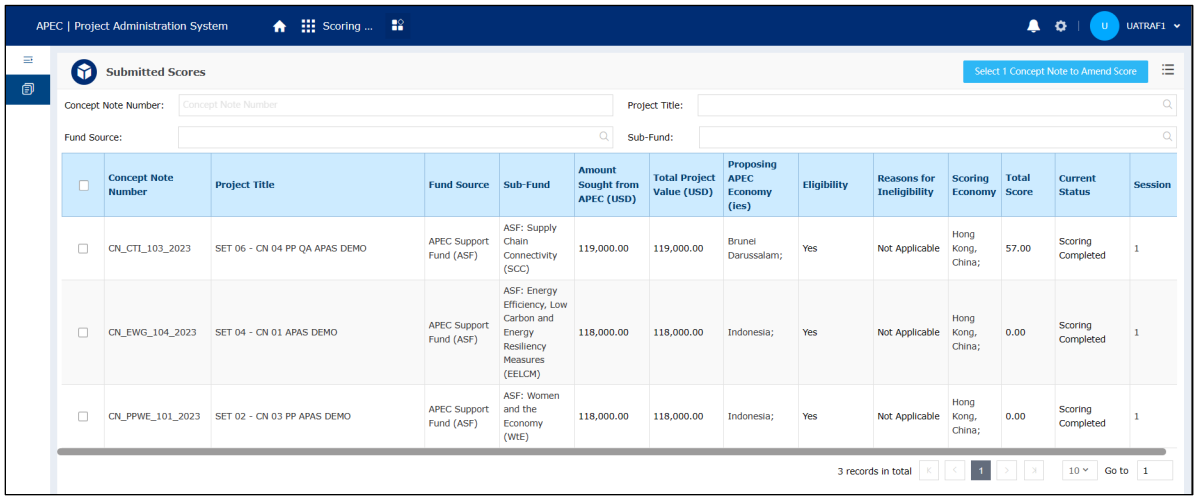
The RAFs can also view or amend submitted scores. Concept Note by following these steps:

1. Log into APAS as a RAF, if you're not logged in already. Your Dashboard displays.



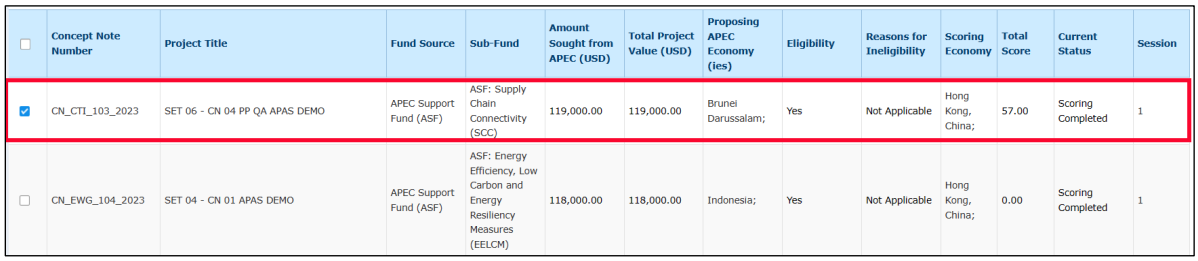
2. In **Scoring** widget on your Dashboard, click **Submitted Scores**.

The Submitted Scores page displays in a separate tab in your web browser.

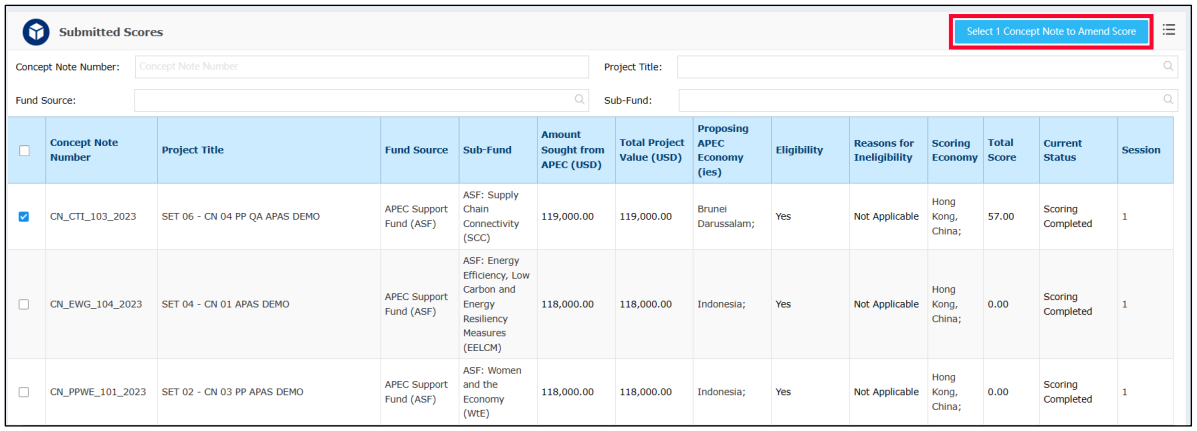


3. Select the Concept Note you want to view or amend by checking the box at the left of the Concept Note number.

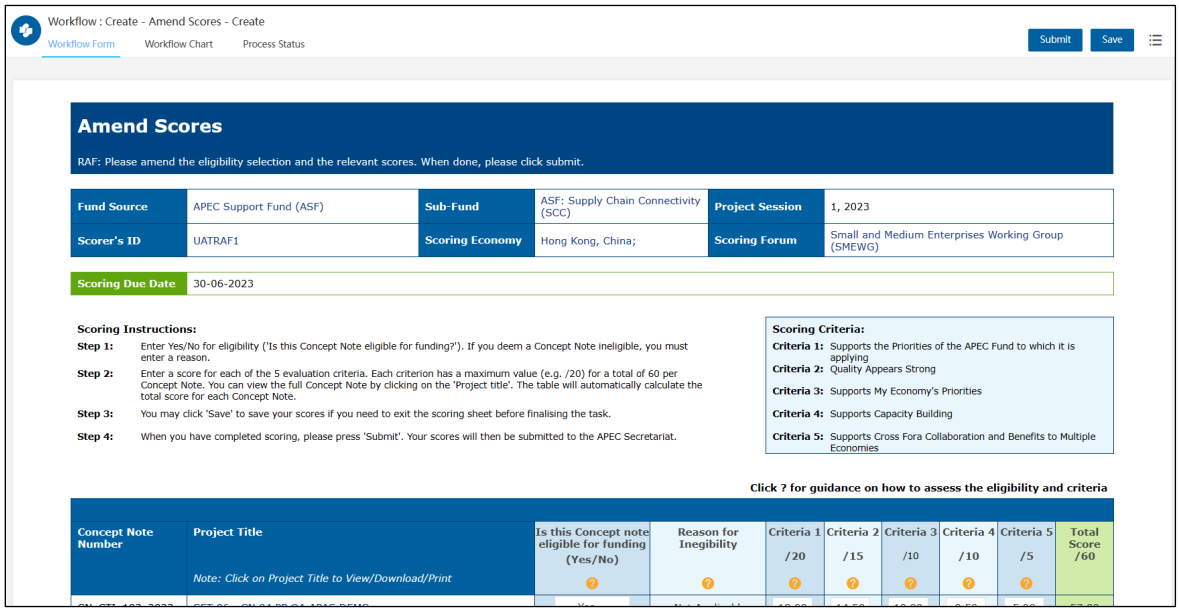
   Note: You can view or amend only one Concept Note at a time.



4. Click the **Select 1 Concept Note to Amend Score** button.



The scoring sheet for the Concept Note displays in a separate tab in your web browser.

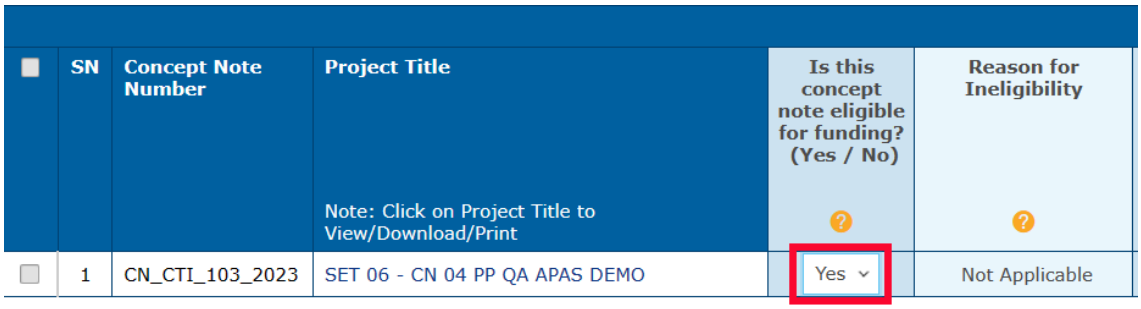


5. Scroll down to the scoring table at the bottom of the page.

Concept Note Number	Project Title *Note: Click on Project Title to View/Download/Print*	Is this Concept note eligible for funding (Yes/No)	Reason for Inegibility	Criteria 1 /20	Criteria 2 /15	Criteria 3 /10	Criteria 4 /10	Criteria 5 /5	Total Score /60
CN_CTI_103_2023	SET 06 - CN 04 PP QA APAS DEMO	Yes	Not Applicable	18.00	14.50	10.00	9.50	5.00	57.00

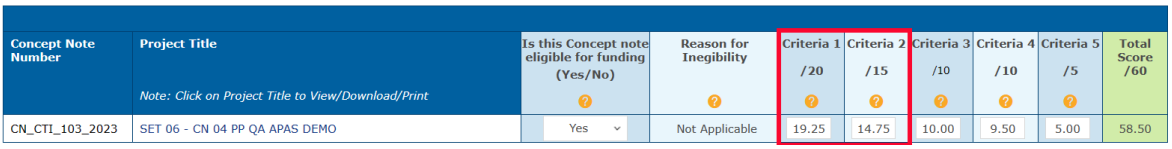
If you need to change the funding eligibility for the Concept Note, select Yes from the **Is this Concept Note eligible for funding?** field. An example is shown below.

	SN	Concept Note Number	Project Title Note: Click on Project Title to View/Download/Print	Is this concept note eligible for funding? (Yes / No)	Reason for Ineligibility
☐	1	CN_CTI_103_2023	SET 06 - CN 04 PP QA APAS DEMO	No	The project does not demonstrate capacity building benefits for APEC developing economies.



SN	Concept Note Number	Project Title Note: Click on Project Title to View/Download/Print	Is this concept note eligible for funding? (Yes / No)	Reason for Ineligibility
1	CN_CTI_103_2023	SET 06 - CN 04 PP QA APAS DEMO	Yes	Not Applicable

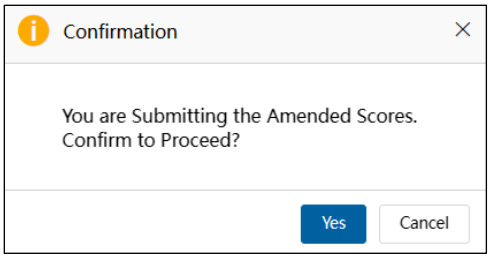
In the **Criteria** columns of the scoring table, enter the scores you want to update. The total score calculates automatically.



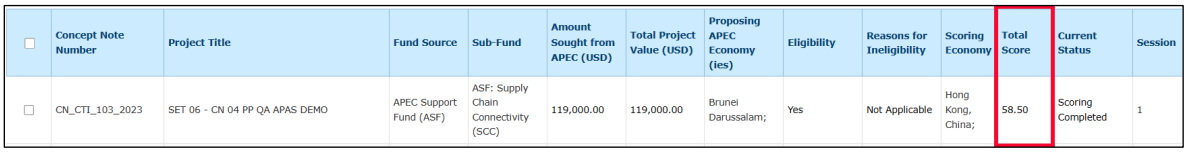
Concept Note Number	Project Title Note: Click on Project Title to View/Download/Print	Is this Concept note eligible for funding (Yes/No)	Reason for Inegibility	Criteria 1 /20	Criteria 2 /15	Criteria 3 /10	Criteria 4 /10	Criteria 5 /5	Total Score /60
CN_CTI_103_2023	SET 06 - CN 04 PP QA APAS DEMO	Yes	Not Applicable	19.25	14.75	10.00	9.50	5.00	58.50

6. When you're finished, click the **Submit** button at the top right of the page.

A confirmation message displays. Click **Yes** to continue.

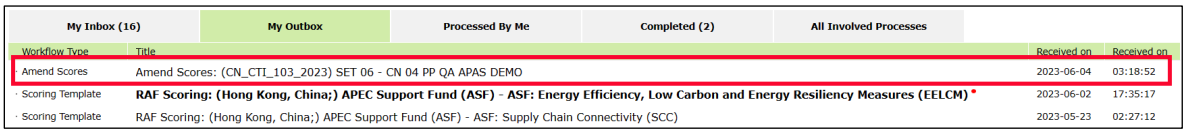


The scoring sheet closes, and the amended score displays in the Concept Note row on the **Submitted Scores** page.



Concept Note Number	Project Title	Fund Source	Sub-Fund	Amount Sought from APEC (USD)	Total Project Value (USD)	Proposing APEC Economy (ies)	Eligibility	Reasons for Ineligibility	Scoring Economy	Total Score	Current Status	Session
CN_CTI_103_2023	SET 06 - CN 04 PP QA APAS DEMO	APEC Support Fund (ASF)	ASF: Supply Chain Connectivity (SCC)	119,000.00	119,000.00	Brunei Darussalam;	Yes	Not Applicable	Hong Kong, China;	58.50	Scoring Completed	1

Also, a task confirming you amended the score displays in the **My Outbox** tab.



2.3.4 Monitoring and Consolidating Scores

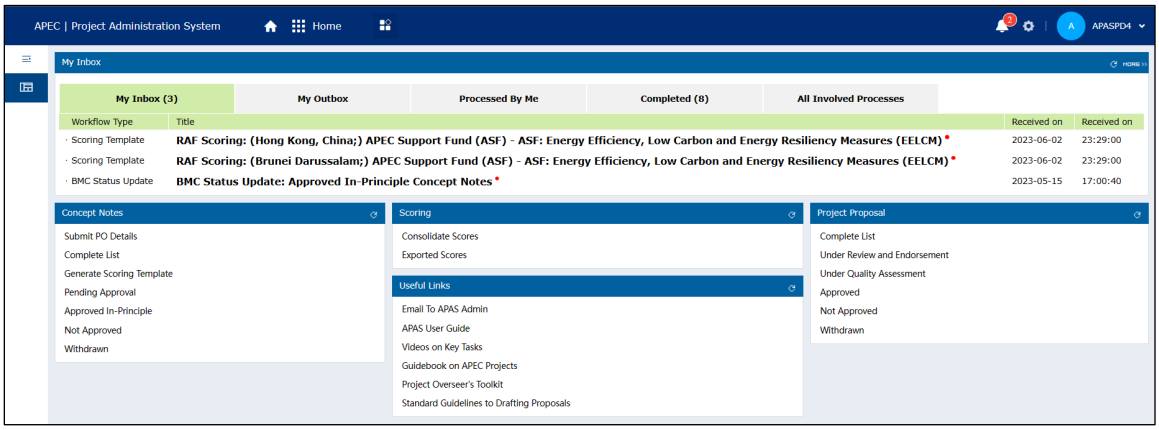
Close monitoring of the score submissions by the economies in Fund Sources managed by the PDs is strongly advised. PDs should monitor submission progresses at least once a week during the scoring period. PDs need to ensure:

- That ineligible scores are timely addressed with the responsible economies (copying PMU in your communication), so there is time to amend scores on APAS.
  Note: In APAS, under **Submitted Scores**, Concept Notes with ineligible scores are listed on the top of the Concept Note list and marked in red to draw PDs attention.
- That economies provide scores to all the listed Concept Notes in the Fund Source or fill in scores in all 5 criteria fields in a specific Concept Note.
- That economies submit scores by the scoring deadline.

When the deadline to submit scores is reached, the PD or PE consolidates the submitted scores for the Concept Notes of each APEC Funding Source. Consolidation means that each score is averaged to come up with a single score total for each Concept Note.

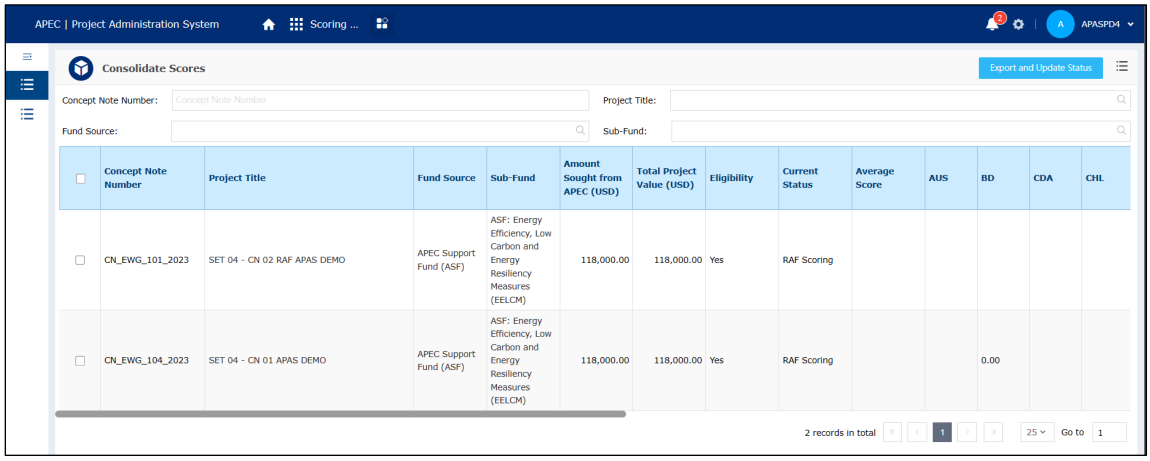
The PD or PE follows these steps to consolidate the scores from all the RAFs for a Concept Note:

1. Log into APAS as a PD or PE user, if you're not logged in already. Your Dashboard displays.

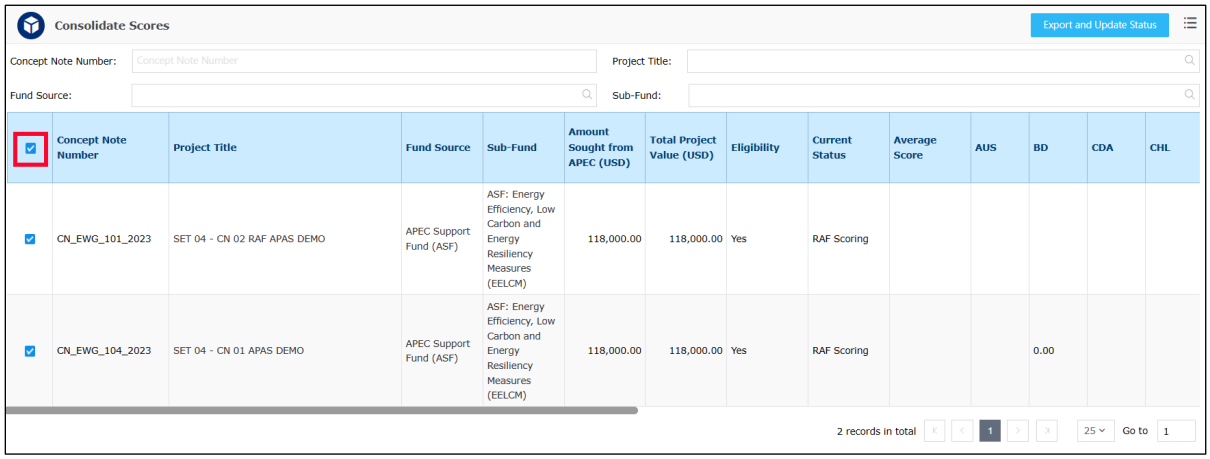


2. In **Scoring** widget on your Dashboard, click **Consolidate Scores**.

The Consolidate Scores page displays in a separate tab in your web browser.

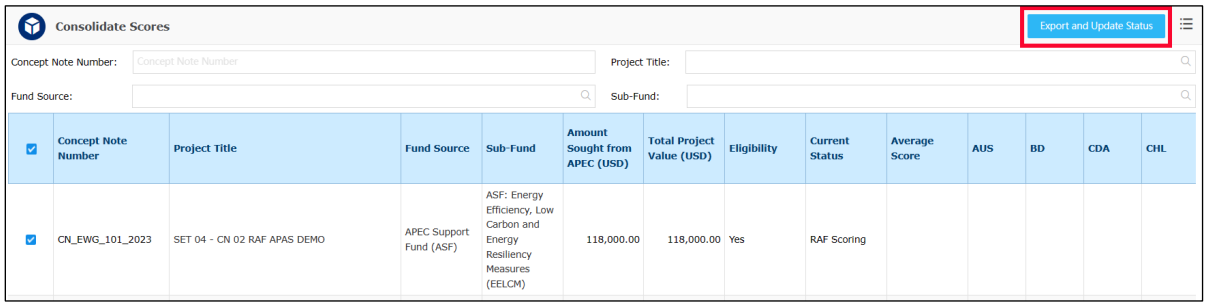


3. Select all Concept Notes in the table by checking the box at the left of the **Concept Note Number** column in the table heading.



4. Click the **Export and Update Status** button.

   Note: Follow this step only when the deadline for scoring has reached.



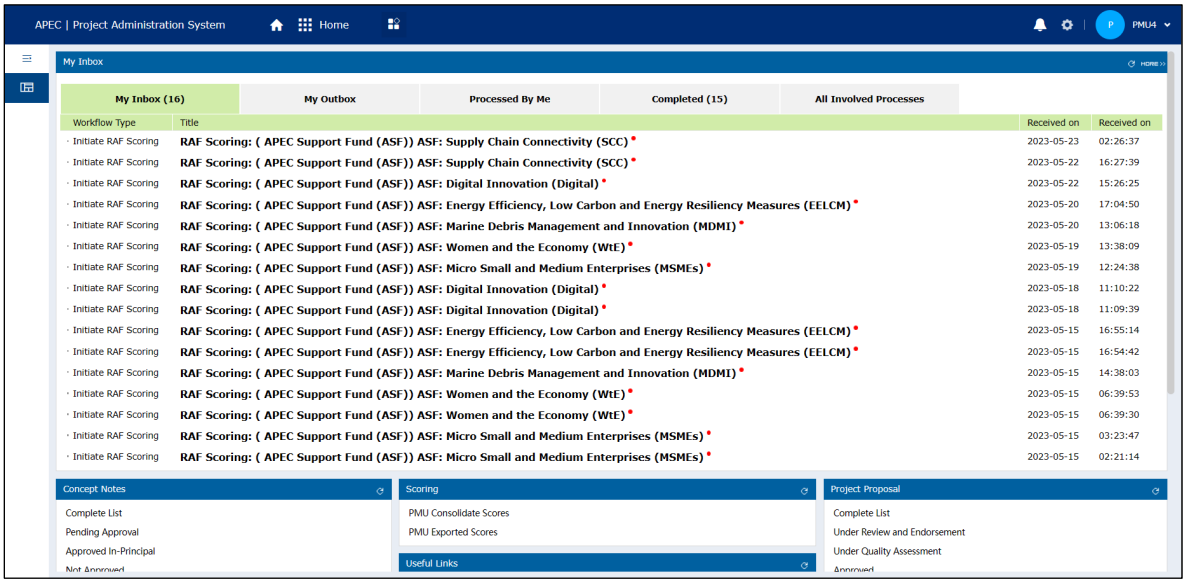
5. The Average Scores for the Fund Source exports to an Excel spreadsheet. Download and review the scores.
   - Make sure you see no irregularities, such as all zero scores. Zero scores for economies that you know have submitted scores. (Zero scores are fields that economies left blank and did not enter any scores. They are not counted as zeros or averaged in the total score.)
   - Make sure you have exported all the Concept Notes. Count the number of CNs exported. They should match the number of endorsed CNs submitted for your Fund(s).
6. Email the Average Score spreadsheet(s) to PMU by the stipulated deadline.

2.4 Approving Projects In-Principle

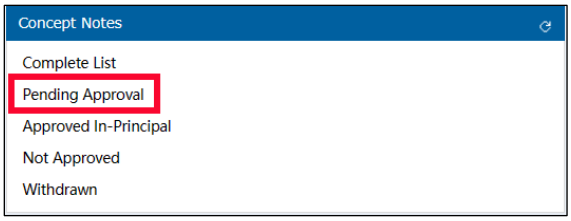
2.4.1 Updating the Project Approval

The BMC in-principle approval of a Concept Note is conducted through email correspondence. When this is finished, the PMU follows these steps to update the approval status of a Concept Note in APAS and notify the PO of the status:

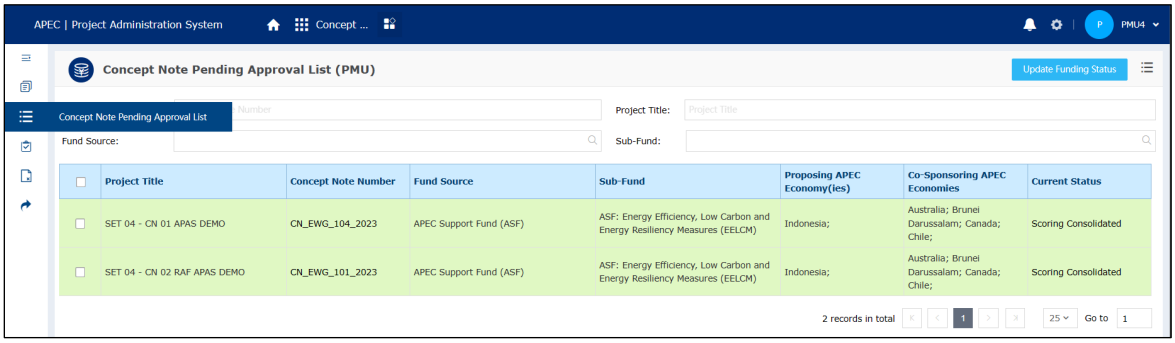
1. Log into APAS as a PMU user, if you're not logged in already. Your Dashboard displays.



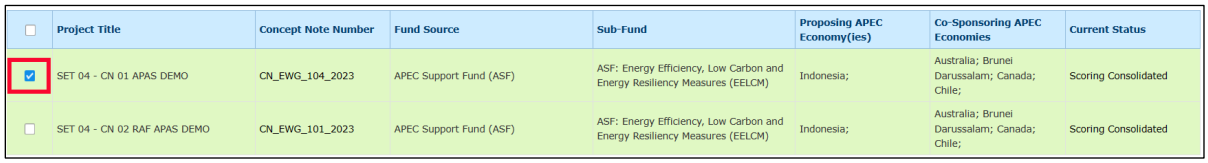
2. In **Concept Note** widget on your Dashboard, click **Pending Approval**.



The list of Concept Notes that needs to be approved displays in a separate tab in your web browser.

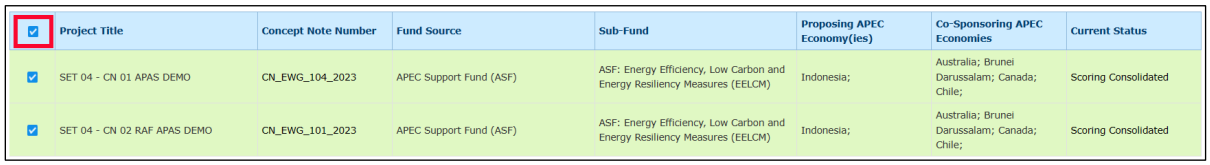


3. Check the box at the left of each Concept Note you are approving.



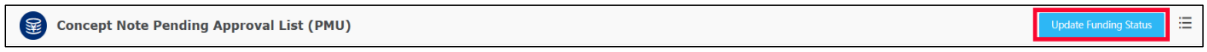
	Project Title	Concept Note Number	Fund Source	Sub-Fund	Proposing APEC Economy(ies)	Co-Sponsoring APEC Economies	Current Status
☑	SET 04 - CN 01 APAS DEMO	CN_EWG_104_2023	APEC Support Fund (ASF)	ASF: Energy Efficiency, Low Carbon and Energy Resiliency Measures (EELCM)	Indonesia;	Australia; Brunei Darussalam; Canada; Chile;	Scoring Consolidated
☐	SET 04 - CN 02 RAF APAS DEMO	CN_EWG_101_2023	APEC Support Fund (ASF)	ASF: Energy Efficiency, Low Carbon and Energy Resiliency Measures (EELCM)	Indonesia;	Australia; Brunei Darussalam; Canada; Chile;	Scoring Consolidated

(optional) If you are approving all the Concept Notes in the list, check the box in the header to select all the Concept Notes.

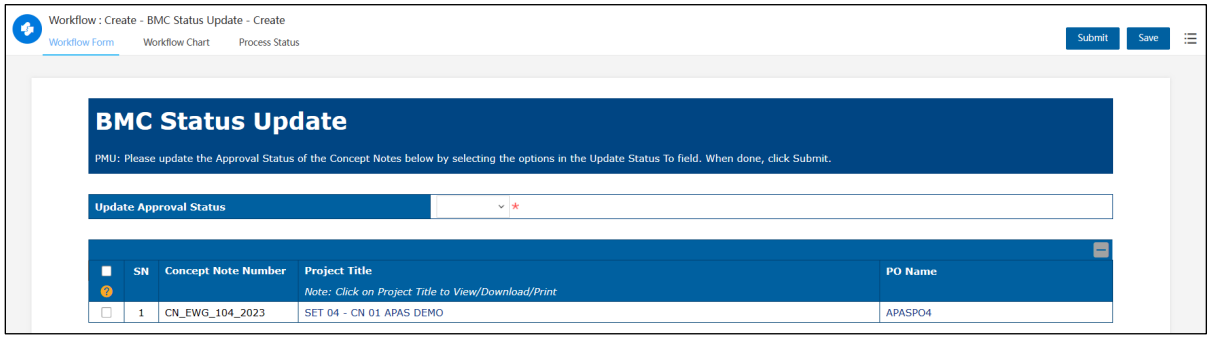


☑	Project Title	Concept Note Number	Fund Source	Sub-Fund	Proposing APEC Economy(ies)	Co-Sponsoring APEC Economies	Current Status
☑	SET 04 - CN 01 APAS DEMO	CN_EWG_104_2023	APEC Support Fund (ASF)	ASF: Energy Efficiency, Low Carbon and Energy Resiliency Measures (EELCM)	Indonesia;	Australia; Brunei Darussalam; Canada; Chile;	Scoring Consolidated
☑	SET 04 - CN 02 RAF APAS DEMO	CN_EWG_101_2023	APEC Support Fund (ASF)	ASF: Energy Efficiency, Low Carbon and Energy Resiliency Measures (EELCM)	Indonesia;	Australia; Brunei Darussalam; Canada; Chile;	Scoring Consolidated

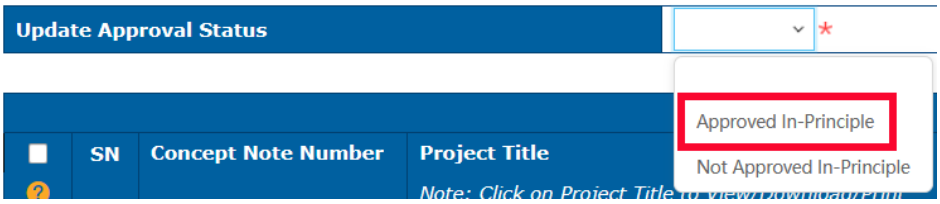
4. Click the **Update Funding Status** button in the top right corner of the page.



The BMC Status Update page displays.

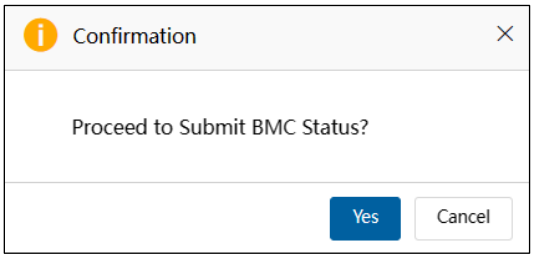


5. Click the **Update Approval Status** dropdown and select the **Approved In-Principle** option.

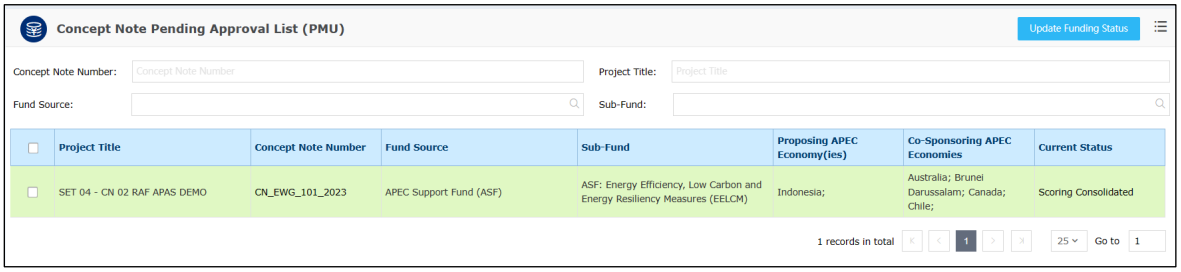


6. Click the **Submit** button in the top right corner of the page to send a notification to the PO that the Concept Note is approved in principle.

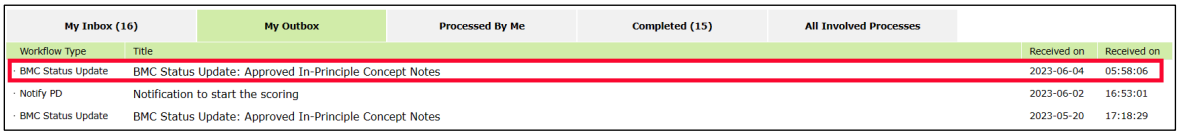
A confirmation message displays. Click **Yes** to continue.



The BMC Status Update page closes, and the **Concept Note Pending Approval List (PMU)** page displays. The Concept Notes you approved in principle no longer display on this page.



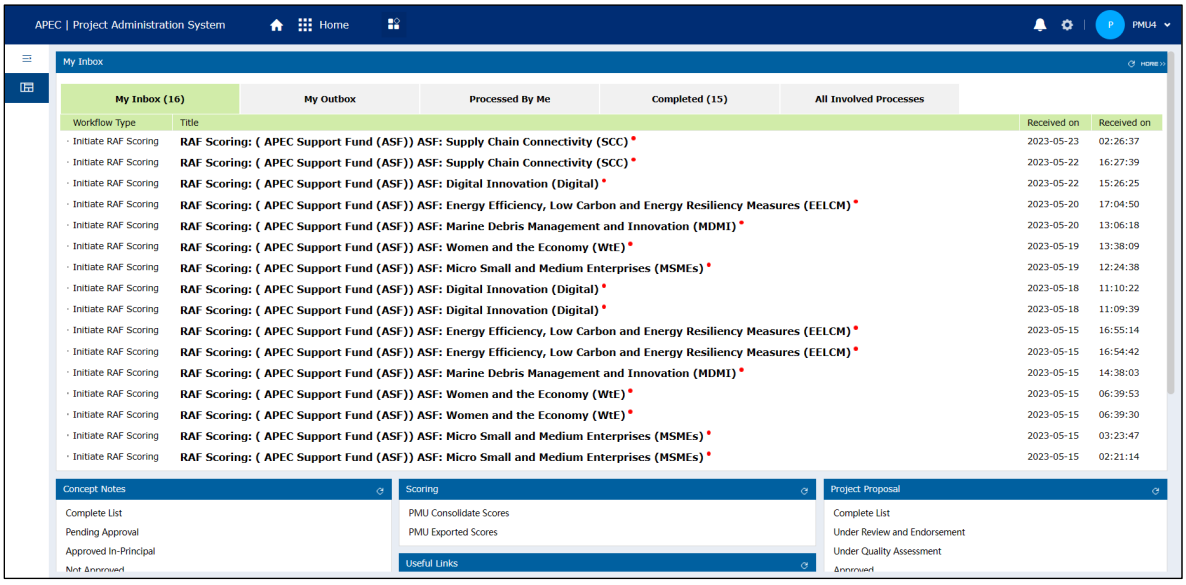
Also, a message confirming the approved in principle Concept Note displays in the **My Outbox** tab.



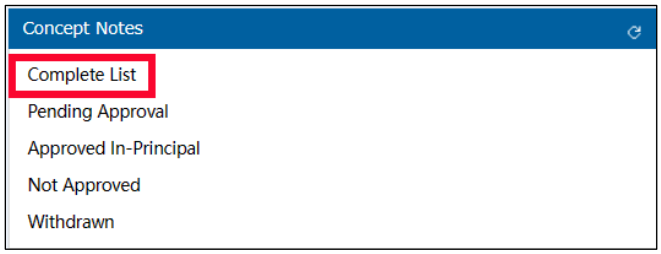
2.4.2 Changing the Project Status to Withdrawal

If a project is withdrawn, the PMU follows these steps to update the project status in APAS:

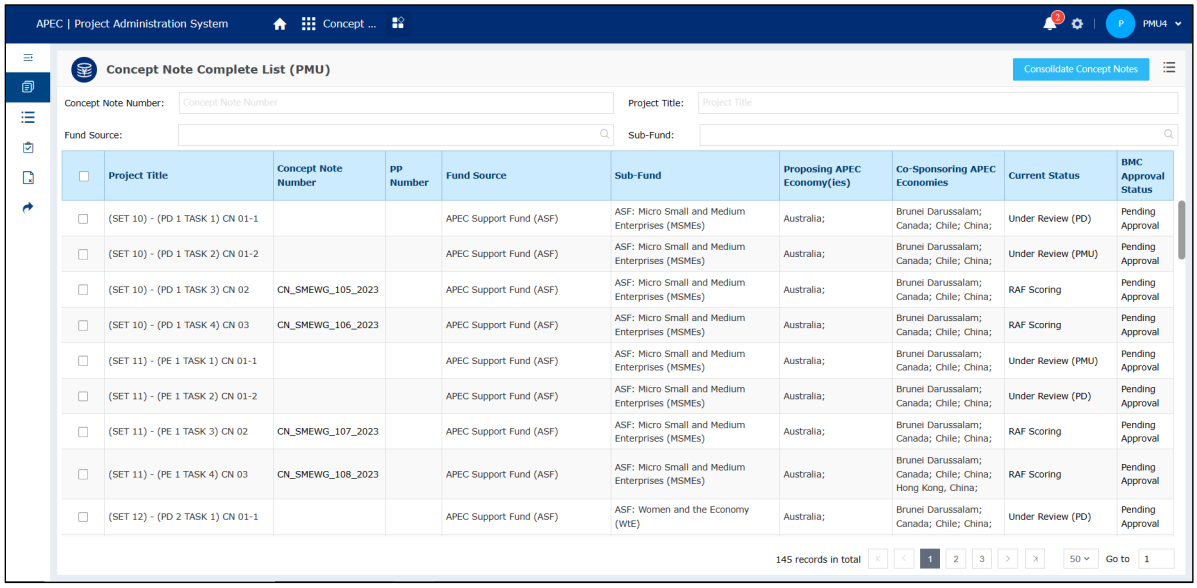
1. Log into APAS as a PMU user, if you're not logged in already. Your Dashboard displays.



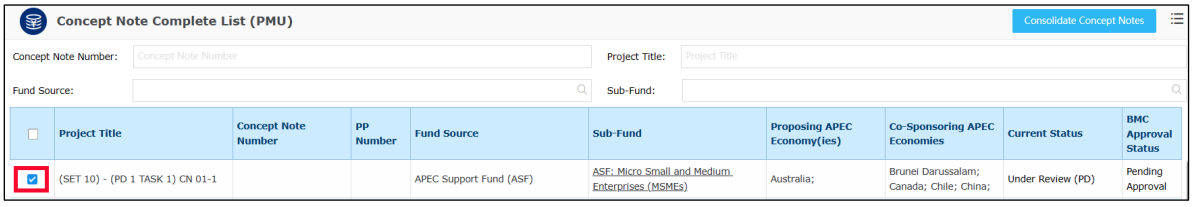
2. In the **Concept Notes** widget, click **Complete List**.



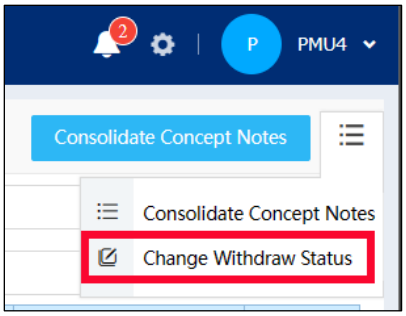
The Concept Note Complete List (PMU) page displays in a separate tab.



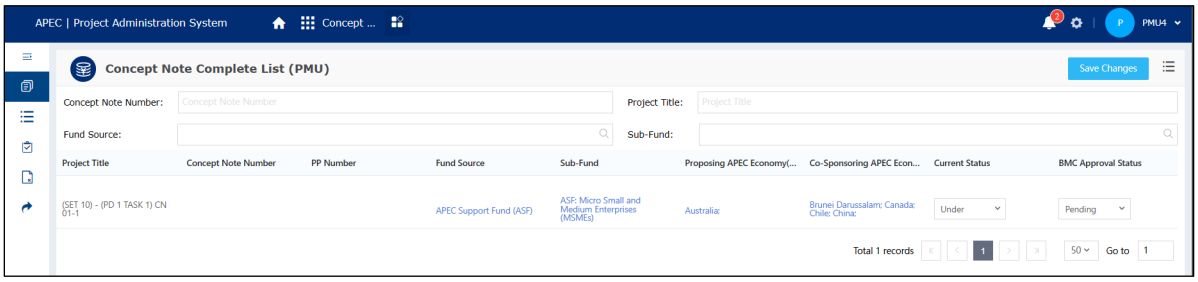
3. You may look for the specific Concept Note or Project by its Number, Project Title, Fund Source or Sub-Fund.
Select the Concept Note you want to withdraw by checking the box at the left of the **Project Title**.



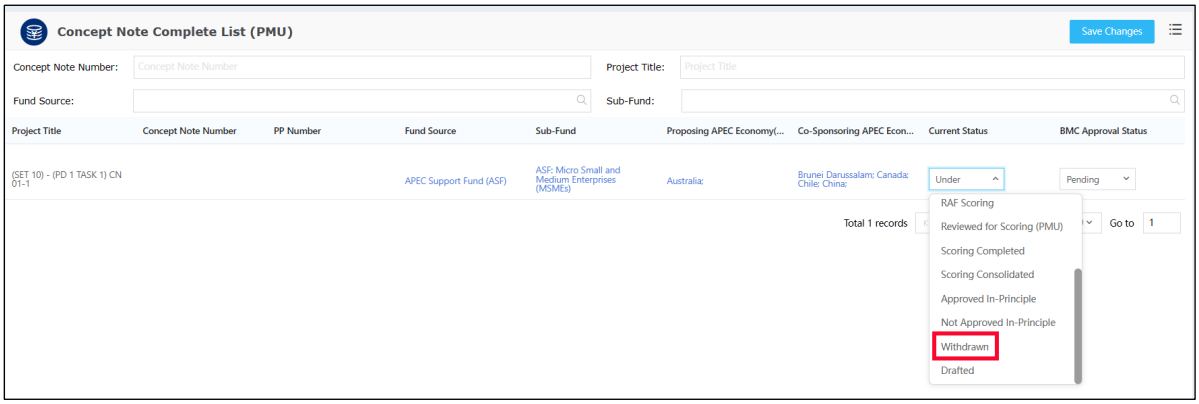
4. In the upper right corner of the page, click the bulleted list icon and select **Change Withdraw Status** from the list that drops down.



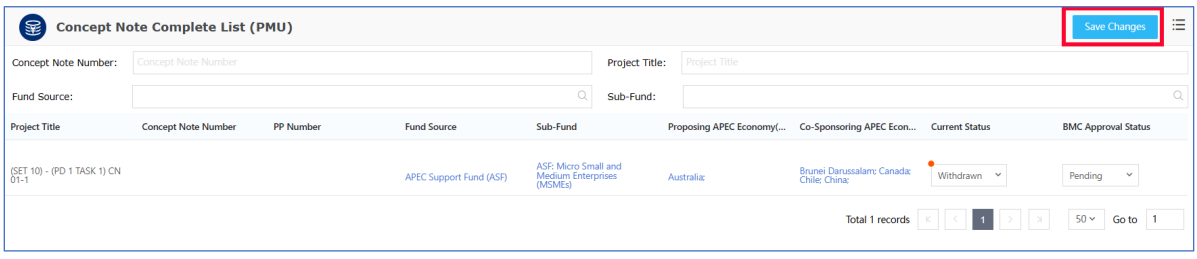
The Concept Note you selected displays on the Concept Note Complete List (PMU) page.



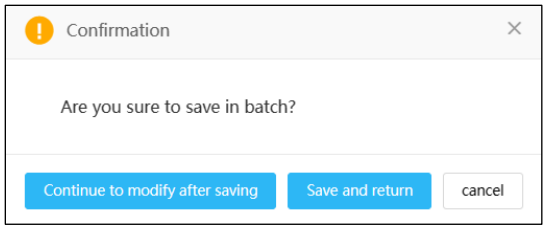
5. In the **Current Status** column, select **Withdrawn** from the dropdown list.



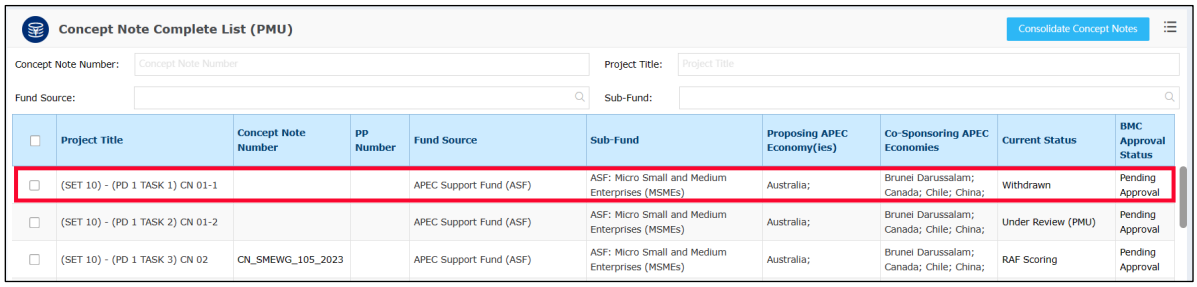
6. In the top right corner of the page, click the **Save Changes** button.



A confirmation message displays. Click **Save and return** to continue.



7. The full list of Concept Notes display on the Concept Note Complete List (PMU) page, and the status of the Concept Note you withdrew displays with the new status.



3. The Project Proposal

3.1 Overview of the Project Proposal Process Workflow

The Project Proposal workflow consists of the following tasks:

1. Submitting the Project Proposal
2. Endorsing the Project Proposal
3. Conducting a quality assessment of the Project Proposal
4. Approving the Project Proposal
5. Issuing the Letter of Acceptance

Note: The abbreviation *LoA* refers to the Letter of Acceptance.

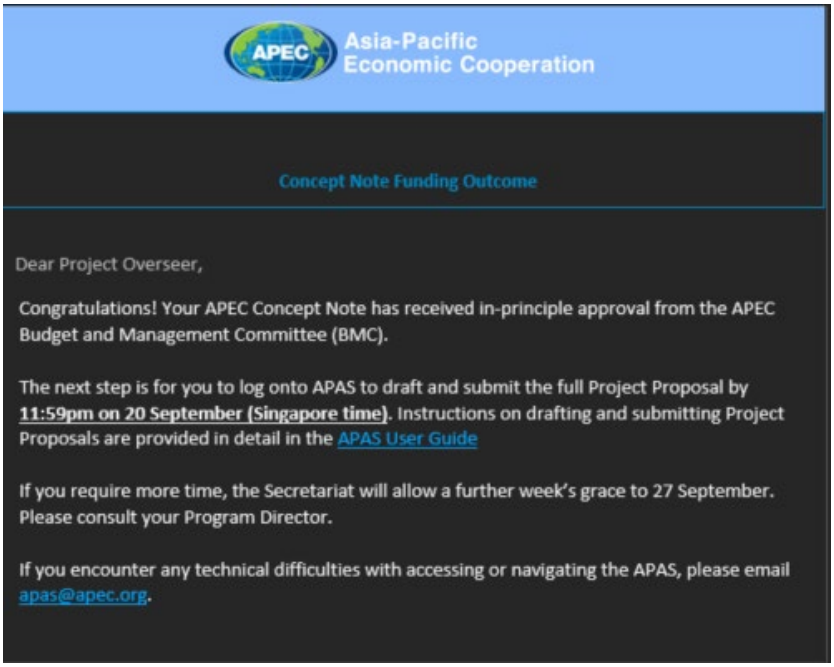
The steps for these tasks are described in detail in this chapter.

