

ENDA Mifos Configuration and Setup

Prepared by Ryan Whitney, Lassâad Ben Hadj and Khaled Jamel

Table of Contents

<i>Office Hierarchy</i>	2
<i>Fees</i>	2
<i>Funding</i>	3
<i>Holiday Schedule</i>	4
<i>Payment Types</i>	5
<i>Organizational Settings</i>	6
<i>Lookup Options</i>	7
<i>Mandatory Fields</i>	8
<i>Additional Fields</i>	8
Clients	8
Loans	8
<i>Loan Products</i>	9
Product Categories	9
Lateness and Dormancy Settings	9
Products	10
Product Mix	10
Roles & Permissions	11
Database Settings	12
applicationConfiguration.custom.properties	13

For more details, please visit the wiki page at:

<http://www.mifos.org/knowledge/deployment-project-pages/enda-tunisia/configuration>

Mifos Admin Page

Office Hierarchy

[Admin](#) / [View office hierarchy](#)

View office hierarchy

The office hierarchy can have minimum two and maximum five levels

Check the levels to be included.

Note: The highest and lowest hierarchy levels cannot be removed from the system.

- Head Office
- Regional Office
- Divisional Office
- Area Office
- Branch Office

Fees

One fee has been created to match with each loan.

[Admin](#) / [View Fees](#)

View Fees

Click on a fee below to view details and make changes or [define a new fee](#)

Product Fees

- o [Frais Eddar](#) (Loans)
- o [Frais Elevage1](#) (Loans)
- o [Frais Fardi JADID](#) (Loans)
- o [Frais Fardi Jadid2](#) (Loans)
- o [Frais Fardi TATOUIR](#) (Loans)
- o [Frais Fardi Tatouir2](#) (Loans)
- o [Frais Forsa](#) (Loans)
- o [Frais Groupe Solidaire2](#) (Loans)
- o [Frais Istithmar](#) (Loans)
- o [Frais Istithmar2](#) (Loans)
- o [Frais MACHROUE KEBIR](#) (Loans)
- o [Frais Majmouaâ Jadid](#) (Loans)
- o [Frais Majmouaâ TATOUIR](#) (Loans)
- o [Frais OldGroup](#) (Loans)
- o [Frais OldIndividuale](#) (Loans)
- o [Frais Parallele](#) (Loans)
- o [Frais Solfa](#) (Loans)
- o [Frais Taâlim](#) (Loans)

Client Fees

Funding

ENDA has entered in donor names to match previous funding in Al-Faten.

[Admin / View funds](#)

View funds

Name	Fund code	
Non Donor	00	Edit
Funding Org A	00	Edit
Funding Org B	00	Edit
Funding Org C	00	Edit
Funding Org D	00	Edit
NO_Donor	00	Edit
INTERMON	00	Edit
MAFF	00	Edit
EMAUS_int	00	Edit
CI	00	Edit
CE	00	Edit
IPADE	00	Edit
Autres	00	Edit
Crenda_RLF	00	Edit
INTERMON_3	00	Edit
ICCO	00	Edit
AGFUND	00	Edit

Holiday Schedule

[Admin](#) / [View Holidays - Organization Wide](#)

View Holidays - Organization Wide

Below is the list of organization wide holidays. Click here to [Add a new holiday](#)

Holidays for year 2009

From Date	To Date	Holiday Name	Repayment Rule
2009-01-01	2009-01-01	Jour de l'an	Next Working Day
2009-02-25	2009-03-01	Mawlid	Next Working Day
2009-03-20	2009-03-20	Fete de l'Independance	Next Working Day
2009-03-21	2009-03-21	Fete de la jeunesse	Next Working Day
2009-04-09	2009-04-09	Journée des Martyrs	Next Working Day
2009-05-01	2009-05-01	Fete du travail	Next Working Day
2009-06-25	2009-06-25	Fete de la republique	Next Working Day
2009-08-13	2009-08-13	Fete de la femme famille	Next Working Day
2009-09-18	2009-09-22	Aid_el_Fitr	Next Working Day
2009-11-07	2009-11-07	Celebration du 07 Nov	Next Working Day
2009-11-26	2009-11-30	Aid el adha	Next Working Day
2009-12-15	2009-12-20	Awel Moharem	Next Working Day

Payment Types

[Admin](#) / Define Accepted Payment Types

Define Accepted Payment Types

Specify the accepted payment types below. Click on a payment type in the left box to select. Then click Add. To remove, click on a payment type on the right box to select. Then click remove.

