# ENDA Mifos Configuration and Setup

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For more details, please visit the wiki page at:
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.

View Fees
Click on a fee below to view details and make changes or define a new fee

Product Fees
- Frais Effar (Loans)
- Frais Elevage (Loans)
- Frais Fardj Jadid (Loans)
- Frais Fardj Jadid2 (Loans)
- Frais Fardj Tatouir (Loans)
- Frais Fardj Tatouir2 (Loans)
- Frais Fora (Loans)
- Frais Groupe Solidaire2 (Loans)
- Frais Istithmar (Loans)
- Frais Istithmar2 (Loans)
- Frais MACHROUE KEBIR (Loans)
- Frais Maimoua Jadid (Loans)
- Frais Maimoua Tatouir (Loans)
- Frais OlGroup (Loans)
- Frais Olig individual (Loans)
- Frais Parallele (Loans)
- Frais Solfa (Loans)
- Frais Ta'lim (Loans)

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

<table>
<thead>
<tr>
<th>Name</th>
<th>Fund code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non Donor</td>
<td>00</td>
</tr>
<tr>
<td>Funding Org A</td>
<td>00</td>
</tr>
<tr>
<td>Funding Org B</td>
<td>00</td>
</tr>
<tr>
<td>Funding Org C</td>
<td>00</td>
</tr>
<tr>
<td>Funding Org D</td>
<td>00</td>
</tr>
<tr>
<td>NO_Donor</td>
<td>00</td>
</tr>
<tr>
<td>INTERMON</td>
<td>00</td>
</tr>
<tr>
<td>MAFF</td>
<td>00</td>
</tr>
<tr>
<td>EMAUS_int</td>
<td>00</td>
</tr>
<tr>
<td>CI</td>
<td>00</td>
</tr>
<tr>
<td>CE</td>
<td>00</td>
</tr>
<tr>
<td>IPADE</td>
<td>00</td>
</tr>
<tr>
<td>Autres</td>
<td>00</td>
</tr>
<tr>
<td>Credna_RLF</td>
<td>00</td>
</tr>
<tr>
<td>INTERMON_3</td>
<td>00</td>
</tr>
<tr>
<td>ICCO</td>
<td>00</td>
</tr>
<tr>
<td>AGFUND</td>
<td>00</td>
</tr>
</tbody>
</table>

[Admin / View funds]
# Holiday Schedule

**View Holidays - Organization Wide**

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

**Holidays for year 2009**

<table>
<thead>
<tr>
<th>From Date</th>
<th>To Date</th>
<th>Holiday Name</th>
<th>Repayment Rule</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009-01-01</td>
<td>2009-01-01</td>
<td>Jour de l'an</td>
<td>Next Working Day</td>
</tr>
<tr>
<td>2009-02-25</td>
<td>2009-03-01</td>
<td>Mawlid</td>
<td>Next Working Day</td>
</tr>
<tr>
<td>2009-03-20</td>
<td>2009-03-20</td>
<td>Fête de l'Indépendance</td>
<td>Next Working Day</td>
</tr>
<tr>
<td>2009-03-21</td>
<td>2009-03-21</td>
<td>Fête de la jeunesse</td>
<td>Next Working Day</td>
</tr>
<tr>
<td>2009-04-09</td>
<td>2009-04-09</td>
<td>Journée des Martyrs</td>
<td>Next Working Day</td>
</tr>
<tr>
<td>2009-08-13</td>
<td>2009-08-13</td>
<td>Fête de la femme famille</td>
<td>Next Working Day</td>
</tr>
<tr>
<td>2009-09-18</td>
<td>2009-09-22</td>
<td>Aid_el_Fitr</td>
<td>Next Working Day</td>
</tr>
<tr>
<td>2009-11-26</td>
<td>2009-11-30</td>
<td>Aid el adha</td>
<td>Next Working Day</td>
</tr>
<tr>
<td>2009-12-15</td>
<td>2009-12-20</td>
<td>Awel Moharem</td>
<td>Next Working Day</td>
</tr>
</tbody>
</table>
**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.

<table>
<thead>
<tr>
<th>Clients / Groups / Centers</th>
<th>Fees: Voucher</th>
<th>Add &gt;&gt;</th>
<th>Cash Cheque</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>&lt;&lt; Remove</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Loans:</th>
<th>Disbursements: Voucher</th>
<th>Add &gt;&gt;</th>
<th>Cash Cheque</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>&lt;&lt; Remove</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Repayments: Voucher</th>
<th>Add &gt;&gt;</th>
<th>Cash Cheque</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>&lt;&lt; Remove</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Savings:</th>
<th>Withdrawals: Voucher Cheque</th>
<th>Add &gt;&gt;</th>
<th>Cash</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>&lt;&lt; Remove</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Deposits: Voucher Cheque</th>
<th>Add &gt;&gt;</th>
<th>Cash</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>&lt;&lt; Remove</td>
<td></td>
</tr>
</tbody>
</table>
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:
- Mr
- Mme
- Mlle