3.2 Creating a Draft Project Proposal for Endorsement

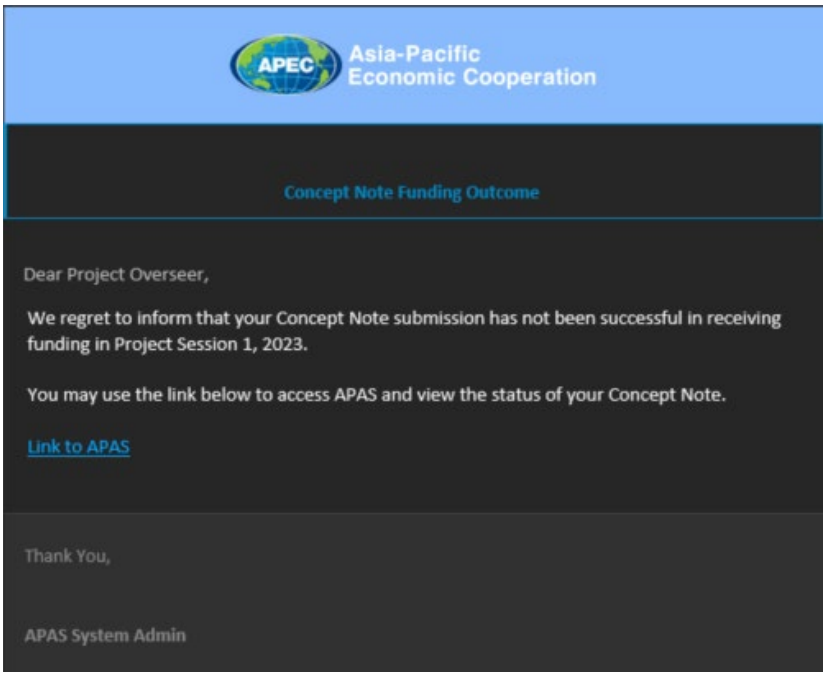
3.2.1 Drafting a Project Proposal

POs receive email notifications on their Concept Note Approval Outcomes. The notifications may notify that the PO's Concept Note is approved or not approved 'in-principle'.

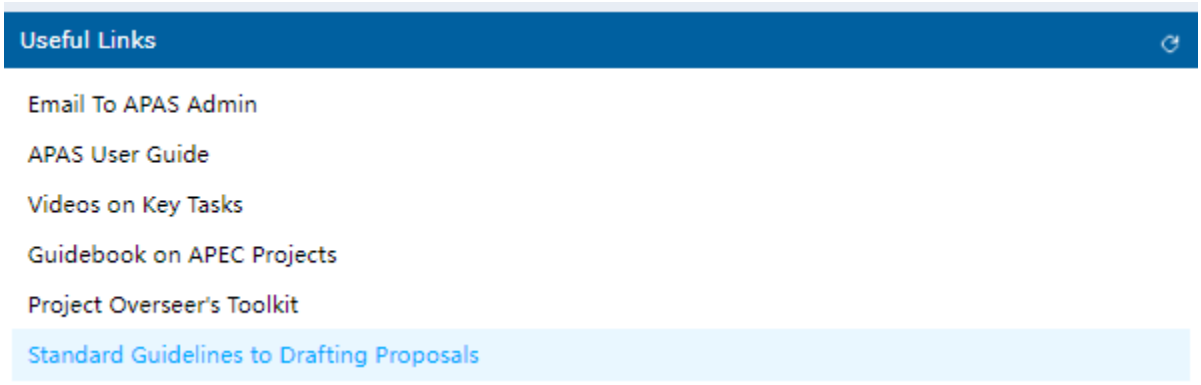
Below is an example of a notification of a Concept Note approved in-principle.



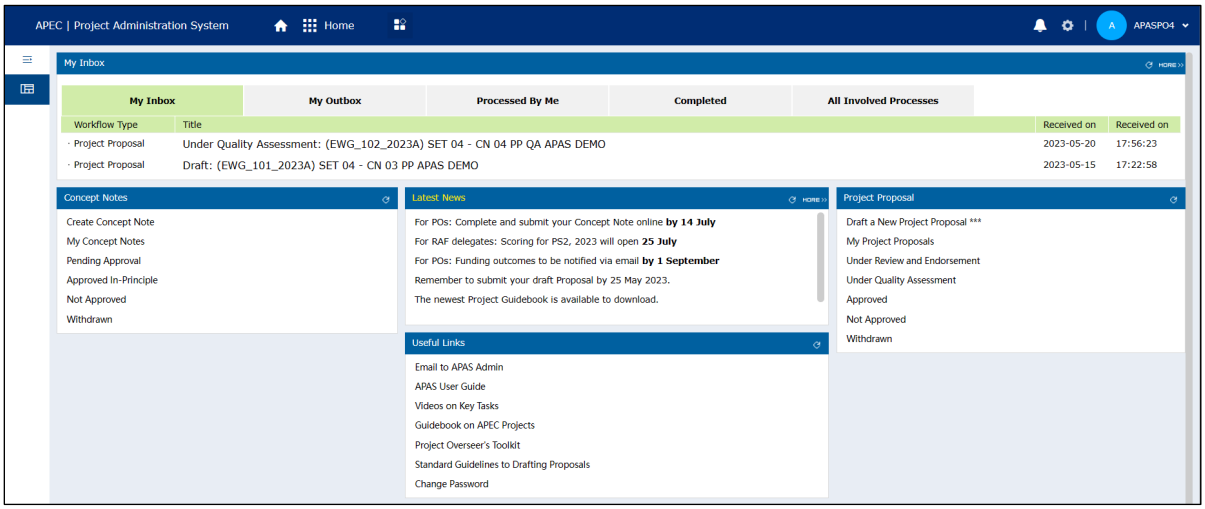
This is an example of a notification of a Concept Note not approved in-principle.



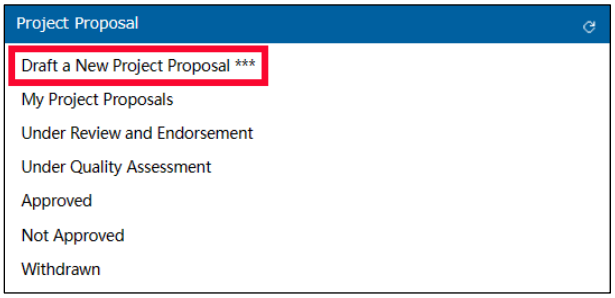
1. When an approved in principle email notification is received, the PO is ready to create a draft of the Project Proposal In APAS.
   Note: Before the PO drafts a Project Proposal, make sure to refer to the **Standard Guidelines to Drafting Proposals** to learn important information with regard to drafting the document.
   The document is found under **Useful Links** in the Dashboard.



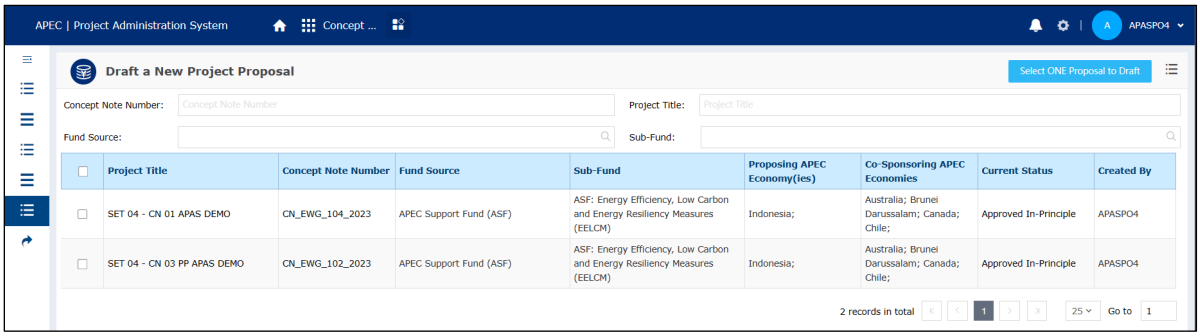
2. Log into APAS as a PO user, if you're not logged in already. Your Dashboard displays.



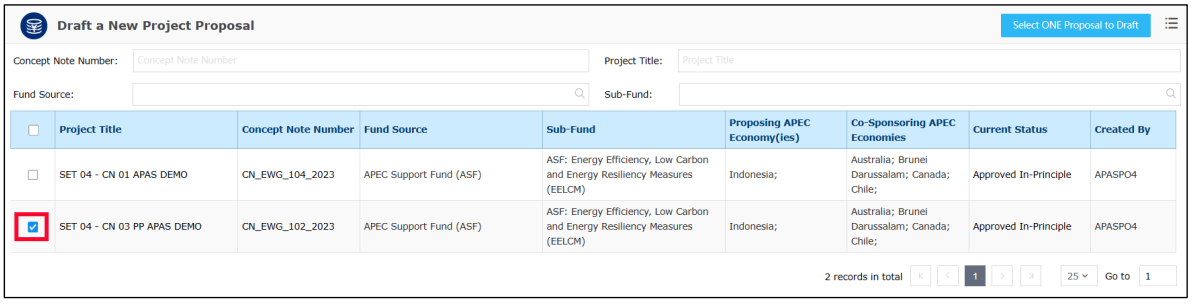
3. In the **Project Proposal** box on the **Dashboard**, select **Draft a New Project Proposal**.



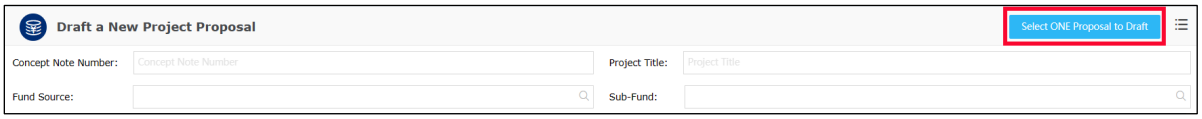
The Draft a New Project Proposal page opens in a separate tab.



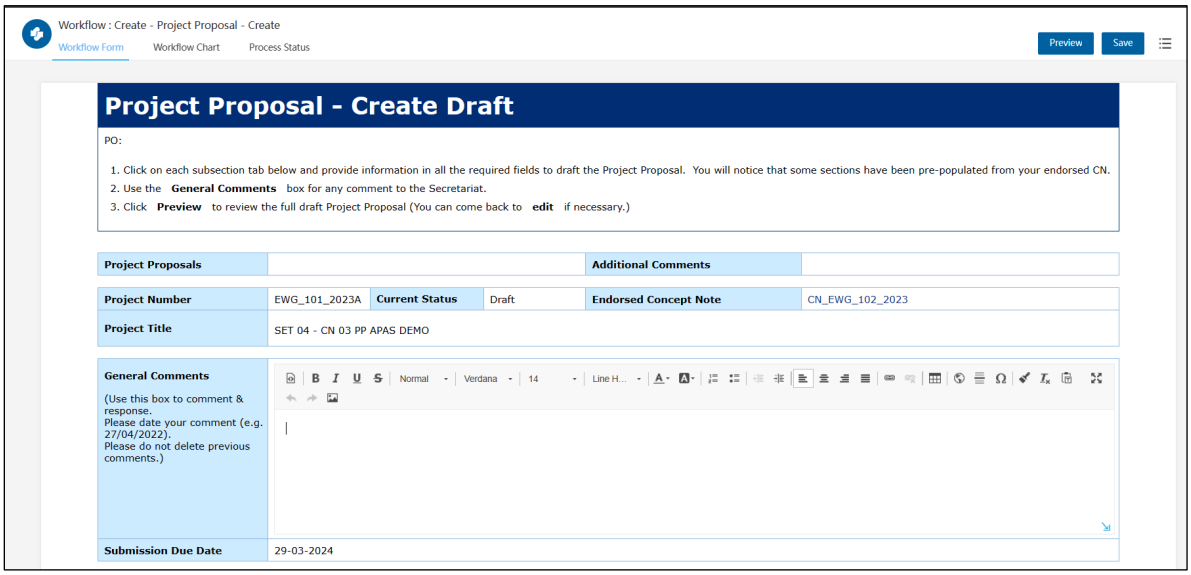
4. Select your Project Proposal by checking the box at the left of the **Project Title**.



5. Click the **Select ONE Proposal to Draft** button in the top right corner of the page.



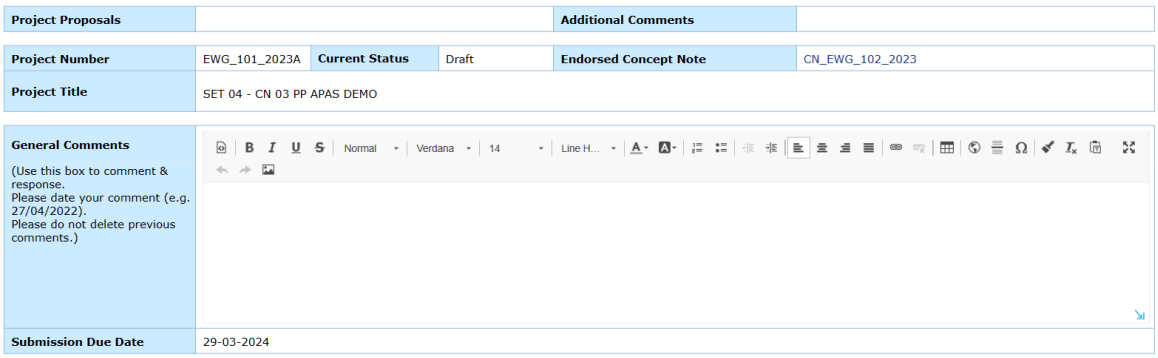
The Project Proposal – **Create Draft** page for the Project Proposal you selected displays in a separate tab.



Throughout this page, several fields have been pre-populated with information from the Concept Note approved in principle:

- At the top of the page, the **Project Number**, **Current Status**, **Endorsed Concept Note**, **Project Title**, and **Submission Due Date** fields are pre-populated. Also, there might be some notes for the Secretariat in the **General Comments** field. In the example below, no comments have been entered yet.

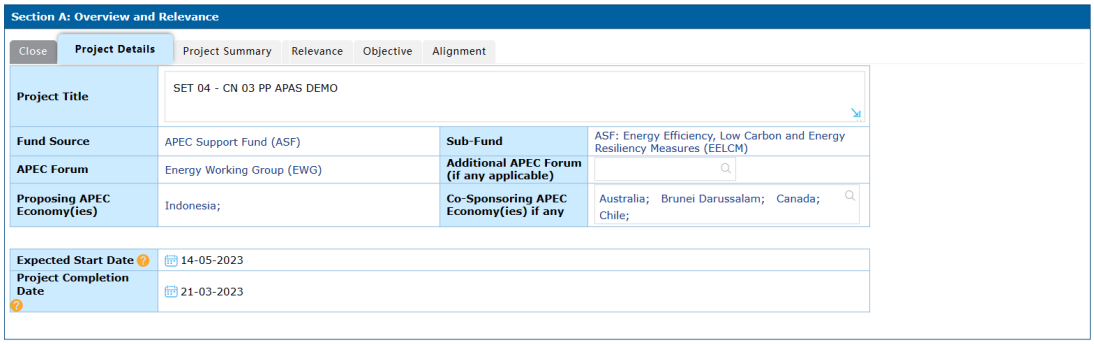
  Note: If you enter any comments for the Secretariat in the **General Comments** field, make sure you add the date when you make the comments. Use the *<day>/<month>/<year>* format as in this example: 27/04/2022.



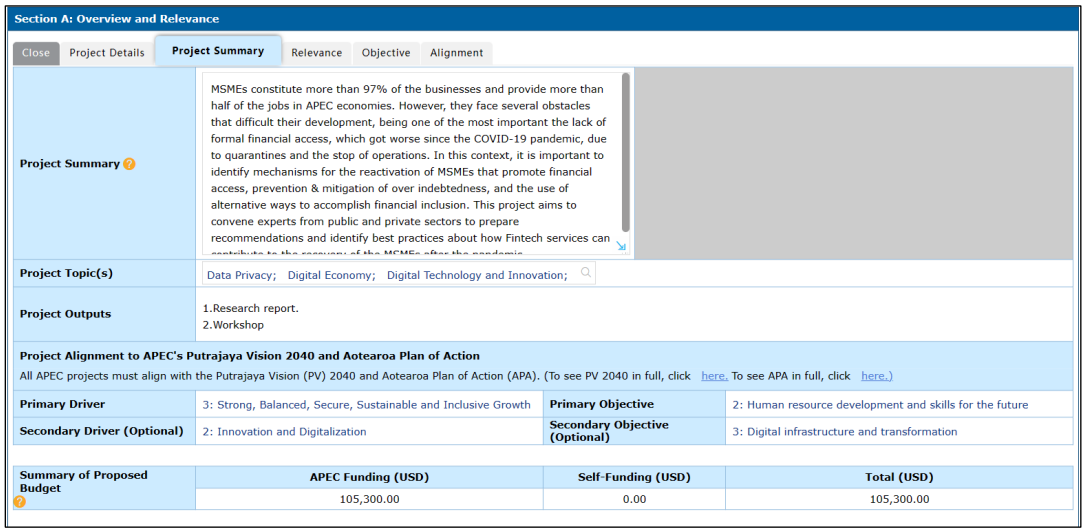
- All tabs in **Section A: Overview and Relevance** are pre-populated.
  Click each tab to view the information pre-populated there.
  When you open one tab, the tab you previously viewed closes.
  In some cases, you might need to expand or clarify certain pre-populated content in specific sections of the Proposal (such as the **Project Summary** or **Benefits to the Region**) by adding or amending the details.

  Examples of each of these tabs are shown below.

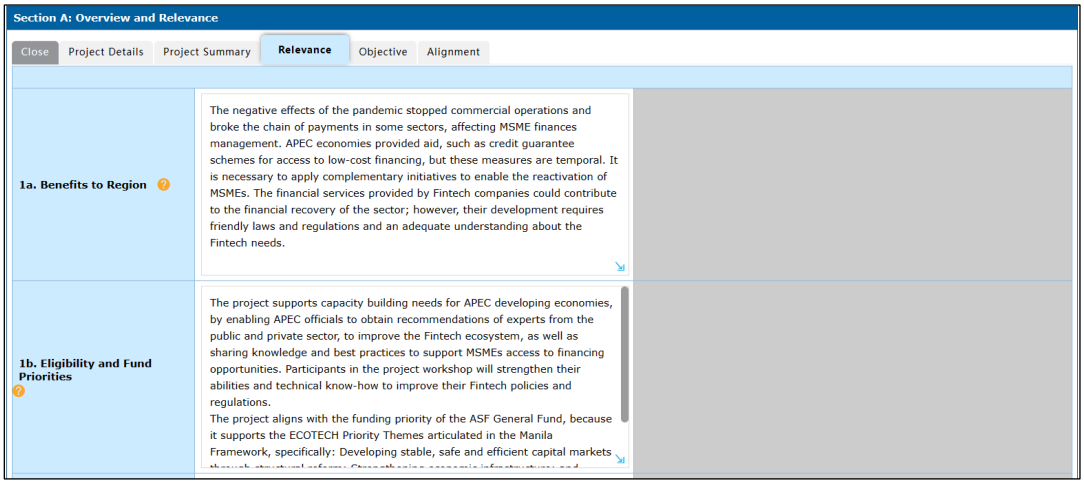
  - **Project Details**



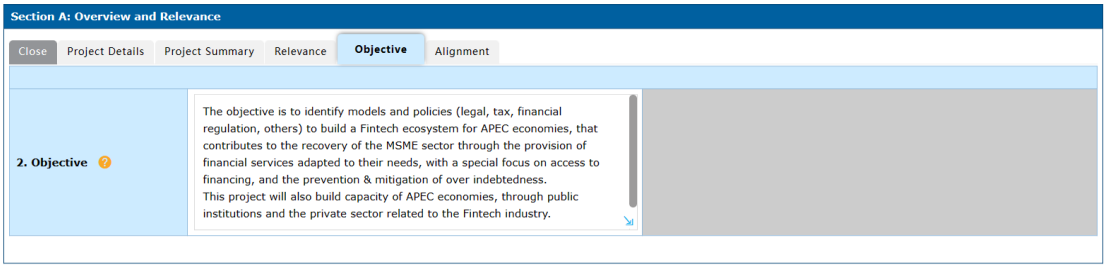
  - **Project Summary**



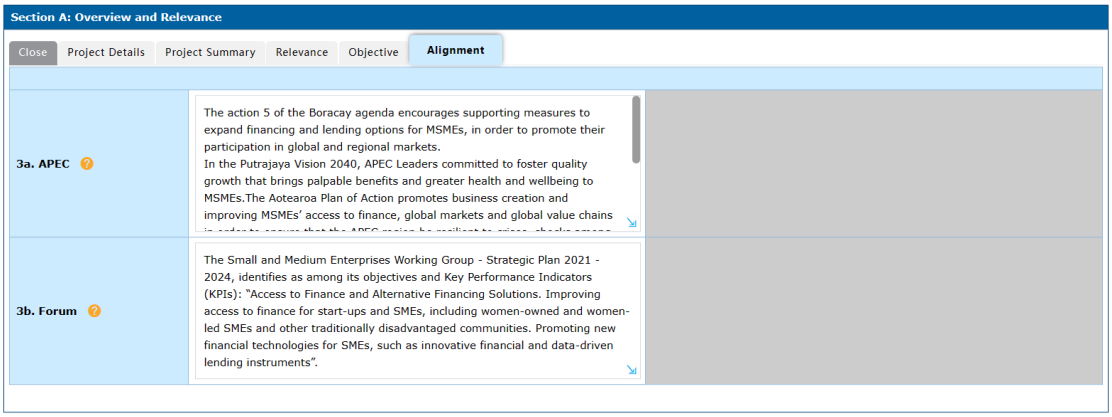
- **Relevance**



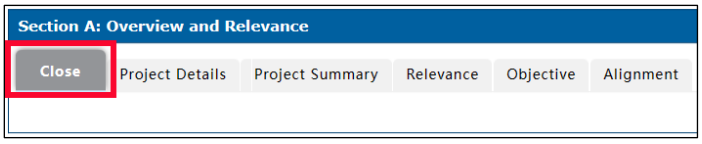
- **Objective**



- **Alignment**

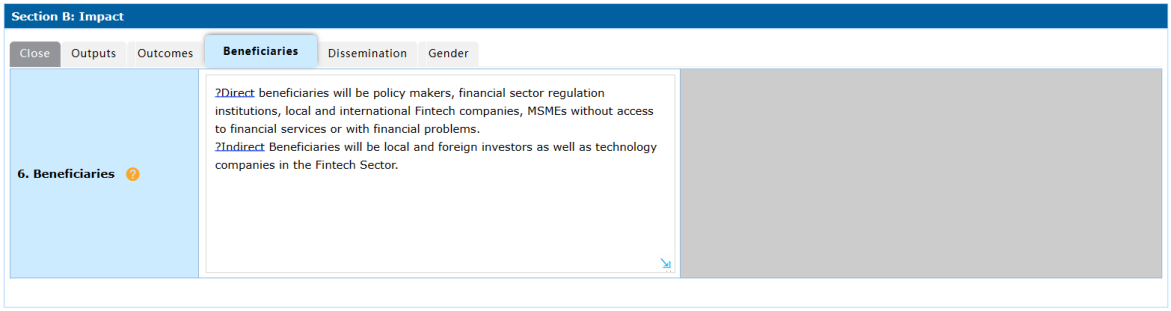


When you are finished viewing the tabs, click the **Close** button on the left side of the **Section A** box to close the active tab.

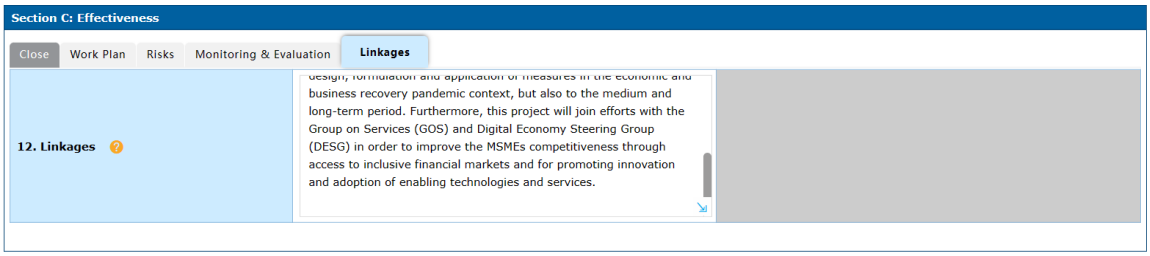


For each main section of the Project Proposal, the **Create Draft** page has tabs that have a Close button like the one shown above.

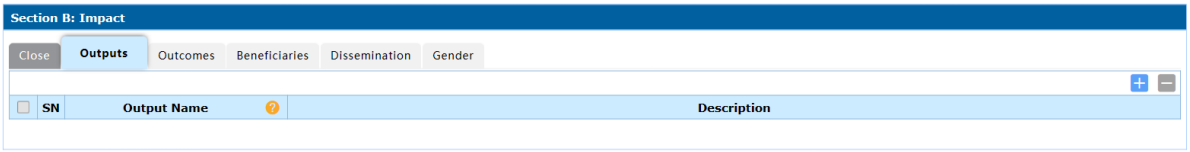
- In **Section B: Impact**, the **Beneficiaries** tab is pre-populated.



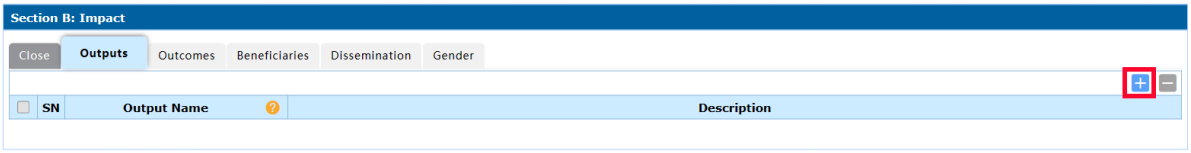
- In **Section C: Effectiveness**, the **Linkages** tab is pre-populated.



6. In **Section B: Impact**, click the **Outputs** tab.

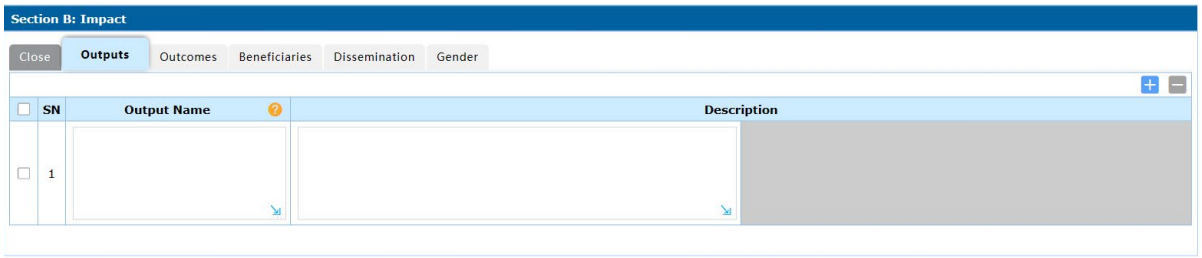


7. To add a row, click the **+** (plus) button at the top right corner of the **Outputs** table.

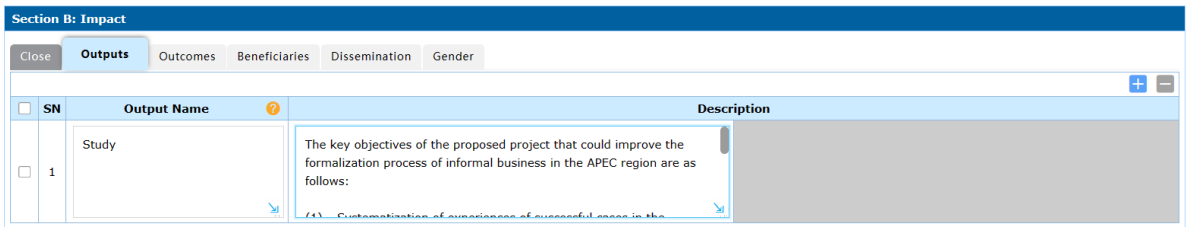


A new row is added to the table.

Note: to **delete** a row, check the box in the first column and click on the **-** (minus) button on the right.

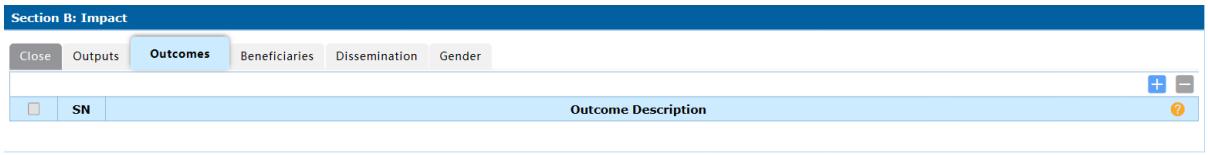


8. Enter the **Output Name** and **Description** in the corresponding fields in the new row. The Outputs you create in this section should match the outputs that you listed in the **List your output**' section of the Concept Note.

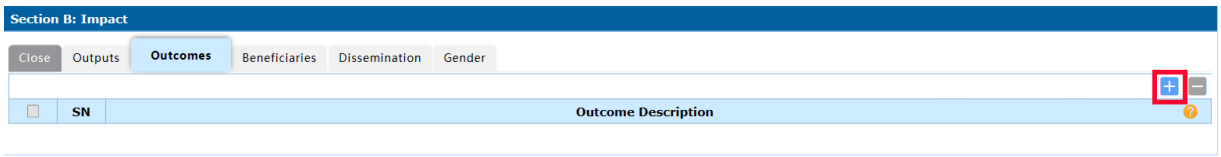


9. Repeat steps 7-8 to add another output.

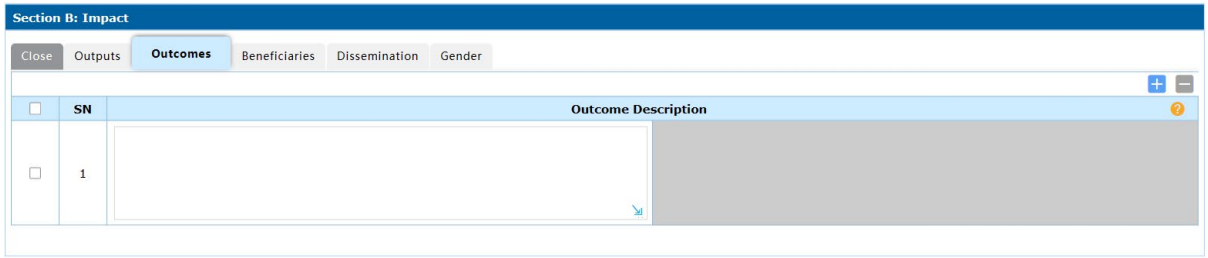
10. In **Section B: Impact**, click the **Outcomes** tab.



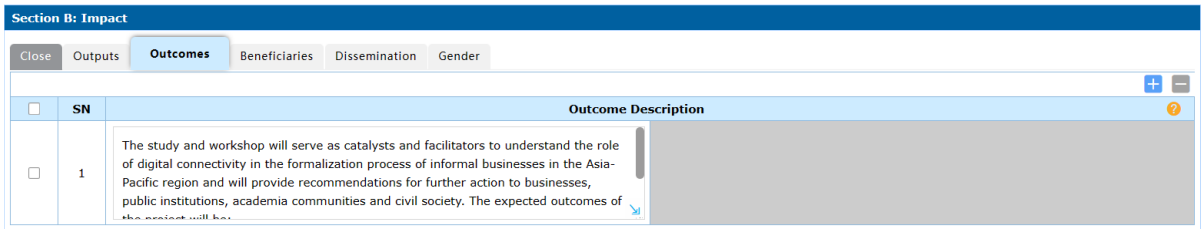
11. Click the **+** button at the top right corner of the **Outcomes** table.



A new row is added to the table.

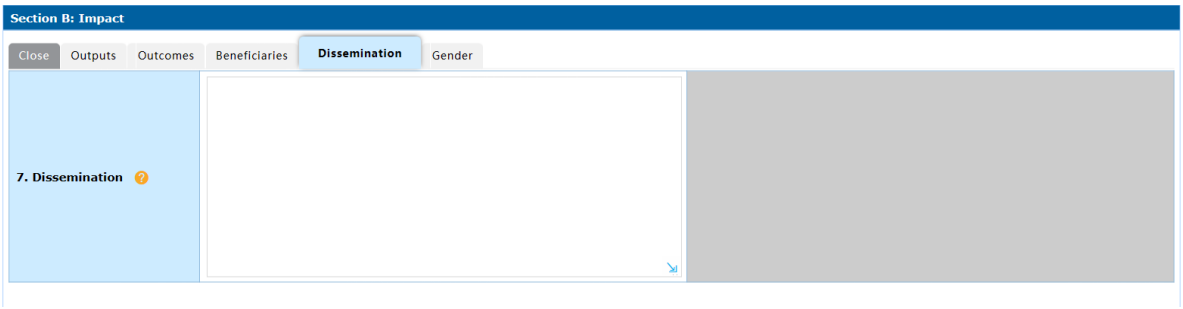


12. Enter the **Outcome Description** in the new row.

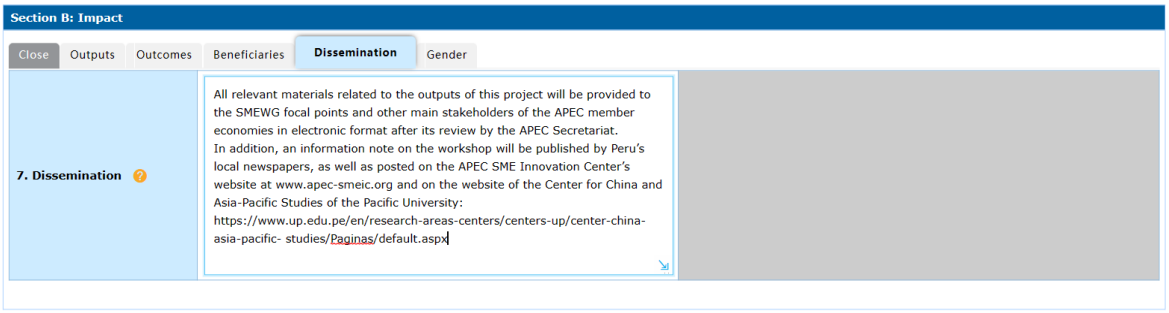


13. Repeat steps 11-12 to add another outcome.

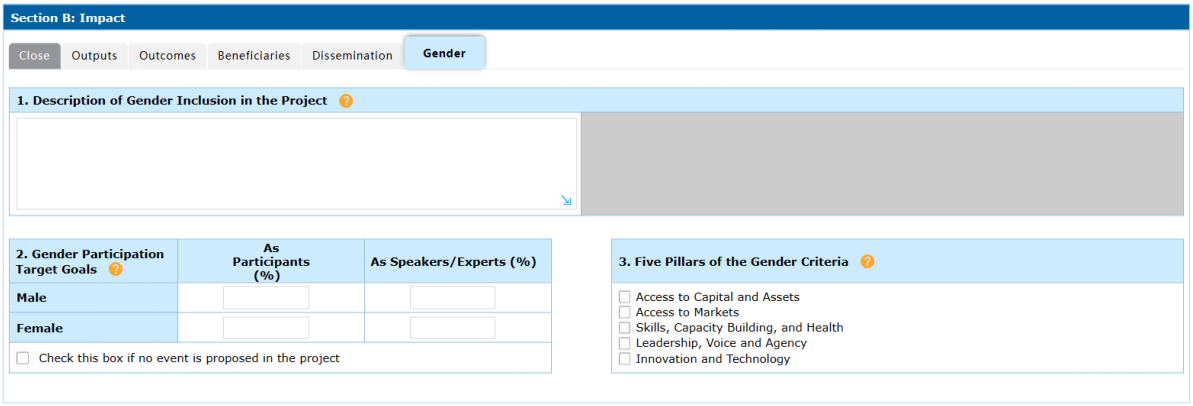
14. Click the **Dissemination** tab.



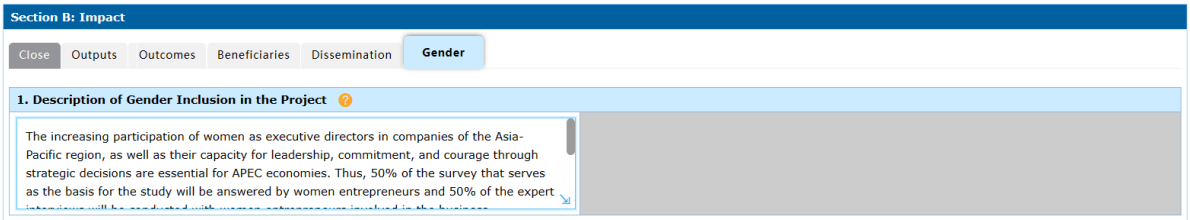
15. Enter the information about the dissemination in the **Dissemination** field.



16. Click the **Gender** tab.



17. In the **1. Description of Gender Inclusion in the Project** field, enter the description of the Gender Inclusion for your Project.



18. In the **2. Gender Participation Target Goals** table, follow these steps:
    - In the **As Participants (%)** column, enter the target percentage rates of male and female participants for the project event. Gender-balanced target participation rates (50/50) are strongly encouraged.

2. Gender Participation Target Goals	As Participants (%)	As Speakers/Experts (%)
Male	50	
Female	50	
☐ Check this box if no event is proposed in the project		

    - In the **As Speakers/Experts (%)** column, enter the percentages of male and females who will be experts the project event. Gender-balanced target participation rates (50/50) are strongly encouraged.

2. Gender Participation Target Goals	As Participants (%)	As Speakers/Experts (%)
Male	50	50
Female	50	50
☐ Check this box if no event is proposed in the project		

Note: If the project does not have an associated event, check the **Check this box if no event is proposed in the project**. The percentage rates show 'zero'.

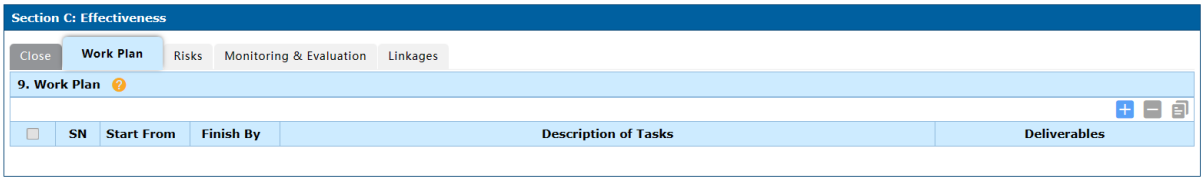
2. Gender Participation Target Goals	As Participants (%)	As Speakers/Experts (%)
Male	0	0
Female	0	0
☑ Check this box if no event is proposed in the project		

19. In the **3. Five Pillars of the Gender Criteria** section, check the pillars of gender economic empowerment that the project contributes to or promotes.

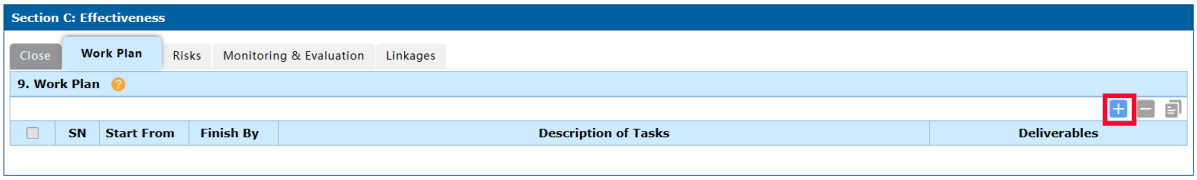
3. Five Pillars of the Gender Criteria

- ☑ Access to Capital and Assets
- ☑ Access to Markets
- ☑ Skills, Capacity Building, and Health
- ☑ Leadership, Voice and Agency
- ☑ Innovation and Technology

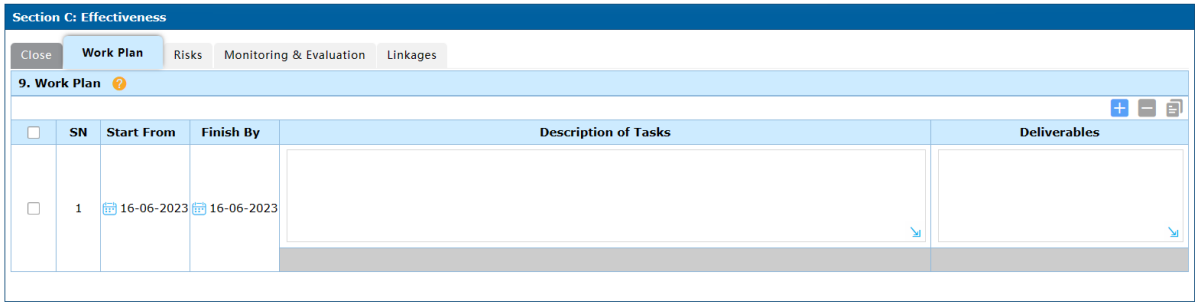
20. In **Section C: Effectiveness**, click the **Work Plan** tab. You should create one row per task. List project tasks in the chronological order they would be implemented.
    For instance, your first project task is normally the drafting of the contract.



21. Click the **+** button at the top right corner of the **Work Plan** table.

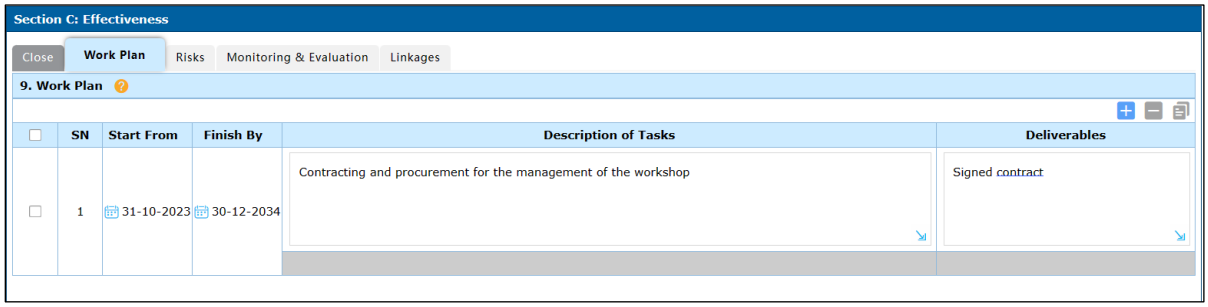


A new row is added to the table.

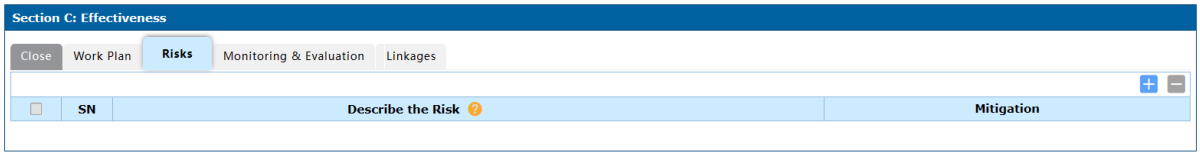


22. To fill information about each task:
    - Enter the first day of the selected month as the **Start From** date and the last day of the selected month as the **Finish By** date.
    - In the **Description of Tasks** field, enter the tasks that will be taken to deliver the product or output.
    - In the **Deliverable**s field, enter the name of the item to be delivered.

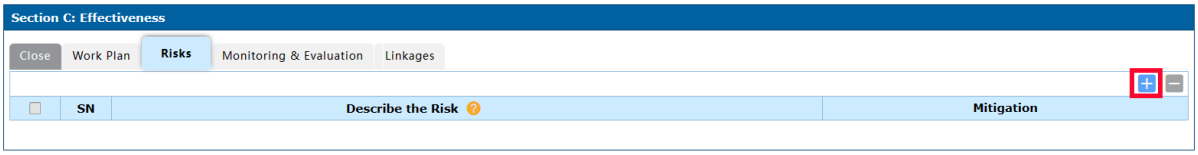
    In the *example* below:
    - the Start Date is 01-11-2023,
    - the Finish By date is 31-12-2034,
    - the Description of Tasks is Contracting and procurement for the management of the workshop, and
    - the Deliverable is a signed contract.



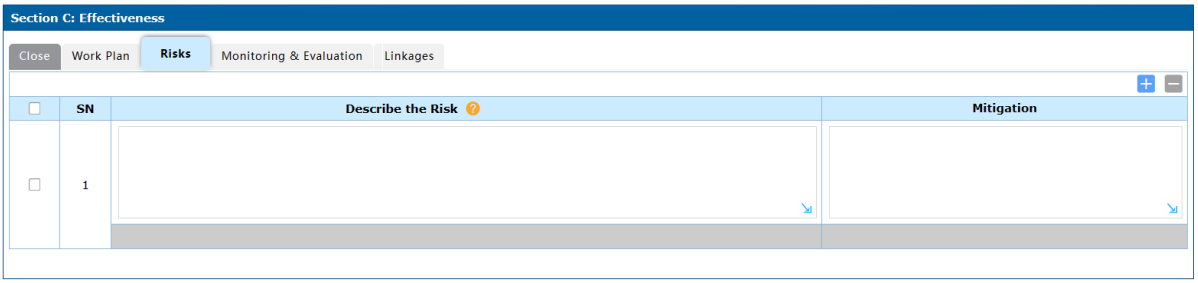
23. Repeat steps 21-22 to add another item to the work plan.
24. Click the **Risks** tab.



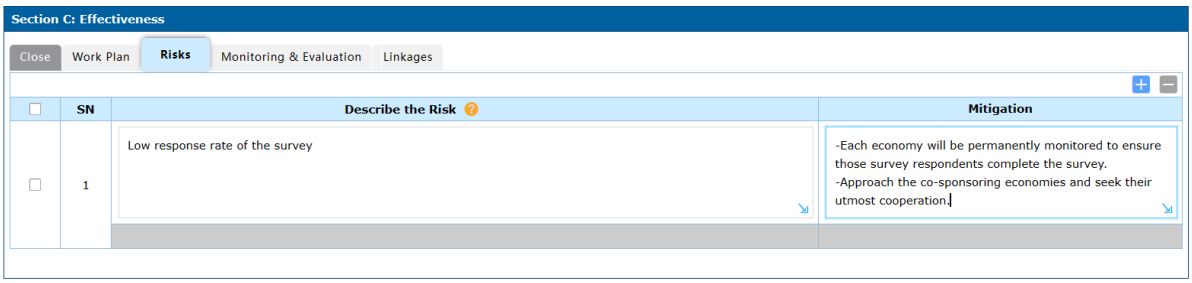
25. Click the **+** button at the top right corner of the **Risks** table.



A new row is added to the table.



26. Enter the **Description of the Risk** and your **Mitigation** plan of the risk in the corresponding fields in the new row.

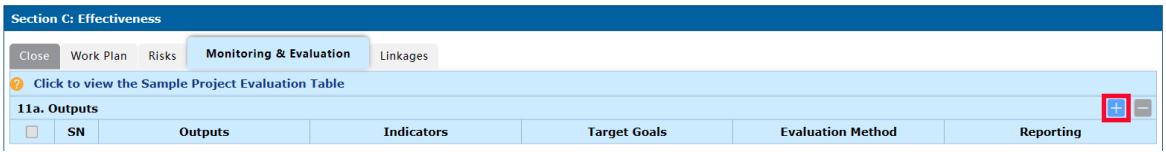


27. Repeat steps 25-26 to add another risk.

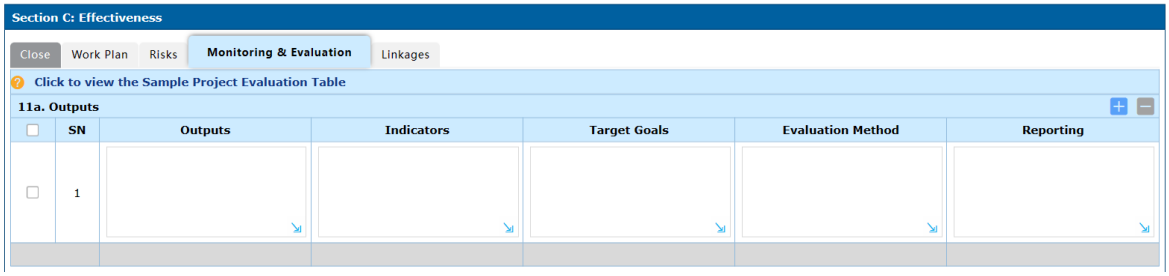
28. Click the **Monitoring & Evaluation** tab.

    To understand how to develop a quality Monitoring and Evaluation valuation plan for your project, click the **Sample Project Evaluation table**. A new screen will launch.

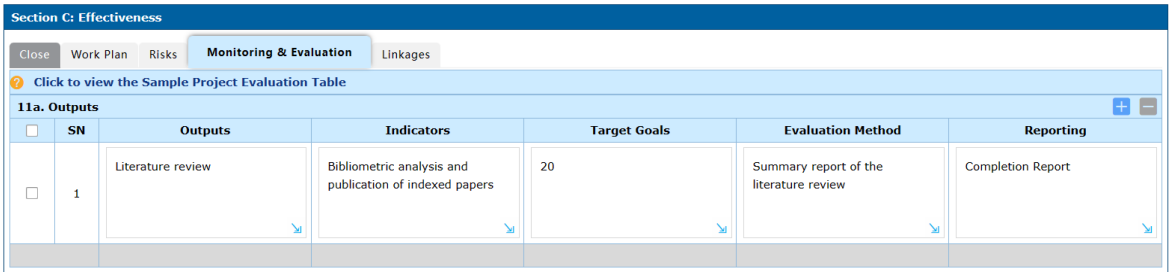
29. To create your plan, click the **+** button at the top right corner of the **Monitoring and Evaluation** table.



A new row is added to the table. A row should be created for <u>one</u> indicator. You should provide at least one evaluation indicator for <u>each</u> of the outputs you listed in the **Outputs** section.

