MENARID Gateway

Strengthening and scaling up Integrated Natural Resource Management across MENA

Monitoring and Evaluation Tool

USER MANUAL

March, 2014

www.menarid.icarda.org

ICARDA
Science for Better Livelihoods in Dry Areas

GEF

IFAD
Enabling poor rural people
to overcome poverty

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Definitions and abbreviations

Chart .... Graphical representation of M&E project data (indicators, targets, financial data, etc.) that is used by site visitors for analytical and information purposes.

Data Table .... Tabular representation of M&E project data (indicators, targets, financial data, etc.) that is used by site visitors for analytical and information purposes.

Dashboard .... A custom-developed web part enabling the addition of charts, data tables and various WYSIWYG (html) elements to a dashboard.

M&E .... Monitoring and Evaluation system that is built in MENARID web site.

M&E web site .... A SharePoint web site under MENARID site collection with relative URL '/MAE' containing all projects and indicators data as well as financial data of M&E system.

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As an Administrator

How do I add a country to the M&E system?

Click to play video tutorial

To add a new country:

1.   Navigate to M&E web site clicking 'Monitoring & Evaluation Database' link in the top menu:

2.   Click on 'Site Actions' menu link and in expanded menu click on 'View All Site Content':

3.   Under 'Lists' table click on 'Countries' link:

4.   When in 'Countries' list, click 'Add new item' link:

5.   On opened form populate country name and press Save button:

6.   Done.

How do I edit existing Country used in M&E system?

Click to play video tutorial

To add a new country:

1.　Navigate to 'Countries' list (see chapter 'How do I add a Country used in M&E system?').

2.　When in 'Countries' list, select respective checkbox against a country item you want to edit, and then press Edit Item button in the ribbon:

3.　On opened form edit country name and press Save button.

4.　Done.

How do I add new Indicator Unit?

Refer to chapter 'How do I add a Country used in M&E system?' but instead of 'Countries' list use 'Units' list.

How do I edit existing Indicator Unit?

Refer to chapter 'How do I edit existing Country used in M&E system?' but instead of 'Countries' list use 'Units' list.

How do I add new Indicator Type (output, outcome, etc.)?

Refer to chapter 'How do I add a Country used in M&E system?' but instead of 'Countries' list use 'Indicator Types' list.

How do I edit existing Indicator Type?

Refer to chapter 'How do I edit existing Country used in M&E system?' but instead of 'Countries' list use 'Indicator Types' list.

How do I add new Category (output, outcome, etc.)?

Refer to chapter 'How do I add a Country used in M&E system?' but instead of 'Countries' list use 'Categories' list.

How do I edit existing Category?

Refer to chapter 'How do I edit existing Country used in M&E system?' but instead of 'Countries' list use 'Categories' list.

How do I add or edit Indicators?

Click to play video tutorial

To add a new Indicator:

1. Navigate to 'Indicators' list (see chapter 'How do I add a Country used in M&E system?' to learn how to navigate to lists).

2. When in 'Indicators' list, click 'Add new item' link:

3. On opened form populate fields:

   • Title – title for new indicator;

   • Category – indicator category. Note: you cannot create an indicator if no categories are entered into the system. To learn how to add a category see chapter 'How do I add a new category"

   • Unit – indicator unit of measure. The field can be empty (in this case no unit will be displayed for indicator).

   • Data Collection Period – defines how frequently indicator data should be entered into the system (1 – once a year, 2 – once a quarter, 3 – once a month).

   • Type – indicator type. Note: you cannot create an indicator if no indicator types are entered into the system. To learn how to add indicator type see chapter 'How do I add a new Indicator Type?'