### User Title:

### Marital Status:
- Célibataire
- Marié(e)
- Divorcé(e)
- Veuf(fe)

### Ethnicity:

### Education level:
- Analphabète
- Peut lire et écrire
- Primaire
- Secondaire cycle 1
- Secondaire cycle 2

### Citizenship:
- Tunisienne
- Autres

### Business Activity:

### Purpose of Loan:
- Agriculture
- Articles de décoration
- Aviculture
- Bâtiment
- Bijouterie
### Mandatory Fields

<table>
<thead>
<tr>
<th>Client / system users fields</th>
<th>Hide</th>
<th>Mandatory</th>
</tr>
</thead>
<tbody>
<tr>
<td>Middle name</td>
<td>☐</td>
<td></td>
</tr>
<tr>
<td>Second last name</td>
<td>☐</td>
<td></td>
</tr>
<tr>
<td>Government ID</td>
<td>☑</td>
<td></td>
</tr>
</tbody>
</table>

### Additional Fields

#### Clients

**Client - View Additional Fields**

<table>
<thead>
<tr>
<th>Sequence No.</th>
<th>Label</th>
<th>Data Type</th>
<th>Default Value</th>
<th>Mandatory</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Date de démarrage du projet</td>
<td>Text</td>
<td>No</td>
<td>Edit</td>
</tr>
<tr>
<td>2</td>
<td>introduit par</td>
<td>Text</td>
<td>No</td>
<td>Edit</td>
</tr>
<tr>
<td>3</td>
<td>Notes</td>
<td>Text</td>
<td>No</td>
<td>Edit</td>
</tr>
</tbody>
</table>

#### Loans

**Loan - View Additional Fields**

<table>
<thead>
<tr>
<th>Sequence No.</th>
<th>Label</th>
<th>Data Type</th>
<th>Default Value</th>
<th>Mandatory</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Utilisation du prêt</td>
<td>Text</td>
<td>Yes</td>
<td>Edit</td>
</tr>
<tr>
<td>2</td>
<td>Raison du prêt</td>
<td>Text</td>
<td>Yes</td>
<td>Edit</td>
</tr>
<tr>
<td>3</td>
<td>Patente</td>
<td>Text</td>
<td>Yes</td>
<td>Edit</td>
</tr>
<tr>
<td>4</td>
<td>Type de la micro-entreprise</td>
<td>Text</td>
<td>Yes</td>
<td>Edit</td>
</tr>
</tbody>
</table>
Loan Products

Product Categories

View Product Categories

Click on a category below to view details and make changes or define a new product category

Loan
- Other
- Prêt Enda

Savings
- Other

Lateness and Dormancy Settings

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: 10 days

Set Dormancy Definition

Savings
Specify the number of days to define "Dormancy" in Savings Accounts. 30 days
The account status will be changed to "On Hold" by the system.
Products

View Loan products
Click on a Loan product below to view details and make changes or Define a new Loan product.

- Eddar
- Elevage1
- Elevage2
- Fardi JADID ■ Inactive
- Fardi Jadid2
- Fardi TATOURI■ Inactive
- Fardi Tatouri2
- Forca
- Groupe Solidaire2
- Istithmar ■ Inactive
- Istithmar2 ■ Inactive
- MACHROUE KEBIR ■ Inactive
- Majmoua Jadid ■ Inactive
- Majmoua TATOURI■ Inactive
- OldGroup ■ Inactive
- OldIndividual ■ Inactive
- Parallele ■ Inactive
- Pret Sinistre
- Sofia
- Taâlim

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
- Eddar
- Elevage1
- Elevage2
- Fardi Jadid2
- Fardi Tatouri2
- Forca
- Groupe Solidaire2
- Pret Sinistre
- Sofia
- Taâlim
## Roles & 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**.

<table>
<thead>
<tr>
<th>Role</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin</td>
<td>Delete role</td>
</tr>
<tr>
<td>Agent de Crédit</td>
<td>Delete role</td>
</tr>
<tr>
<td>Caissier/Agent administratif</td>
<td>Delete role</td>
</tr>
<tr>
<td>Coordinateur Régional</td>
<td>Delete role</td>
</tr>
<tr>
<td>Gestionnaire caisse</td>
<td>Delete role</td>
</tr>
<tr>
<td>Superviseur</td>
<td>Delete role</td>
</tr>
</tbody>
</table>


Database Settings

The following settings will be enabled and/or set:

- loanIndividualMonitoringIsEnabled (LSIM) = Enabled
- repaymentSchedulesIndependentOfMeetingIsEnabled (GLIM) = Enabled
- minDaysBetweenDisbursementAndFirstRepaymentDay = 30
- maxDaysBetweenDisbursementAndFirstRepaymentDay = 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