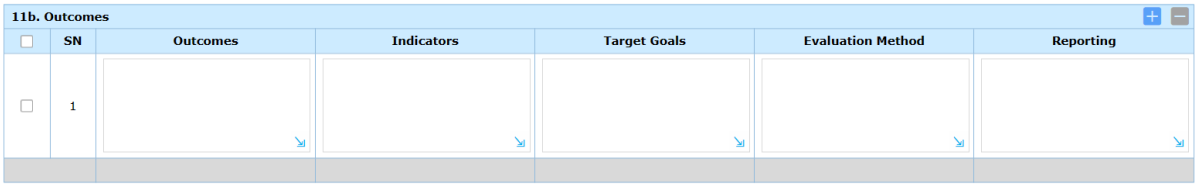


30. Enter information in each corresponding column for each indicator in the new row:
    - **Outputs**: the name of the output you are evaluating
    - **Indicators**: describe what the indicator is
    - **Target Goals**: what the target goal is (e.g. a percentage, a total number, etc.)
    - **Evaluation Method**: how you will evaluate this indicator (e.g. a survey, event summary)
    - **Reporting**: where the evaluation result will be reported (e.g. the Completion Report)



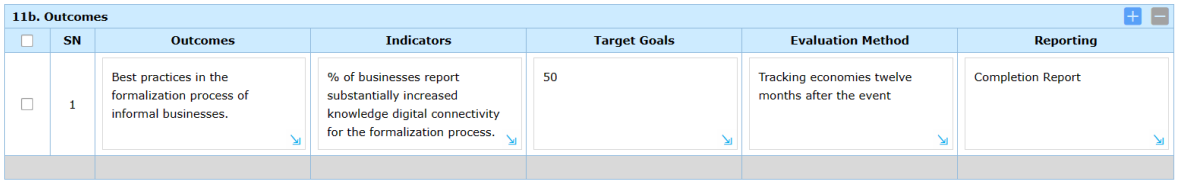
31. Click the **+** button at the top right corner of the **Outcomes** table.

A new row is added to the table. A row should be created for <u>one</u> indicator. You should provide at least one evaluation indicator for each of the outcomes you listed in the **Outcomes** section.



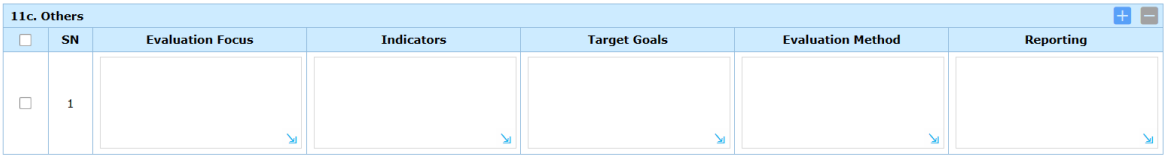
32. Enter this information in the corresponding fields in the new row:
    - **Outcomes**: the outcome (from the Outcomes section) you are evaluating
    - **Indicators**: describe what the indicator is
    - **Target Goals**: what the target goal is (e.g. a percentage, a total number, etc.)
    - **Evaluation Method**: how you will evaluate this indicator (e.g. a survey, event summary)

- **Reporting**: where the evaluation result will be reported (e.g. the Completion Report)



33. *(optional)* Click the **+** button at the top right corner of the **Others** table.

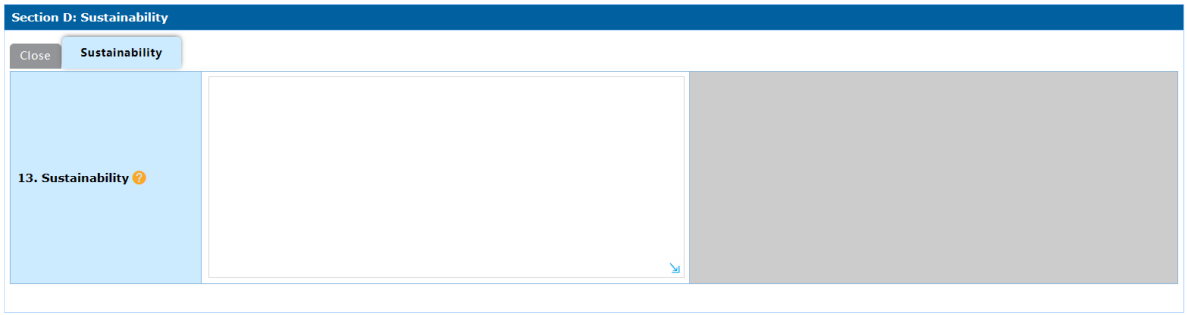
A new row is added to the table. You can add indicators that you will use to evaluate items other than Outputs or Outcomes.



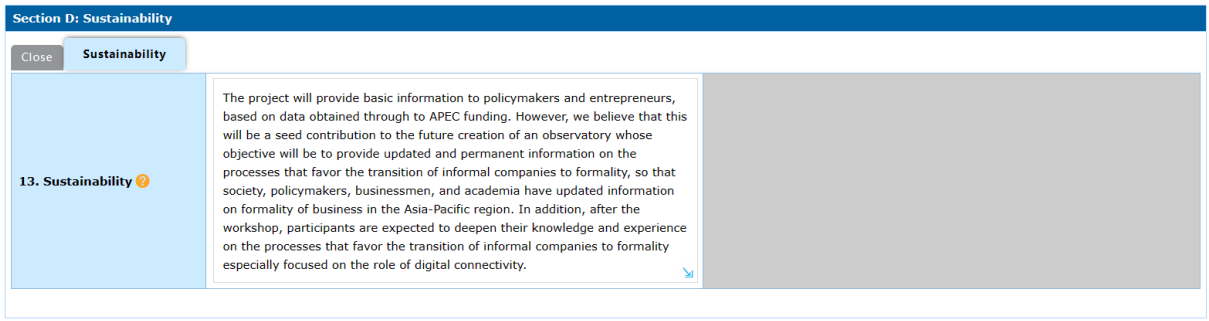
Enter this information in the corresponding fields in the new row:

- **Evaluation Focus**
- **Indicators**: describe what the indicator is
- **Target Goals**: what the target goal is (e.g. a percentage, a total number, etc.)
- **Evaluation Method**: how you will evaluate this indicator (e.g. a survey, event summary)
- **Reporting**: where the evaluation result will be reported (e.g. the Completion Report)

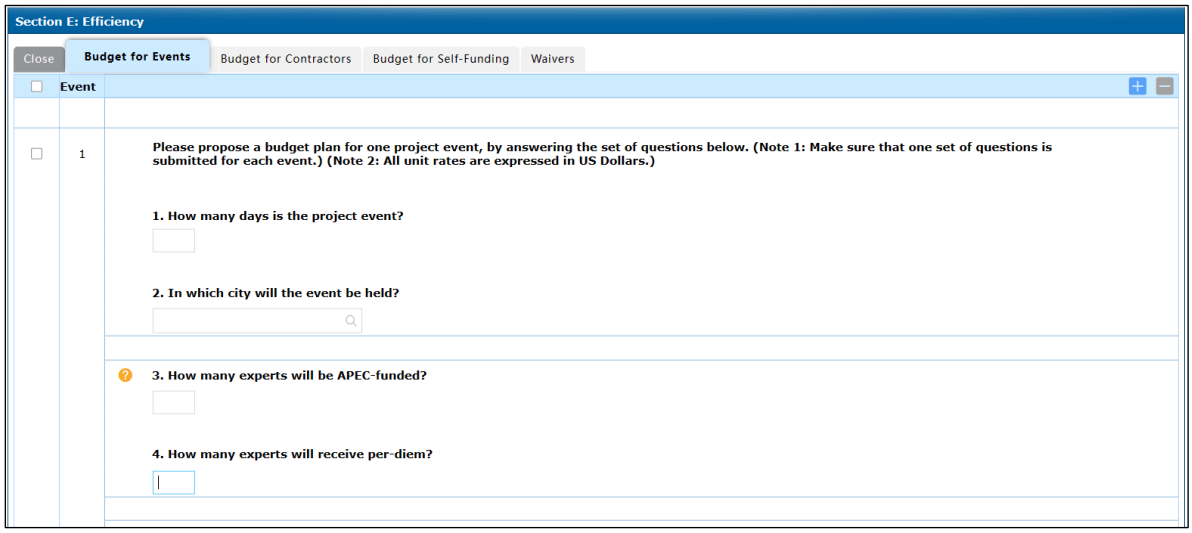
34. In **Section D: Sustainability**, click the **Sustainability** tab.



35. Enter details about how the project's impact will be sustainable after the project is completed in the **Sustainability** field.



36. In **Section E: Efficiency**, click the **Budget for Events** tab. A list of questions displays in this tab.

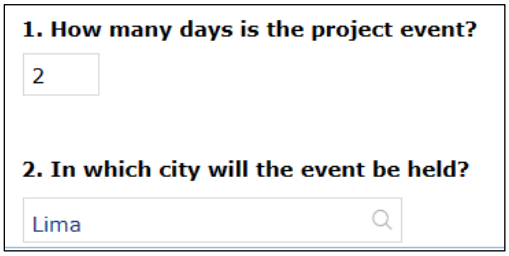


Note: There are 37 questions for each event. If you're planning only one event, answer only the first set of 37 questions in the **Budget for Events** tab.

Follow these steps to complete the budget for the event:

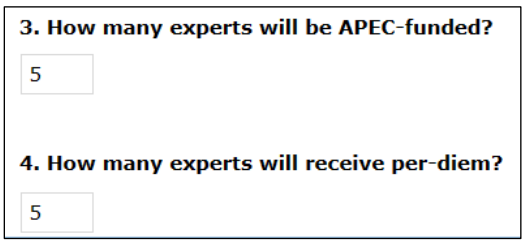
a. Determine the duration and location of the event.
   - In **Question 1**, enter the number of days for the event.
   - In **Question 2**, enter the location of the event. By entering the event, APAS automatically calculates the per-diem rate of the selected city.

   In the example below, the event's duration is two days, and it will be held in Lima, Peru.



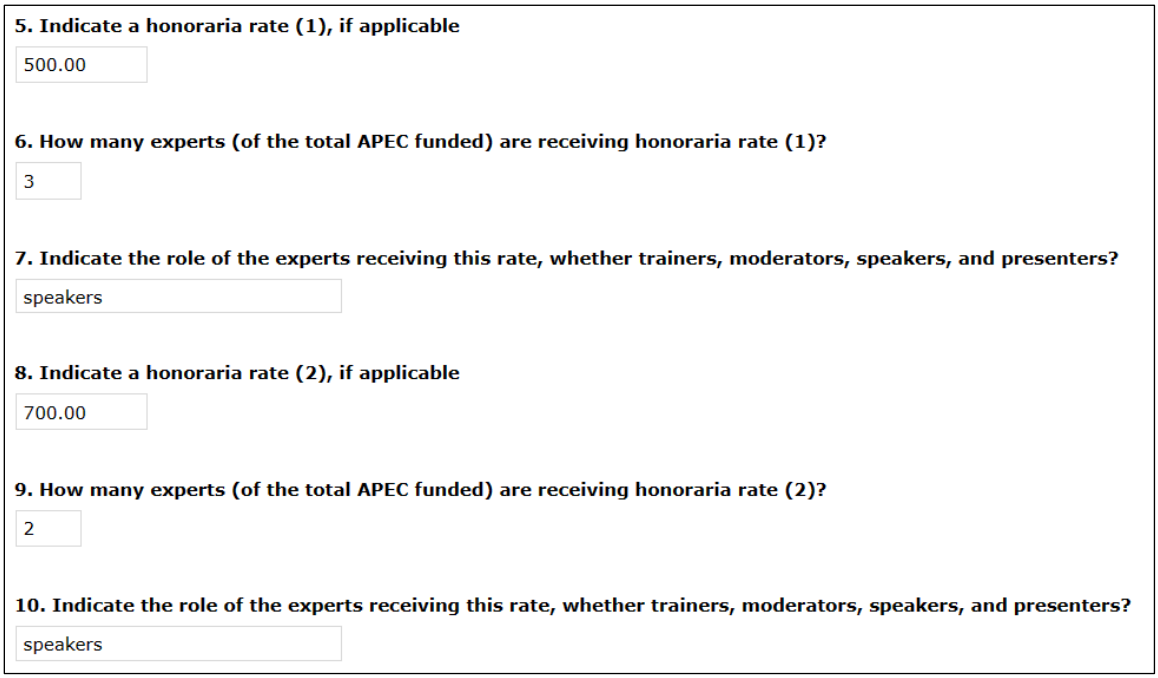
b. Decide how many experts the project will fund for the event and the number of the total experts who will receive a per diem.
   - In **Question 3**, enter the number of experts that APEC will fund.
   - In **Question 4**, enter how many of these experts will receive a per diem.

   In the example below, APEC will fund five experts, and all five experts will receive a per diem.



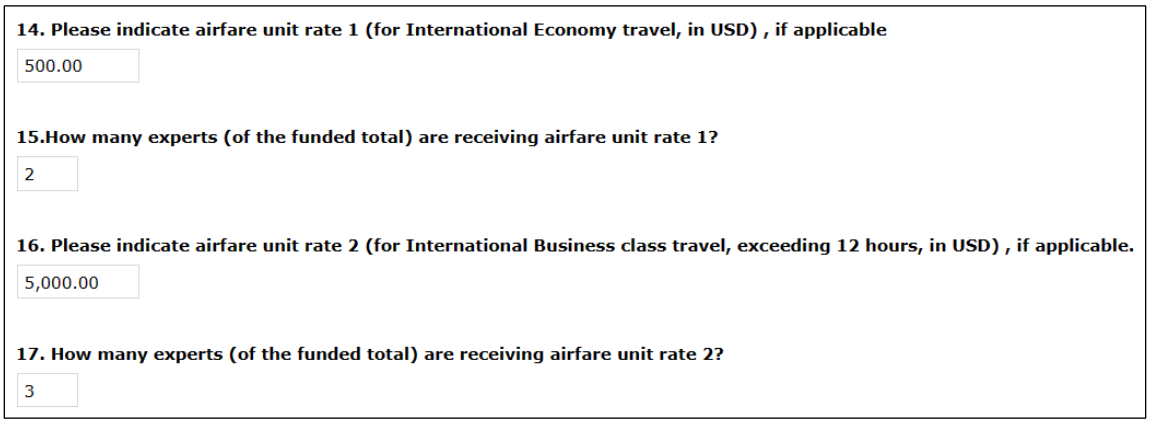
c. *(optional)* If you are paying an honorarium to any experts, decide how many of the total experts will receive an honorarium, what their roles will be, and whether different rates will be applied.
   - In **Question 5**, enter the first honorarium rate.
   - In **Question 6**, enter the number of experts who will receive the first honorarium rate entered in Question 5.
   - In **Question 7**, enter the role of the experts who will receive the first honorarium rate entered in Question 5.
   - In **Question 8**, enter the second honorarium rate, if a different rate will be paid to other experts.
   - In **Question 9**, enter the number of experts who will receive the second honorarium rate entered in Question 8.
   - In **Question 10**, enter the role of the experts who will receive the first honorarium rate entered in Question 8.

   In the example below, the PO is proposing two different honoraria rates. Three out of the five experts will act as speakers and receive $500 (the first honorarium rate). The other two experts will be speakers and receive $700 (the second honorarium rate).



d. Decide how many of the experts entered in Question 3 will receive funding for airfare and the different airfare unit rates, where applicable.
   - In **Question 14**, enter the first airfare rate for those traveling in International Economy.
   - In **Question 15**, enter how many experts from the funded experts who will receive this airfare rate.
   - In **Question 16**, enter the second airfare rate, if applicable, for those traveling in International Economy.
   - In **Question 17**, enter the number of experts from the funded total who will receive the second airfare rate.

In the example below, there are two airfare unit rates. Two of the five funded experts will travel in international economy, and the proposed airfare rate is $500 for each traveler. The other three funded experts will travel in International Business class (more than 12 hours), and the proposed airfare rate is $5,000 for each traveler.

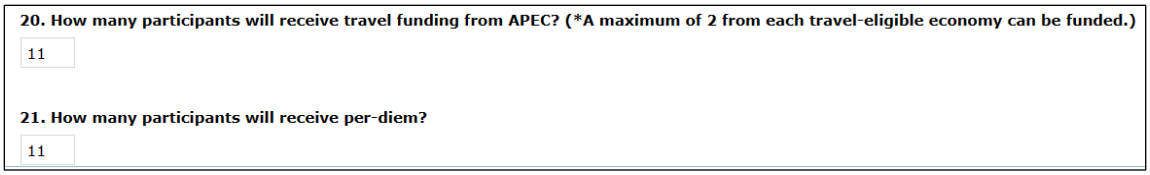


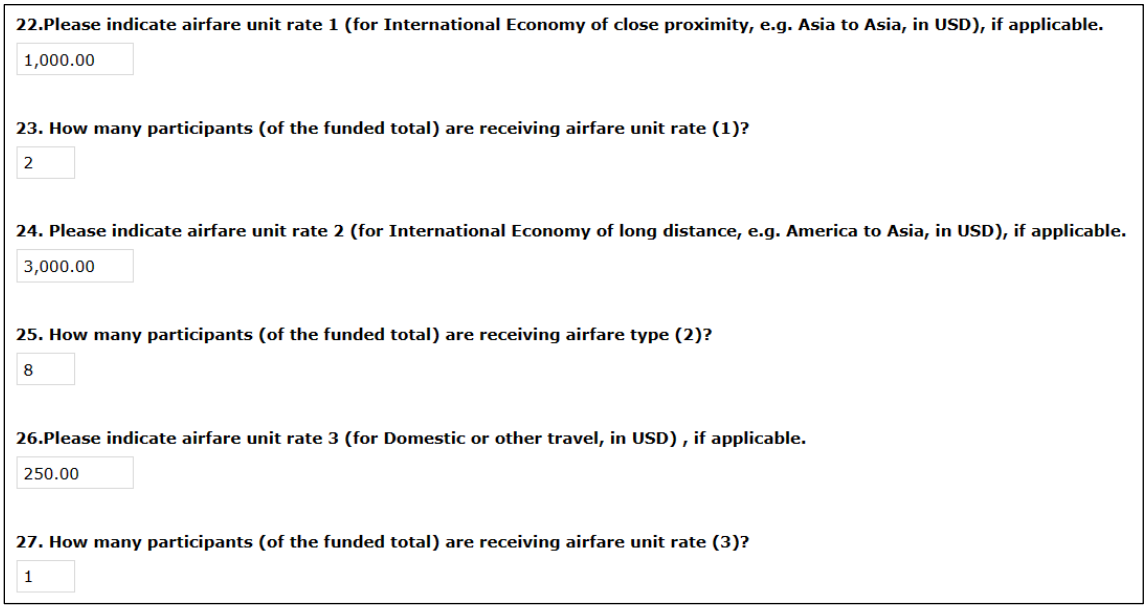
e. Determine the number of funded participants who will receive APEC funding to participate in the event.

Note: Only the participants from the 11 travel-eligible economies can be funded by APEC.

- In **Question 20**, enter the number of the funded participants who will receive travel funding from APEC.
- In **Question 21**, enter the number of the funded participants who receive a per diem.
- In **Question 22**, enter the airfare rate for the funded participants who will travel in International Economy in close proximity to the event, such as South America to South America or Asia to Asia.
- In **Question 23**, enter the number of the funded participants who travel in International Economy in close proximity to the event.
- In **Question 24**, enter the airfare rate for the funded participants who will travel in International Economy of a longer distance, such as the United States to South America or the United States to Asia.
- In **Question 25**, enter the number of the funded participants who will travel in International Economy of a longer distance.
- In **Question 26**, enter the airfare rate of the funded participants who will travel in Domestic Economy.
- In **Question 27**, enter the number of participants who will travel in Domestic Economy.

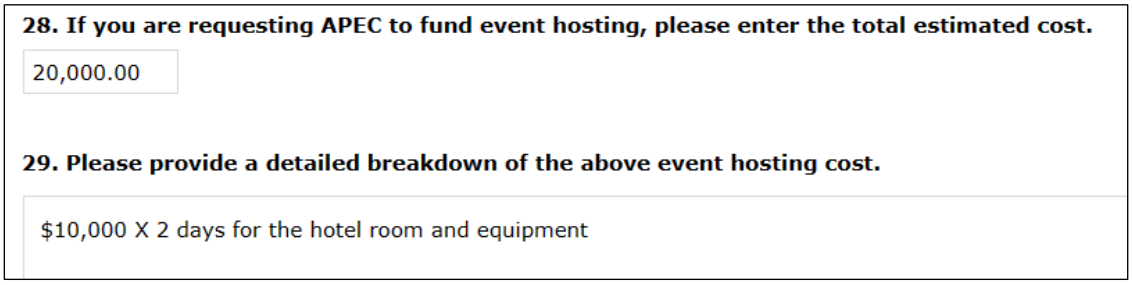
In the example below, two of the 11 participants will travel in International Economy of close proximity, and $1,000 is the proposed airfare for each traveler. Eight participants will travel in International Economy of a longer distance, and $3,000 is the proposed airfare for each traveler. One participant from the host economy will travel Domestic Economy, and $250 is the proposed airfare.





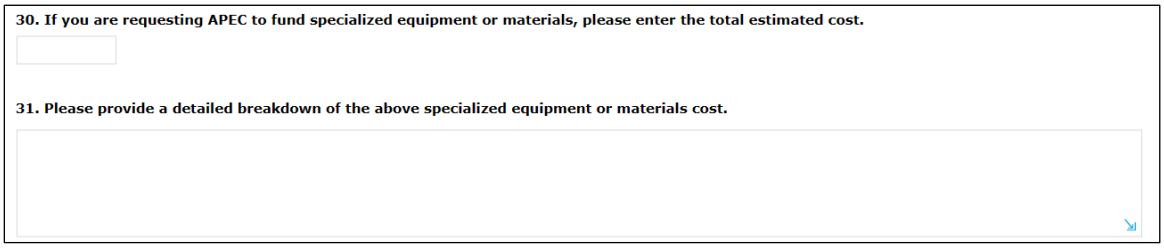
f. Decide whether you need funding to host the event, and determine the total cost.
   - In **Question 28**, enter the total estimated cost for event hosting.
   - In **Question 29**, enter a detailed breakdown of the event hosting costs.

   In the example below, the PO is requesting $20,000 from APEC to host a two-day event, which breaks down to $10,000 for each day for the hotel room and equipment.



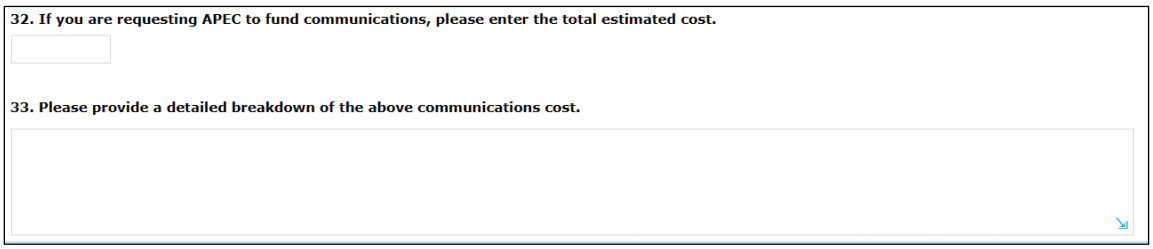
g. *(optional)* Decide whether you need funding for specialized equipment, and determine the total cost.
   - In **Question 30**, enter the total estimated cost of the specialized equipment.
   - In **Question 31**, enter a detailed breakdown of the specialized equipment costs.

In the example below, the PO is not requesting any funding for specialized equipment, so the answer fields for Questions 30 and 31 are left blank.



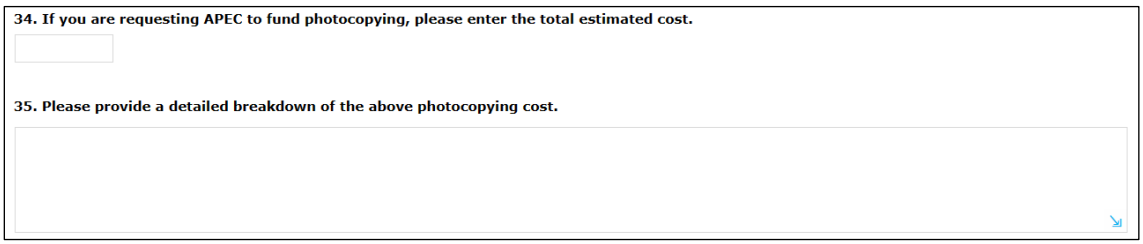
h. *(optional)* Decide whether you need funding for communications, and determine the total cost.
- In **Question 32**, enter the total estimated costs for communications.
- In **Question 33**, enter a detailed breakdown of the communication costs.

In the example below, the PO is not requesting any funding for communications, so the answer fields for Questions 32 and 33 are left blank.



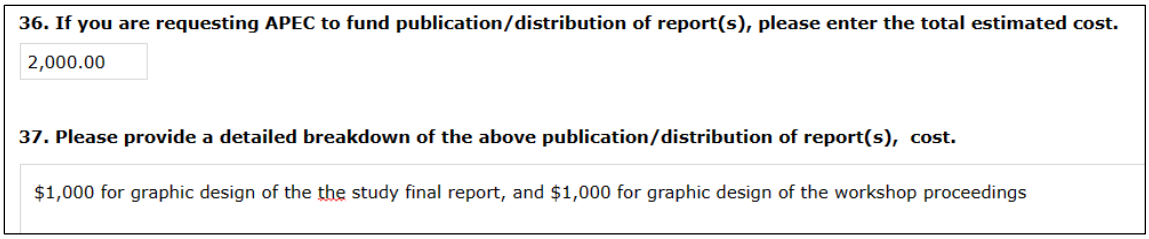
i. *(optional)* Decide whether you need funding for photocopying, and determine the total cost.
- In **Question 34**, enter the total estimated costs for photocopying.
- In **Question 35**, enter a detailed breakdown of the photocopying costs.

In the example below, the PO is not requesting any funding for photocopying, so the answer fields for Questions 34 and 35 are left blank.



j. Decide whether you need funding for publications and distribution of reports, and determine the total cost.
- In **Question 36**, enter the total estimated costs for publications and distribution of reports.
- In **Question 37**, enter a detailed breakdown of costs of the publications and distribution of reports.

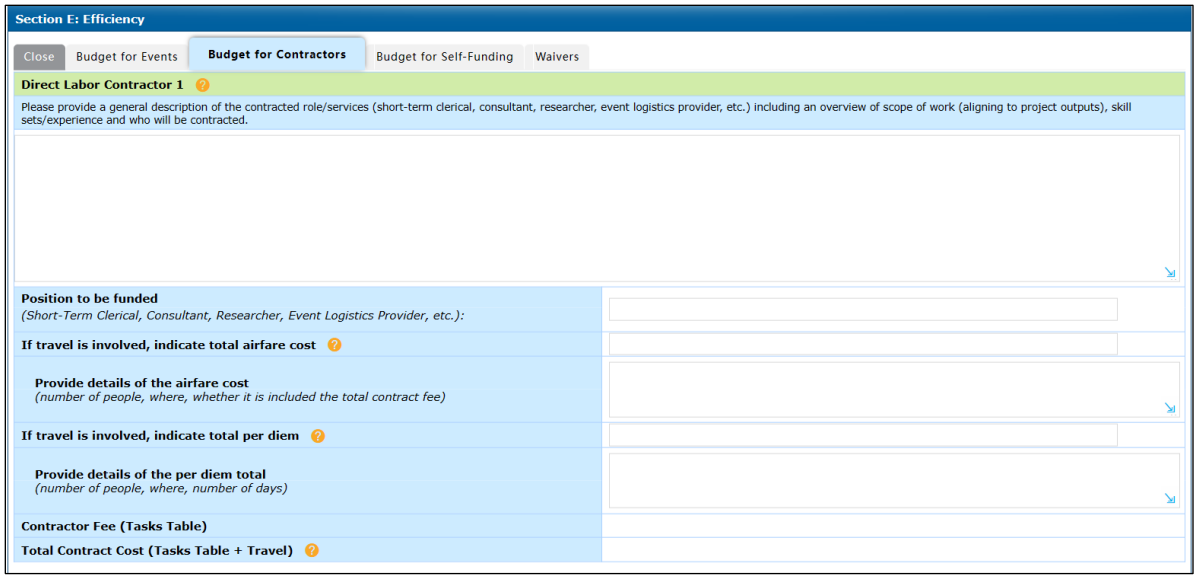
In the example below, the PO is requesting a total of $2,000 for graphic design services. The graphic design of final report for the story will cost $1,000, and the graphic design of the workshop proceedings will cost $1,000.



37. *(optional)* If you're planning another event, click the **+** button at the top right corner of the **Budget for Events** tab to insert a new set of 37 questions.

Repeat step 36 to answer the questions for the second event.

38. *(optional)* If you're hiring contractors for the project, click the **Budget for Contractors** tab.
Note: There is a total of two tables in this section, each with a set of fields to be filled out. You will use one table for each Direct Labor contract for the project.
Note: Only <u>two</u> contracts per project will be allowed in APAS.



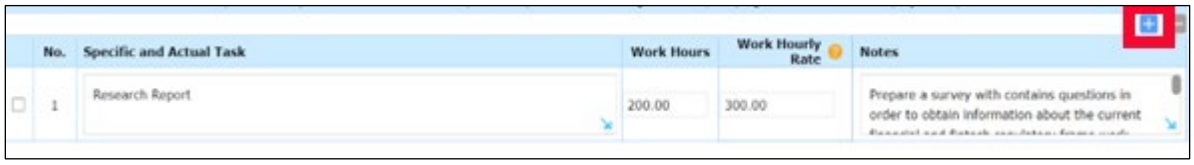
Fill out the table for **Direct Labor Contractor 1**.

i. Provide a general description of the contracted role/services and an overview of scope of work.
ii. Select the type of Position to be funded.
iii. Indicate the airfare cost, if travel is involved.
iv. Provide the details of the airfare cost.
v. Indicate the per-diem total, if travel is involved.
vi. Provide the details of the total per-diem.
vii. The Contractor Fee is calculated automatically from the **Table of Tasks** below it.
viii. The Total Contract Cost is calculated automatically from items **c**, **e**, and **g** above.

Note: You must fill the Table of Tasks to see the total **Contractor Fee** and the total **Contract Fee**.

List all the tasks to be performed by **Contractor 1**.

Click the **+** button at the top right corner of the **Tasks** table.



A new row is added to the table.

Fill out the following info for each task:

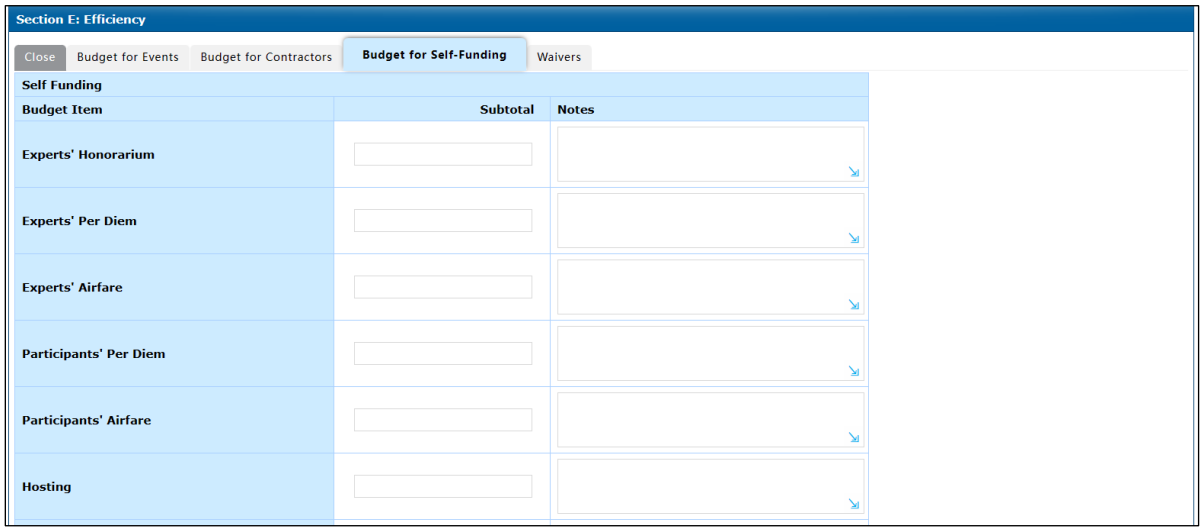
- Give the **task** a title
- Provide the total **work hours** to perform the task
- Provide the **hourly rate** of that task.
- In **Notes**, describe what the task involves.

Add another row for the next task to be performed by the Contractor.

APAS calculates all the **work hours** multiplied by **hourly rates** for all the listed tasks and provide the total in **step g, Contractor Fee**.

Fill out the table for **Direct Labor Contractor 2**, if applicable.

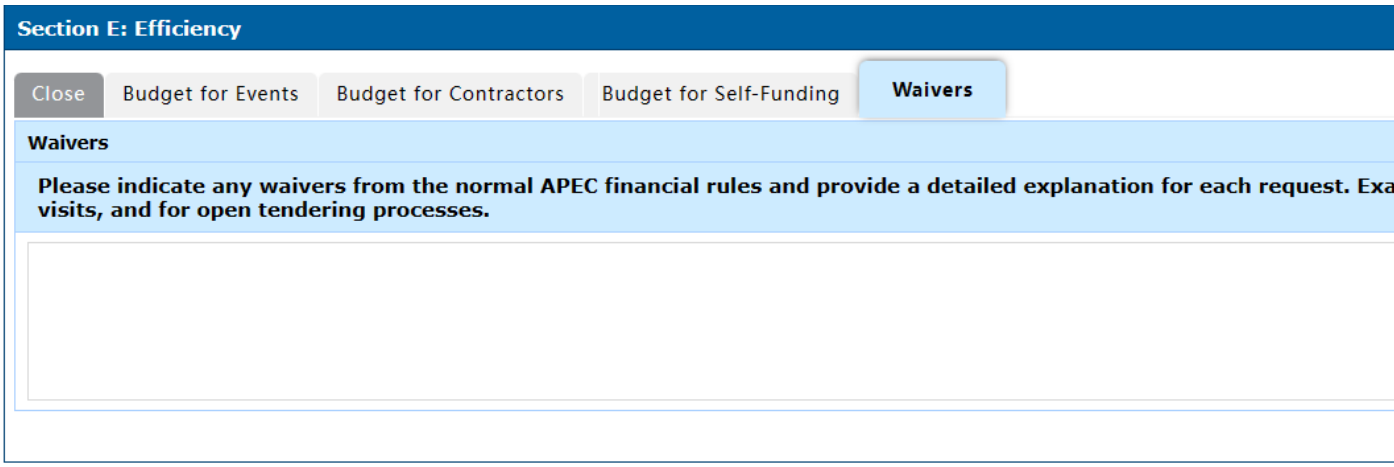
39. *(optional)* If your project has self-funding, click the **Budget for Self-Funding** tab.



Fill out the fields in this tab, where applicable.

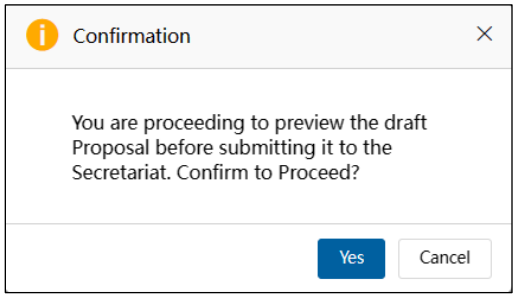
The system auto-calculates the sum of the cost of each item to be self-funded by the Project Overseer.

40. *(optional)* If there are any waivers for the project, click the **Waivers** tab and enter the details about the waiver.
Examples of waivers: no-funding for project site visits, open tendering processes

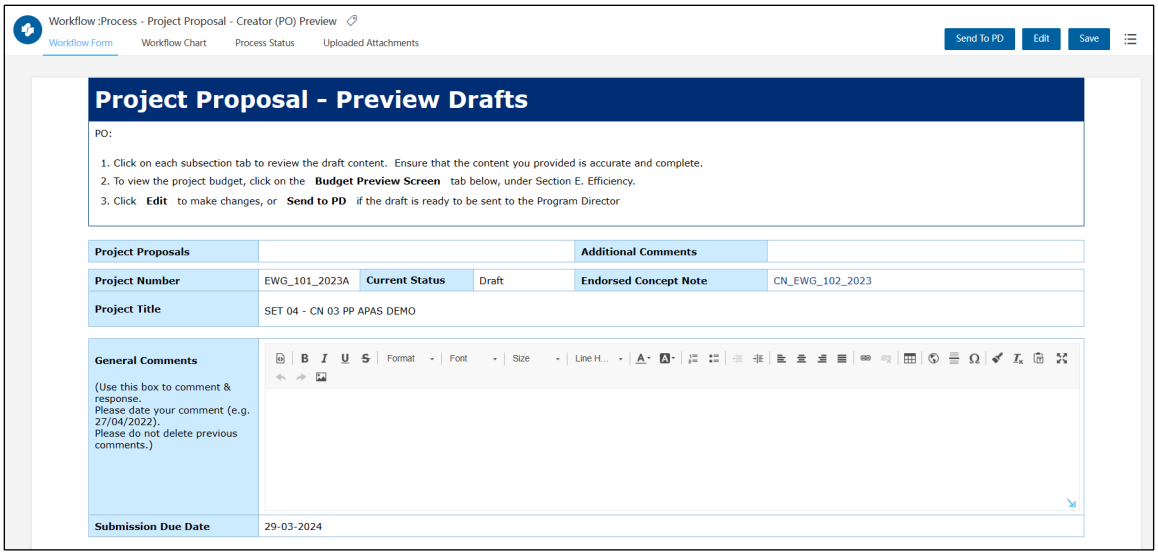


41. Click the **Preview** button at the top right corner of the **Project Proposal – Create Draft** page to review the information you entered in the Project Proposal before sending the Project Proposal to the PD or PE.

A confirmation message displays. Click **Yes** to continue.



The preview of the Project Proposal displays.



42. Verify that the information you entered in the Project Proposal is correct by clicking on the tabs for each section.

    Make sure you scroll down to **Section E. Efficiency** and click the **Budget Preview Section** tab to see the consolidated **Project Budget plan**.

Part A. Project Budget Plan displays. The table show the total calculation of the cost items you indicated in the Create Draft page, when you filled out information in the Budget for Event, Contract, and the Self-Funding tabs.

Part A : Project Budget Plan			
Event Number	1		
Number of event days	1		
Location (city) of the event	Hai Phong City		
Cost Items	**Details**	**Notes**	**APEC Funding (USD)**
Experts to receive APEC funding	1		
Honorarium Type 1	$900 X 1	researcher	900.00
Honorarium Type 2	$0 X 0		0.00
Honorarium Type 3	$0 X 0		0.00
Per diem	1 X 2.75	$132 per day	363.00
Airfare Type 1 - International Economy	$1200 X 1		1,200.00
Airfare Type 2 - International Business	$0 X 0		0.00
Airfare Type 3 - Domestic or others	$0 X 0		0.00
Participants to receive APEC funding	1		
Per Diem	1 X 2.75	$132 per day	363.00
Airfare Type 1 - International Economy (Short Distance)	$0 X 0		0.00
Airfare Type 2 - International Economy (Long Distance)	$0 X 0		0.00
Airfare Type 3 - Domestic or others	$0 X 0		0.00
Hosting	$12000		12,000.00
Specialized equipment or materials	$20000		20,000.00
Communications	$5000		5,000.00
Photocopying	$2000		2,000.00
Publication/distribution of report	0		

The table shows the calculations for **Contractors**, **Total APEC Funding**, **Total Self-Funding**, and **Total Project Value**.

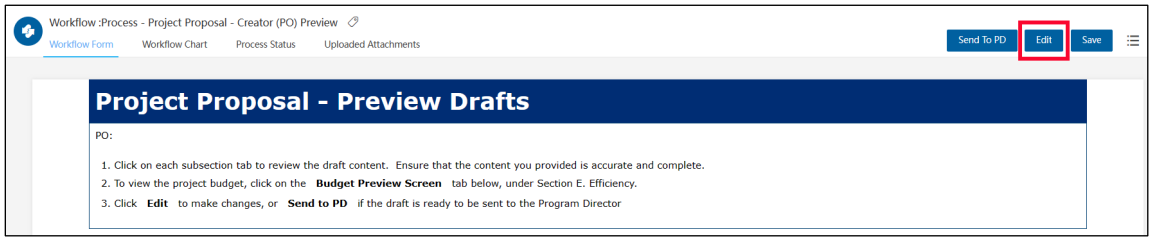
Contractor 1	60,000.00
Contractor 2	4,000.00
CN Approved-In Principle Amount	119,000.00
Total APEC Funding	105,826.00
Total Self Funding	0.00
Total Project Value	**105,826.00**

If the **Total APEC Funding** you are seeking exceeds the amount of the CN Approved In-Principle, the amount displays in red. You must go back to the previous screen to amend your budget request in the **E. Efficiency** section. See step 43.

Contractor 1	200,000.00
Contractor 2	4,000.00
CN Approved-In Principle Amount	119,000.00
Total APEC Funding	245,826.00
Total Self Funding	0.00
Total Project Value	**245,826.00**

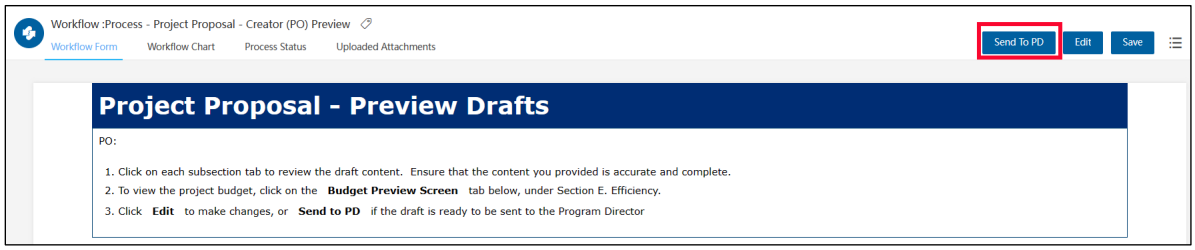
Part B. APEC Funded Contractors, **Part C. Self-Funding**, and **Part D. Waivers** display filled information you filled in earlier.

43. If you need to make any changes, click the **Edit** button in the top right corner of the **Project Proposal – Preview Drafts** page. Then complete your changes.

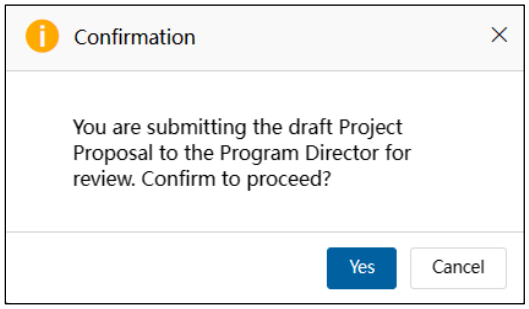


44. When you are finished previewing the Project Proposal, scroll down to the **Project Overseer Declaration** field at the bottom of the **Project Proposal – Preview Drafts** page and check the box, **Please check to declare**.

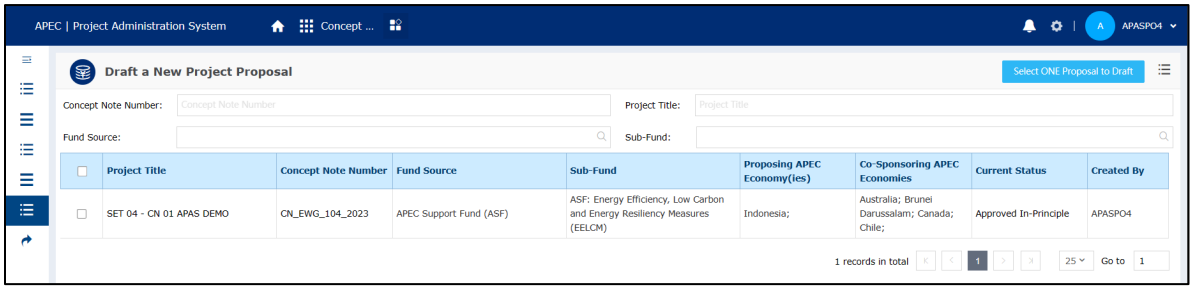
45. If the draft Project Proposal is ready for the Secretariat's review, click the **Send to PD** button in the top right corner of the **Project Proposal – Preview Drafts** page.



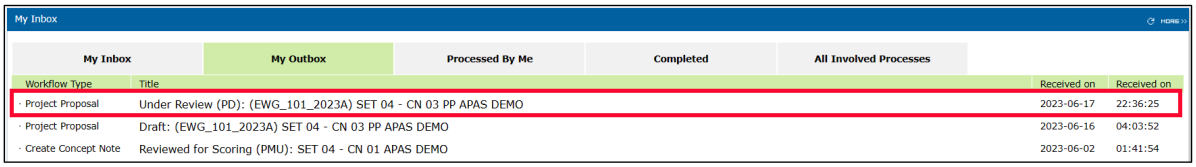
46. A confirmation message displays. Click **Yes** to continue.



The **Project Proposal – Preview Drafts** tab closes and the **Draft a New Project Proposal** tab displays. The Project Proposal you just submitted to the PD or PE has been removed from the list in **My Inbox**.



The Project Proposal submission to the PD or PE displays in your **Outbox**.



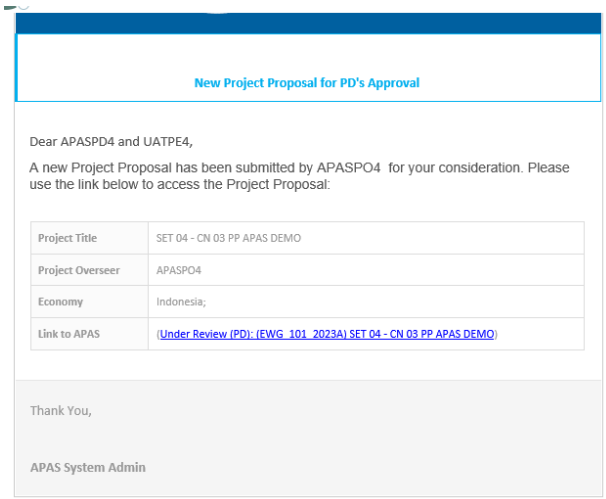
3.2.2 Submitting a Draft Project Proposal by Deadline

POs must submit a draft Project Proposal to the PD by a stipulated deadline. When the stipulated deadline reaches (generally by 11:59pm Singapore time of a said date), APAS will block any further submission actions by the PO. Inability to submit before the deadline will result in the withdrawal of the project. The PO will receive an email notification notifying them of the non-submission of the Proposal before a deadline and the withdrawal of their project.

3.2.3 Reviewing a Draft Project Proposal

After the PO submits the Project Proposal to the PD or PE, the PD or PE will review the APAS Project Proposal, to make sure its readiness to be circulate it to forum members for comments and endorsement.

1. The PD or PE receives an email notification that the draft Project Proposal is ready to review. An example of this email notification is shown below.



New Project Proposal for PD's Approval

Dear APASPD4 and UATPE4,

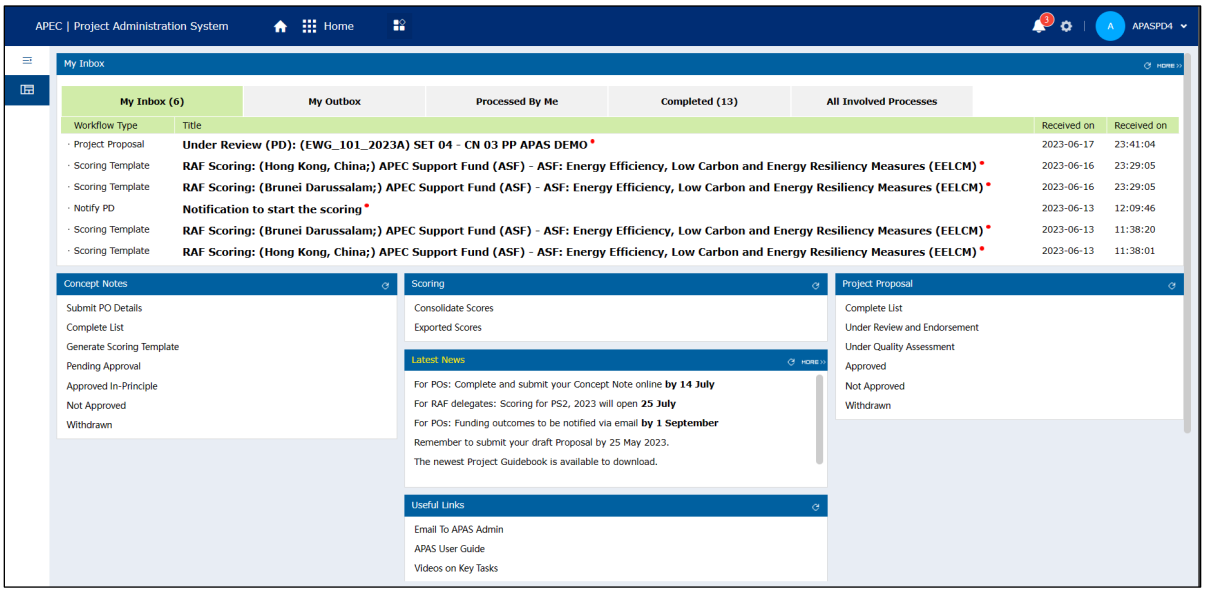
A new Project Proposal has been submitted by APASPO4 for your consideration. Please use the link below to access the Project Proposal:

Project Title	SET 04 - CN 03 PP APAS DEMO
Project Overseer	APASPO4
Economy	Indonesia;
Link to APAS	(Under Review (PD): (EWG_101_2023A) SET 04 - CN 03 PP APAS DEMO)

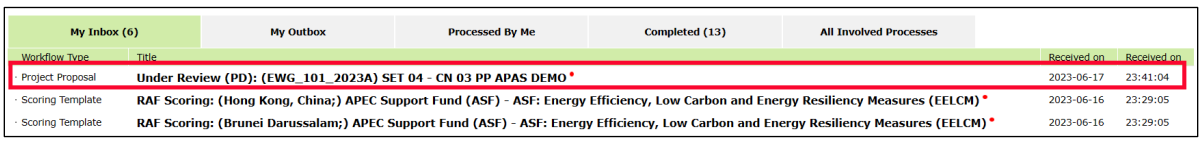
Thank You,

APAS System Admin

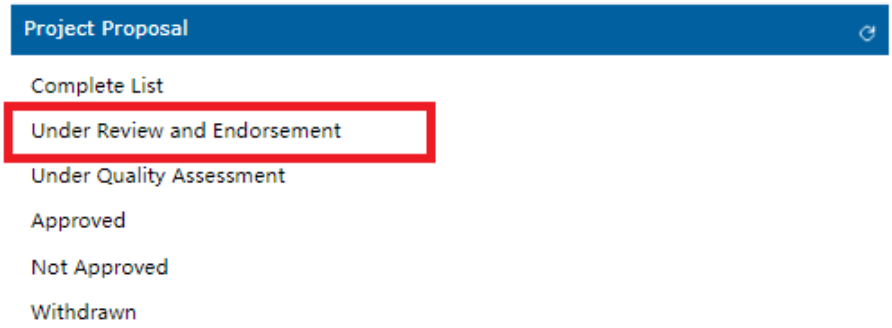
2. Log into APAS as a PD or PE user, if you're not logged in already. Your Dashboard displays.