Clients / Groups / Centers

Fees:	<div style="border: 1px solid gray; padding: 2px;">Voucher</div>	<div style="border: 1px solid gray; padding: 2px;">Cash</div> <div style="border: 1px solid gray; padding: 2px;">Cheque</div>
		<div style="border: 1px solid gray; padding: 2px; text-align: center;">Add >></div> <div style="border: 1px solid gray; padding: 2px; text-align: center;"><< Remove</div>

Loans:

Disbursements:	<div style="border: 1px solid gray; padding: 2px;">Voucher</div>	<div style="border: 1px solid gray; padding: 2px;">Cash</div> <div style="border: 1px solid gray; padding: 2px;">Cheque</div>
		<div style="border: 1px solid gray; padding: 2px; text-align: center;">Add >></div> <div style="border: 1px solid gray; padding: 2px; text-align: center;"><< Remove</div>
Repayments:	<div style="border: 1px solid gray; padding: 2px;">Voucher</div>	<div style="border: 1px solid gray; padding: 2px;">Cash</div> <div style="border: 1px solid gray; padding: 2px;">Cheque</div>
		<div style="border: 1px solid gray; padding: 2px; text-align: center;">Add >></div> <div style="border: 1px solid gray; padding: 2px; text-align: center;"><< Remove</div>

Savings:

Withdrawals:	<div style="border: 1px solid gray; padding: 2px;">Voucher</div> <div style="border: 1px solid gray; padding: 2px;">Cheque</div>	<div style="border: 1px solid gray; padding: 2px;">Cash</div>
		<div style="border: 1px solid gray; padding: 2px; text-align: center;">Add >></div> <div style="border: 1px solid gray; padding: 2px; text-align: center;"><< Remove</div>
Deposits:	<div style="border: 1px solid gray; padding: 2px;">Voucher</div> <div style="border: 1px solid gray; padding: 2px;">Cheque</div>	<div style="border: 1px solid gray; padding: 2px;">Cash</div>
		<div style="border: 1px solid gray; padding: 2px; text-align: center;">Add >></div> <div style="border: 1px solid gray; padding: 2px; text-align: center;"><< Remove</div>

Organizational Settings

[Admin](#) / **Organizational Settings**

Organizational Settings

Fiscal year

Working days: Monday, Tuesday, Wednesday, Thursday, Friday

Allow calendar definition for next year: 30 days before end of current year

Start of Week: Monday

Off days: Sunday, Saturday

Week days: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday

Meeting in case of a holiday: same_day

Locale

Country: GB

Language: EN

Accounting rules

Currency: TND

Maximum Interest: 999.0

Minimum Interest: 0.0

Number of digits after decimal: 1

Number of digits before decimal: 7

Number of digits after decimal for interest: 1

Number of digits before decimal for interest: 0.0

Number of interest days: 365

Client rules

Center hierarchy exists: No

Groups allowed to apply for loans: Yes

Client can exist outside group: Yes

Name sequence: first_name, middle_name, last_name, second_last_name

Process flow / optional state

Client pending approval state enabled: Yes

Group pending approval state enabled: Yes

Loan disbursed to loan officer state enabled: No

Loan pending approval state enabled: Yes

Savings pending approval state enabled: Yes

Miscellaneous

Session timeout: : 30 minutes

Number of days in advance the collection sheet should be generated: 1

Back dated transactions allowed: No

Lookup Options

[Admin](#) / Define Lookup Options

Define Lookup Options

Salutation:
Mme
Mlle

User Title:

Marital Status:
Marié(e)
Divorcé(é)
Veuf(ve)

Ethnicity:

Education level:
Peut lire et ecrire
Primaire
Secondaire cycle 1
Secondaire cycle 2

Citizenship:
Autres

Business Activity:

Purpose of Loan:
Articles_de_decor
Aviculture
Batiment
Bijouterie

Mandatory Fields

Client / system users fields	Hide	Mandatory
Middle name	<input type="checkbox"/>	
Second last name	<input type="checkbox"/>	<input type="checkbox"/>
Government ID	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Additional Fields