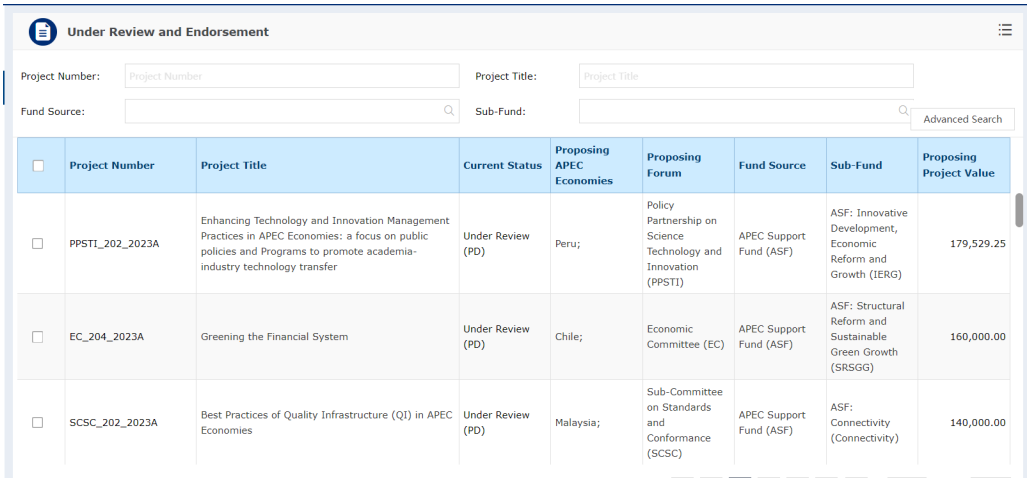
3. In the **Inbox**, look for the Project Proposal task and click its title.



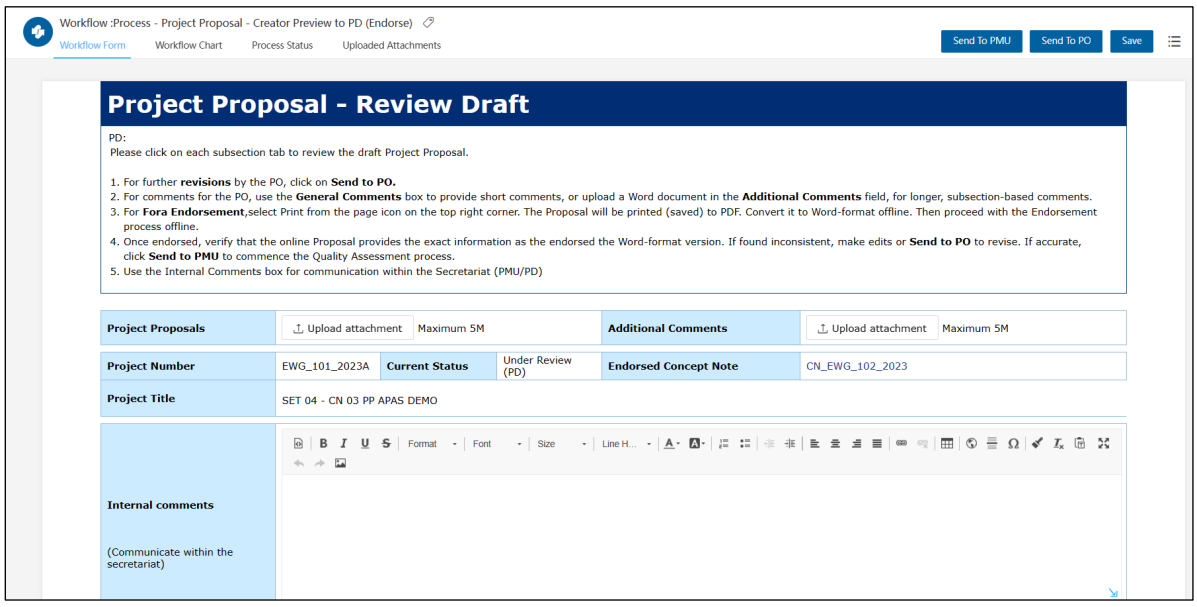
Alternatively, go to the Project Proposals widget and click **Under Review and Endorsement.**



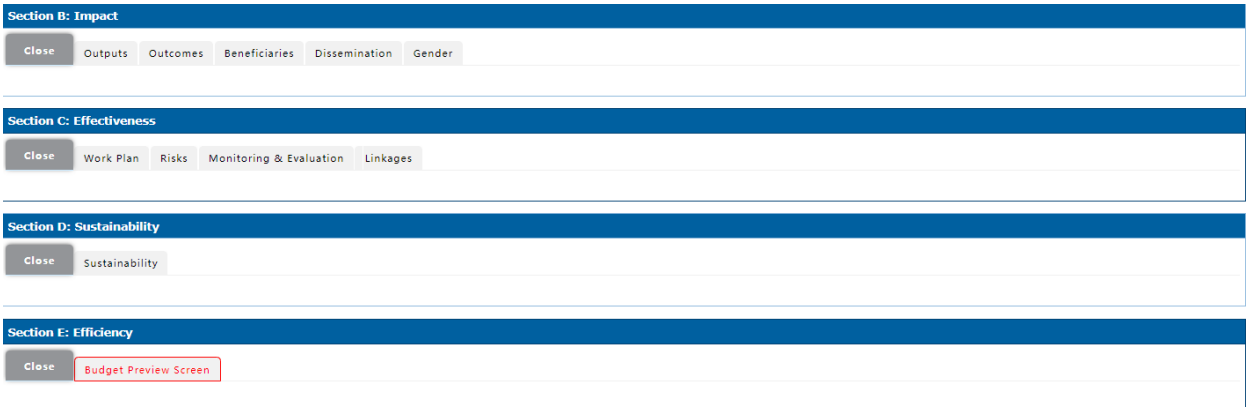
A list of Project Proposals **Under Review** displays. Click on a project title to review a Proposal.



The **Project Proposal – Review Draft** page displays in a separate tab in your web browser.

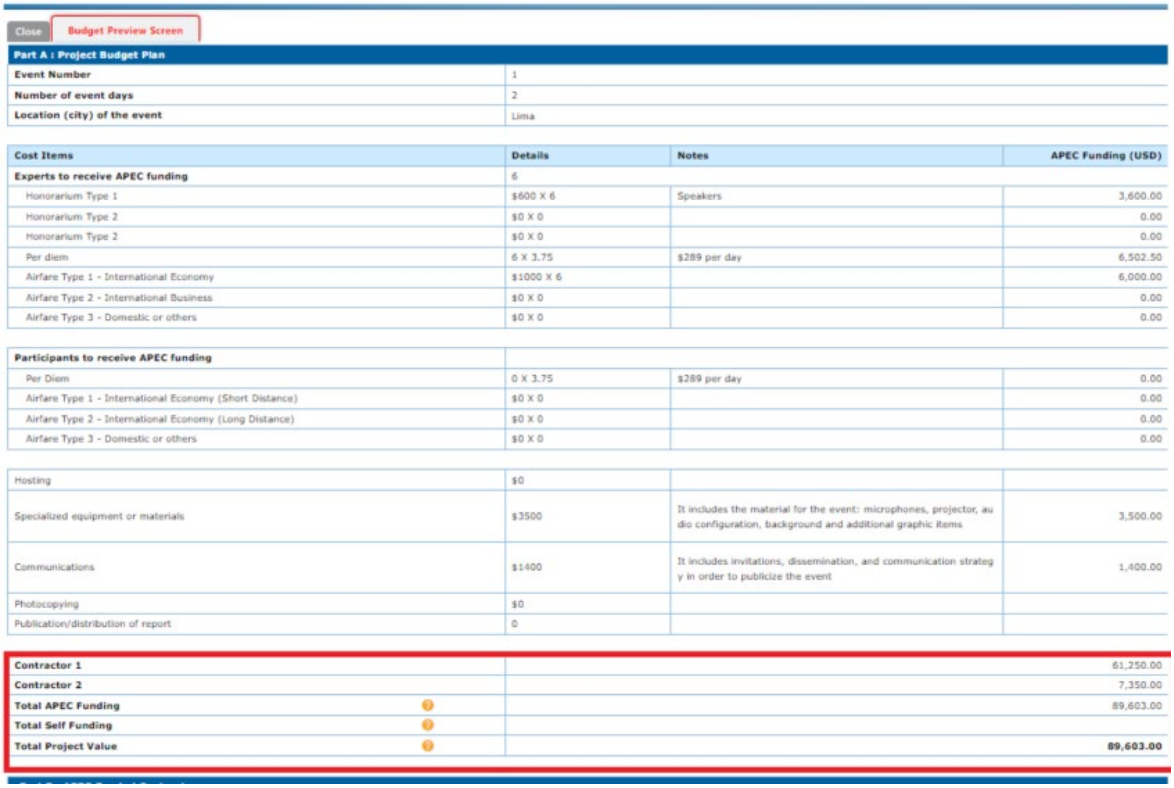


4. Verify the fields in the Project Proposal are filled in by clicking on the tabs in each of the sections from **A. Overview and Relevance** to E. **Efficiency**.

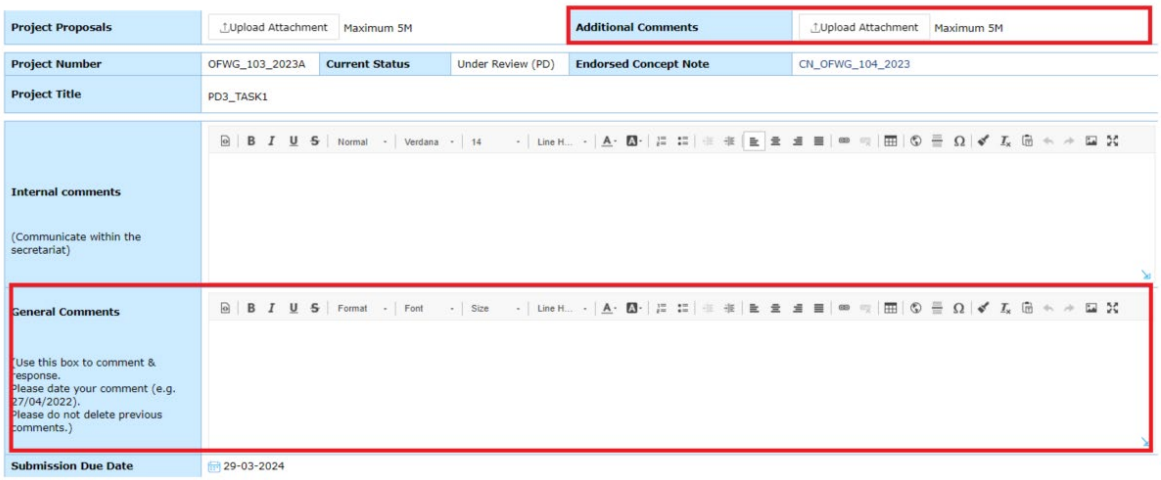


5. It is important that the PD or PE assesses the **Project Budget Plan** submitted by the PO. Go to E. Efficiency and click the red **Budget Preview Screen** tab.

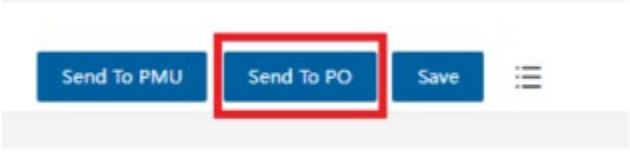
Make sure the **Total APEC Funding** amount in the table is not in red. If in red, it means that the budget request from the PO in the Project Proposal has exceeded the APEC Funding Amount approved in the Concept Note (Section A. Overview and Relevance > Project Summary).



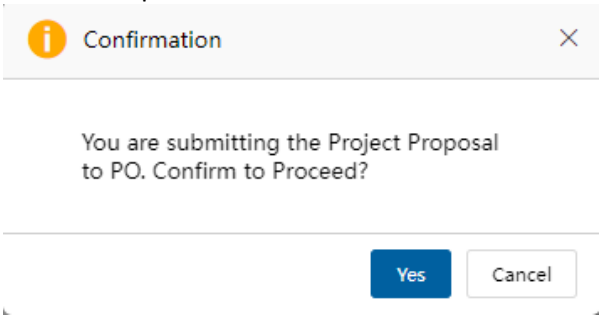
5. To send comment to the PO, use the **General Comments** box in the top screen to provide short comments, or upload a Word document in the **Additional Comments** field, for longer, subsection-based comments



6. To return the Proposal back to the PO for revisions, click **Send to PO**, located on the top right corner of the screen.



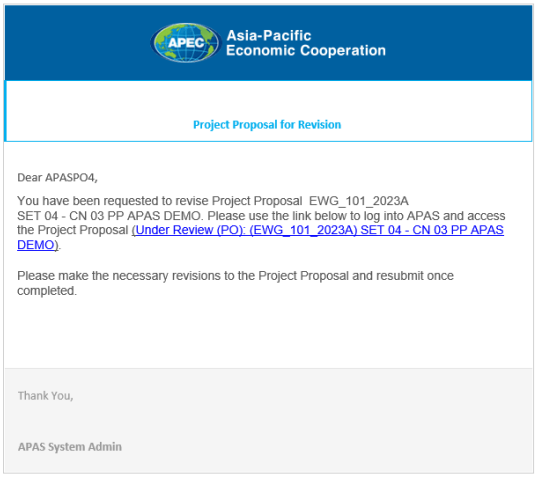
Click Yes to proceed.



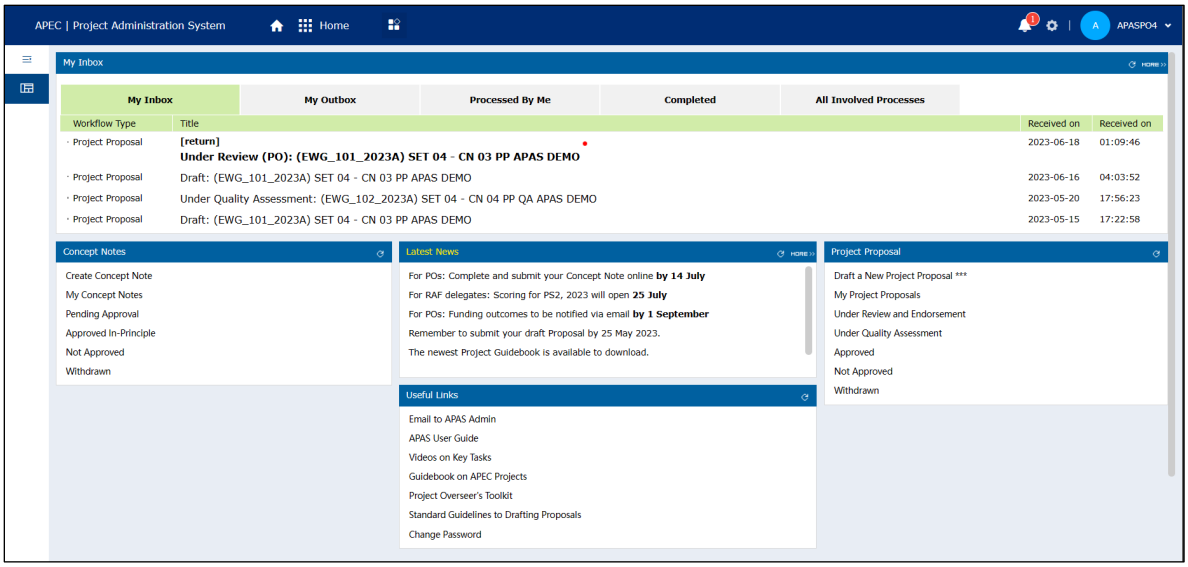
The Proposal is returned to the PO. The **Project Proposal - Review Draft** tab closes. You will now return to the Dashboard.

3.2.4 Revising a Draft Project Proposal

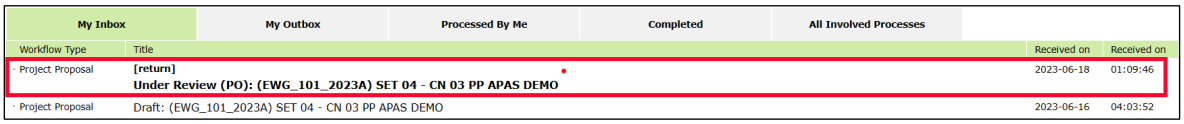
1. The PO receives an email notification that the draft Project Proposal needs to revised. An example of this email notification is shown below.



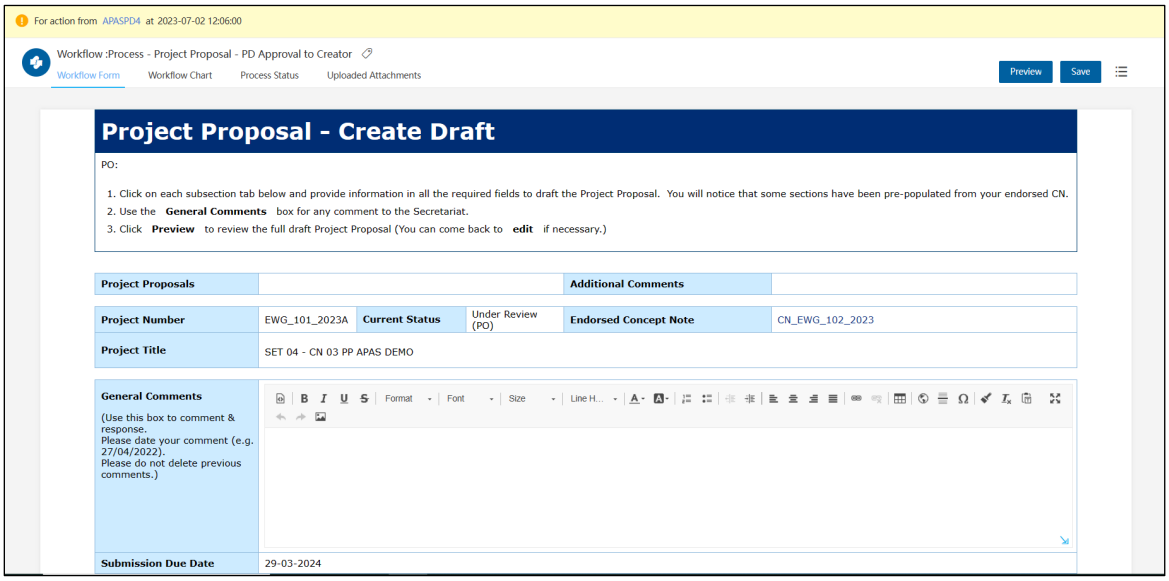
2. Log into APAS as a PO, if you're not logged in already. Your Dashboard displays.



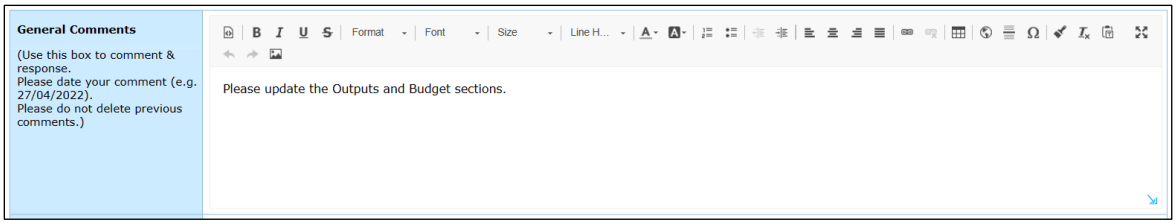
3. In your inbox, look for the Project Proposal that needs to be revised and click the task to open it.



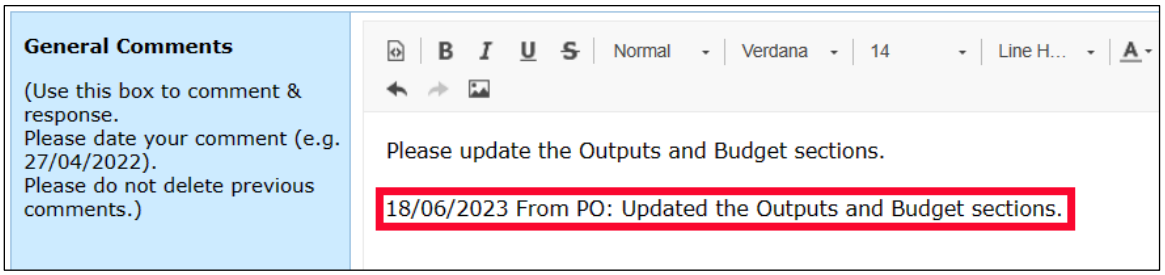
The Project Proposal opens in a new tab.



4. In the **General Comments** field, read the PD's or PE's comments you received and make the changes requested in the Project Proposal.
   You can also check in the **Additional Comments** field on the top screen to see whether a document with comments has been sent to you instead.

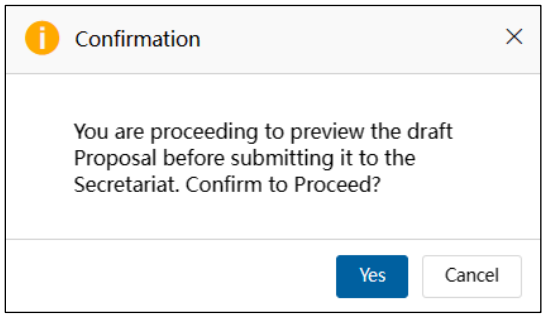


5. After you apply the changes requested by the Secretariat, reply with a note in the **General Comments** field. Include today's date at the beginning of your note.

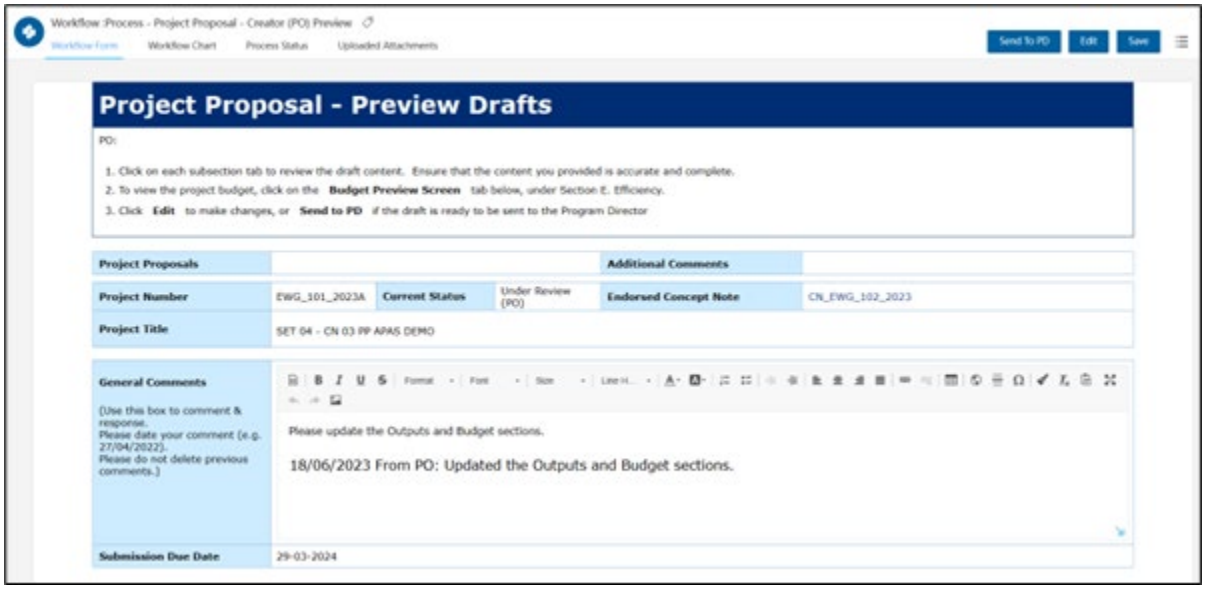


6. Click the **Preview** button in the top right corner of the page to preview the changes you made and verify they are correct.

A confirmation message displays. Click **Yes** to continue.



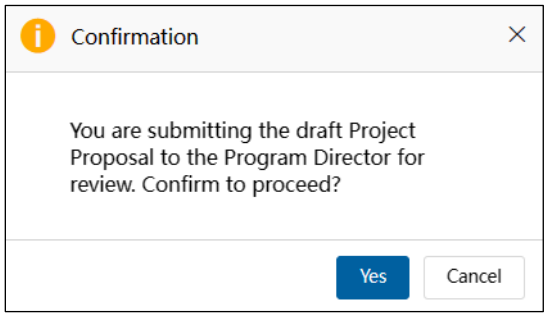
The Project Proposal – Preview Drafts page displays.



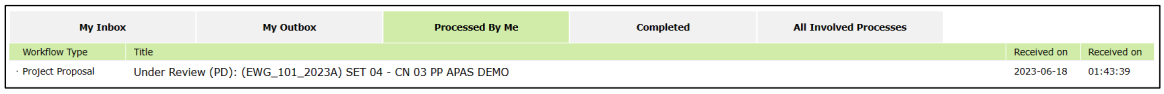
If you need to make any changes, click the **Edit** button in the top right corner of the page.

7. After you finish previewing the draft Project Proposal and making any changes, click the **Send to PD** button in the top right corner of the page to send the revised draft Project Proposal to the PD or PE for review.

A confirmation message displays. Click **Yes** to continue.



The Project Proposal – Preview Drafts page closes and your Dashboard displays. When the Project Proposal is submitted to the PD or PE, it moves from the **My Inbox** tab to the **Processed by Me** tab in your Dashboard.



8. The PD or PE confirms the changes were made to the Project Proposal by following the steps in section 2.2.2 Reviewing an Endorsed Concept Note. After the changes are verified, the PD or PE submits the Project Proposal to the PMU.

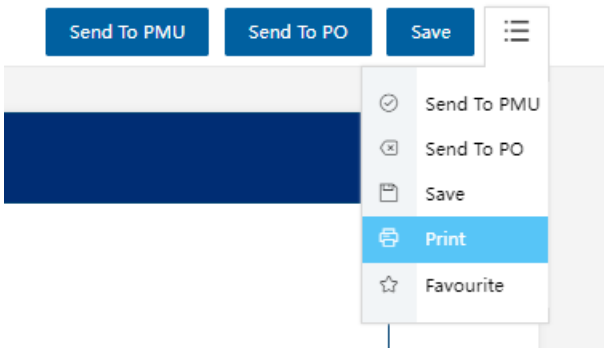
   Note: When you save the two documents to compare, use these file names:

   - Endorsed Project Proposal attachment—**Original Word PP – <*project title*>.docx**
   - Project Proposal in APAS—**APAS Version Original PP – <*project title*>.docx**

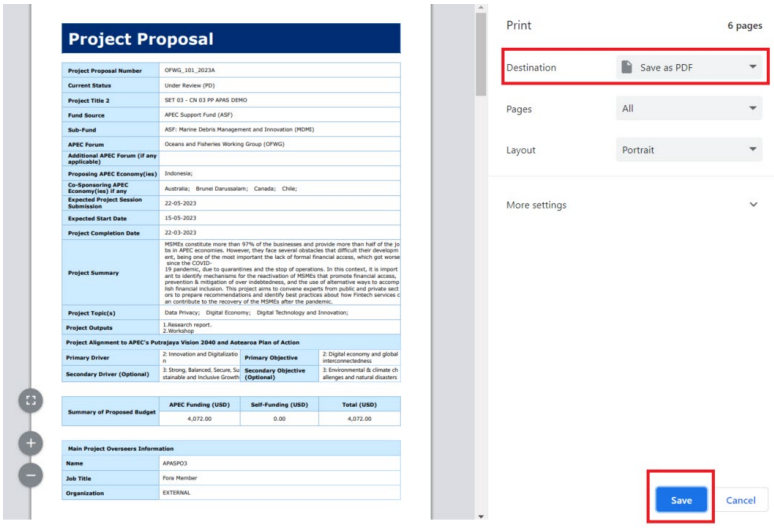
3.2.5 Printing and Converting the Draft Project Proposal for Endorsement

When the PD or PE reviews the draft Project Proposal and deems it to be in order, PD or PE will download the Proposal from APAS and circulate it via email to forum members for their comments and endorsement. The PD or PE follows these steps to review, download draft and send the Project Proposal for comments and endorsement:

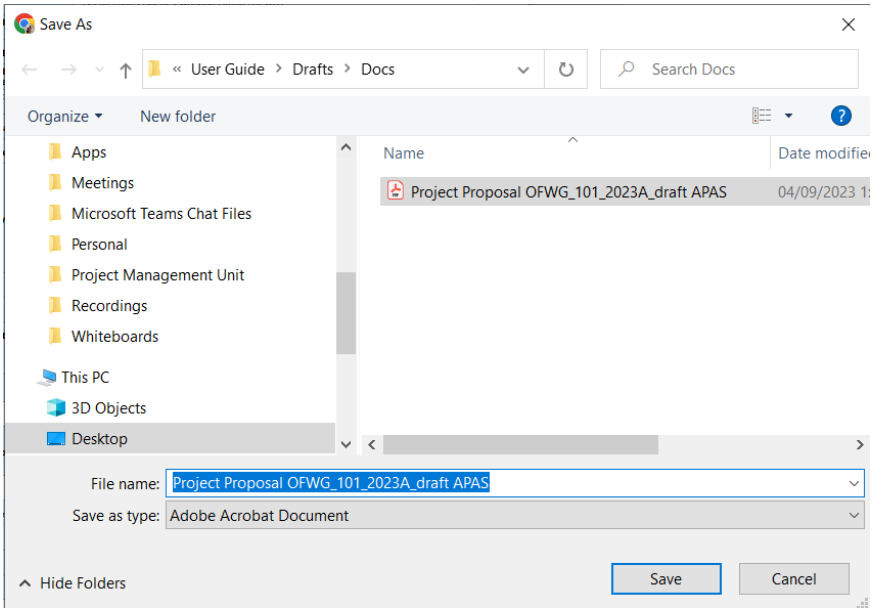
1. The PD or PE logs into APAS and reviews the draft Project Proposal following steps 1 to 5 as described in 3.2.2 Reviewing a Draft Project Proposal.
2. After the Proposal is deemed ready for members comments and endorsement, download the Project Proposal from APAS.
   Go to the upper right corner of the screen. Click on the **3-line option** menu. Click **Print**.



3. The Project Proposal launches in a new tab and the Print screen appears. Make sure the **Save as PDF** option is selected. Click **Save**.

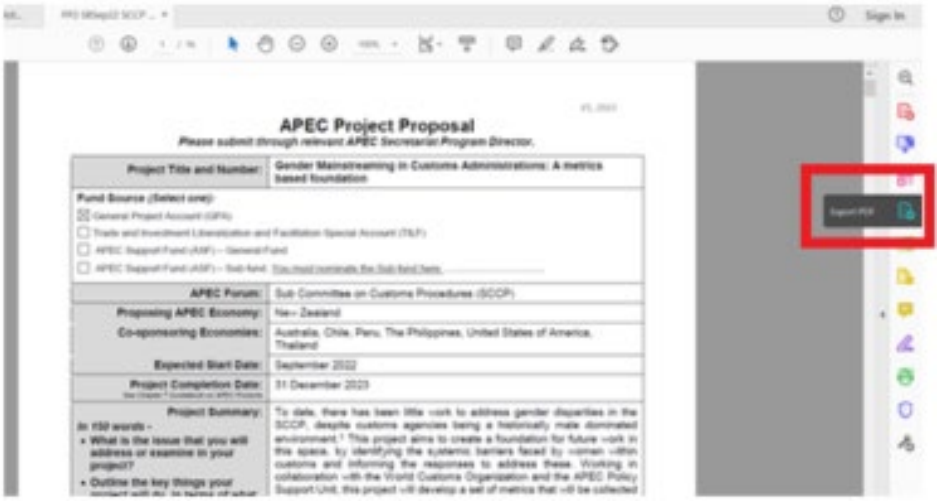


4. Save the Project Proposal onto your computer.

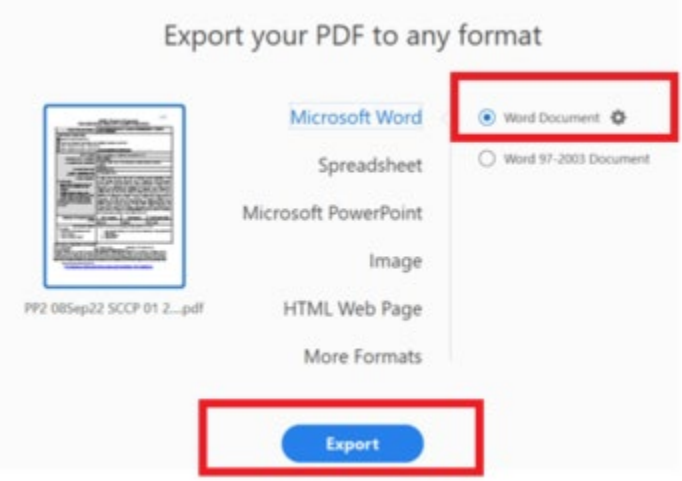


5. Open the PDF document in Acrobat. Verify that PDF format of the Project Proposal displays correctly.
6. **Convert** the Project Proposal to a **Word** document and name it as **_draft APAS.docx**.

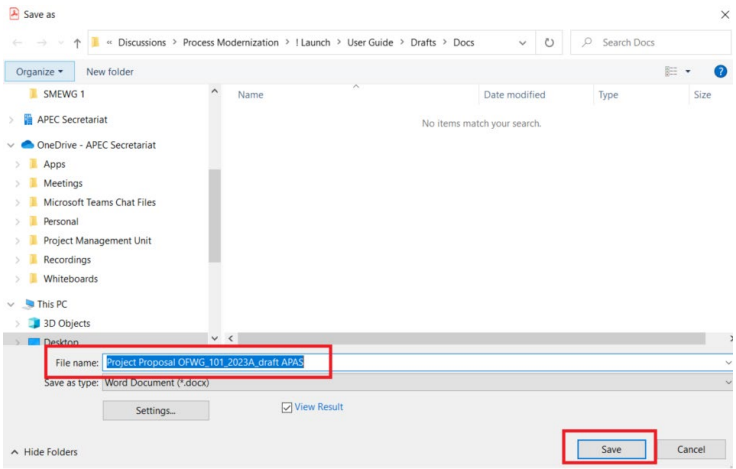
   i. Click on the “Export PDF” tool in the right pane.



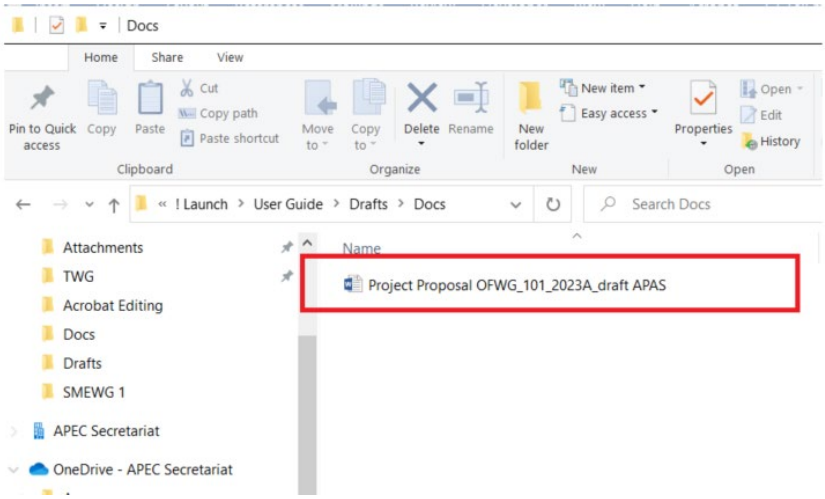
ii. Select **Microsoft Word** as your export format. Click **Export**.



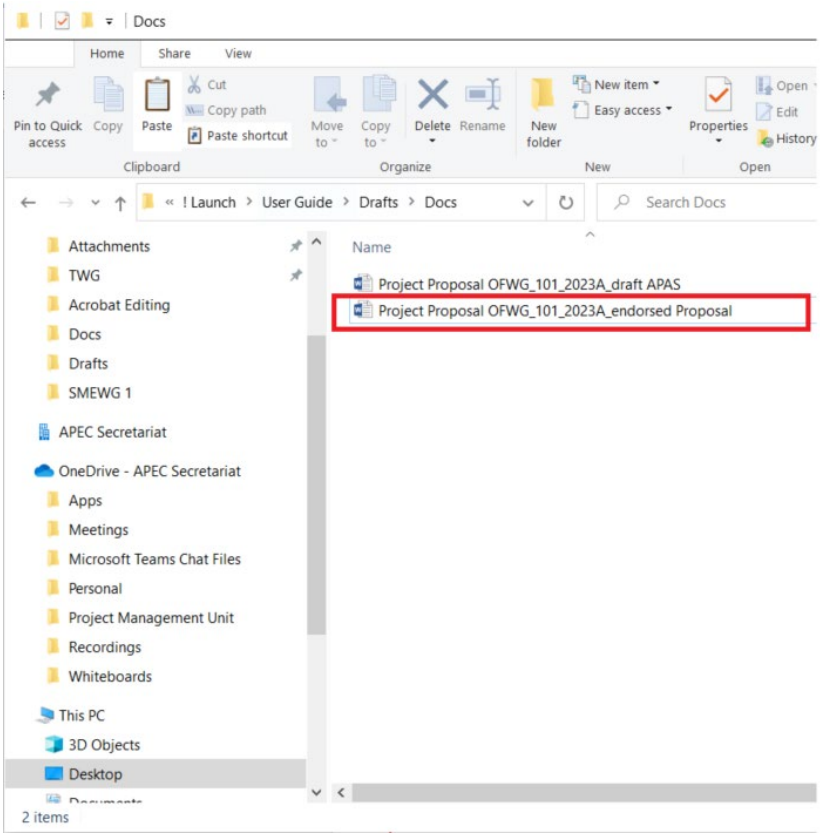
iii. **Save** the converted Word file as **_draft APAS.docx**. Click **Save.**



7. The **_draft APAS Proposal** (Word doc) is now ready to be emailed to the forum delegates for comments and endorsement.



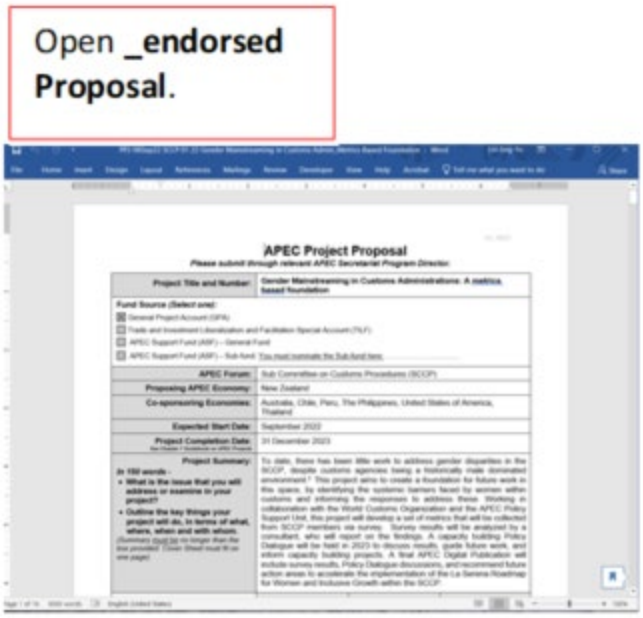
8. PD or PE manages the comments and the endorsement of the draft Project Proposal offline (not on APAS). In this process:
   i. Member delegates provide comments by annotating and editing the draft Project Proposal by a stipulated deadline.
   ii. The draft Proposal with comments is sent from member delegates to the PO, copying the PD.
   iii. PO makes revisions based on delegates' comments and emails the revised Proposal to the PD.
   iv. The PD circulates the revised Proposal for another round of endorsement. Steps i to iv may repeat.
   v. Once the revised document is endorsed by members, PD names and saves the endorsed Proposal as **_endorsed Proposal.docx**.



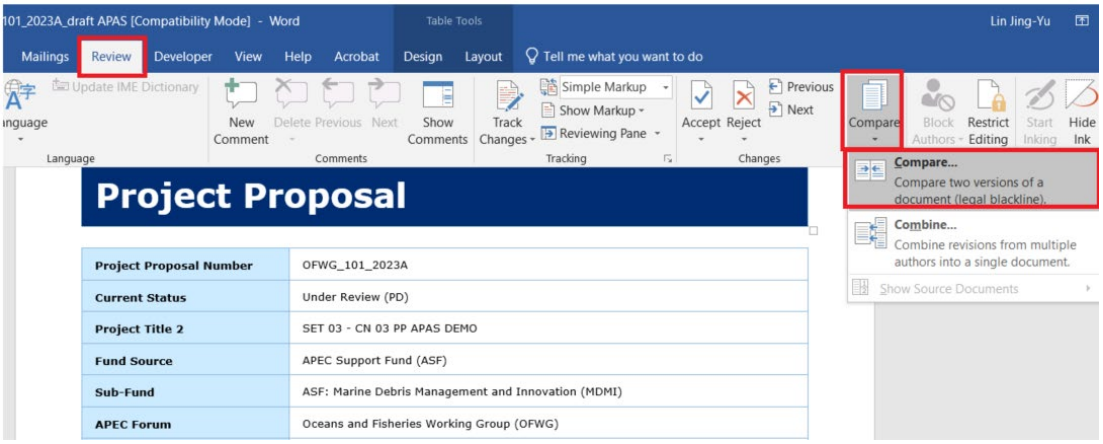
3.2.6 Comparing Draft and Endorsed Proposals before Updating on APAS

PD or PE compares **_draft APAS.docx** and **_endorsed Proposal.docx** to show track changes in the document. Track changes are important because the changes need to updated on the APAS Proposal.

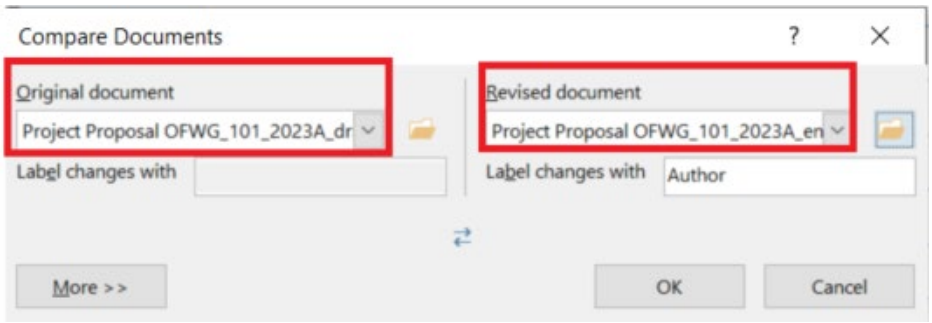
i. To compare two Project Proposal, open any one Proposal (e.g. **_endorsed Proposal**)



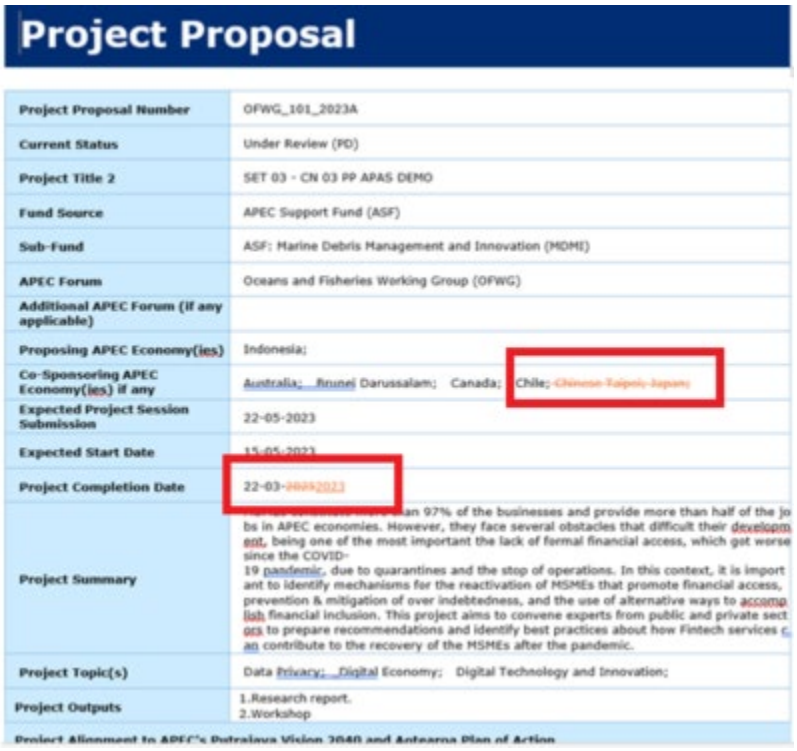
2. On the **Review** menu, Click on **Compare**. Then choose '**Compare**' (Click on it)



3. From the **Compare Documents** box, choose the **Original** document (browse and select_draft APAS) and the **Revised** document (browse and select _endorsed Proposal).
Click **OK**.



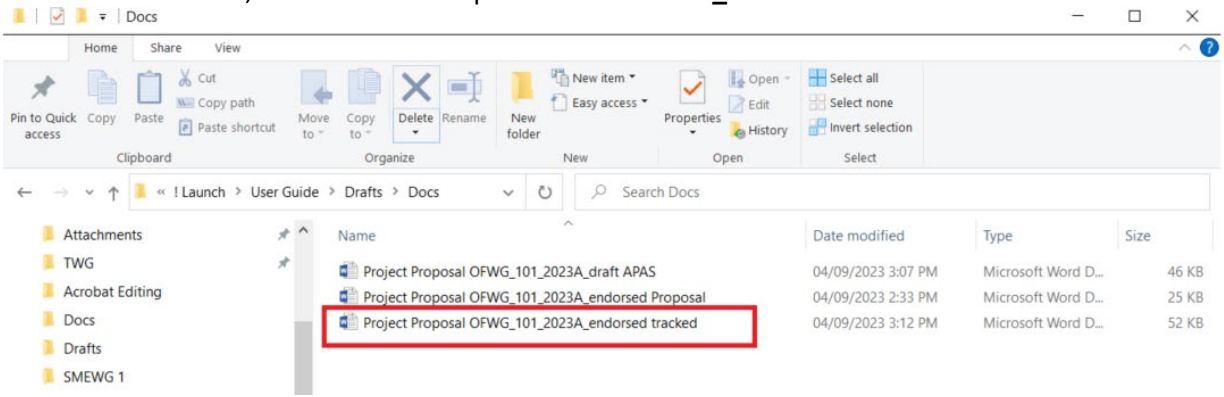
4. The **Compared Document** displays. This document shows the differences between the two versions of the Project Proposal in **track changes**.



Project Proposal

Project Proposal Number	OFWG_101_2023A
Current Status	Under Review (PD)
Project Title 2	SET 03 - CN 03 PP APAS DEMO
Fund Source	APEC Support Fund (ASF)
Sub-Fund	ASF: Marine Debris Management and Innovation (MDMI)
APEC Forum	Oceans and Fisheries Working Group (OFWG)
Additional APEC Forum (if any applicable)	
Proposing APEC Economy(ies)	Indonesia;
Co-Sponsoring APEC Economy(ies) if any	Australia; Brunei Darussalam; Canada; Chile; ~~Chinese Taipei; Japan;~~
Expected Project Session Submission	22-05-2023
Expected Start Date	~~15-05-2023~~
Project Completion Date	22-03-~~2023~~2023
Project Summary	~~[illegible]~~ an 97% of the businesses and provide more than half of the jo bs in APEC economies. However, they face several obstacles that difficult their developm ent, being one of the most important the lack of formal financial access, which got worse since the COVID-19 pandemic, due to quarantines and the stop of operations. In this context, it is import ant to identify mechanisms for the reactivation of MSMEs that promote financial access, prevention & mitigation of over indebtedness, and the use of alternative ways to accomp lish financial inclusion. This project aims to convene experts from public and private sect ors to prepare recommendations and identify best practices about how Fintech services c an contribute to the recovery of the MSMEs after the pandemic.
Project Topic(s)	Data Privacy; Digital Economy; Digital Technology and Innovation;
Project Outputs	1.Research report. 2.Workshop
Project Alignment to APEC's Putrajaya Vision 2040 and Aotearoa Plan of Action	

5. Go to **File** > **Save As**, and Save the Compared Document as **_endorsed tracked**.



6. The PD or PE has two options to make sure that the APAS Proposal is updated to the same content in the endorsed Project Proposal (Word doc):
   Option 1: Endorsed Proposal is sent to PO to update on APAS
   Option 2: PD updates the Endorsed Proposal on APAS

7. **Option 1** is selected: Endorsed Proposal is sent to PO to update on APAS

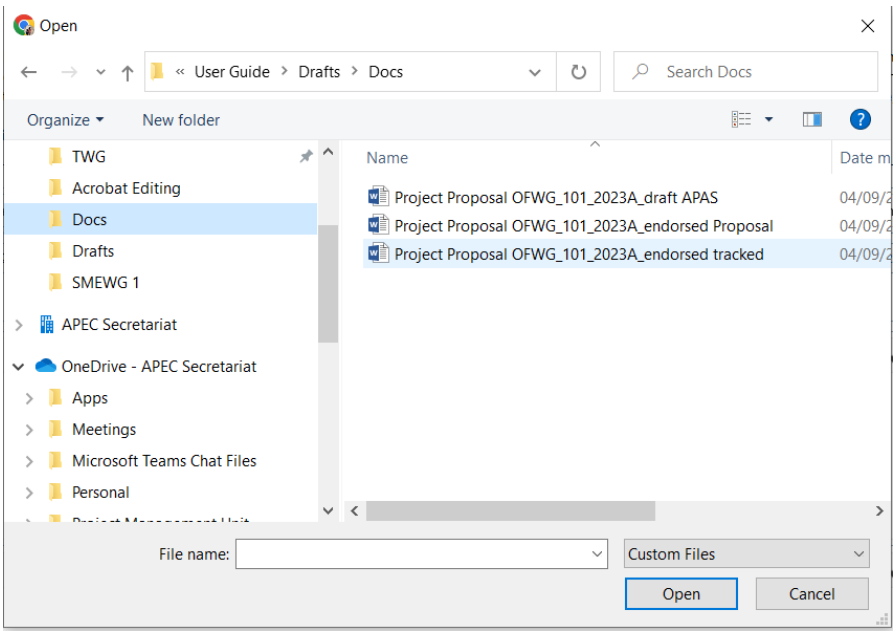
In this option, PD or PE sends the endorsed tracked Proposal to the PO to update the Project Proposal via APAS. These are the steps to follow:

i. PD or PE logs into APAS. From the Dashboard, click on the Project Proposal and opens the **Project Proposal – Review Draft** screen.

ii. To upload the **_endorsed tracked.docx**, go to P**roject Proposals** field. Click on **Upload Attachment**.

iii. Choose the **_endorsed tracked** Proposal from the box. Click **Open**.

The uploaded Proposal displays in the Project Proposal field as an attachment.



iv. The PD or PE send a message to the Project Overseer using the **General Comments** box. The message should request the PO to update the Project Proposal on APAS according to the track changes showing in the endorsed Project Proposal (Word doc).

The following message may be inserted in the field:

Dear Project Overseer,

Your Project Proposal is now endorsed. You must now log onto APAS and update the Proposal on APAS according to the latest endorsed Proposal (Word Document).

Please follow these steps:

1. Go to the Project Proposals field located on the top of this screen and download the latest endorsed Project Proposal (Word doc).

2. Open the Proposal and find the track changes in the document. These changes show the different changes you have made from the draft Proposal to the endorsed version.

3. Locate the sections in the Proposal on APAS to make the necessary edits.

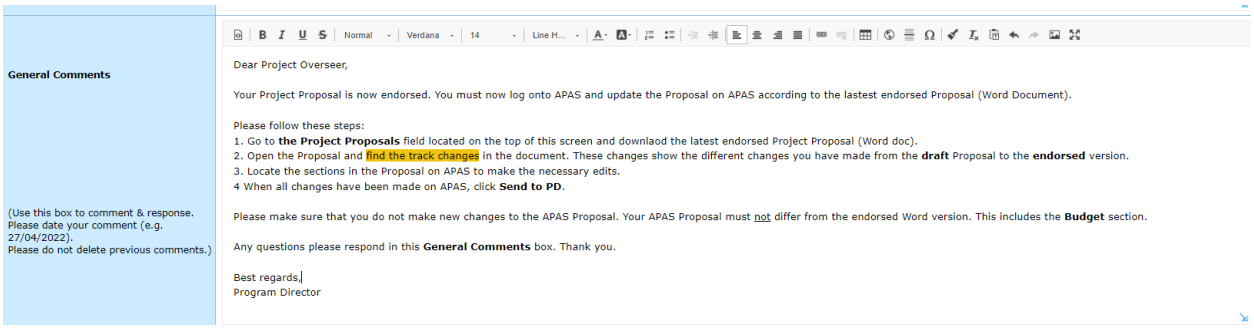
4 When all changes have been made on APAS, click Send to PD.

Please make sure that you do not make new changes to the APAS Proposal. Your APAS Proposal must not differ from the endorsed Word version. This includes the Budget section.

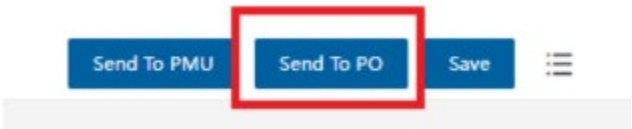
Any questions please respond in this General Comments box. Thank you.

Best regards,

Program Director



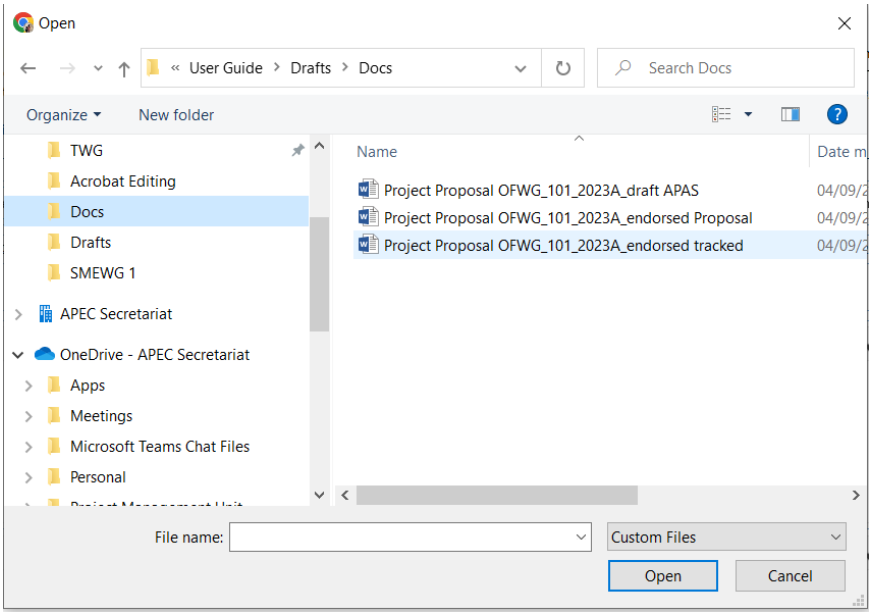
v. When done, click **Send to PO**.



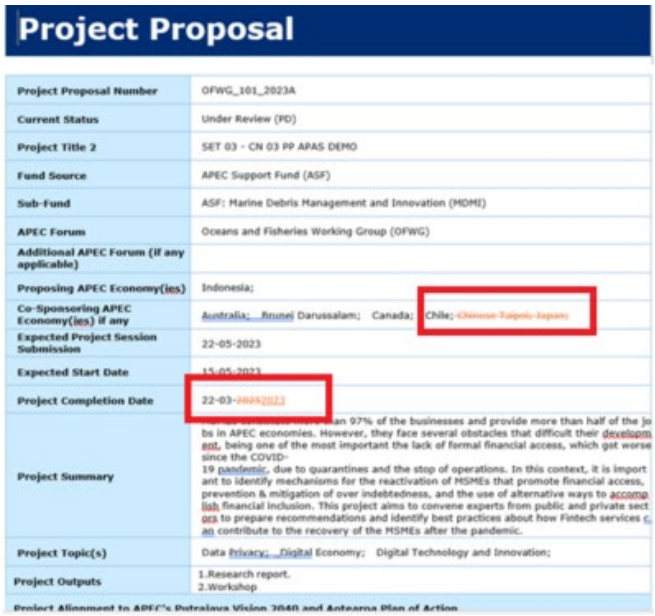
8. **Option 2** is selected: PD updates the Endorsed Proposal on APAS
   In this option, PD uploads the endorsed tracked Proposal on APAS and updates the changes showing in the endorsed Project Proposal, before sending the endorsed APAS Proposal to PMU. These are the steps to follow:
   i. PD or PE logs into APAS. From the Dashboard, click on the Project Proposal and opens the **Project Proposal – Review Draft** screen.
   ii. To upload the **_endorsed tracked.docx**, go to P**roject Proposals** field. Click on **Upload Attachment**.

iii. Choose the **_endorsed tracked** Proposal from the box. Click **Open**.

The uploaded Proposal displays in the Project Proposal field as an attachment.

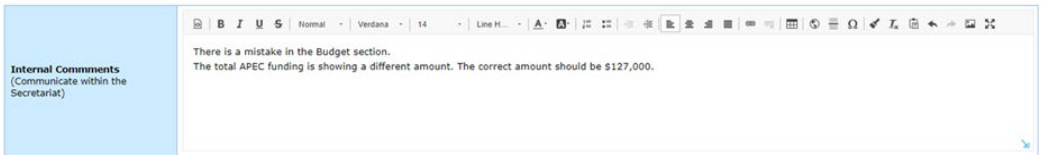


iv. Open the **endorsed tracked Proposal** and locate all the track changes in the document.



v. Based on the track changes, amend the sections in the Project Proposal in APAS. Make sure that all changes are addressed and sections in the Proposal are updated.

vi. If track changes show in the Budget section (meaning that Budget items must be amended to follow the endorsed Proposal, the PD will not be able to amend them on APAS. Leave a note in the **Internal Comments** section to PMU with a description of what the changes in Budget consists. An example is given below:



vii. When all changes have been applied in the Project Proposal on APAS, click **Send to PMU**.

3.2.7 Updating an Endorsed Proposal

After the Project Proposal is endorsed and if the endorsed Proposal is sent back to the PO to update, the PO needs to do so in APAS. The APAS Proposal needs to be updated based on the changes that were made in the **draft** version of the Proposal that is now saved as an **endorsed** version.

The PO must make sure that the APAS Proposal is identical to the endorsed Proposal (Word doc) and must not make any new changes to the Proposal in APAS that are not part of the endorsed Proposal. This includes the Budget section.

The PO follows these steps to update the endorsed proposal on APAS:

1. When an endorsed proposal needs to be updated, the PO receives the following email notification:

Dear [PO's name]:

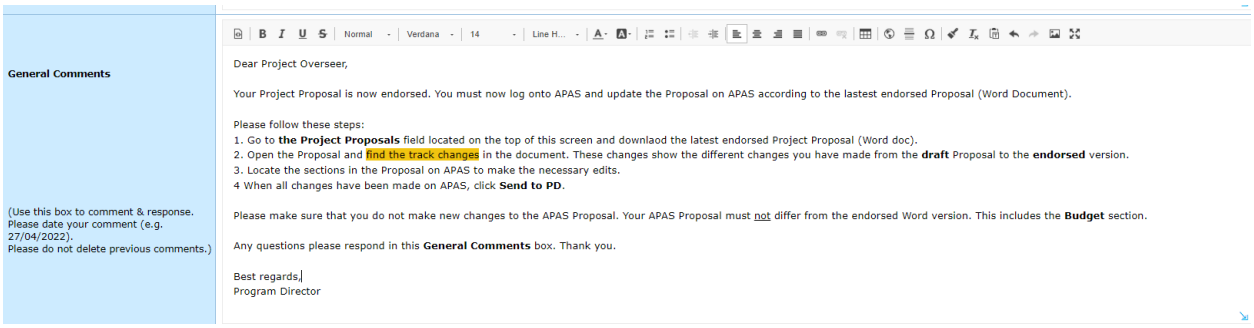
You have been requested to revise Project Proposal [PP Number and Title]. Please use the link below to log into APAS and access the Project Proposal [LINK].

Please make the necessary revisions to the Project Proposal and resubmit once completed.

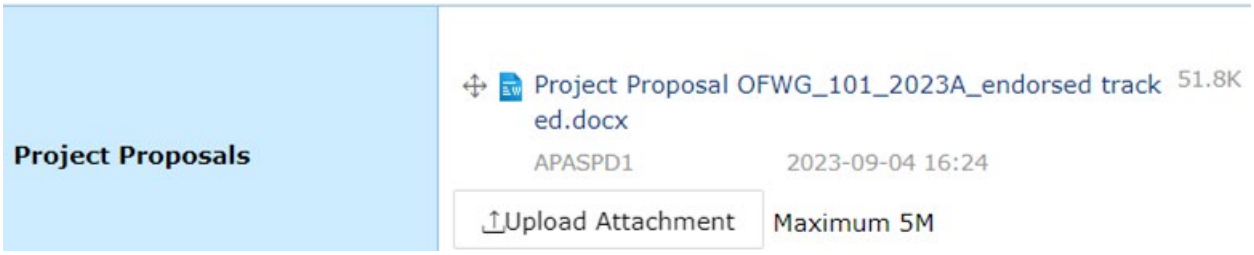
Thank you,

APAS SYSTEM ADMINISTRATOR

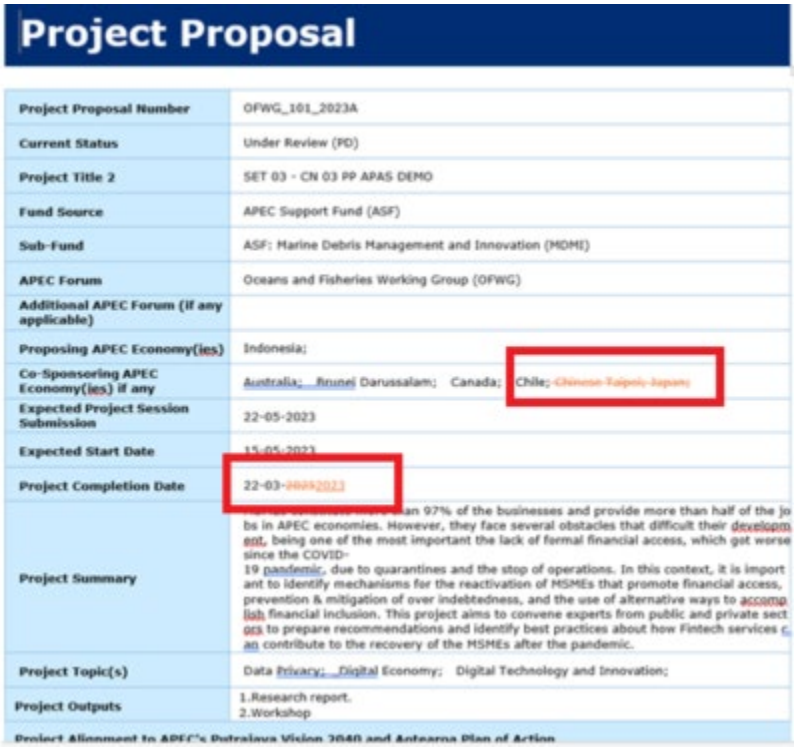
2. Log into APAS as a PO, if you're not logged in already. Your Dashboard displays.
3. In the Dashboard navigate to **My Inbox** and click on the Project Proposal title. The **Project Proposal – Create Draft** screen launches in a new tab.
4. Go to the **General Comments** box and read the message sent by the PD with instructions to update the Project Proposal.



5. At the top of the screen, download the **endorsed tracked** Project Proposal from the **Project Proposals** field.



6. Open the downloaded Proposal and locate all the track changes in the document.



7. Based on the track changes, amend the sections in the Project Proposal in APAS. Make sure that all changes are addressed and sections in the Proposal are updated.

Note: No new changes should be made other than those indicated in track changes in the endorsed Proposal (Word doc). This includes the Budget section and all endorsed Budget items.

8. Click **Preview** to view the updated Project Proposal. If all is in order, click **Send to PD**.
9. After the Proposal is sent to the PD, the PO receives the following email notification:

   Dear [PO Name],

   You have successfully submitted the following Project Proposal to PD for approval.

   [TABLE OF Project Proposal INFORMATION

   Project Title:

   Project Overseer:

   Economy:

   [APAS Link:]

   Thank you,

   APAS SYSTEM ADMINISTRATOR

3.2.8 Reviewing and Submitting an Endorsed Proposal

When the **APAS Project Proposal** has been updated by the PO based on the endorsed version and is ready to be reviewed, the PD or PE receives the following email notification:

Dear [PD FULL NAME]

A new Project Proposal has been submitted by [PO FULL NAME] for your consideration. Please use the link below to access the Project Proposal:

[TABLE OF Project Proposal INFOMRATION

Project Title:

Project Overseer:

Economy:

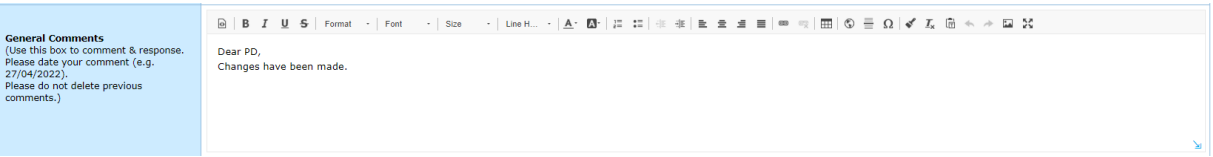
Link:]

Thank you,

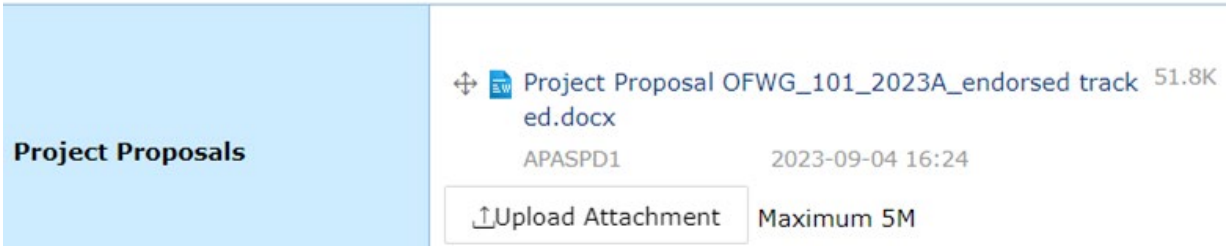
APAS SYSTEM ADMINISTRATOR

The PD or PE follows these steps to review the endorsed Project Proposal:

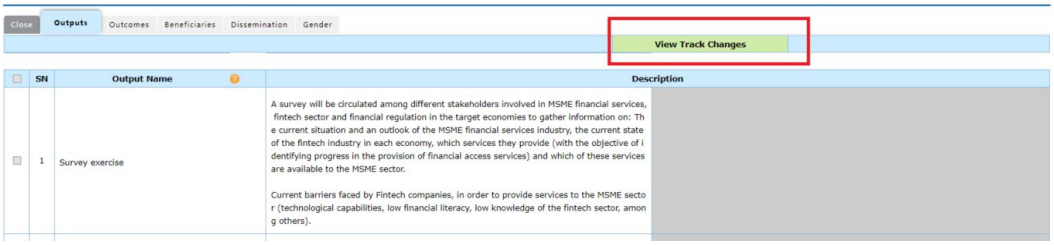
1. Log into APAS as a PD or PE user, if you're not logged in already. Your Dashboard displays.
2. Navigate to the **My Inbox** tab, find the Project Proposal title, and launches the **Project Proposal – Review Draft** screen.
3. Go to the **General Comments** section and view any comment made by the PO.



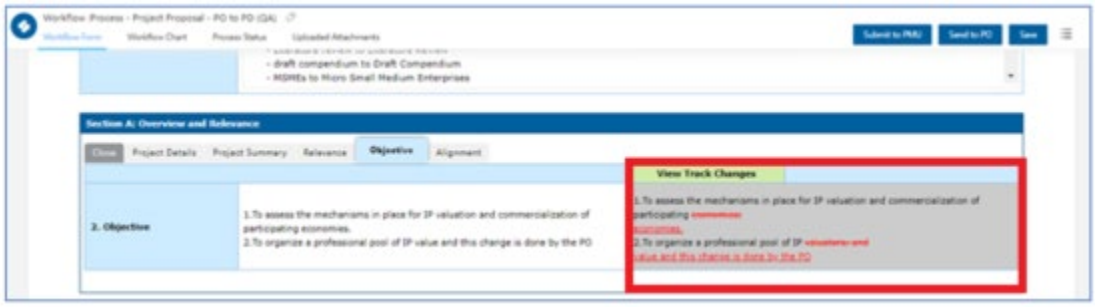
4. Download the **endorsed tracked** Proposal from the **Project Proposals** field. Open the document. Locate the track changes.



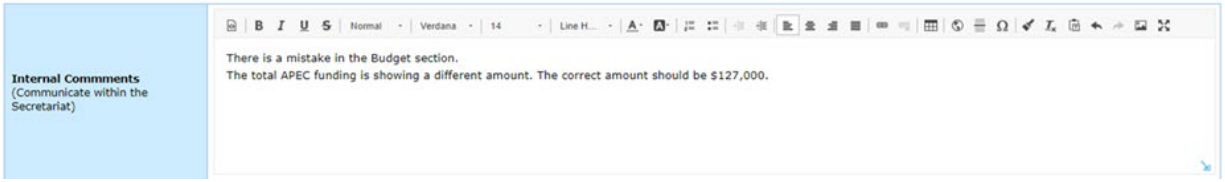
5. On APAS, locate the sections where the track changes are located. Click **View Track Changes** in the specific section to review the changes made by the PO.



6. Text in the box on the left appears again on the right **grey** box. If the PO made changes to this section when updating the Proposal, the changes made will be will be marked in a different color (red, in this instance).
   Note: Make sure that all changes made correspond with the track changes you see in the endorsed Project Proposal (Word doc).



7. If the two versions are not identical, send the Project Proposal back to the PO. You may notify the PO of the mistake by using the **General Comments** section and **Send to PO**. You may also make the correct changes on the PO's behalf.
8. If the endorse APAS Proposal shows identical content as the endorsed tracked Proposal, click **Send to PMU** to start the Quality Assessment process.
   Note: Remember if the mistake takes place in the **Budget** section (meaning that Budget items must be amended to follow the endorsed Proposal, the PD will not be able to amend them on APAS. Leave a note in the **Internal Comments** section to PMU with a description of what the changes in Budget consists. Then **Send to PMU**.
   An example is given below:

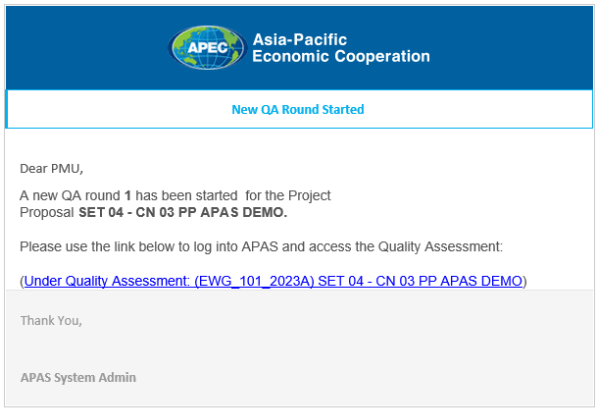


3.3 Assessing and Revising a Project Proposal for Quality

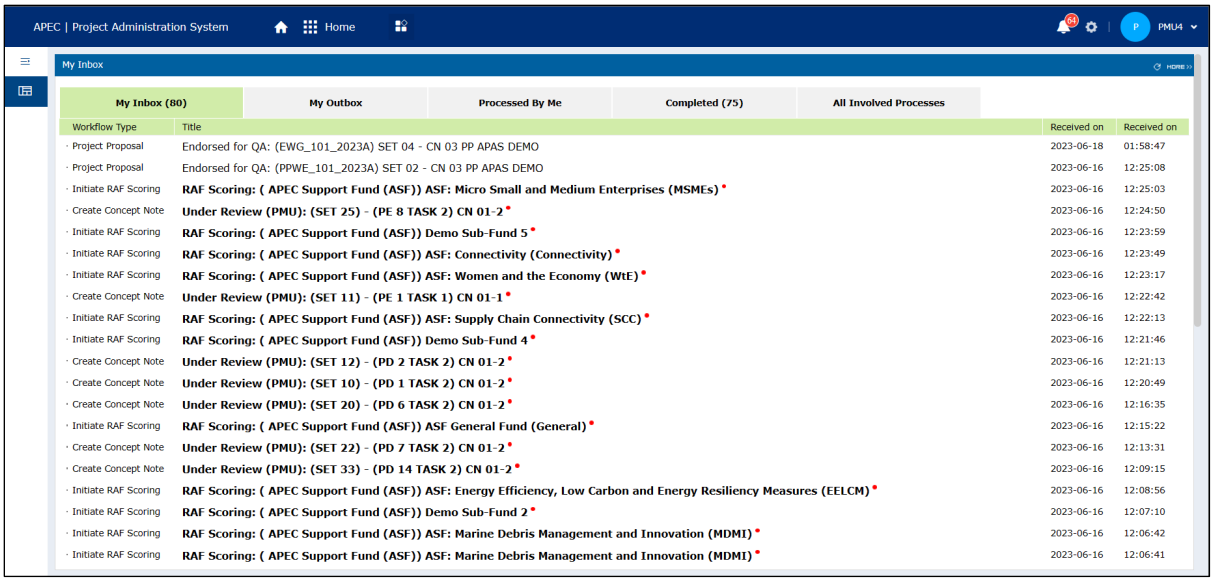
3.3.1 Starting a Quality Assessment Round

When the endorsed Project Proposal is submitted by the PD or PE, the PMU receives it and starts a Quality Assessment by following these steps:

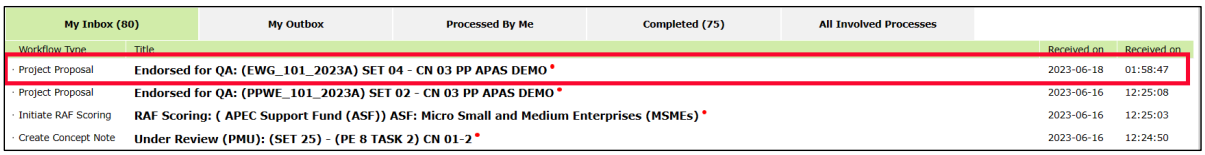
1. The PMU receives an email notification that the Project Proposal is ready for the Quality Assessment. An example of this email notification is shown below.



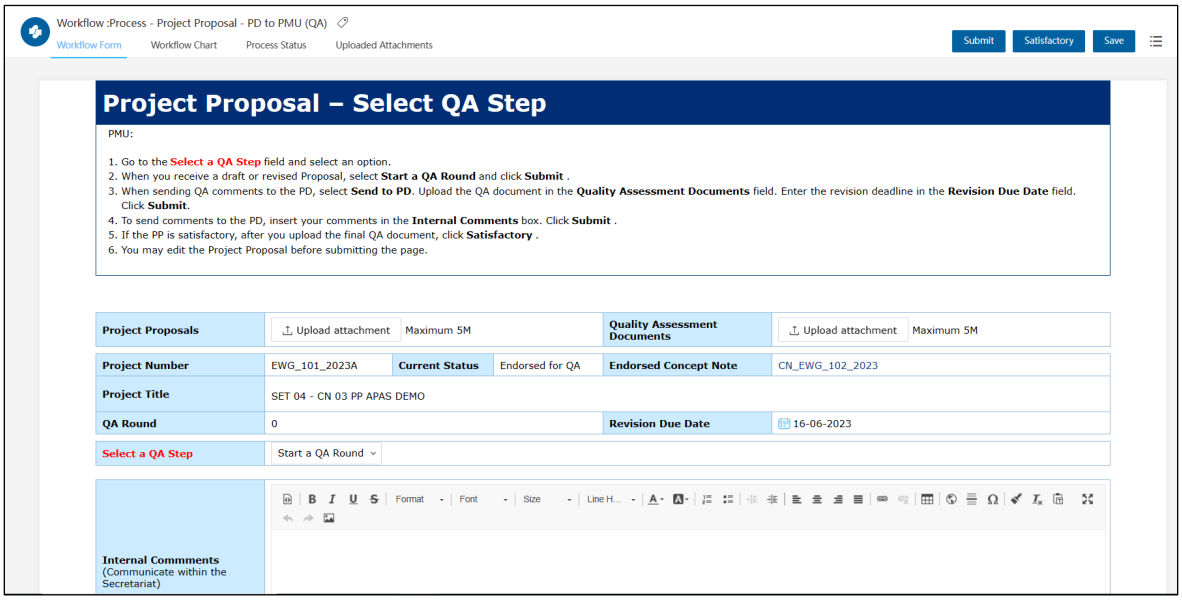
2. Log into APAS as a PMU user, if you're not logged in already. Your Dashboard displays.



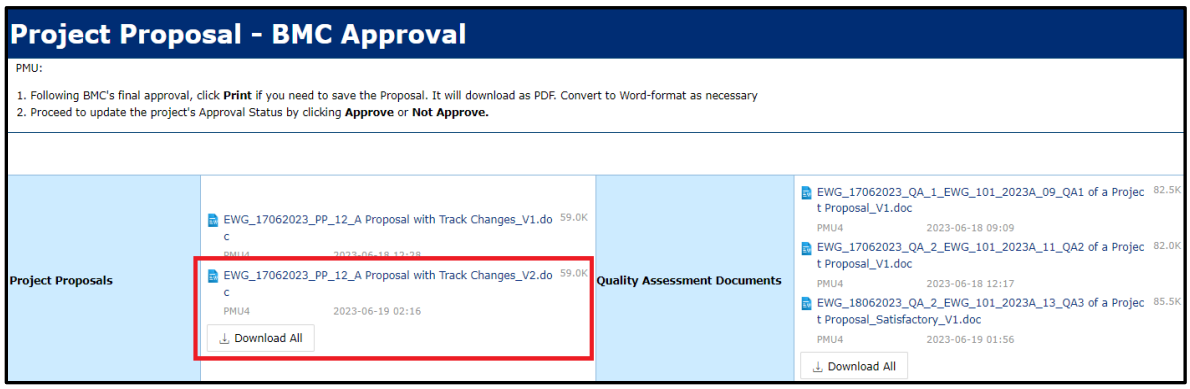
3. In your inbox, look for the Project Proposal that is ready for the Quality Assessment and click the task to open it.



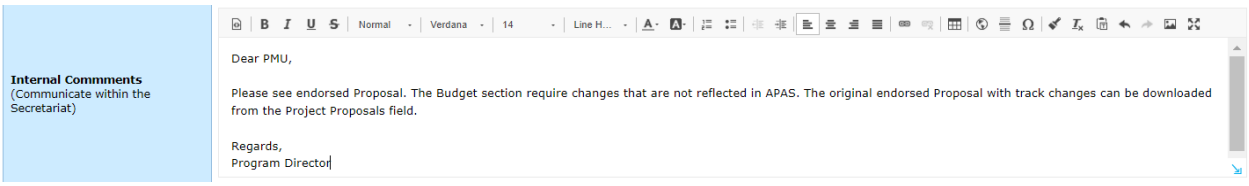
4. The Project Proposal opens in a new tab.



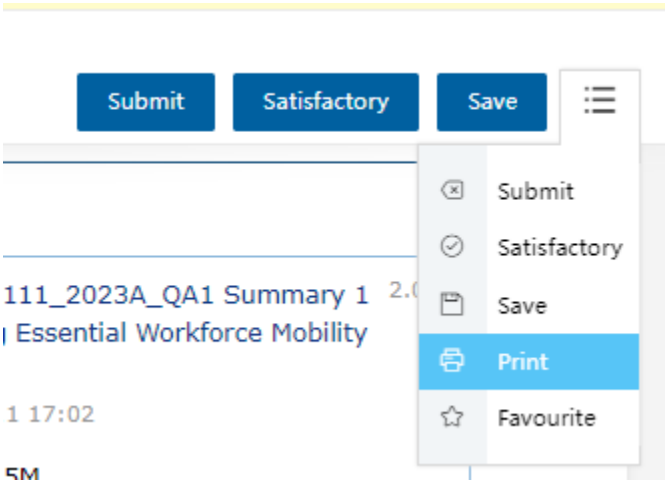
5. In the **Project Proposals** field, PMU may wish to download and save the previous Project Proposal that show track changes (Word or Acrobat), from the **Project Proposals** field.



6. From the **Internal Comments** field, read message or comments entered by the Program Director.

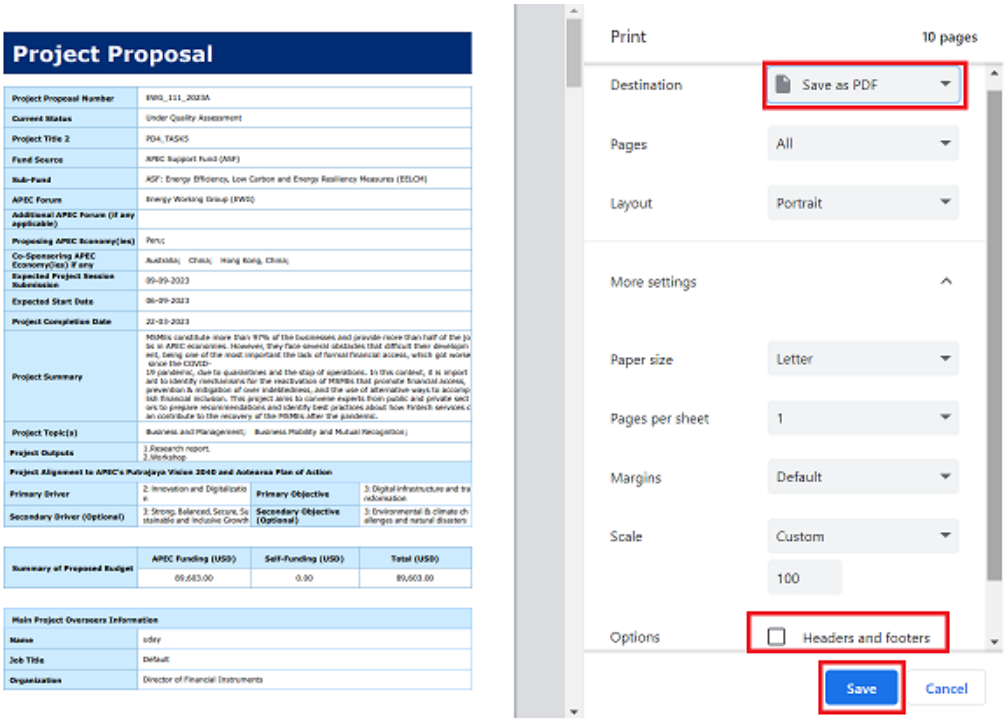


7. From the 3-line icon on the top right corner, select Print to download and save the APAS Proposal.

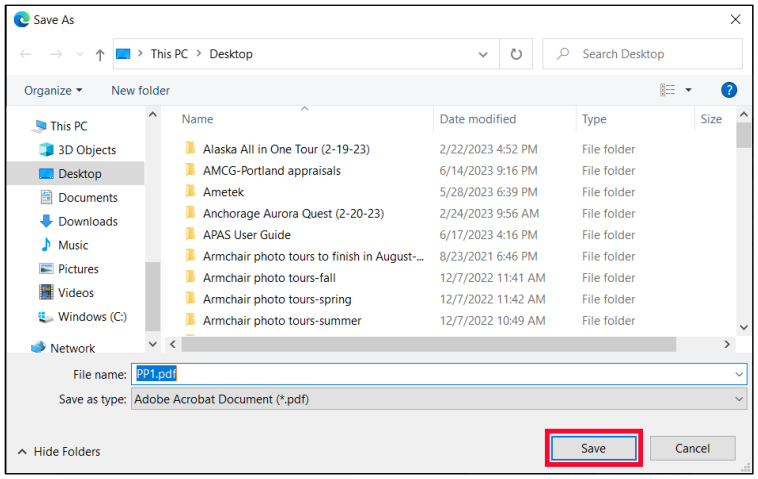


8. The Printer screen launches. Select **Save as PDF**.

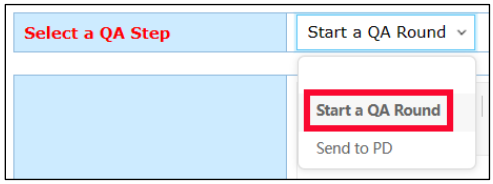
Make sure **Header and Footer** is unchecked. Click **Save**.



9. The **Save As** window displays. Navigate to the location where you want to save the PDF version of the Project Proposal. Change the file name as appropriate. Click **Save**.

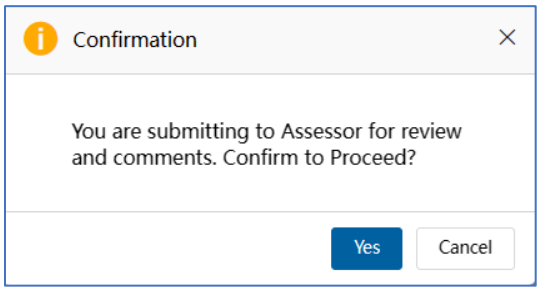


10. Go back to APAS. In the **Select a QA Step** field, select **Start a QA Round** from the list that drops down to begin a Quality Assessment round.

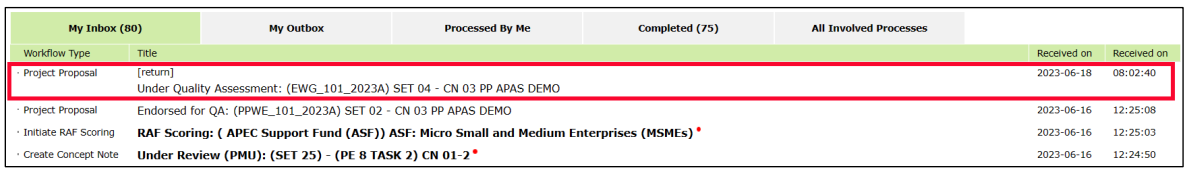


11. Click the **Submit** button at the top right corner of the Project Proposal.

A confirmation message displays. Click **Yes** to continue.



The "Submitting Project Proposal. Please Wait" message displays while the Project Proposal is being submitted. The task changes to **[return] Under Quality Assessment** in the **My Inbox** tab in the Dashboard.



3.3.2 Assessing Proposals Offline

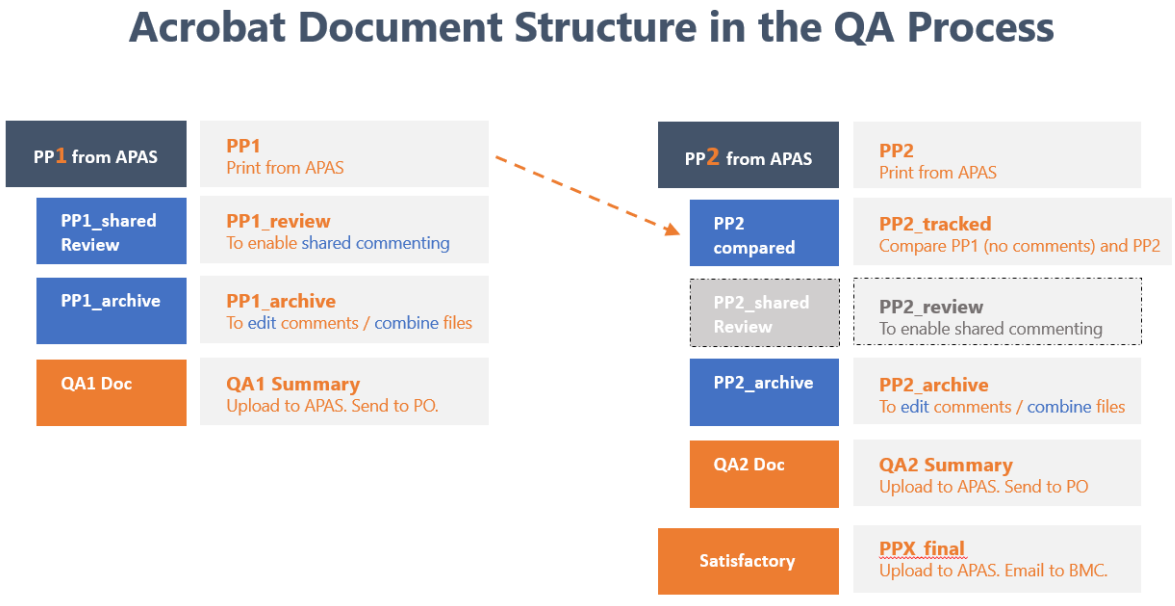
The Quality Assessment process consists of various rounds. The PMU conducts each Quality Assessment offline. Then when a QA document is ready, the PMU logs into APAS again and completes a series of tasks. These tasks are described in this section.

1. In the QA process, PMU downloads the first Project Proposal from APAS in PDF format and saves it as PP1 in the Secretariat's internal server (i.e. M:Drive). PMU will assign the Proposal assessors to conduct Quality Assessment and provide comments in a **shared review** version of the Proposal. The PMU assessor then combines and consolidates all the comments in an **archive** version and creates QA1 document. The QA1 document (PDF) is sent to the PD/PE who forwards it to the PO.

2. Once PO revises PP1 on APAS based on the received QA1 document (PDF), the PO submits PP2 in APAS, PMU will download PP2 in PDF format and perform the 'Compare' function with PP1 to create a 'PP2 **with track changes'** version. The 2nd round of QA will then take place with assessors (PMU only or in exceptional cases, other assessors) providing and sharing comments on this version. When a QA2 document is created (PDF), it is submitted to the PO. The QA process continues until the Proposal becomes Satisfactory and a last QA document (with Satisfactory comments, PDF) is produced and uploaded onto APAS.

3. This is the final PP (PDF). This is the version sent to BMC for final approval. Once approved, the PO implements their project based on the final PP (PDF).

4. To conduct the QA process offline, PMU and all assessors will follow the **User Manual to Using Acrobat for Proposal Quality Assessement**.

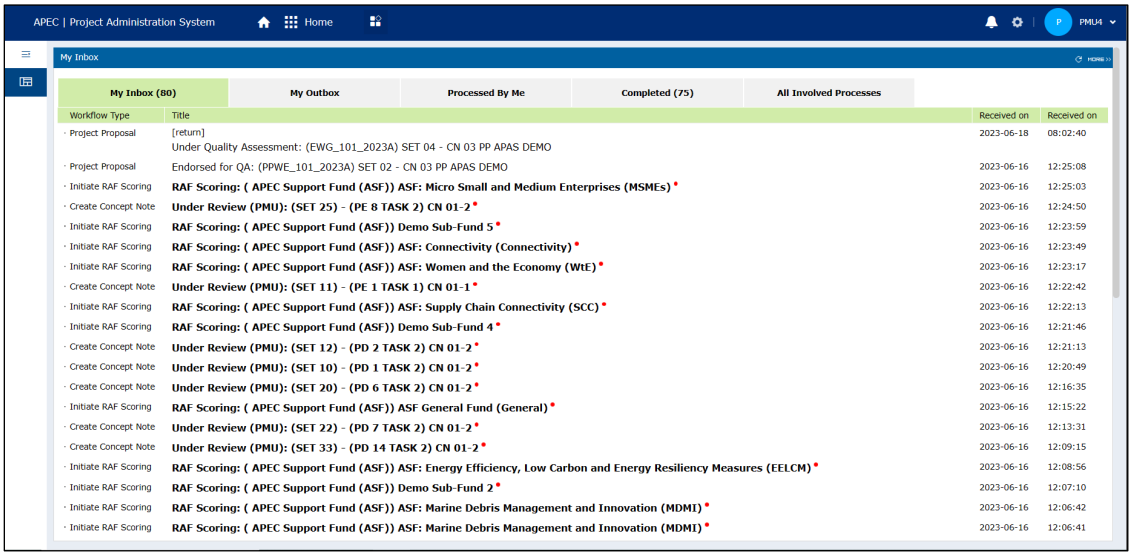


3.3.3 Uploading QA Documents

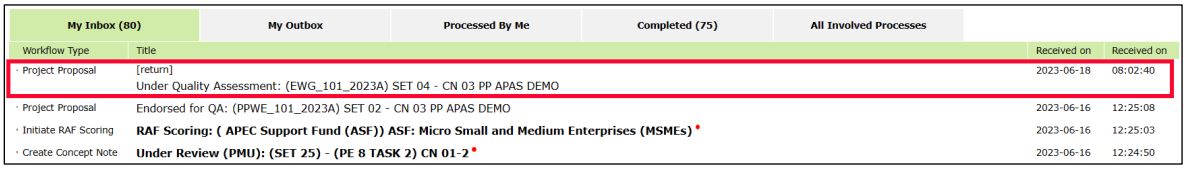
When QA documents are created by the PMU assessor, they will be uploaded in APAS and sent to the PD or PE for review.

3.3.3.1 For QA Round 1

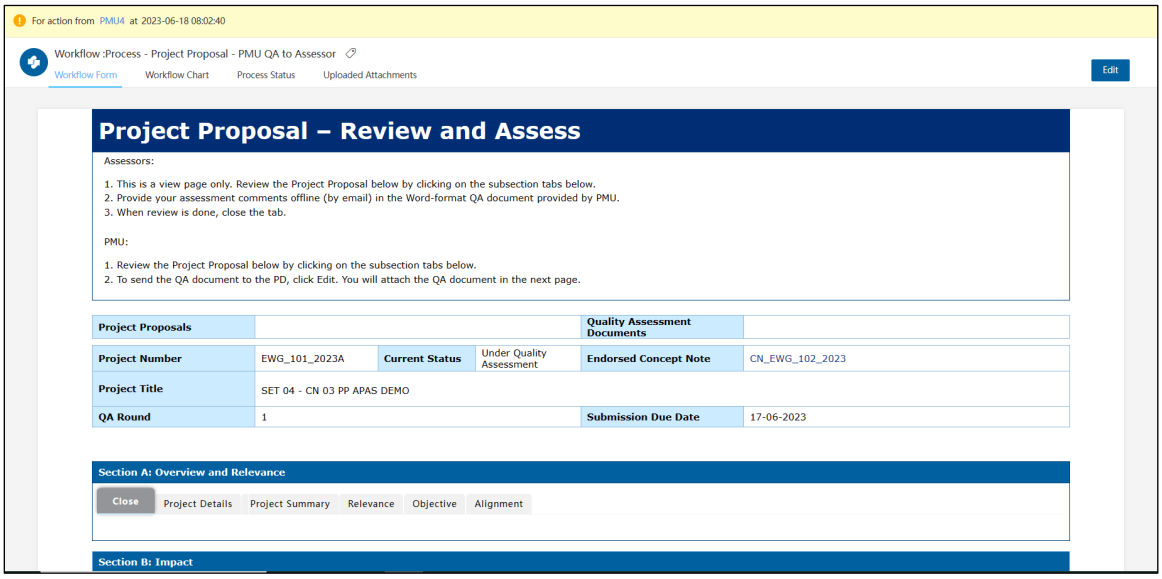
1. Log into APAS as a PMU user, if you're not logged in already. Your Dashboard displays.



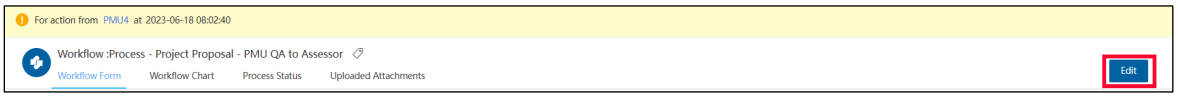
2. In your inbox, look for the Project Proposal that is ready for the Quality Assessment and click the task to open it.
   Note: Alternatively, you may find the Proposal by going to the **Project Proposal** widget and clicking **Under Quality Assessment**. Select from the list of Proposals.



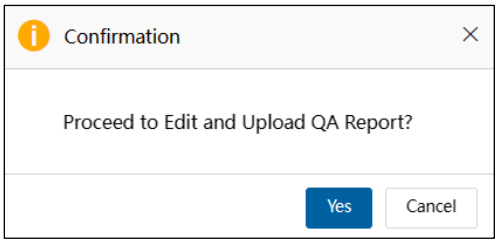
The Project Proposal – Review and Assess page displays in a separate tab.