Clients

[Admin / View Additional Fields / Client](#)

Client - [View Additional Fields](#)

Sequence No.	Label	Data Type	Default Value	Mandatory	
1	Date de démarrage du projet	Text		No	Edit
2	Introduit par	Text		No	Edit
3	Notes	Text		No	Edit

Loans

[Admin / View Additional Fields / Loan](#)

Loan - [View Additional Fields](#)

Sequence No.	Label	Data Type	Default Value	Mandatory	
1	Utilisation du prêt	Text		Yes	Edit
2	Raison du prêt	Text		Yes	Edit
3	Patente	Text		Yes	Edit
4	Type de la micro-entreprise	Text		Yes	Edit

Loan Products

Product Categories

[Admin/](#) **View Product Categories**

View Product Categories

Click on a category below to view details and make changes or [define a new product category](#)

Loan

- o [Other](#)
- o [Prêt Enda](#)

Savings

- o [Other](#)

Lateness and Dormancy Settings

[Admin /](#) **View Lateness/Dormancy Definition**

Set Lateness Definition

Loan

Specify the number of days of non-payment after which status of Loan account is changed to "In Arrears" by the system: days

Set Dormancy Definition

Savings

Specify the number of days to define "Dormancy" in Savings Accounts. The account status will be changed to "On Hold" by the system: days

Products

[Admin](#) / **View Loan products**

View Loan products

Click on a Loan product below to view details and make changes or [Define a new Loan product](#).

- o [Eddar](#)
- o [Elevage1](#)
- o [Elevage2](#)
- o [Fardi JADID](#) ■ Inactive
- o [Fardi Jadid2](#)
- o [Fardi TATOUIR](#) ■ Inactive
- o [Fardi Tatouir2](#)
- o [Forca](#)
- o [Groupe Solidaire2](#)
- o [Istithmar](#) ■ Inactive
- o [Istithmar2](#) ■ Inactive
- o [MACHROUE KEBIR](#) ■ Inactive
- o [Majmouaâ Jadid](#) ■ Inactive
- o [Majmouaâ TATOUIR](#) ■ Inactive
- o [OldGroup](#) ■ Inactive
- o [OldIndividual](#) ■ Inactive
- o [Parallele](#) ■ Inactive
- o [Pret Sinistre](#)
- o [Soifa](#)
- o [Taâlim](#)

Product Mix

[Admin](#) / **View Product Mix**

View product mix

Click on a product instance below to view mix details and make changes or [Define mix for a new product](#)

Loan

- o [Eddar](#)
- o [Elevage1](#)
- o [Elevage2](#)
- o [Fardi Jadid2](#)
- o [Fardi Tatouir2](#)
- o [Forca](#)
- o [Groupe Solidaire2](#)
- o [Pret Sinistre](#)
- o [Soifa](#)
- o [Taâlim](#)

Roles & Permissions

[Admin](#) / Roles and permissions

Roles and permissions

A role is the name for set of users with like permissions for system tasks. Select name and task permissions. You can also add a [new Role](#)

Admin	Delete role
Agent de Cr�dit	Delete role
Caissier/Agent administratif	Delete role
Coordinateur R�gional	Delete role
Gestionnaire caisse	Delete role
Superviseur	Delete role

Database Settings

The following settings will be enabled and/or set:

- loanIndividualMonitoringIsEnabled (LSIM) = Enabled
- repaymentSchedulesIndependentOfMeetingsEnabled (GLIM) = Enabled
- minDaysBetweenDisbursalAndFirstRepaymentDay = 30
- maxDaysBetweenDisbursalAndFirstRepaymentDay = 45

applicationConfiguration.custom.properties

Most settings can be viewed under Organizational Settings. Additional settings not covered are listed below

- CollectionSheet.DaysInAdvance=1
- AccountingRules.CurrencyRoundingMode=CEILING
- AccountingRules.InitialRoundingMode=CEILING
- AccountingRules.FinalRoundingMode=CEILING
- AccountingRules.FinalRoundOffMultiple=0.1
- AccountingRules.InitialRoundOffMultiple=0.5
- GeneralConfig.PerCenterTimeOutForBulkEntry=10
- GeneralConfig.MaxPointsPerPPISurvey=101