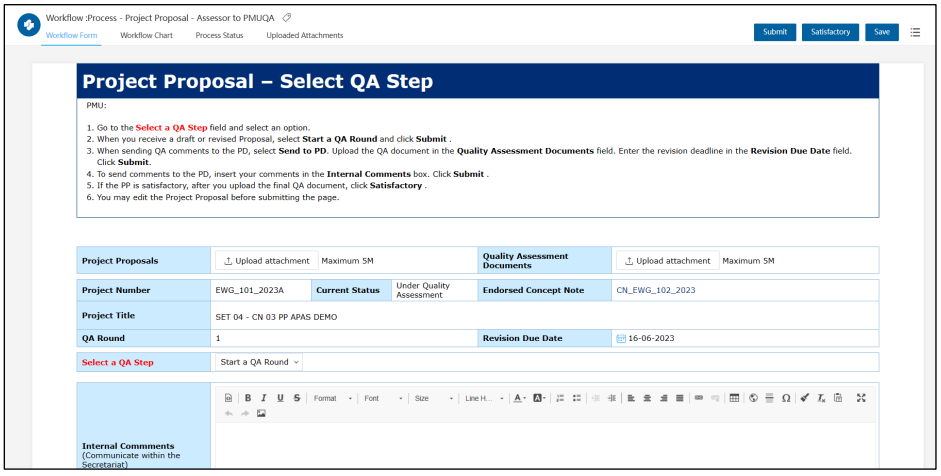
3. Click the **Edit** button in the top right corner of the page.



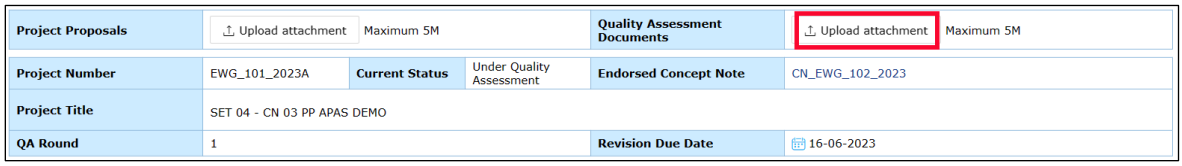
A confirmation message displays. Click **Yes** to continue.



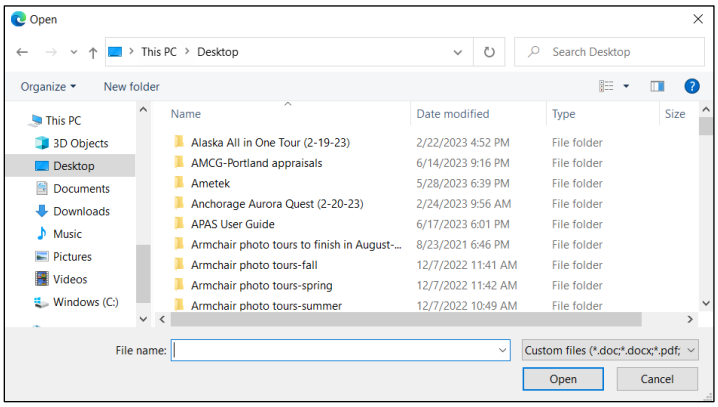
The “Loading Project Proposal. Please Wait.” message displays until the Project Proposal finishes uploading. An example of an uploaded Project Proposal is shown below.



4. In the **Quality Assessment Documents** field, click **Upload attachment**.



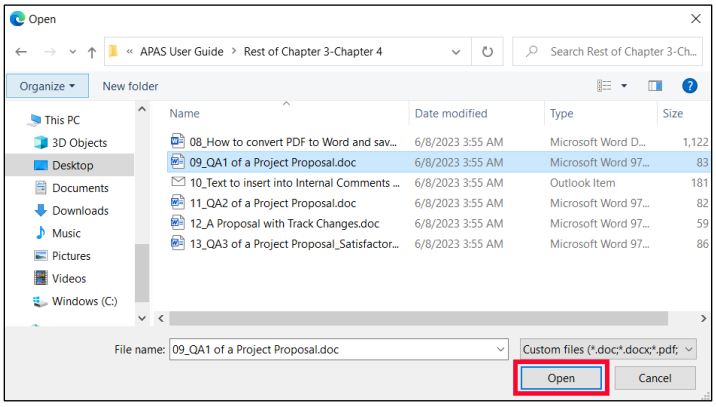
The Open window displays.



5. For QA Round 1, you will attach the two documents below:
   i. **How to View QA documents and Revise the APAS Proposal (For POs)** – a guide to show POs on how to view QA comments in Acrobat
   ii. **The QA1 document**

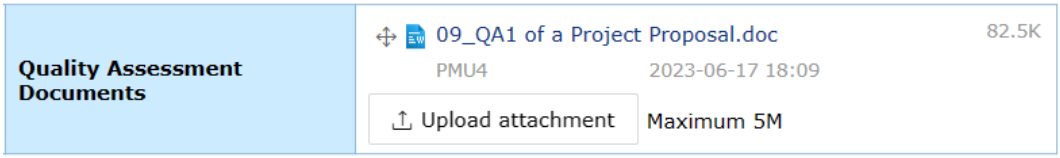
Note: For QA Round 2 onwards, only the relevant QA document needs to be uploaded.

6. Navigate to the document(s) you want to upload, select it, and click the **Open** button.



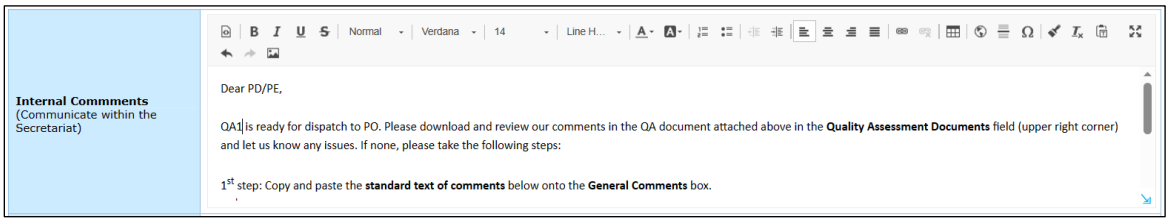
The uploaded document displays in the **Quality Assessment Documents** field.

Note: Make sure **two** documents are uploaded. (See step 5)

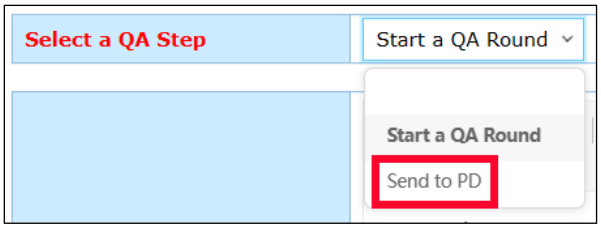


7. In the **Internal Comments** section of the Project Proposal, enter standard text comments for the PD.

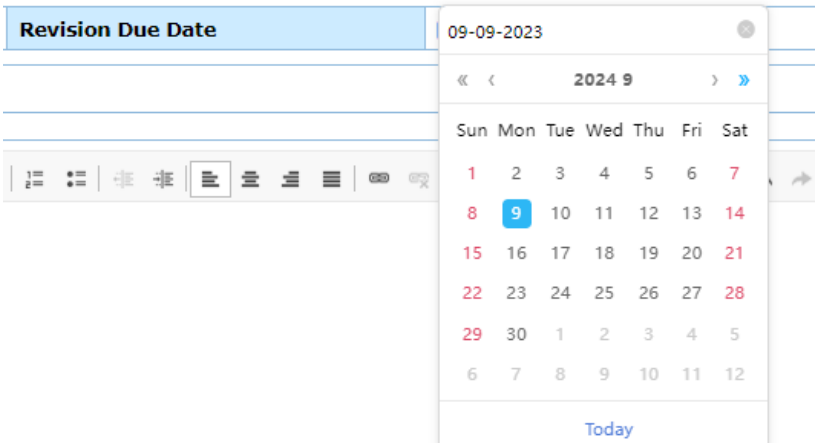
   Note: Refer to the **3 types of comments document** that includes standard text to send to the PD based on the round/status of Quality Assessment.



8. In the **Select a QA Step** field, select **Send to PD** option from the list that drops down.

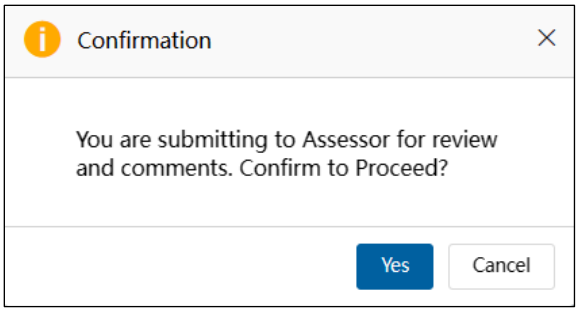


9. Set a due date by which PO should submit a revised Proposal to PD. Select a date in the **Revision Due Date** field.



10. Click the **Submit** button in the top right corner of the page.

A confirmation message displays. Click **Yes** to continue.



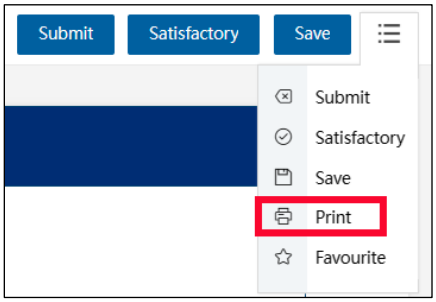
The "Submitting Project Proposal. Please Wait" message displays while the Project Proposal is being submitted.

3.3.3.2 Quality Assessment 2 and Onward

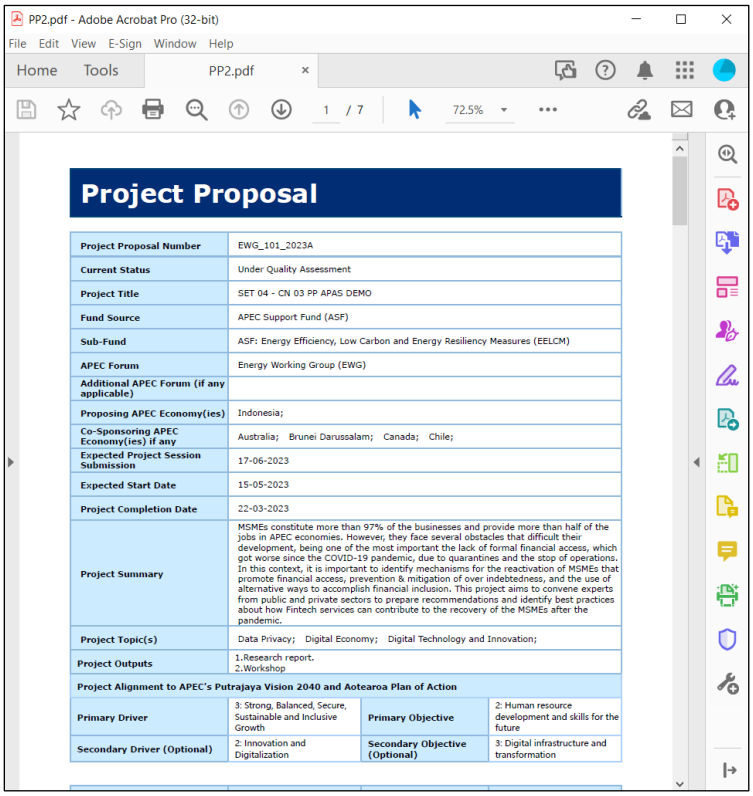
When the PMU receives an email notification to start the second Quality Assessment, they follow these steps:

1. Log into APAS as a PMU user, if you're not logged in already. Your Dashboard displays.
2. In your inbox, look for the Project Proposal that is ready for the Quality Assessment and click the task to open it.

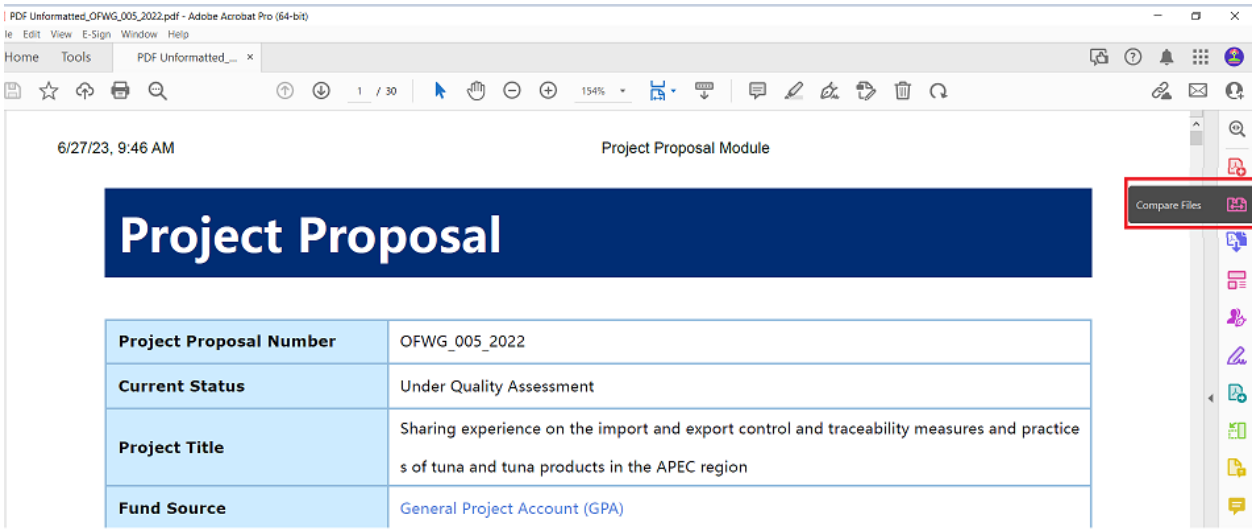
   The Project Proposal displays in a separate tab.
3. In the top right corner of the page, find the a bulleted list icon. Select **Print** and **Save** the Proposal as appropriate **(e.g. PP2)**



4. Open the PDF file you just saved in Adobe Acrobat or Adobe Reader.

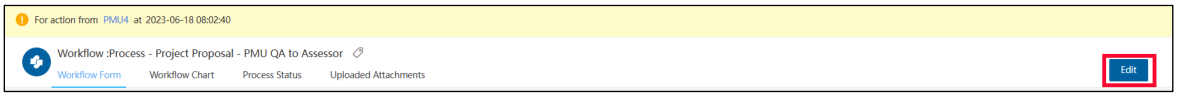


5. The next step to **compare** two versions of the Proposal, the currently downloaded against the previous version (e.g. PP2 compared against PP1). The **Compared** version of the Proposal will show track changes and be saved with the filename '**_tracked'**.
   Note: Follow the steps in **Chapter 3 Compare Project Proposals** in **the User Manual to Using Acrobat for Proposal Quality Assessment** to conduct the **compare** tasks.

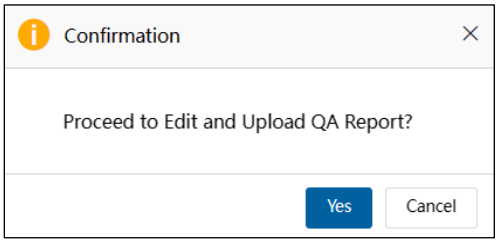


6. Complete the Quality Assessment round offline and create the necessary QA document.
7. After the Quality Assessment round is completed, log into APAS again as a PMU user.
8. In your inbox, look for the Project Proposal and click the task to open it.

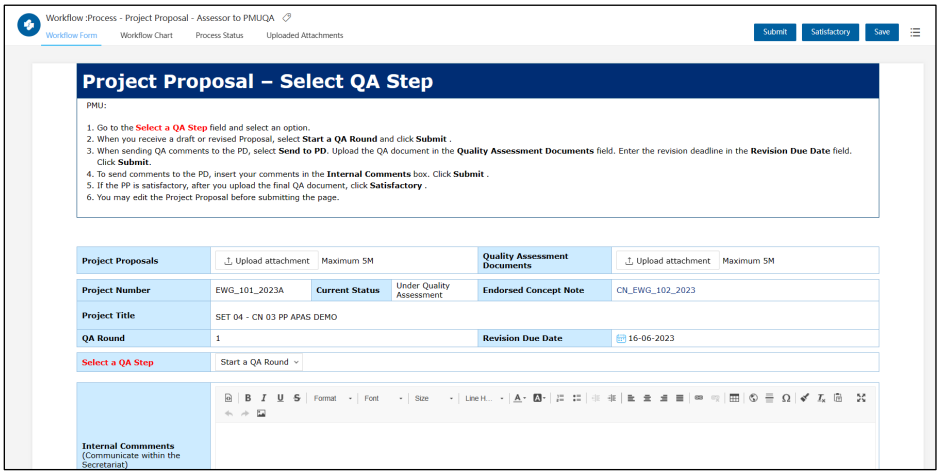
9. Click the **Edit** button in the top right corner of the page.



A confirmation message displays. Click **Yes** to continue.

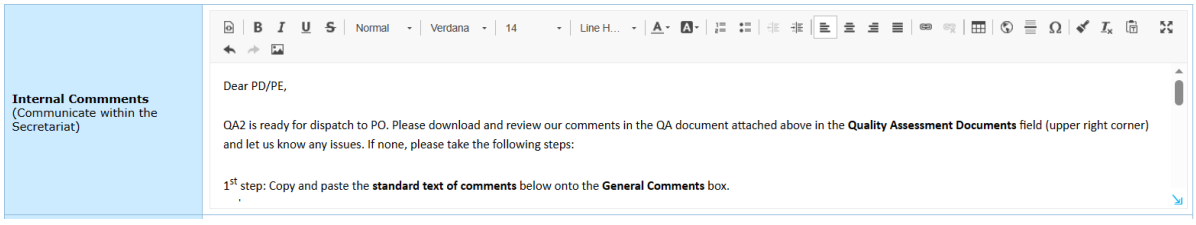


The “Loading Project Proposal. Please Wait.” message displays until the Project Proposal finishes uploading. An example of an uploaded Project Proposal is shown below.



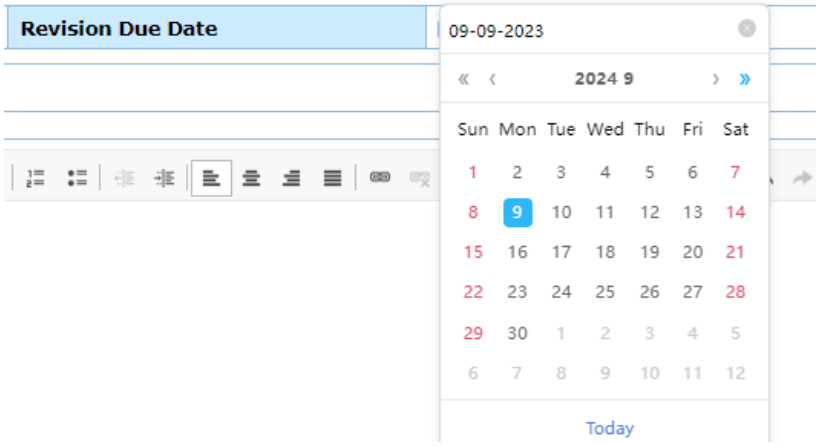
10. In the **Quality Assessment Documents** field, click **Upload attachment** and upload the QA document.

11. In the **Internal Comments** section of the Project Proposal, enter the standard text comment for the applicate QA Round for the PD.



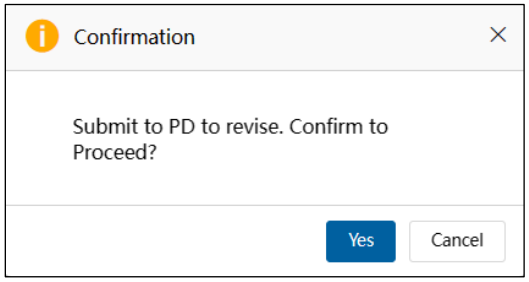
12. In the **Select a QA Step** field, select **Send to PD** option from the list that drops down.

13. Set a due date by which PO should submit a revised Proposal to PD. Select a date in the **Revision Due Date** field.

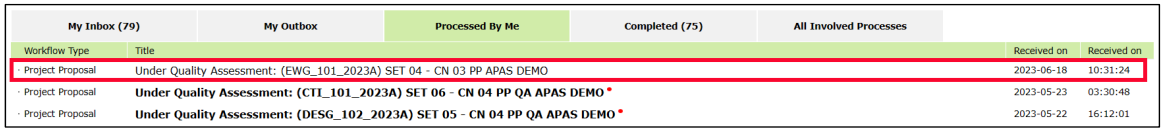


14. Click the **Submit** button in the top right corner of the page.

A confirmation message displays. Click **Yes** to continue.



The “Submitting Project Proposal. Please Wait” message displays while the Project Proposal is being submitted. The Project Proposal –Select QA Step page closes and your Dashboard displays. The task moves from the **My Inbox** tab to the **Processed by Me** tab.

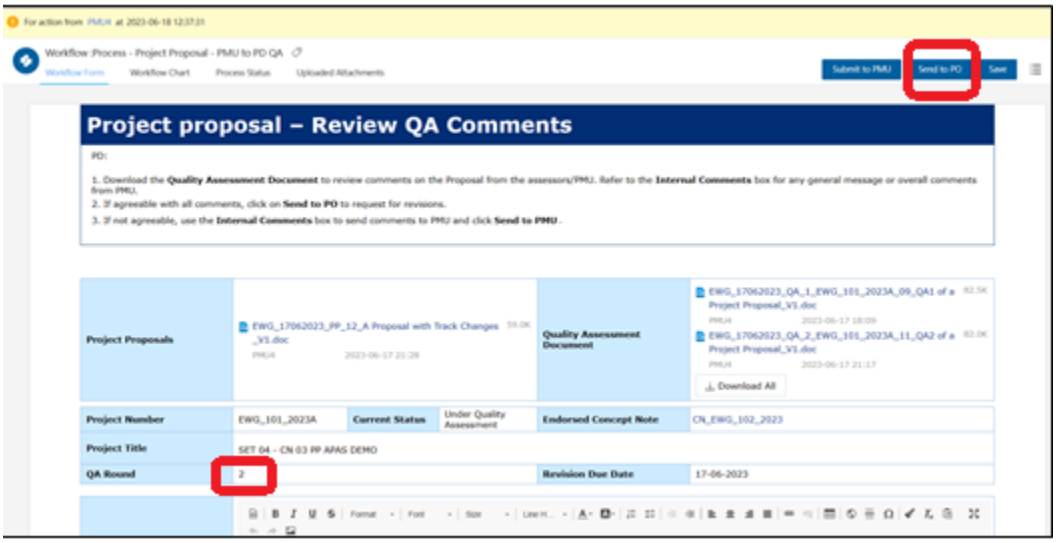


3.3.3.3 Sending Proposal Back without QA

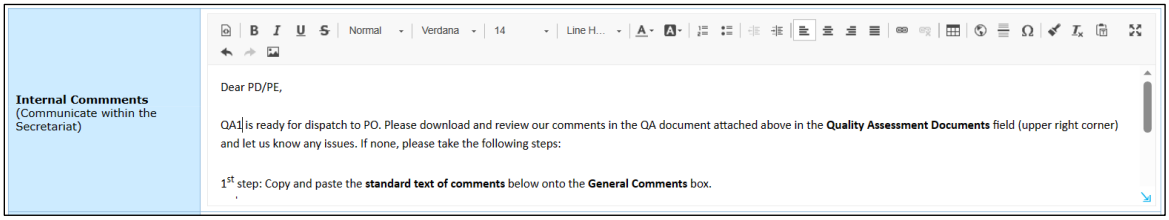
There may be instances whereby the submitted revised Proposal is incomplete (key comments have not been addressed) and requires further revision before it can be accepted by PMU to begin Quality Assessment work.

1. If the revised PP is under review by the PD and has not been **Submitted to PMU**, the PD can **Send** (the Proposal back) **to PO**. Under **General Comments**, PD can comment on the sections in the Proposal on APAS where futher revisions are necessary.

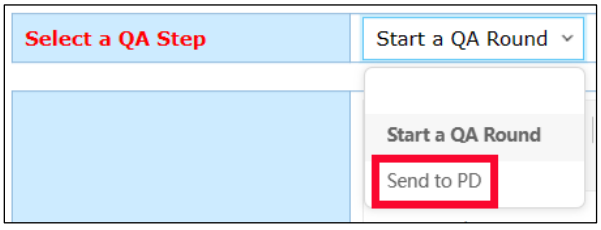
Note: In this case, the QA Round will remain the same as previous.



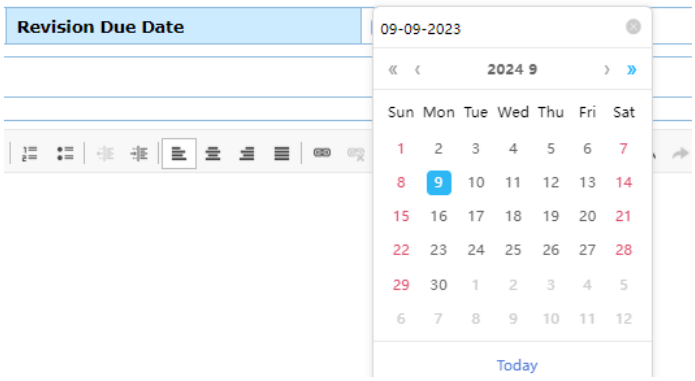
2. If the revised PP has been **Submitted to PMU**, it will be saved as new revised version (e.g. PP2_tracked). The PMU Assessor will log into APAS and **Send to PD**, to **Send** it **to PO**.
3. In the **Internal Comments** section of the Project Proposal, enter comments for the PD.



4. In the **Select a QA Step** field, select **Send to PD** option from the list that drops down.



5. Check the due date in the **Revision Due Date** field.



6. Click the **Submit** button in the top right corner of the page.

A confirmation message displays. Click **Yes** to continue.

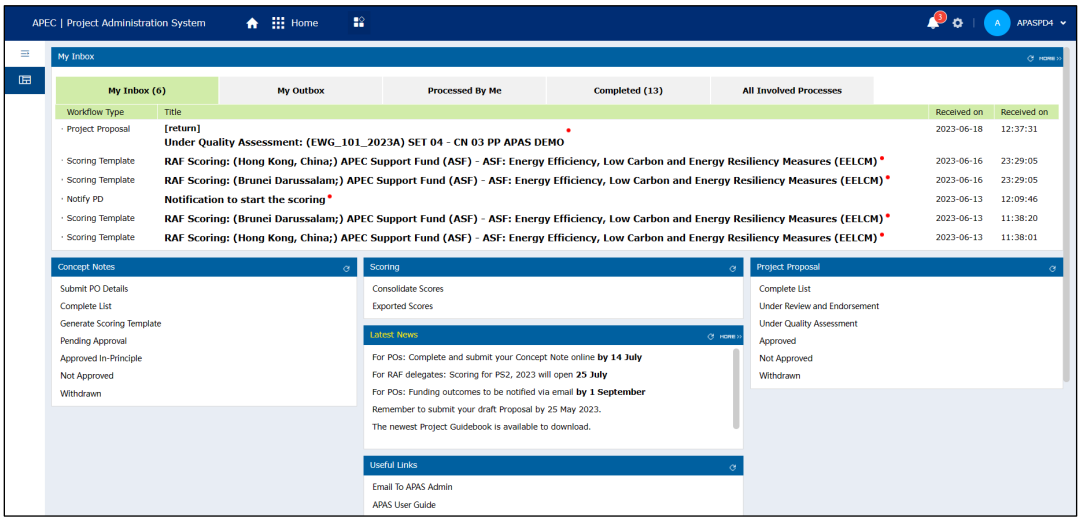
Note: When the Proposal in question is re-submitted as an 'updated' revised version to PMU, PMU will **start a new QA Round** on APAS. When this happens, there will be an additional **QA Round** added and the round number will be incorrect. Users are to disregard the additional QA Round.

(In theory, however, the QA Round should stay as previous, because Quality Assessment tasks were not performed in the previous round. This is a technical limitation to take note.)

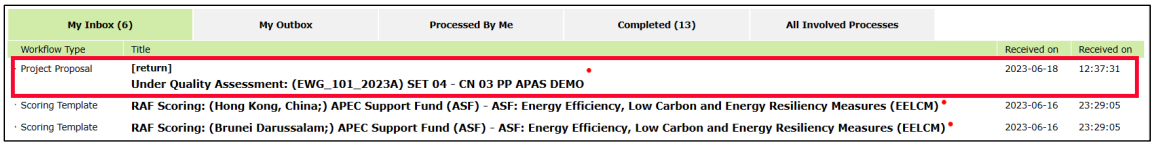
3.3.4 Reviewing and Sending QA Documents

When the PD receives an email notification to review the Quality Assessment comments sent by PMU, they follow these steps:

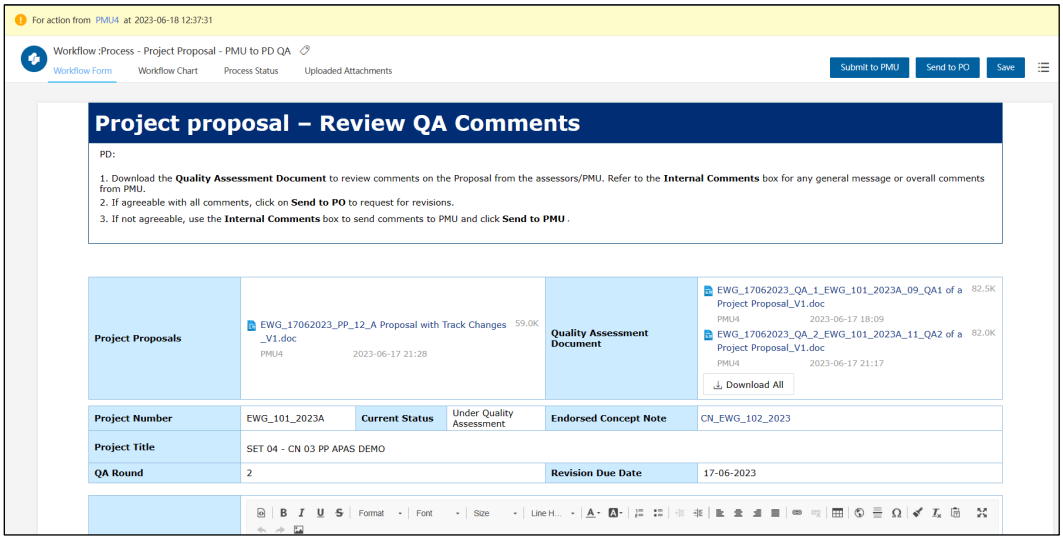
1. Log into APAS as a PD user, if you're not logged in already. Your Dashboard displays.



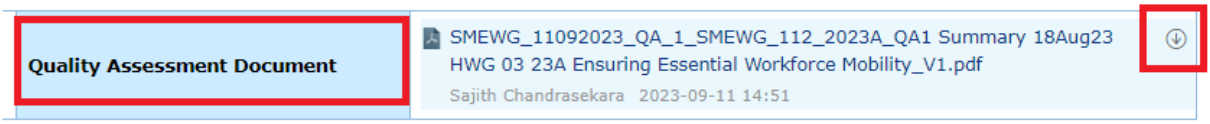
2. In your inbox, look for the Project Proposal that is ready for the Quality Assessment review and click the task to open it.



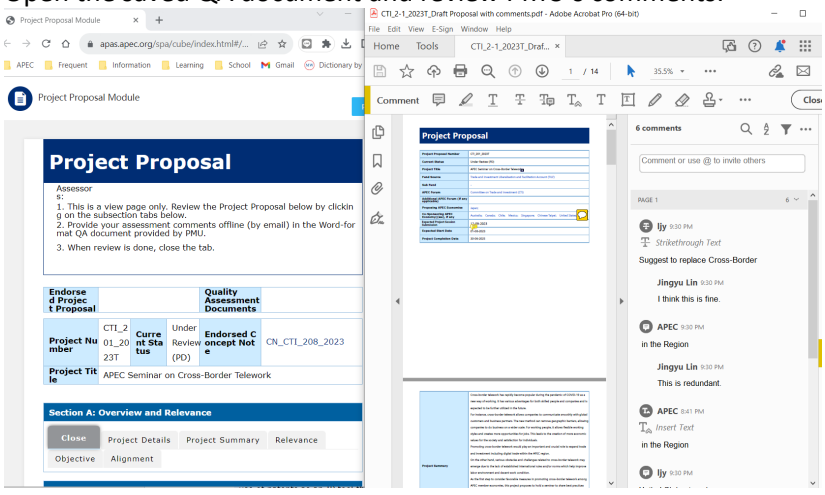
The Project proposal – Review QA Comments page displays in a separate tab.



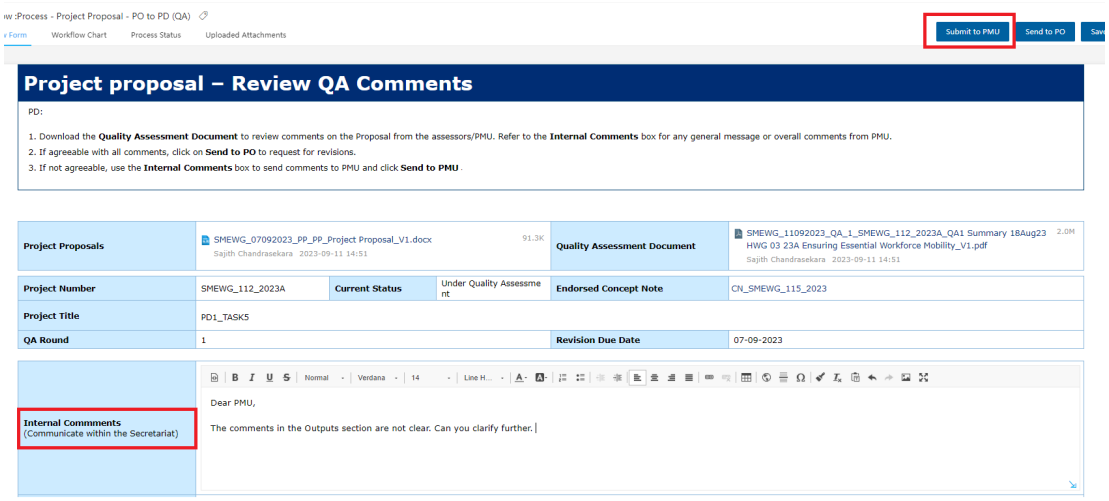
3. Download and review PMU's comments on the Proposal. Go to the **Quality Assessment Document** field, select the latest QA document. Click on the **down arrow** icon on the right side of the document to download.



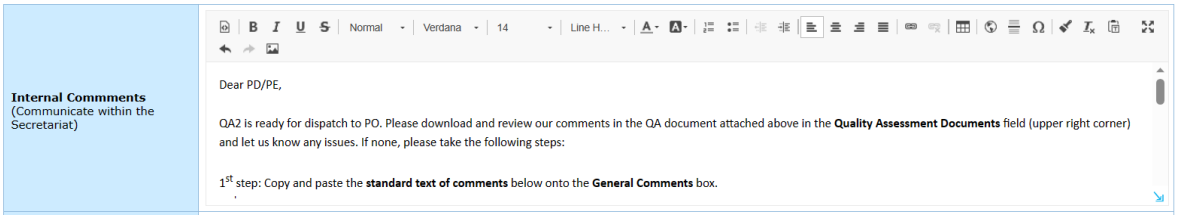
4. Open the saved QA document and review PMU's comments.



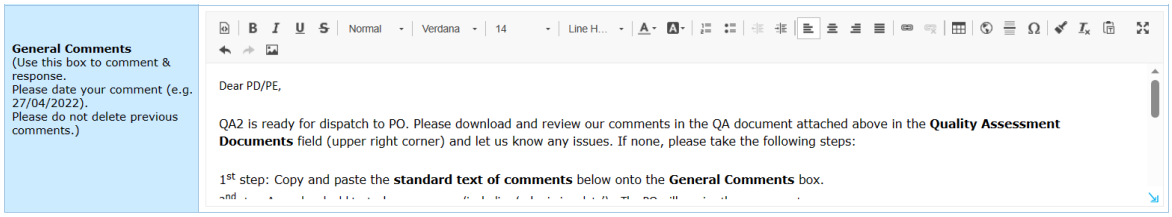
5. If PD has views on PMU's QA comments, PD can **return the Proposal** with a request for changes. Enter comments in the **Internal Comments** field. Click **Submit to PMU**.



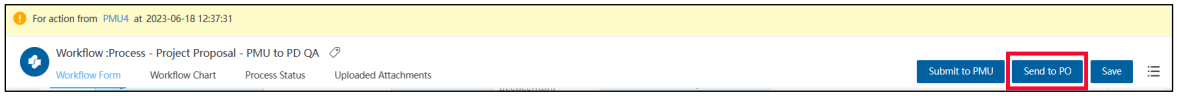
6. If PD is agreeable with PMU's QA comments, proceed to review PMU's comments in the **Internal Comments** field.



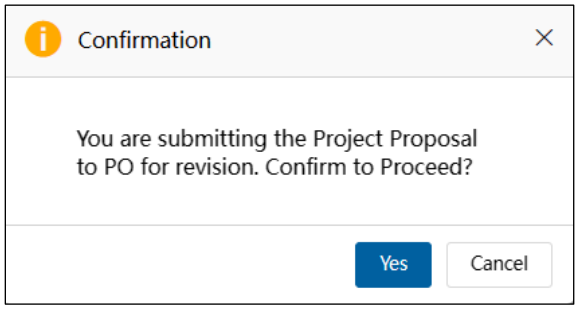
7. Copy the PMU's comments from the **Internal Comments** field and paste them into the **General Comments** field. Then amend these comments, as needed.



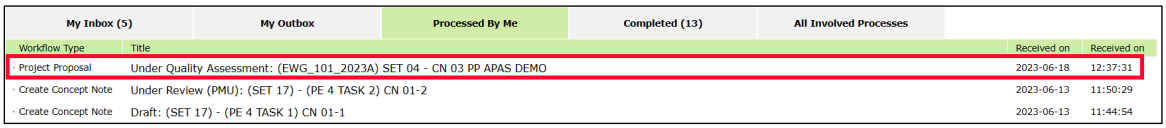
8. Click the **Send to PO** button in the top right corner of the page.



A confirmation message displays. Click **Yes** to continue.



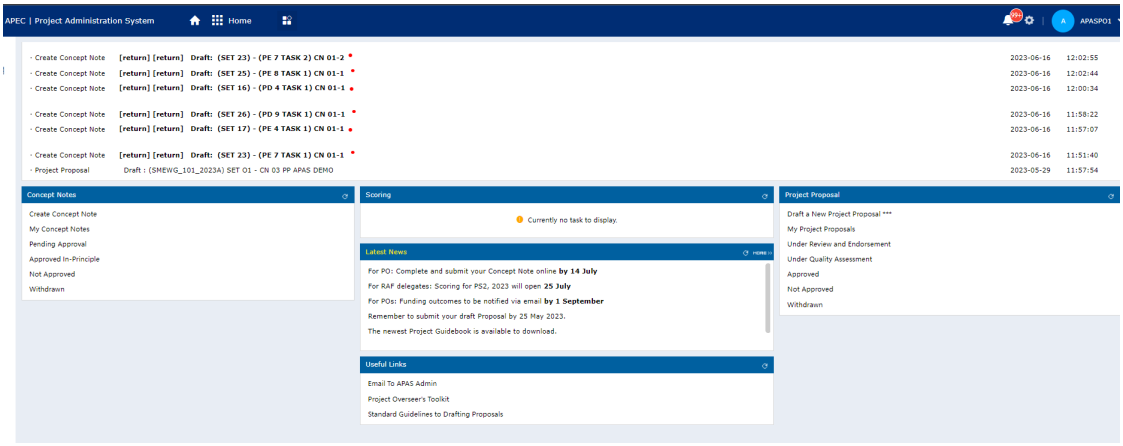
The “Submitting Project Proposal. Please Wait” message displays while the Project Proposal is being submitted. The Project proposal – Review QA Comments page closes and your Dashboard displays. The task moves from the **My Inbox** tab to the **Processed by Me** tab.



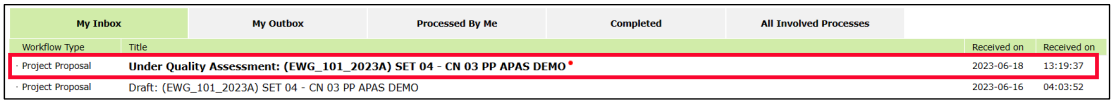
3.3.5 Revising the Project Proposal

When the PO receives an email notification to revise the Project Proposal, they follow these steps:

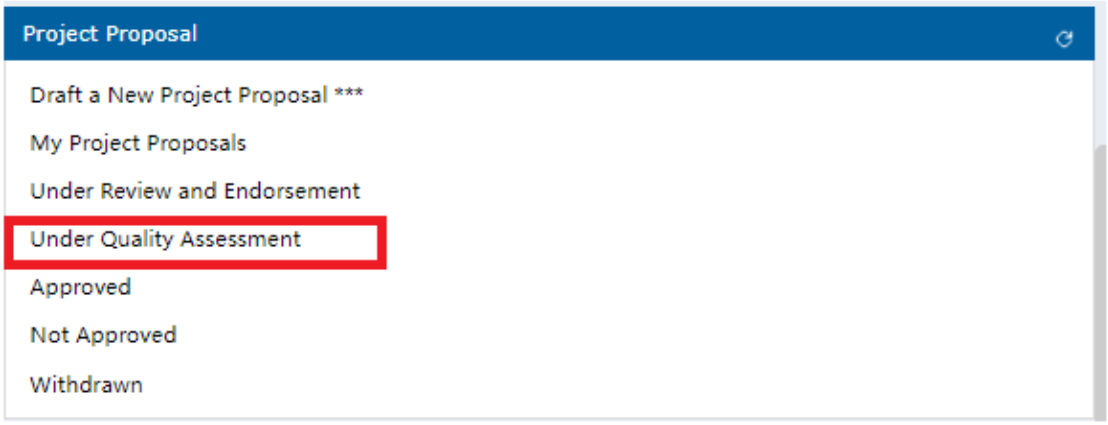
1. Log into APAS as a PO user, if you're not logged in already. Your Dashboard displays.



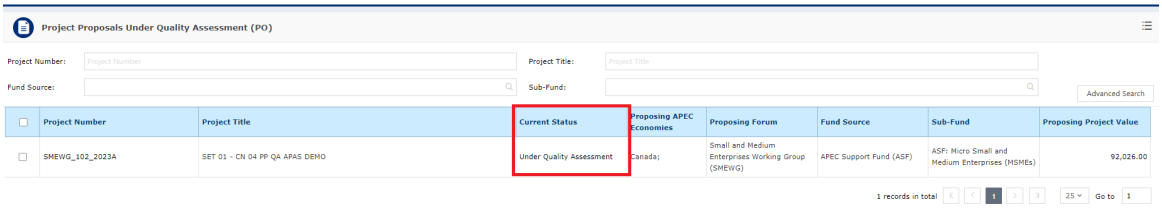
2. In your inbox, look for the Project Proposal that is ready for revision and click the task to open it.



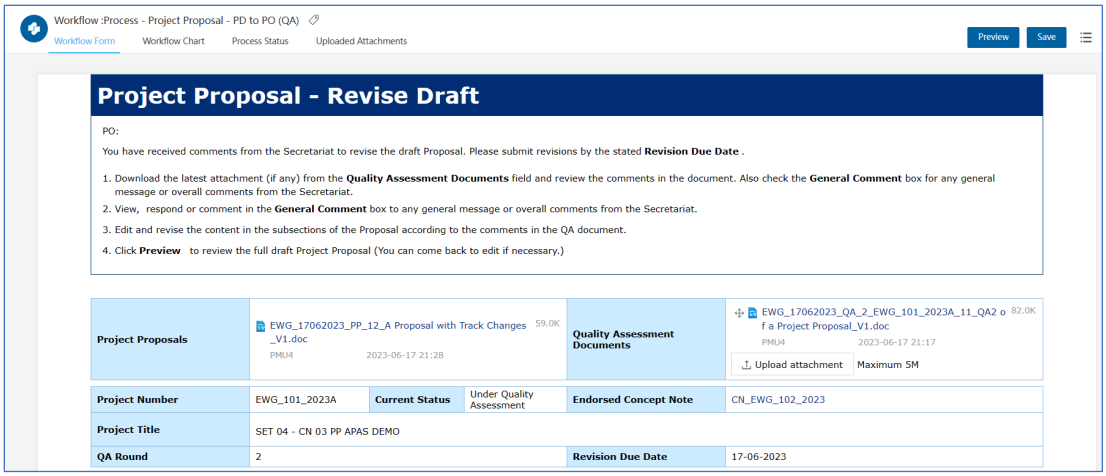
3. Alternatively, go the Project Proposal widget. Click Under Quality Assessment.



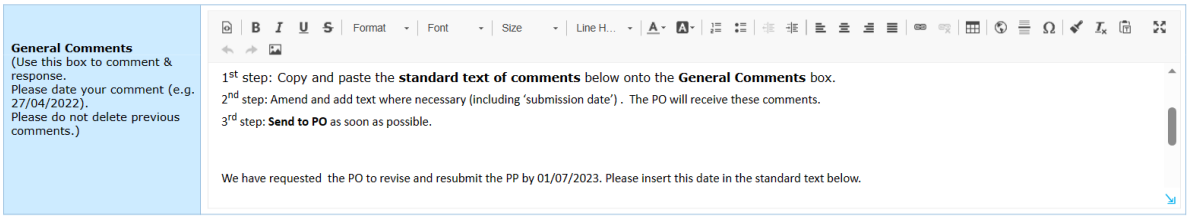
All the Project Proposals that are Under Quality Assessment display in a list. Select the Proposal you are tasked to revise.



The Project Proposal – **Revise Draft** page displays in a separate tab.



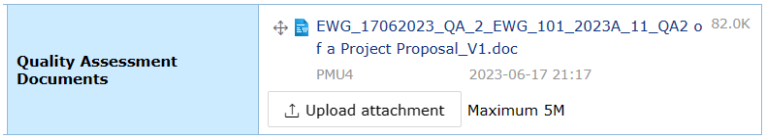
4. Read the comments in the **General Comments** box and respond to the PD or PE, if applicable.



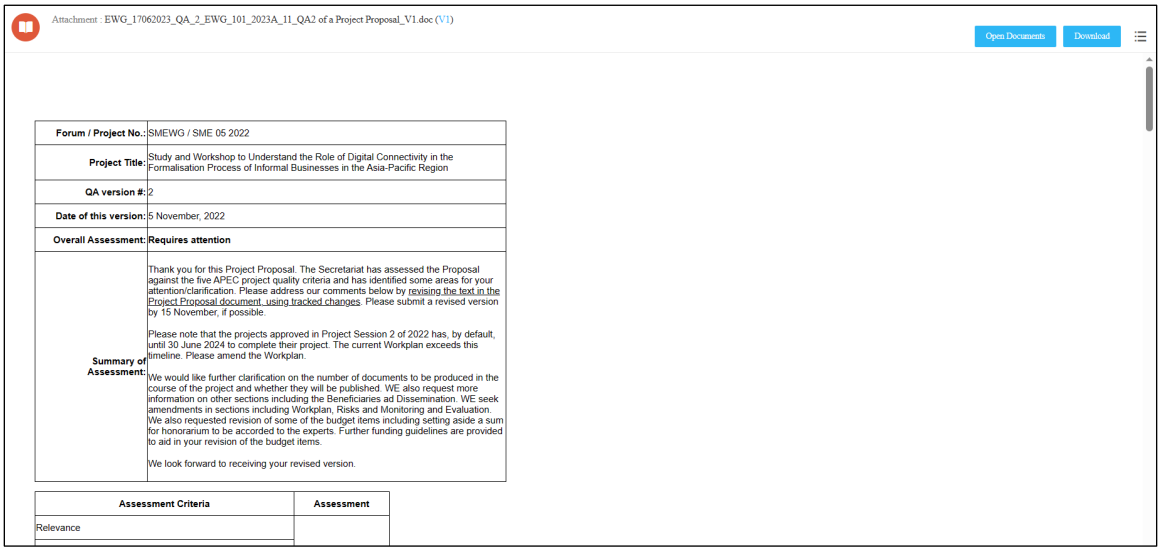
5. To see previous versions of the Proposal, got to the **Project Proposals** field. Click on the relevant Project Proposal.
   Note: The Proposal filename follows a number, such as **PP1, PP2**, etc., that shows the version of the Proposal that was submitted by the PO.

   Note: Versions **PP2** and onwards of the Proposal contain **track changes** that indicated the differences in text between the current and previous versions. The track changes help the reader to easily locate where revisions have been made based on the Secretariat's QA comments.

6. In the **Quality Assessment Documents** field, click the attached QA document.



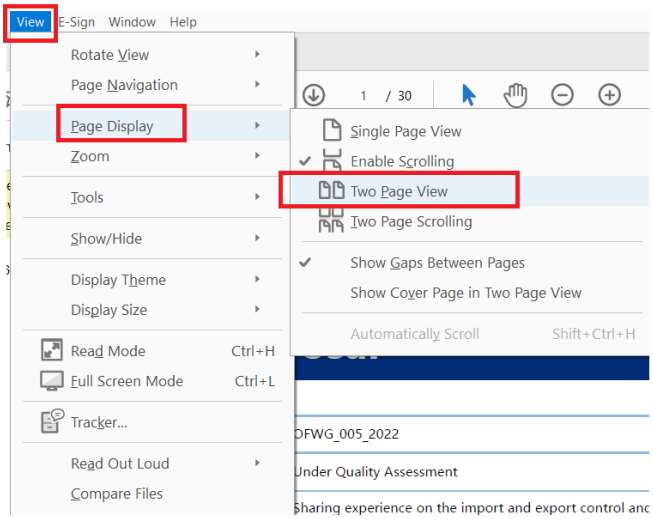
The QA document displays in a separate tab. Click the **Download** button in the top right corner of the tab.



The file downloads to your Downloads folder. When the download finishes, close the tab that displays the document. The downloaded file is the QA document and contains comments from the Secretariat to the PO to revise the Proposal.

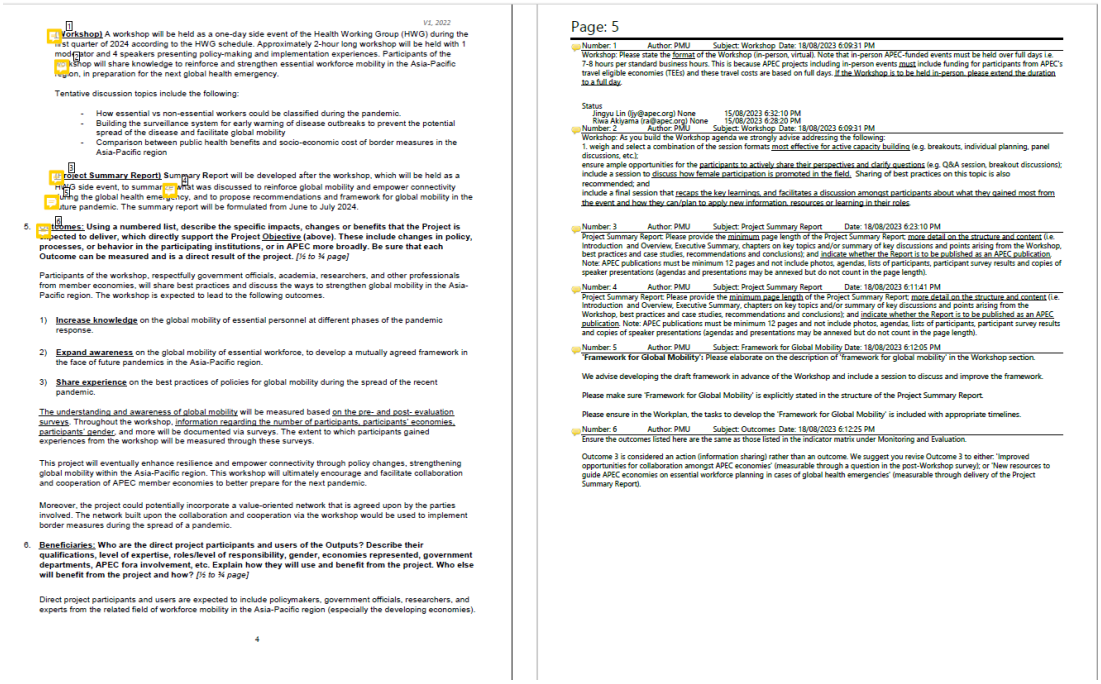
Note: The QA document filename follows a number, such as QA1, QA2, etc., that shows the round of QA the current Project Proposal is in.

7. Open the QA document. For best view, set your **Page Display** to view **Two Pages**.

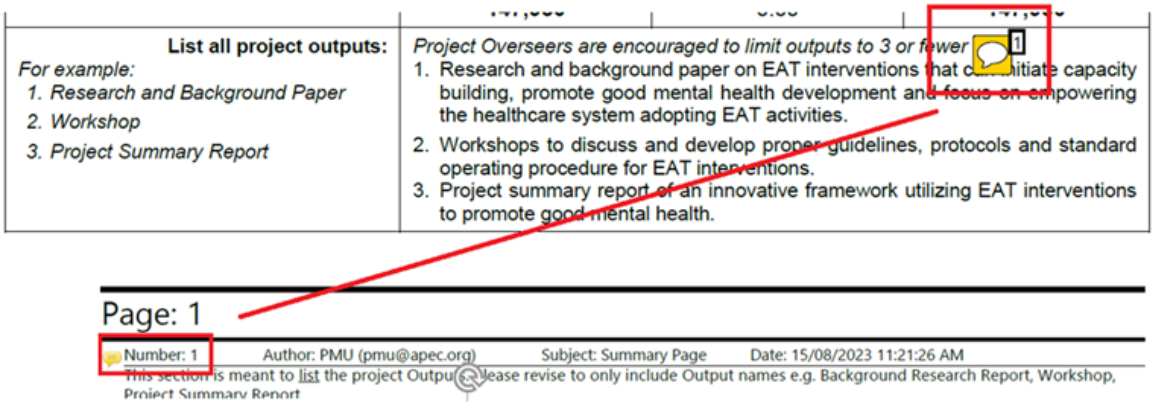


8. The first page is a **Summary of Assessment** – this is a general overview of the Secretariat's comments on your Proposal.

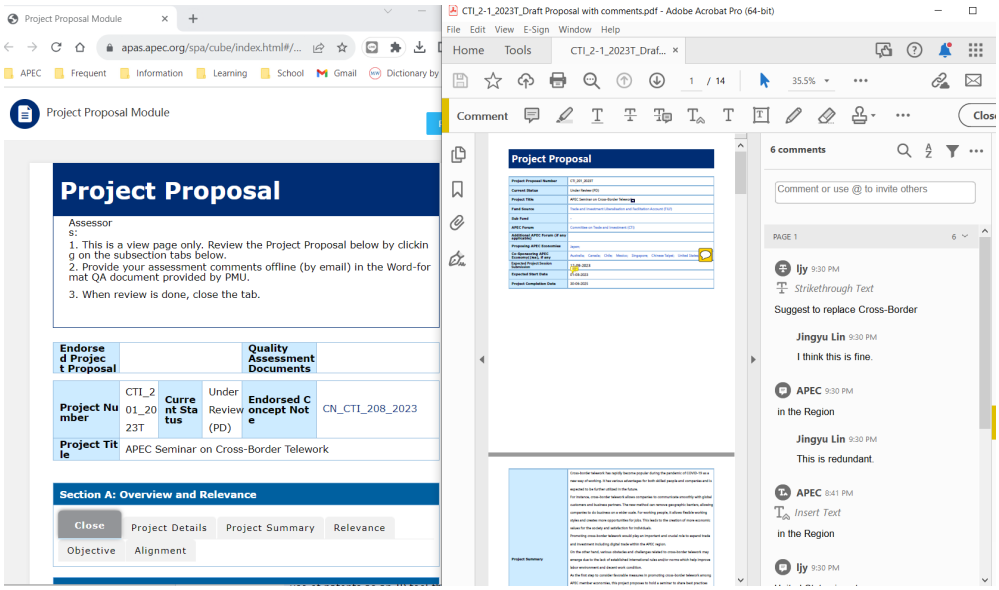
9. From **Page 3** onwards, a **Proposal** page is followed by a **Comments** page, (if there are comments made on the specific Proposal page).
   In the example below, **Page 4** is the Proposal page and **Page 5** is the comments page created based on P3.



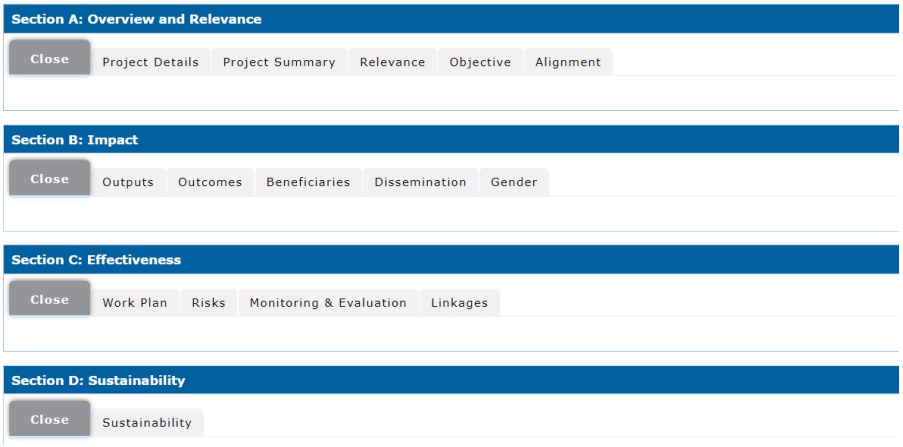
10. The comments in the **Comments** page are numbered in sequence. To identify the section of the Proposal where the comments is referred to, find the icon on the **Proposal** page and the associated number.
    *In the example below, **comment Number 1** in the **Comments** page refers to the **Output table** of the associated **Proposal** page.*



11. Edit the Proposal on APAS based on the comments you received. Place the PDF Proposal with Comments **side by side** with the APAS Proposal.



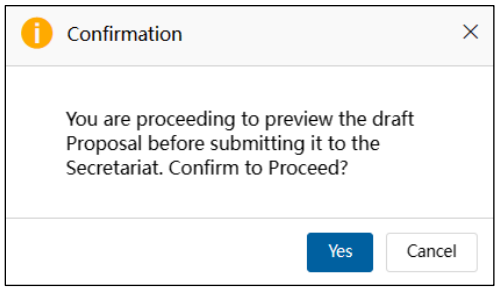
12. Locate the specific tabs in the APAS Proposal to find specific sub-sections in order to make the necessary edits. Make sure you go through all Comments pages, read and address ALL the comments.



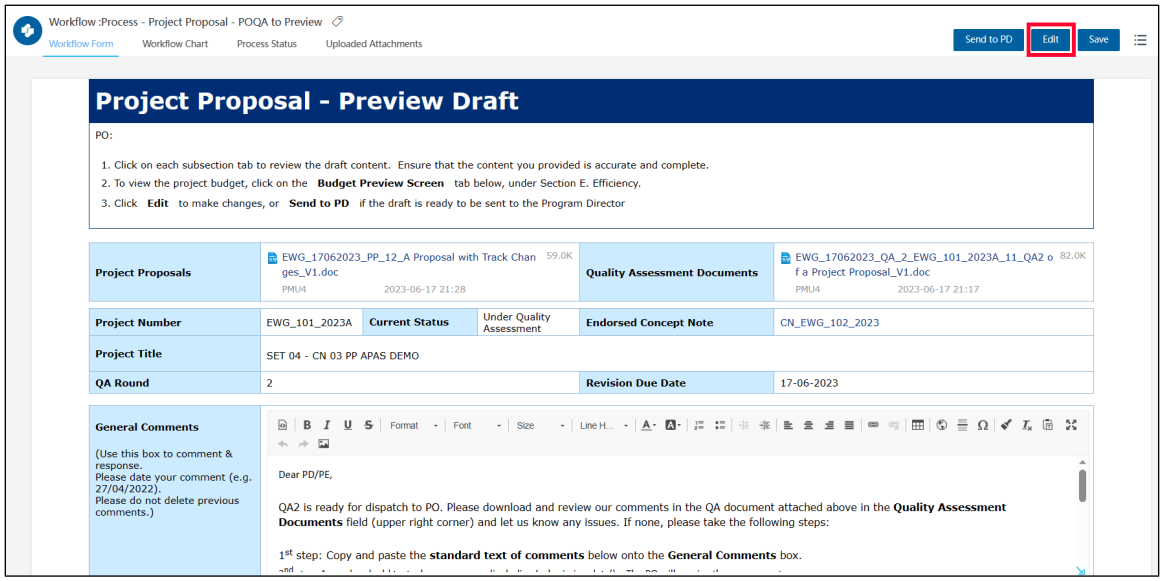
7. *(optional)* If you want to respond to the QA document, upload the Response document in the **Quality Assessment Documents** field.

8. Once you have completed the revisions, click the **Preview**, to verify that changes are correct.

   A confirmation message displays. Click **Yes** to continue.

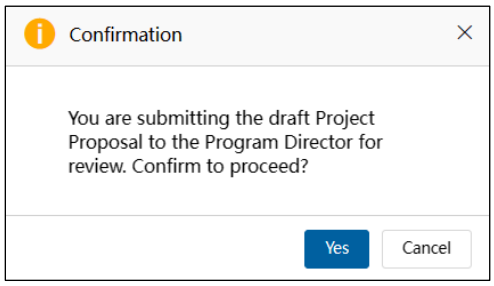


The preview of the Project Proposal displays. If you need to make changes, click the **Edit** button at the top right corner of the screen.

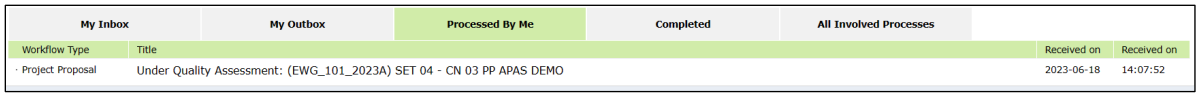


9. When you're finished, click the **Send to PD** button.

A confirmation message displays. Click **Yes** to continue.



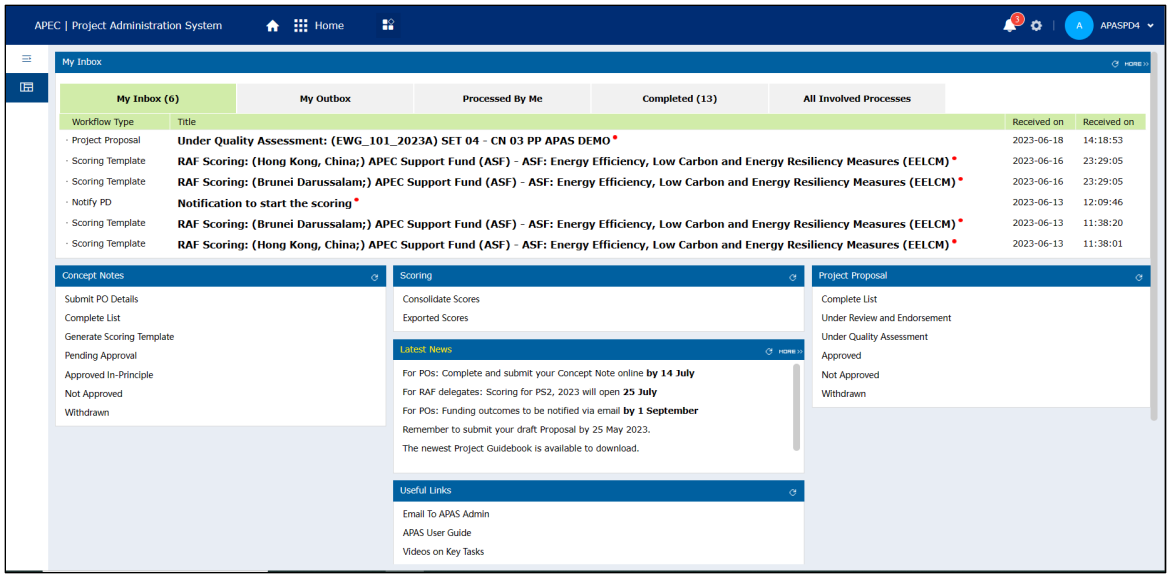
The "Submitting Project Proposal. Please Wait" message displays while the Project Proposal is being submitted. The Project Proposal – Revise Draft page closes and your Dashboard displays. The task moves from the **My Inbox** tab to the **Processed by Me** tab.



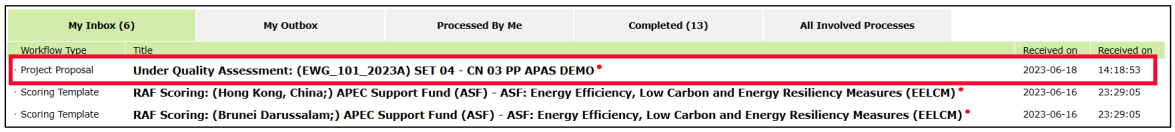
3.3.6 Reviewing the Revised Project Proposal

After the PO revises the Project Proposal, the PD or PE receives an email notification that the Project Proposal is ready to review. The PD or PE follows these steps to complete the review:

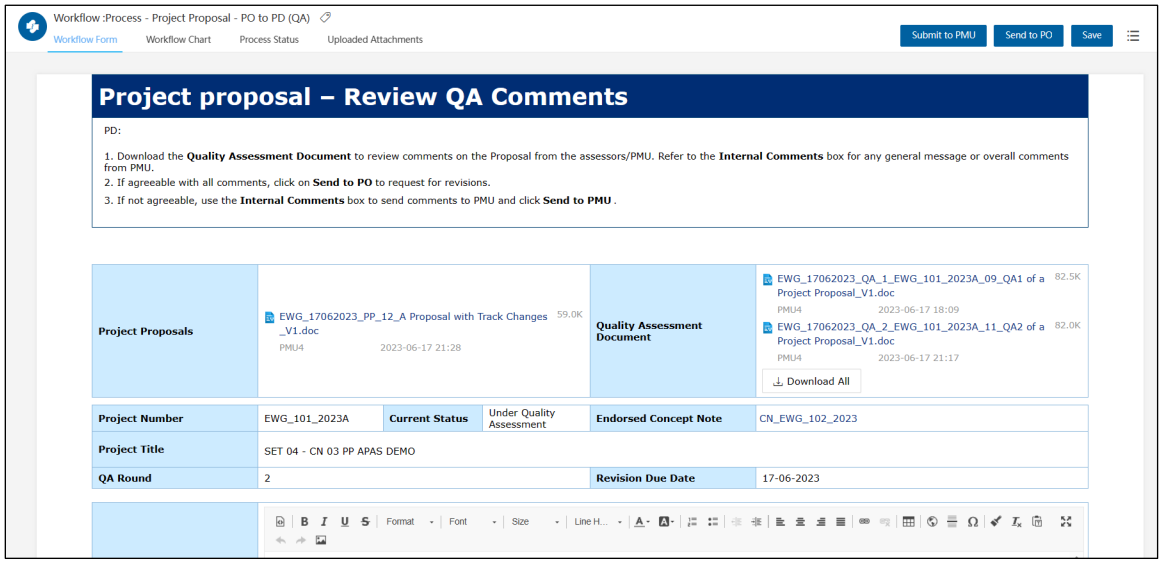
1. Log into APAS as a PD or PE user, if you're not logged in already. Your Dashboard displays.



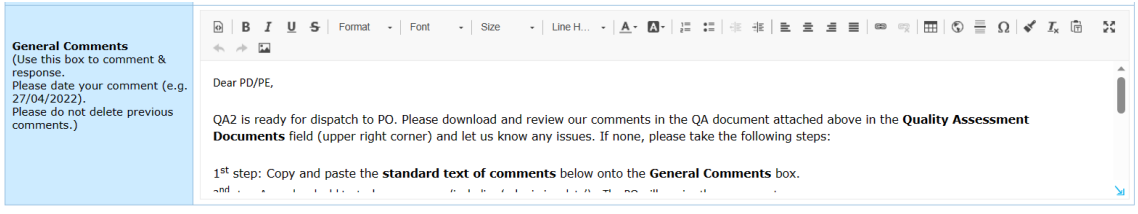
2. In your inbox, look for the Project Proposal that is ready for review and click the task to open it.



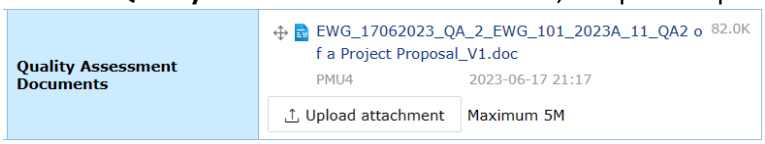
The Project proposal – Review QA Comments page opens in a new tab.



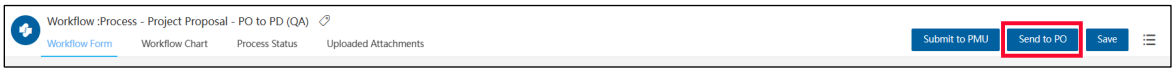
3. Review the comments in the **General Comments** field.



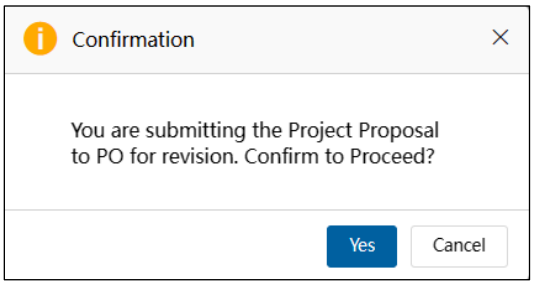
4. To verify that the PO has addressed all QA comments, you may download again the QA document from the **Quality Assessment Documents** field, or open the previously saved QA document.



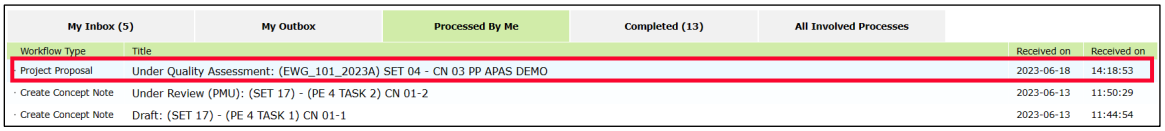
5. Locate the comments in the QA document. Navigate to the sections in APAS where comments were made and click **View Track Changes** to verify that the PO revised the appropriate sections.
6. *(optional)* If some comments have been missed and revisions are incomplete, PD may wish to Send to PD for further changes.
7. Enter your comments for the PO in the **General Comments** field and click the **Send to PO** button in the top right corner of the page.



A confirmation message displays. Click **Yes** to continue.

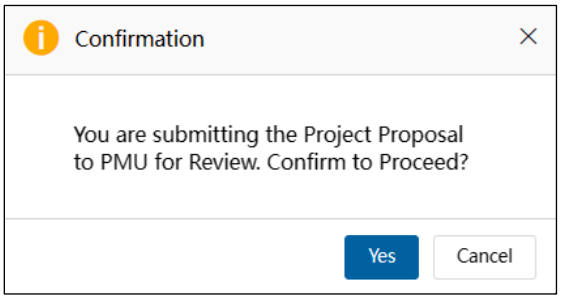


The “Submitting Project Proposal. Please Wait” message displays while the Project Proposal is being submitted. The Project Proposal – Revise Draft page closes and your Dashboard displays. The task moves from the **My Inbox** tab to the **Processed by Me** tab.

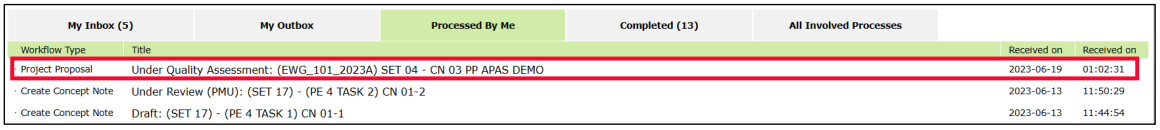


8. If all comments have been addressed by the PO, click the **Send to PMU** button in the top right corner of the page.

A confirmation message displays. Click **Yes** to continue.



The “Submitting Project Proposal. Please Wait” message displays while the Project Proposal is being submitted. The Project Proposal – Revise Draft page closes and your Dashboard displays. The task moves from the **My Inbox** tab to the **Processed by Me** tab.



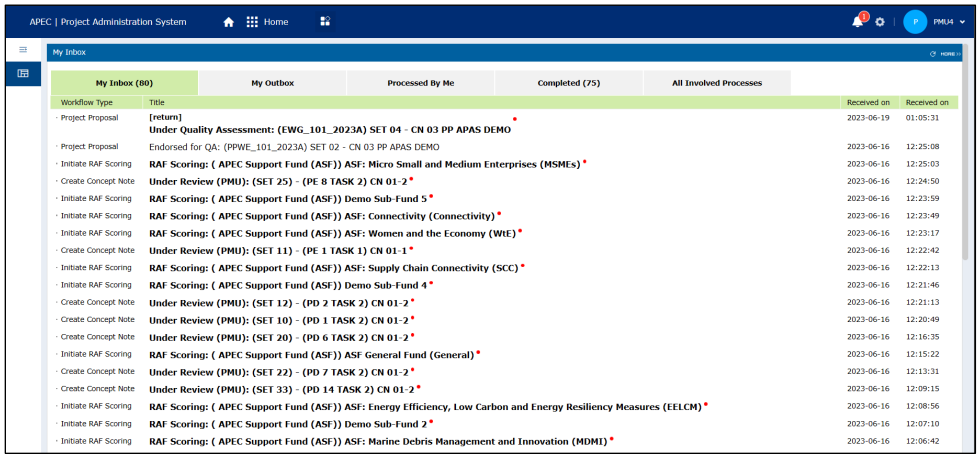
3.3.7 Assessing the Project Proposal as Satisfactory

Note: This task occurs when the Project Proposal has been assessed as Satisfactory by PMU.

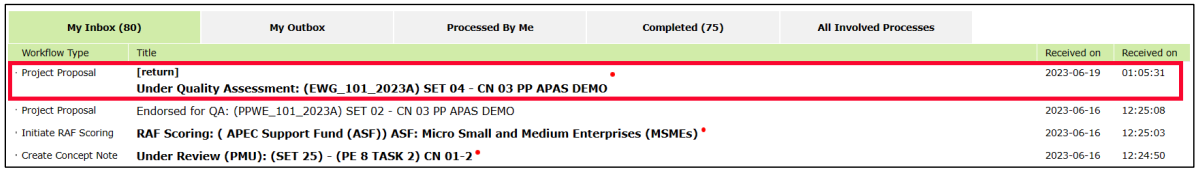
When the Project Proposal is assessed as Satisfactory, the PMU follows these steps to send the Satisfactory QA document to the PO and indicate the Satisfactory status on APAS:

3.3.7.1 Send Satisfactory Proposal to PD

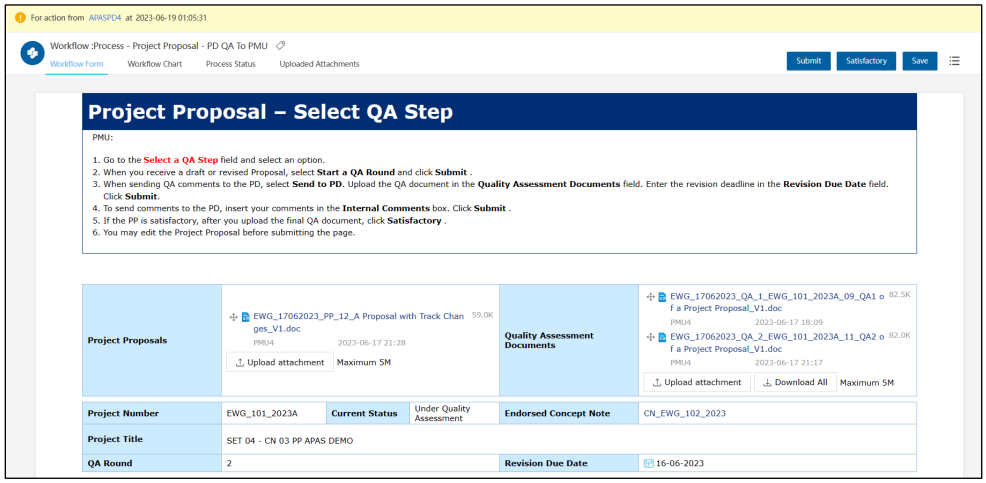
1. Log into APAS as a PMU user, if you're not logged in already. Your Dashboard displays.



2. In your inbox, look for the Project Proposal that is ready to be assessed as satisfactory and click the task to open it.

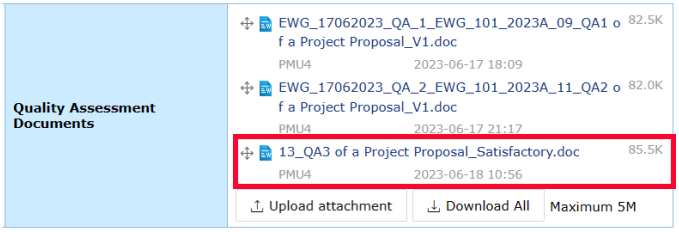


The Project Proposal – Select QA Step page displays in a separate tab.



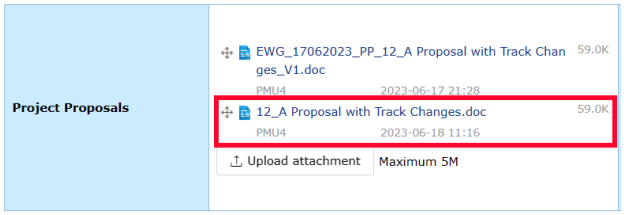
3. In the **Quality Assessment Documents** field, click **Upload attachment** and select the Satisfactory QA document from your computer. Click **Open.**

The uploaded document displays in the Quality Assessment Documents field of the Project Proposal.

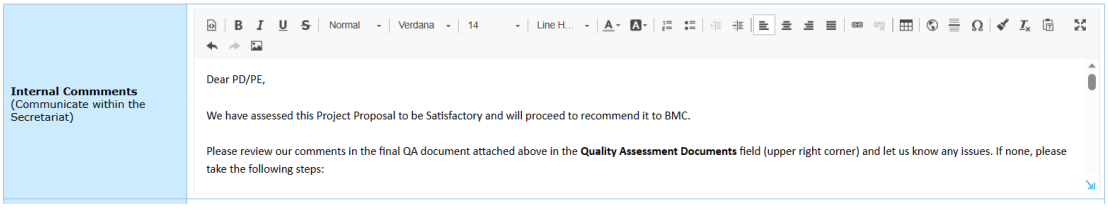


4. In the **Project Proposals** field, click **Upload attachment** and select the Satisfactory Project Proposal from your computer. Click **Open**.

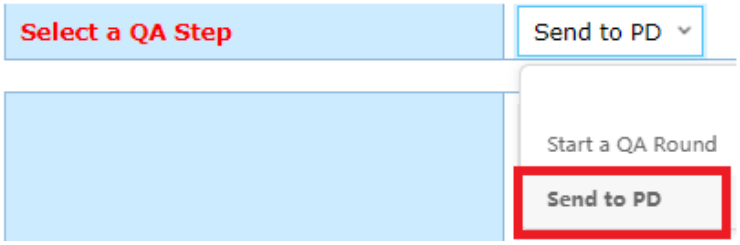
The Satisfactory Proposal displays in the **Project Proposals** field.



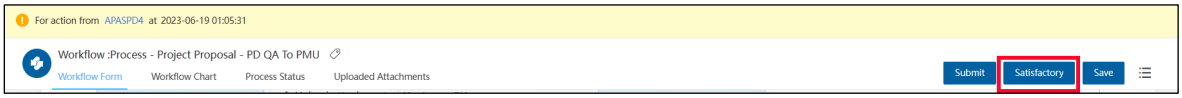
5. In the **Internal Comments** section of the Project Proposal, enter the standard text comment for Satisfactory Proposals to the PD or PE.



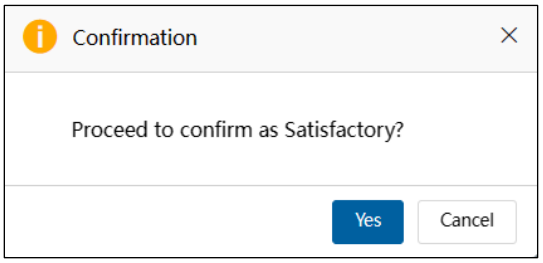
6. In the **Select a QA Step** field, select **Send to PD** option from the list that drops down.



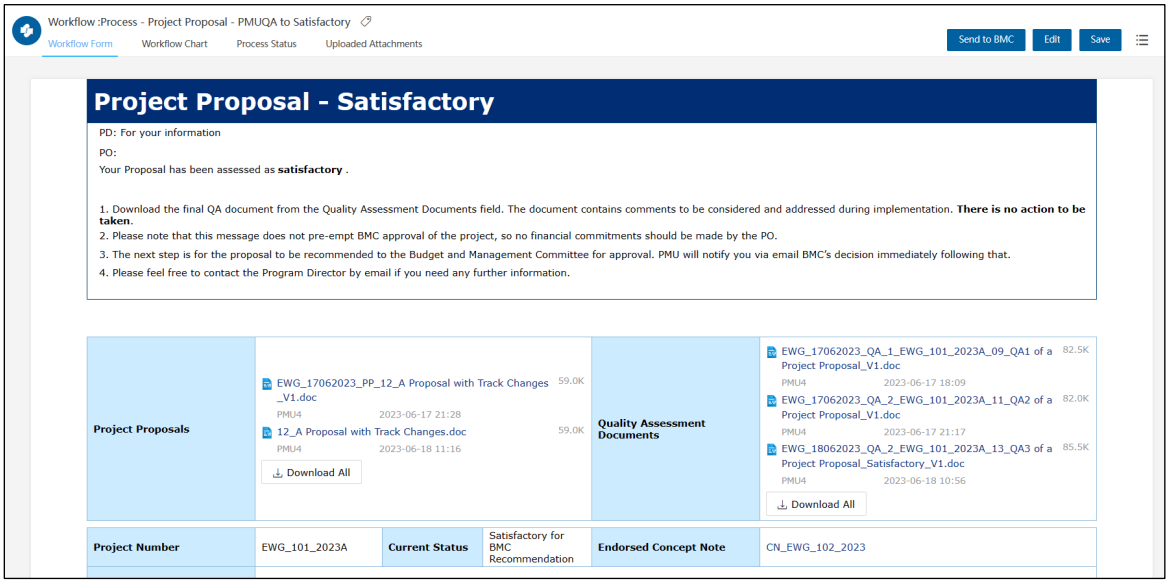
7. Click the **Satisfactory** button in the top right corner of the page.



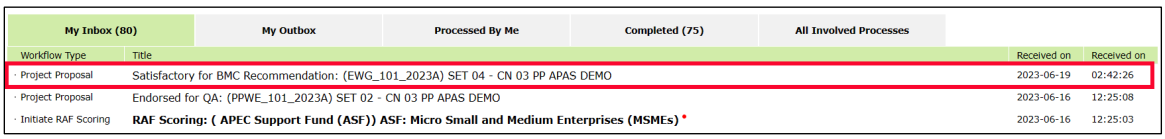
A confirmation message displays. Click **Yes** to continue.



The “Submitting Project Proposal. Please Wait” message displays until the satisfactory confirmation is completed. Then the Project Proposal – Satisfactory page displays.



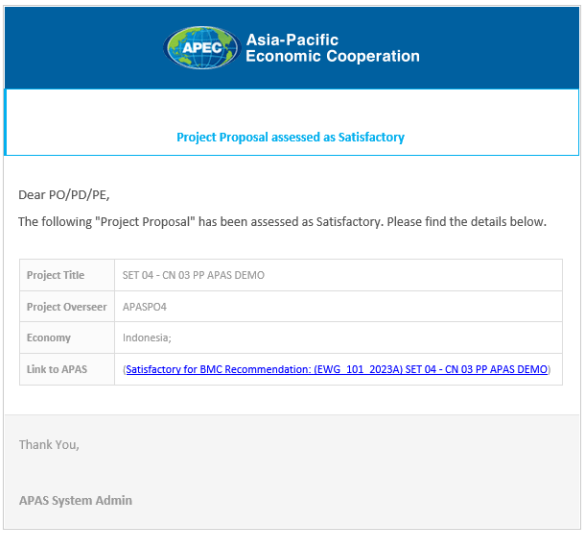
In your Dashboard, the Satisfactory for BMC Recommendation task displays in the **My Inbox** tab.



3.3.8 Receiving Satisfactory Project Proposals

PDs, PEs and POs receive emails notifications from APAS confirming that a Project Proposal was assessed as satisfactory. Examples of these two email notifications are shown below.

3.3.8.1 Email Notifications for a Satisfactory Project Proposal



Asia-Pacific Economic Cooperation

Project Proposal assessed as Satisfactory

Dear PO/PD/PE,

The following "Project Proposal" has been assessed as Satisfactory. Please find the details below.

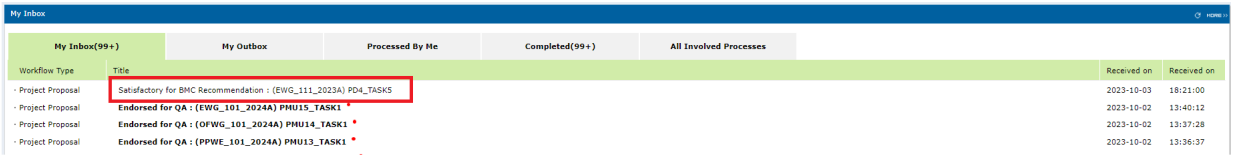
Project Title	SET 04 - CN 03 PP APAS DEMO
Project Overseer	APASPO4
Economy	Indonesia;
Link to APAS	(Satisfactory for BMC Recommendation: (EWG_101_2023A) SET 04 - CN 03 PP APAS DEMO)

Thank You,

APAS System Admin

3.3.8.2 Receive and Download Satisfactory Project Proposals

1. PDs, PEs and POs can log into APAS to see the Satisfactory Project Proposal to be recommended to BMC for final approval.

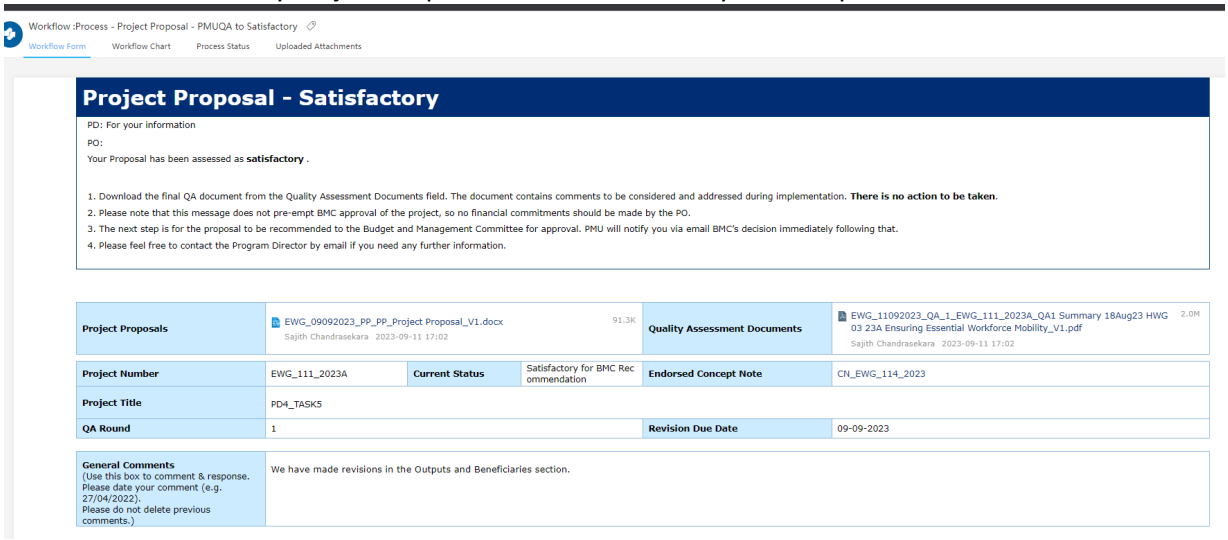


My Inbox

My Inbox(99+) | My Outbox | Processed By Me | Completed(99+) | All Involved Processes

Workflow Type	Title	Received on	Received on
Project Proposal	Satisfactory for BMC Recommendation : (EWG_111_2023A) PD4_TASK5	2023-10-03	18:21:00
Project Proposal	Endorsed for QA : (EWG_101_2024A) PMU15_TASK1	2023-10-02	13:40:12
Project Proposal	Endorsed for QA : (OFWG_101_2024A) PMU14_TASK1	2023-10-02	13:37:28
Project Proposal	Endorsed for QA : (PPWE_101_2024A) PMU13_TASK1	2023-10-02	13:36:37

2. Click on the Satisfactory Project Proposal and the Satisfactory screen opens in another tab.



Workflow :Process - Project Proposal - PMUQA to Satisfactory

Workflow Form | Workflow Chart | Process Status | Uploaded Attachments

Project Proposal - Satisfactory

PD: For your information

PO:

Your Proposal has been assessed as **satisfactory** .

1. Download the final QA document from the Quality Assessment Documents field. The document contains comments to be considered and addressed during implementation. **There is no action to be taken**.
2. Please note that this message does not pre-empt BMC approval of the project, so no financial commitments should be made by the PO.
3. The next step is for the proposal to be recommended to the Budget and Management Committee for approval. PMU will notify you via email BMC's decision immediately following that.
4. Please feel free to contact the Program Director by email if you need any further information.

Project Proposals	EWG_09092023_PP_PP_Project Proposal_V1.docx 91.3K Sajith Chandrasekara 2023-09-11 17:02			**Quality Assessment Documents**	EWG_11092023_QA_1_EWG_111_2023A_QA1 Summary 18Aug23 HWG 03 23A Ensuring Essential Workforce Mobility_V1.pdf 2.0M Sajith Chandrasekara 2023-09-11 17:02
Project Number	EWG_111_2023A	**Current Status**	Satisfactory for BMC Recommendation	**Endorsed Concept Note**	CN_EWG_114_2023
Project Title	PD4_TASK5				
QA Round	1			**Revision Due Date**	09-09-2023
General Comments (Use this box to comment & response. Please date your comment (e.g. 27/04/2022). Please do not delete previous comments.)	We have made revisions in the Outputs and Beneficiaries section.				

3. PDs, PEs and POs can download and save the final **Project Proposal** from the **Project Proposals** field.

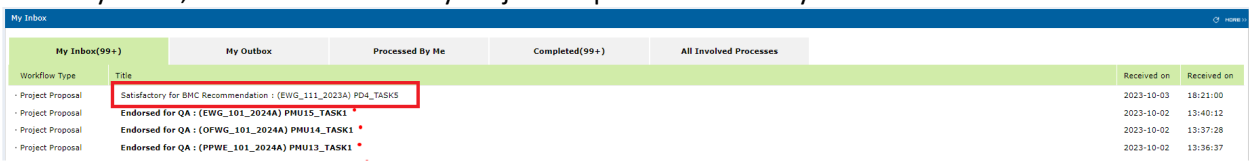
4. PDs, PEs and POs can download and save the final **QA Document** from the **Quality Assessment Documents** field.

Close the Satisfactory screen tab when completed the download task.

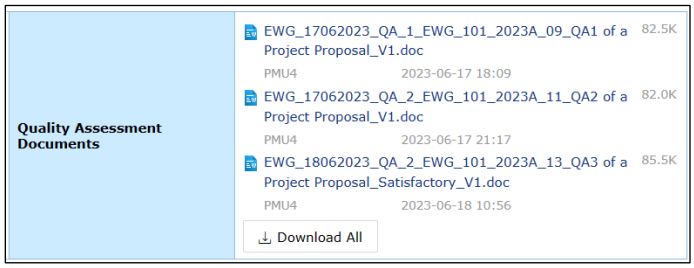
3.3.9 Sending a Satisfactory Project Proposal to the BMC for Approval

When a Project Proposal is assessed as satisfactory, the PMU follows these steps to send it to the BMC for approval:

1. From My Inbox, select the Satisfactory Project Proposal that is ready for BMC Recommendation.



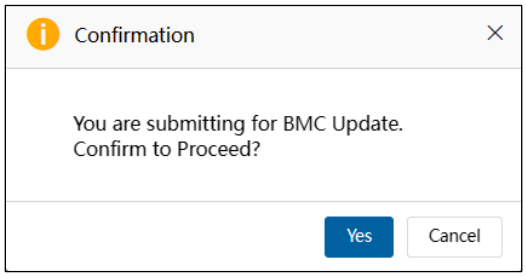
2. On the **Project Proposal – Satisfactory** page, verify that the last QA is uploaded in the **Quality Assessment Documents** field.



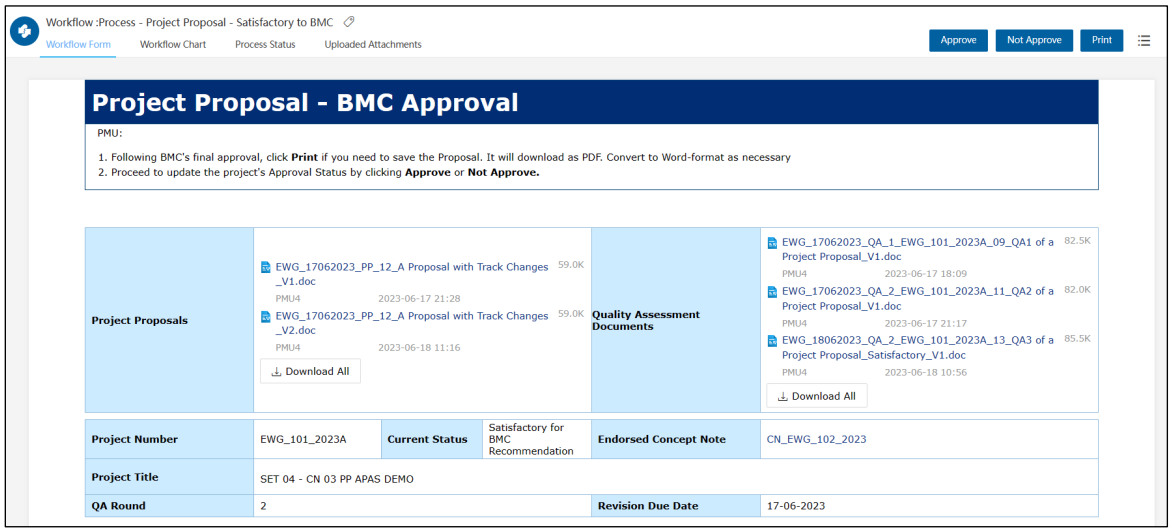
3. Verify that the final Project Proposal is uploaded in the Project Proposal field.

4. Click the **Send to BMC** button in the top right corner of the page.

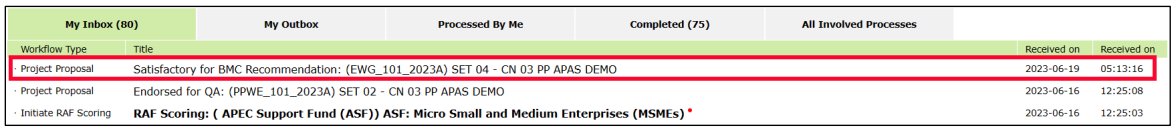
A confirmation message displays. Click **Yes** to continue.



The Project Proposal – BMC Approval page displays.



On the Dashboard, the task displays in the **My Inbox** tab.

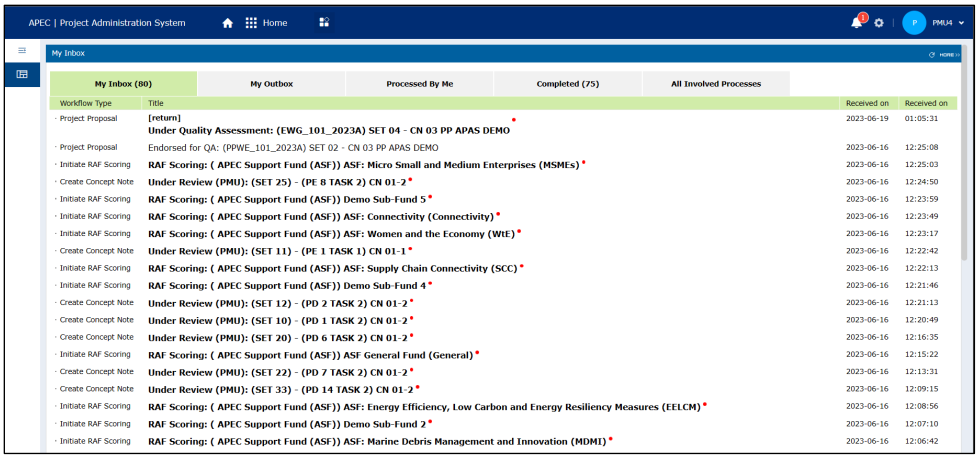


4. Final Project Approval and Letter of Acceptance

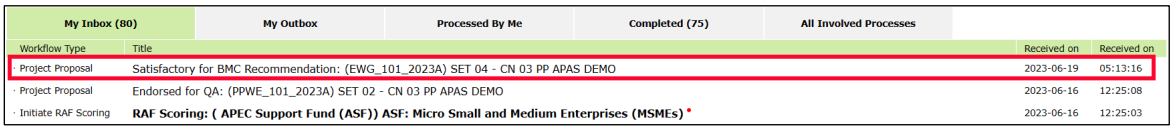
4.1 Approving the Project Proposal

After the BMC responds, the PMU updates the Project Proposal approval status by following these steps:

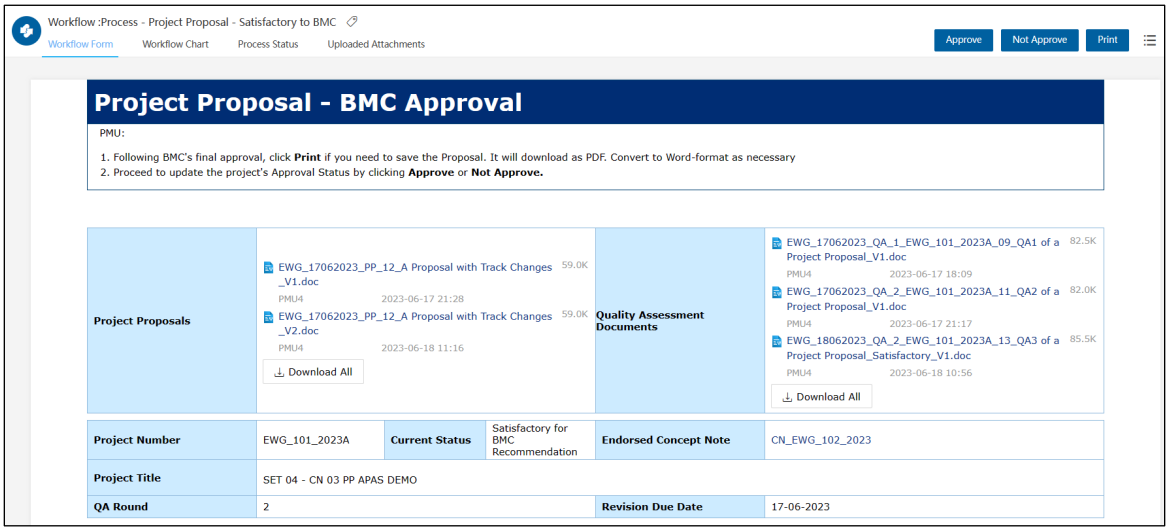
1. Log into APAS as a PMU user, if you're not logged in already. Your Dashboard displays.



2. In your inbox, look for the Satisfactory for BMC Recommendation task and click the task to open it.

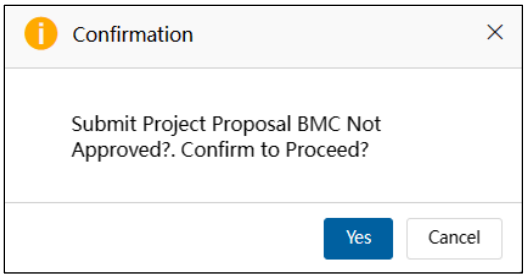


The Project Proposal – BMC Approval page displays in a separate tab.

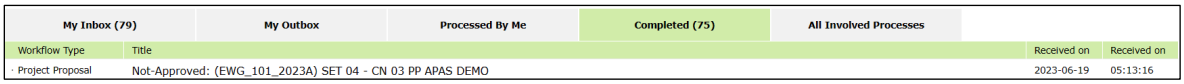


3. *(optional)* If the Project Proposal was not approved, click the **Not Approve** button at the top right corner of the page.

A confirmation message displays. Click **Yes** to continue.

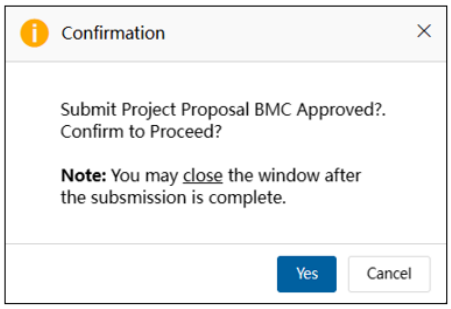


The “Submitting Approval. Please Wait.” message displays while the approval status is updated. The Project Proposal – BMC Approval page closes. In the Dashboard, the task moves to the **Completed** tab.



4. When the BMC approves the Project Proposal, click the **Approve** button at the top right corner of the page.

A confirmation message displays. Click **Yes** to continue.

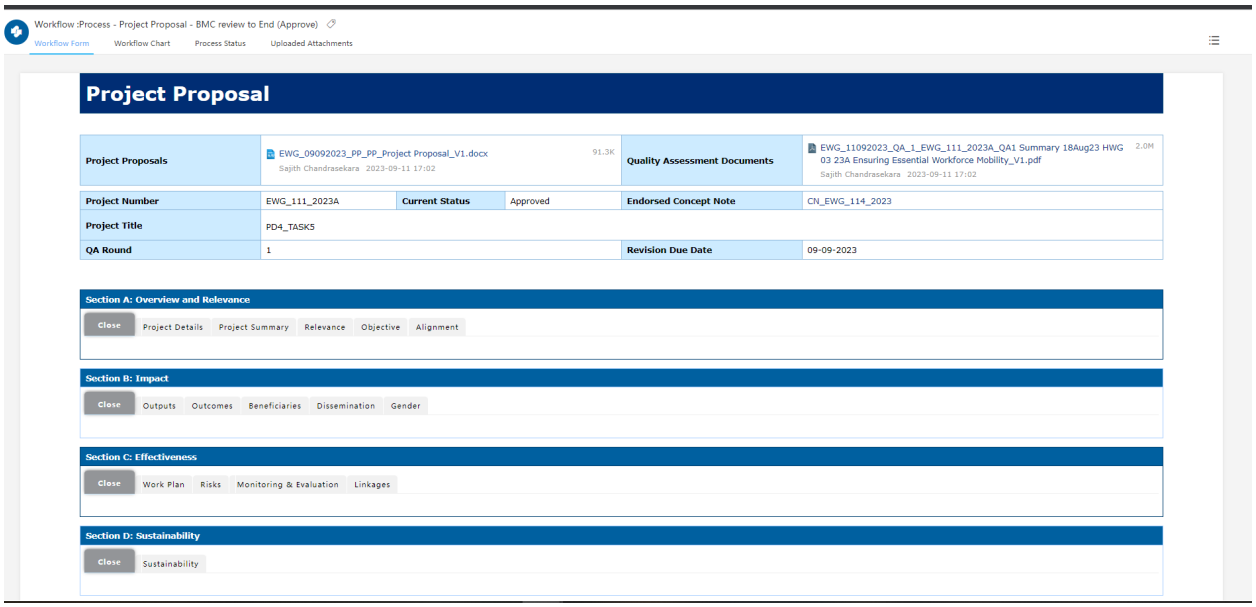


The “Submitting Approval. Please Wait.” message displays while the approval status is updated. The Project Proposal – BMC Approval page closes.

4.2 Receiving Approved Projects

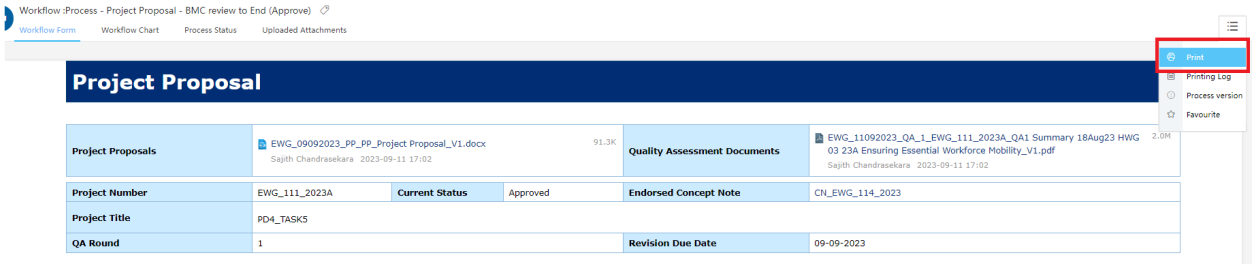
5. PDs, PEs and POs can log into APAS to see the Approved Projects by BMC.

6. Click on the Approved Project and the **final approved Project Proposal** screen opens in another tab.



7. PDs, PEs and POs can download and save the final **QA Document** from the **Quality Assessment Documents** field.

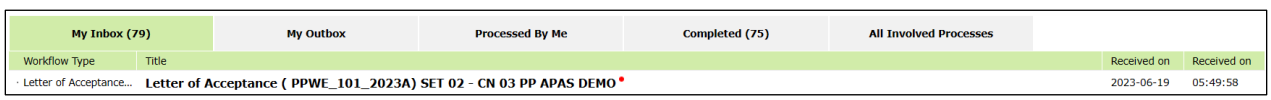
8. PDs, PEs and POs can download the final **Project Proposal** by going to the 3-bullet icon and select **Print**. Save the document as the final Project Proposal.



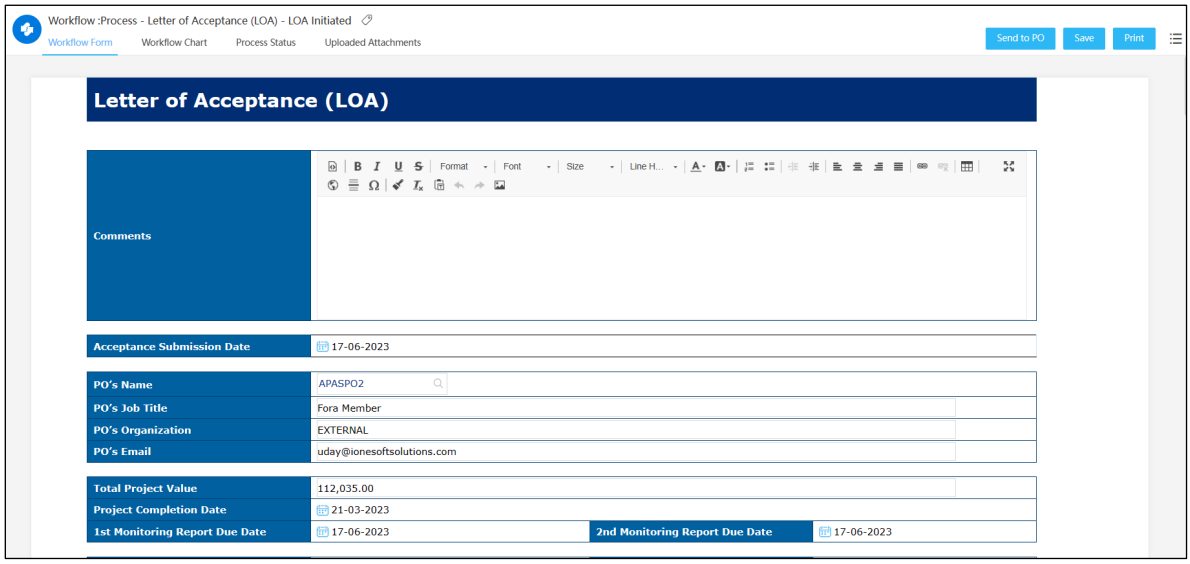
Close the Project Proposal screen tab when completed the download task.

4.3 Drafting the Letter of Acceptance

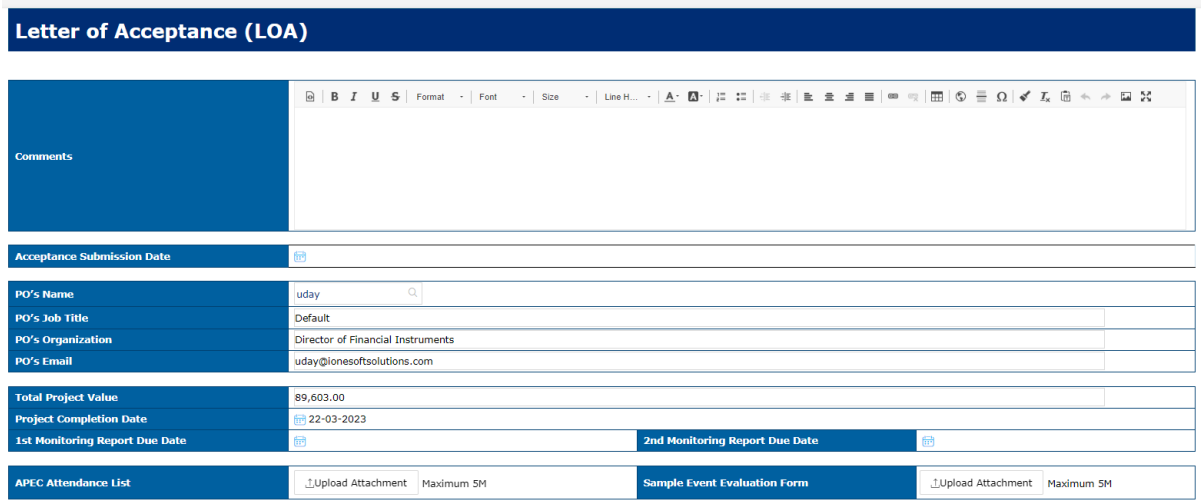
1. After PMU approves a Project, a **Letter of Acceptance** task displays in the **My Inbox** tab.



2. Click the **Letter of Acceptance** task in the **My Inbox** tab. The Letter of Acceptance (LOA) page displays.

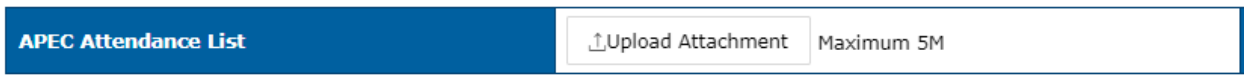


3. Review the pre-populated fields. Comment in the free-text **Comment** field.

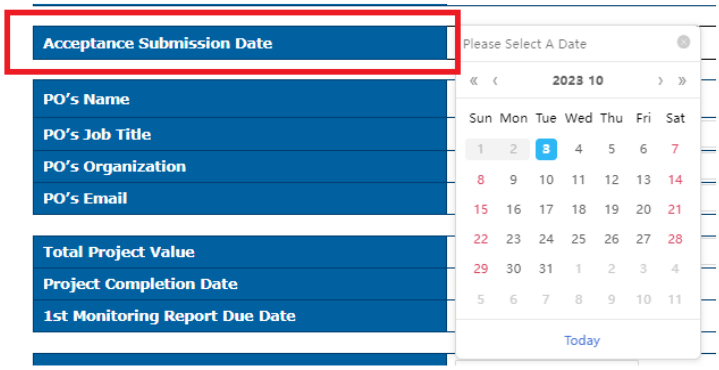


4. Attach the necessary document to **the Sample Event Evaluation** field.

5. Attach the Attendance List excel template in the **APEC Attendance List** field.

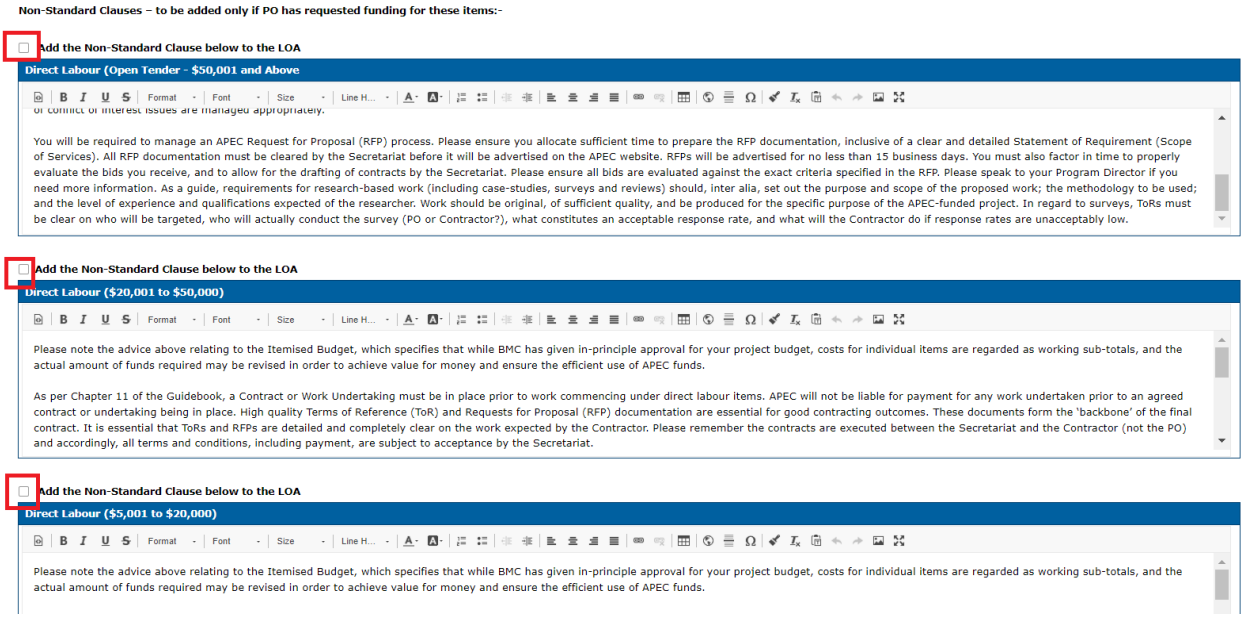


6. Select the **Acceptance Submission Date** from the calendar.

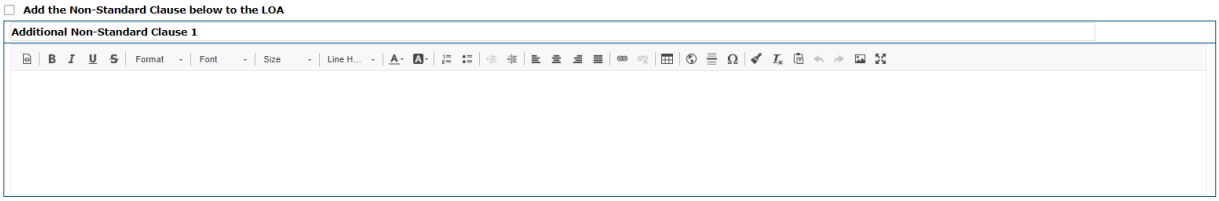


7. Select the two **Monitoring Report Due Dates** from the calendars, where applicable.

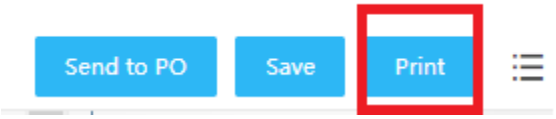
8. Add any **Non-Standard** clauses by checking the applicable box next to the clause.



9. Add any free text **Non-Standard** clause and check the box next to the clause.

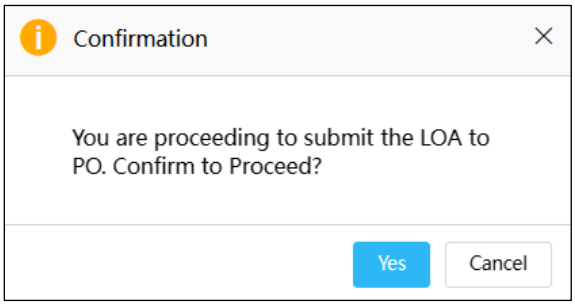


10. You may **Save** or **Print** to download the LOA to verify the content.

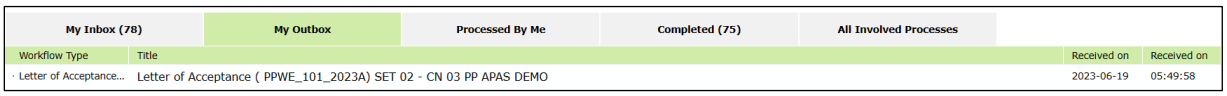


11. After you finish the review, click **Send to PO**.

A confirmation message displays. Click **Yes** to continue.

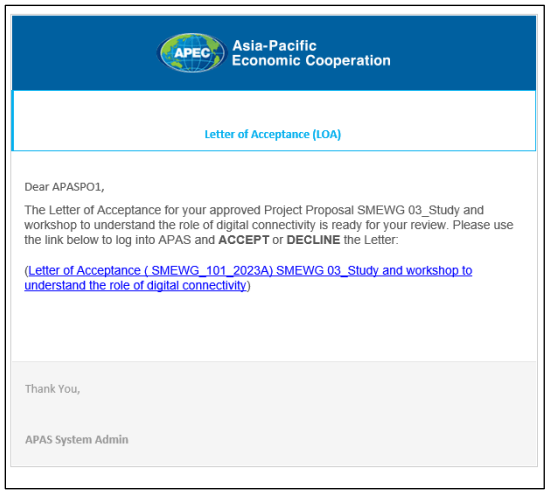


The “Submitting LOA. Please Wait.” message displays while the Letter of Acceptance is sent to the PO. The Letter of Acceptance (LOA) page closes. In the Dashboard, a **Letter of Acceptance** task moves to the **My Outbox** tab.



4.4 Accepting or Rejecting the Letter of Acceptance

When the PO receives an email notification that the Letter of Acceptance is ready to be drafted, they follow these steps to complete the draft:


Asia-Pacific Economic Cooperation

Letter of Acceptance (LOA)

Dear APASPO1,

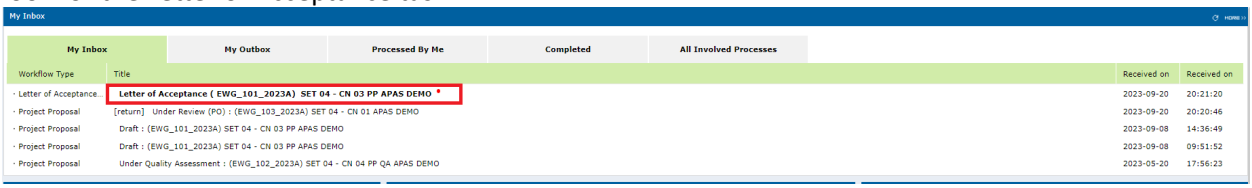
The Letter of Acceptance for your approved Project Proposal SMEWG 03_Study and workshop to understand the role of digital connectivity is ready for your review. Please use the link below to log into APAS and **ACCEPT** or **DECLINE** the Letter:

(Letter of Acceptance (SMEWG_101_2023A) SMEWG 03_Study and workshop to understand the role of digital connectivity)

Thank You,

APAS System Admin

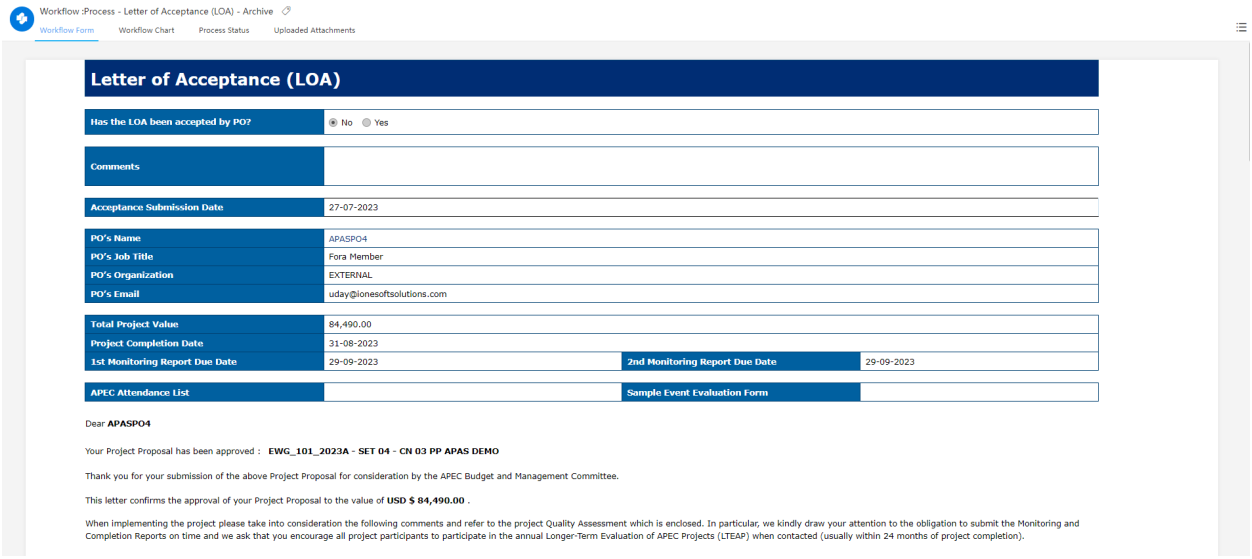
1. Log into APAS as a PO user, if you're not logged in already. Your Dashboard displays. In your inbox, look for the Letter of Acceptance task.


My Inbox

My Inbox | My Outbox | Processed By Me | Completed | All Involved Processes

Workflow Type	Title	Received on	Received on
Letter of Acceptance	Letter of Acceptance (EWG_101_2023A) SET 04 - CN 03 PP APAS DEMO	2023-09-20	20:21:20
Project Proposal	[return] Under Review (PO) : (EWG_103_2023A) SET 04 - CN 01 APAS DEMO	2023-09-20	20:20:46
Project Proposal	Draft : (EWG_101_2023A) SET 04 - CN 03 PP APAS DEMO	2023-09-08	14:36:49
Project Proposal	Draft : (EWG_101_2023A) SET 04 - CN 03 PP APAS DEMO	2023-09-08	09:51:52
Project Proposal	Under Quality Assessment : (EWG_102_2023A) SET 04 - CN 04 PP QA APAS DEMO	2023-05-20	17:56:23

2. Click the task to open. The Letter of Acceptance (LOA) screen opens in another tab.


Workflow :Process - Letter of Acceptance (LOA) - Archive

Workflow Form | Workflow Chart | Process Status | Uploaded Attachments

Letter of Acceptance (LOA)

Has the LOA been accepted by PO?	◉ No ○ Yes		
Comments			
Acceptance Submission Date	27-07-2023		
PO's Name	APASPO4		
PO's Job Title	Fora Member		
PO's Organization	EXTERNAL		
PO's Email	uday@lonesoftsolutions.com		
Total Project Value	84,490.00		
Project Completion Date	31-08-2023		
1st Monitoring Report Due Date	29-09-2023	2nd Monitoring Report Due Date	29-09-2023
APEC Attendance List		Sample Event Evaluation Form	

Dear **APASPO4**

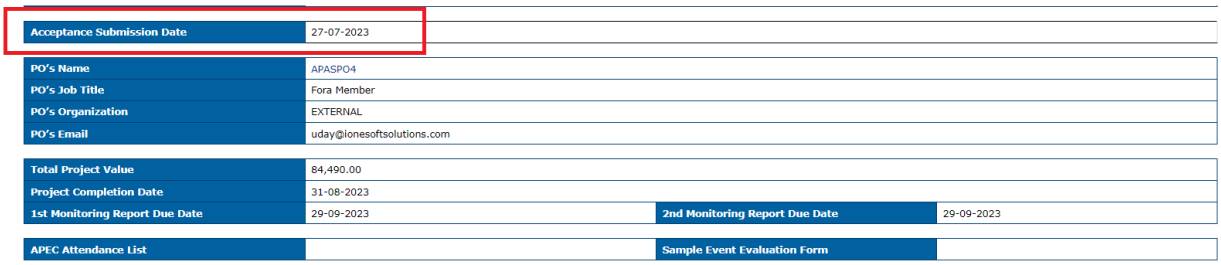
Your Project Proposal has been approved : **EWG_101_2023A - SET 04 - CN 03 PP APAS DEMO**

Thank you for your submission of the above Project Proposal for consideration by the APEC Budget and Management Committee.

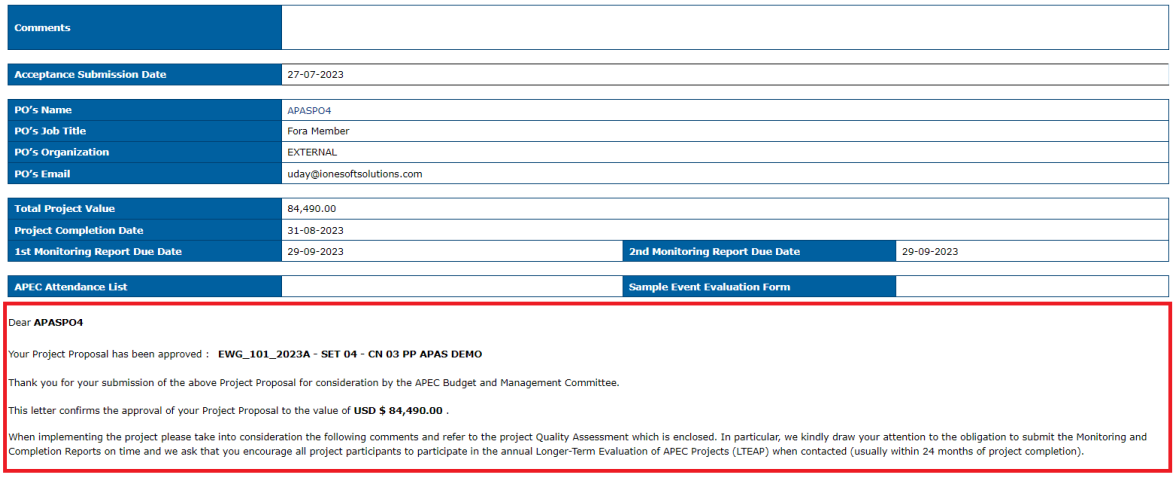
This letter confirms the approval of your Project Proposal to the value of **USD $ 84,490.00** .

When implementing the project please take into consideration the following comments and refer to the project Quality Assessment which is enclosed. In particular, we kindly draw your attention to the obligation to submit the Monitoring and Completion Reports on time and we ask that you encourage all project participants to participate in the annual Longer-Term Evaluation of APEC Projects (LTEAP) when contacted (usually within 24 months of project completion).

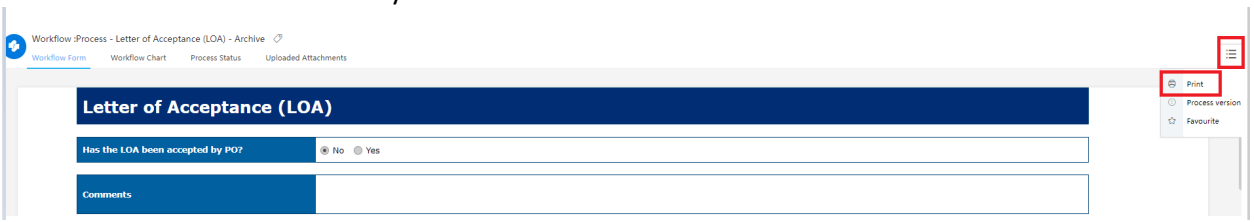
3. Review the important fields containing basic information about the project, such as Project Title, the PO's email, Total Project Value, Project Completion Date and the two Monitoring Report due dates. Note the Acceptance Submission Date.



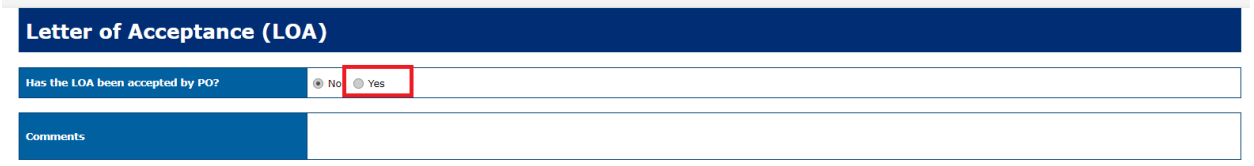
4. Read the comments in the **Comments** field.



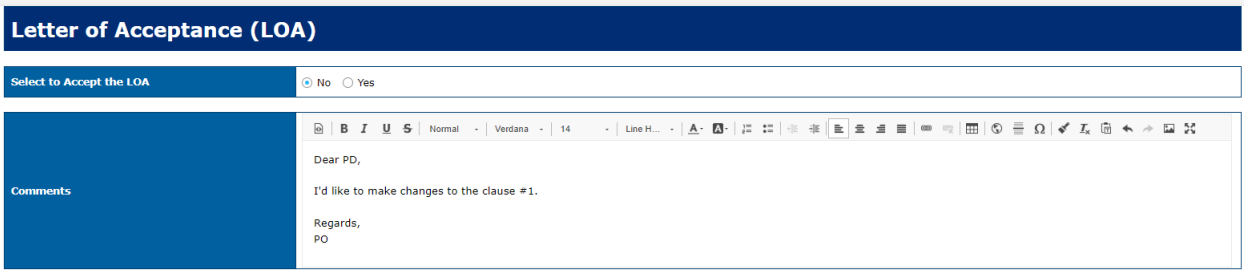
5. Download the **Sample Event Evaluation** document and the **APEC Attendance List** excel template.
6. Print to review the LOA and verify the content.



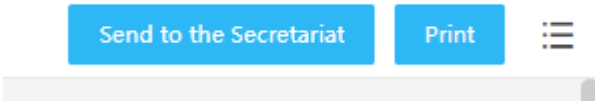
7. Back on APAS, click **Yes** to accept the Letter of Acceptance.



8. If changes to the LOA are necessary, click **No**. Provide comments in the Comments field to be received by the PD or PE.

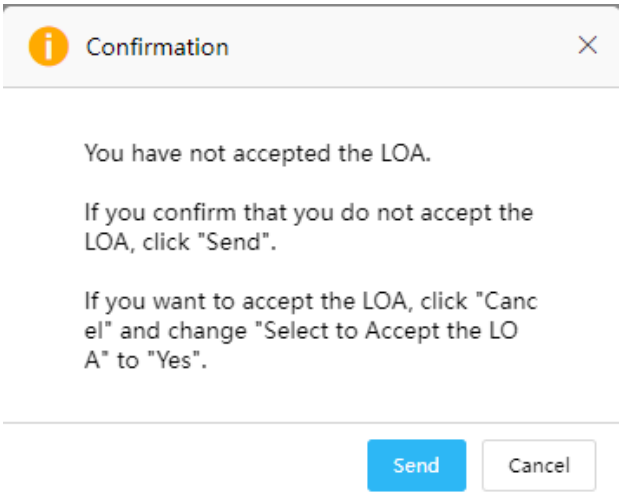


9. Click **Send to the Secretariat**.



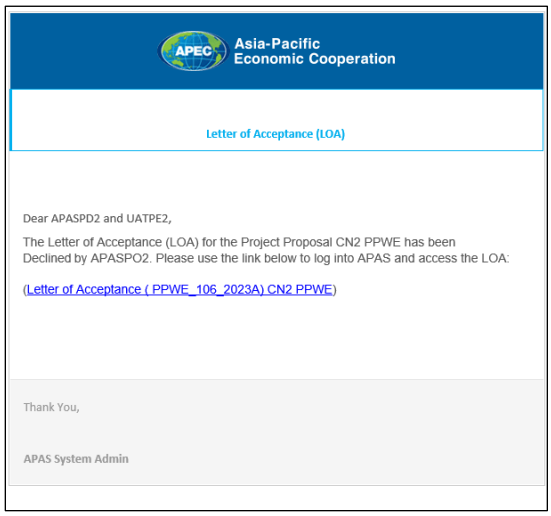
A confirmation message comes up. Click **Send** if you do not accept the LOA.

Otherwise, click **Cancel** and Change the Accept LOA to '**yes**'.



4.5 Reviewing the Letter of Acceptance

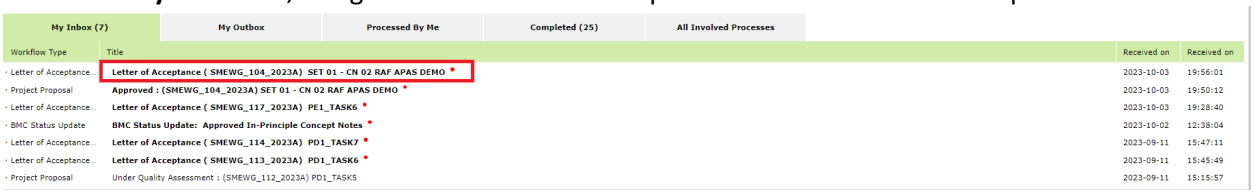
If the Letter of Acceptance was not accepted, the PD or PE receives an email notification that the Letter of Acceptance needs to be revised.



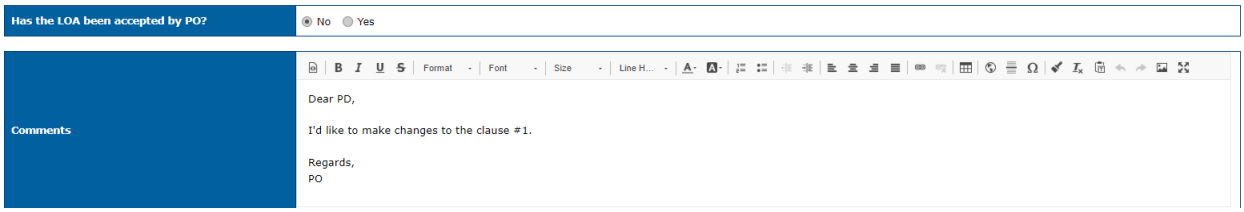
The PD or PE then follows these steps to review the LOA.

1. Log into APAS as a PD or PE user, if you're not logged in already. Your Dashboard displays.

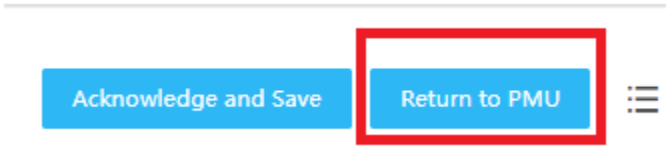
2. In the **My Inbox** tab, navigate to the Letter of Acceptance task and click on it to open it.



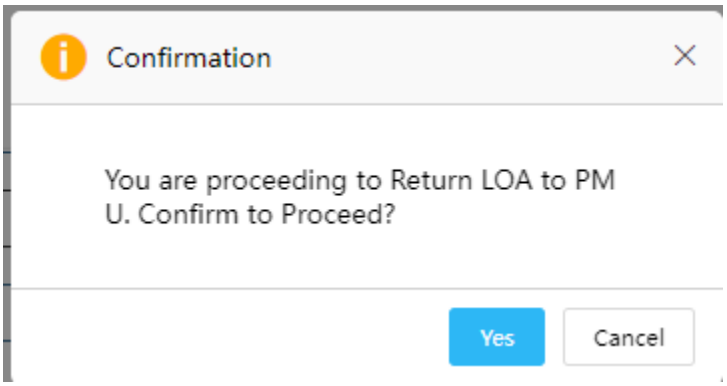
3. Review that In the **Has the LOA been accepted by the PO** field, the **No** button is selected by the PO. Read the PO's comments.



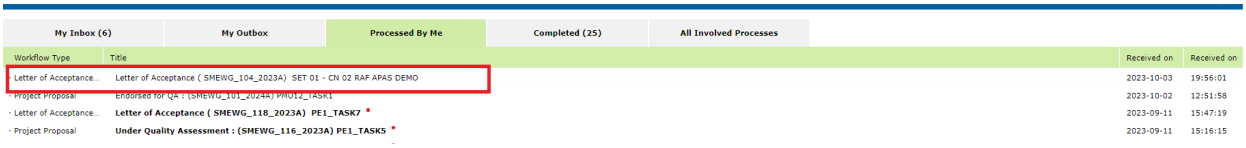
4. Click the **Return to PMU** button in the top right corner of the screen.



A confirmation message comes up. Click **Yes to** continue.



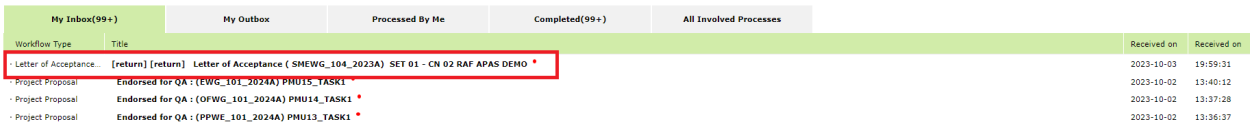
In the Dashboard, in the Process by Me tab, the Letter of Acceptance task displays, indicating that the task has been completed by the user.



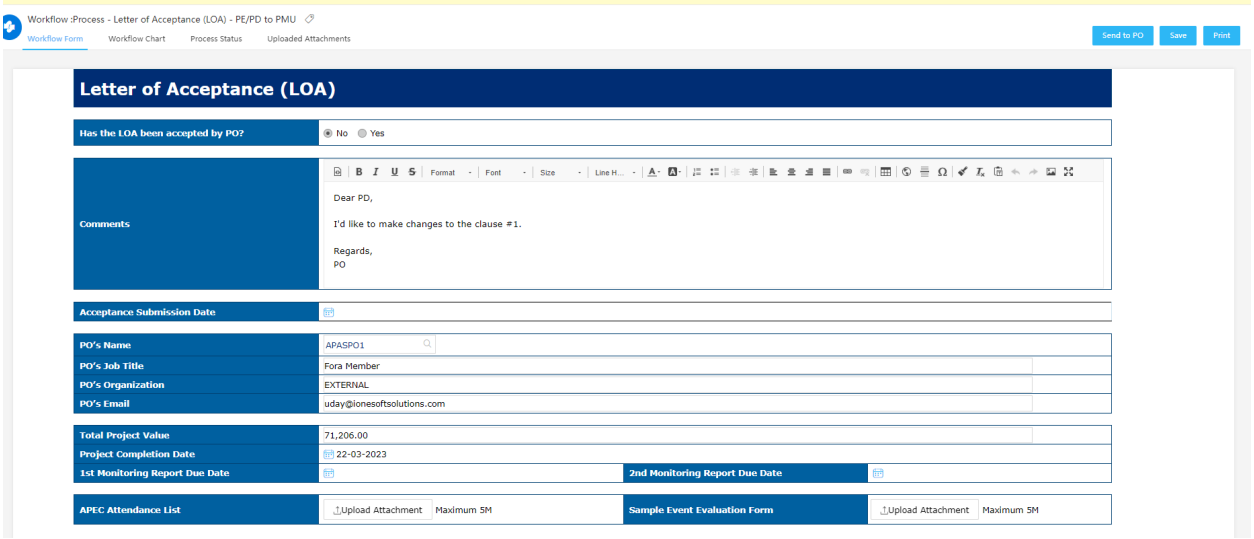
4.6 Revising the Letter of Acceptance

The PMU user follows these steps to revise the LOA:

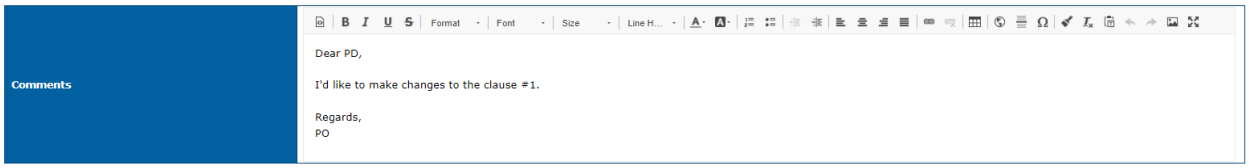
1. Log into APAS as a PMU user. Your Dashboard displays.
2. In the **My Inbox** tab, navigate to the Letter of Acceptance that has been returned to PMU. Click on the task to open it.



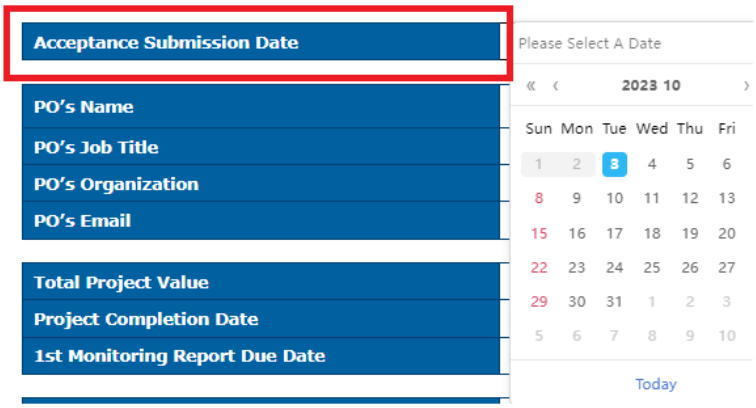
3. The Letter of Acceptance screen open in another tab.



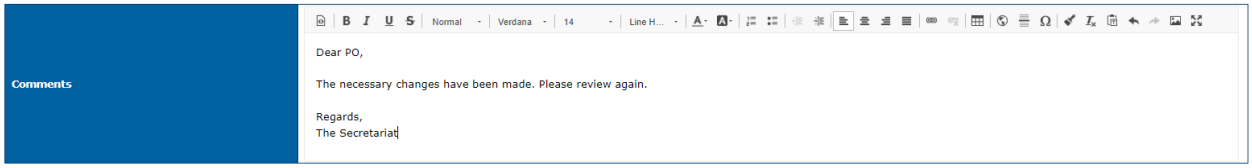
4. Read the comment given by the PO or the PD or PE.



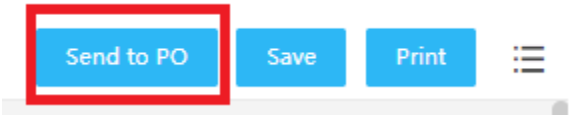
5. Make the necessary revisions on the screen. Revise the **Acceptance Submission Date**.



6. Provide the necessary comments in the **Comments** field.



7. **Print** the current LOA if necessary. Click **Send to PO** to return the Letter of Acceptance to the PO.



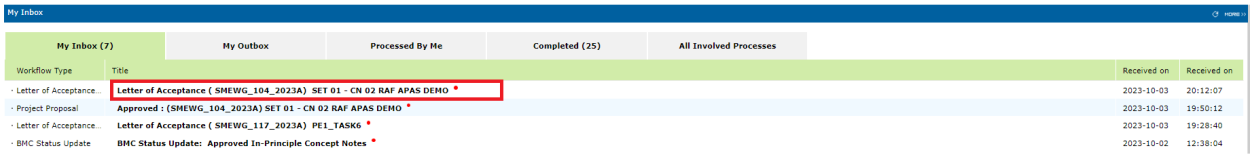
The PO will receive the LOA and accept the document, following the steps indicated in **4.4 Accepting or Rejecting the Letter of Acceptance** of the User Guide.

4.7 Acknowledging Receipt of the Letter of Acceptance

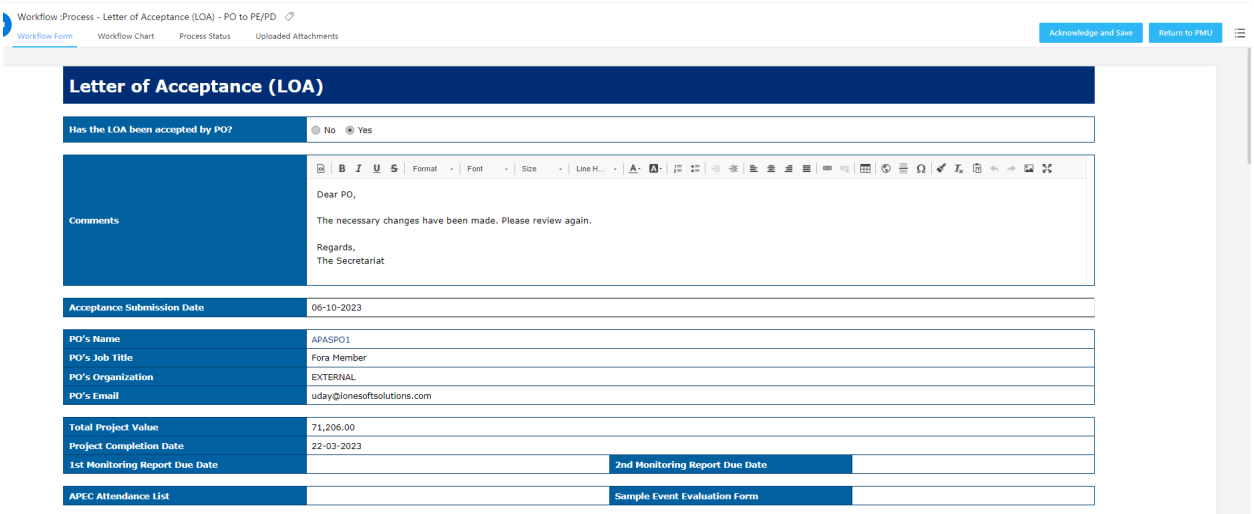
After the PO **accept**s the Letter of Acceptance, the PD or PE receives the following email notification:

The PD or PE then follows these steps to acknowledge they received the Letter of Acceptance:

1. Log into APAS as a PD or PE user, if you're not logged in already. Your Dashboard displays.
2. Navigate to the **My Inbox** tab, look for the **Letter of Acceptance** task, and click the task to open it.

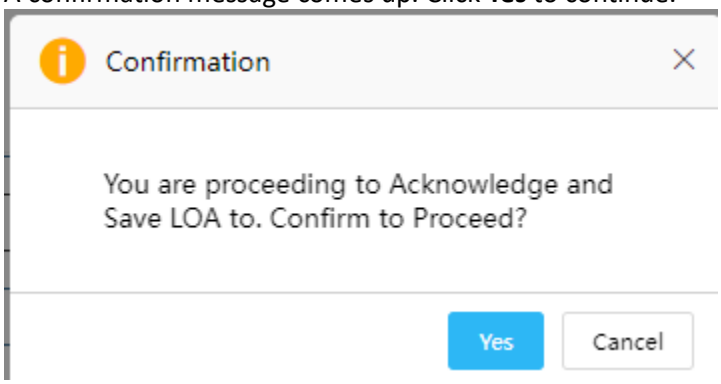


3. The Letter of Acceptance screen displays in another tab.

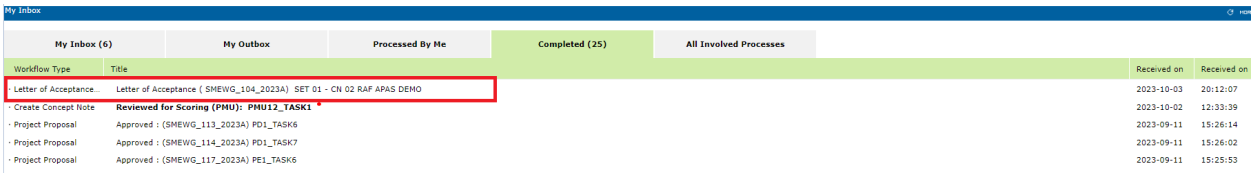


4. Review that in the **Has the LOA been accepted by the PO** section, the **Yes** button is selected.
5. Click the **Acknowledge and Save** button to complete the process.

A confirmation message comes up. Click **Yes** to continue.



The LOA screen closes. In the Dashboard, under the Completed Tab, the Letter of Acceptance task shows completed.



6. An email notification will be sent to the **PO, PMU**, and **PD or PE** informing them that the Letter of Acceptance has been acknowledged.