4. Press Save button.

5. Done.

Editing existing indicator

Click to play video tutorial
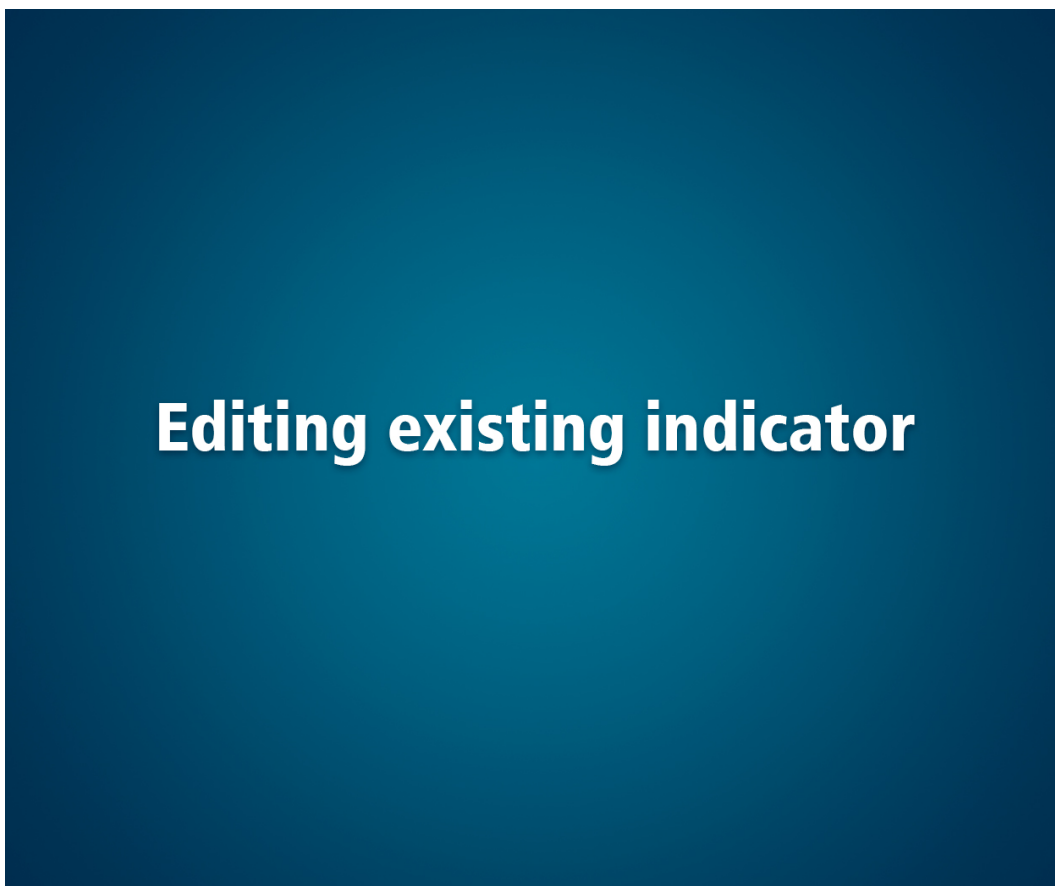
To add a new Indicator:

To learn how to edit list items refer to 'How do I edit existing countries…' The mechanism of editing indicators is the same, you just need to use Indicators list instead of Countries list.

How do I manage list of projects?

To learn how to add and edit list items refer to 'How do I add a country…' and 'How do I edit existing countries…', but use Projects list instead of Countries list.. To create a project the following fields should be filled on project form:

- Project Name – compact version of project name. It is displayed in left menu (green), in tabular data containing project names and other places where long name would be inappropriate.

- Project Full Name – full version of project name.

- Overall Budget – project budget for entire project period.

- Country – defines the country that the project is related to.

> **NOTE:**
>
> You cannot create an indicator if no categories are entered into the system. To learn how to add a category see chapter 'How do I add a new category"

- Project ID – optional project identifier.
- Project Managers – defines list of users having managerial access to the project. It could be actual project managers, donors and other stakeholders.
- Stakeholders e-mail addresses – comma-separated list of e-mail addresses where project-specific scheduled reports and other notifications should be sent.

Empty project form looks similar to this one:

Notes on projects creation:

1. Once a project gets created, a new project web site is created under M&E web site ('/MAE'). The users specified in Project Managers field upon project creation (and after each further editing) get full control permissions on that project web site. All other users (including public users) can read the information on all project web sites. Project web site thus acts as a project-specific workspace and sharing point that can be configured by its project managers as desired.

1. When a project web site gets created (right after project is created itself) the link to the project web site appears in the left menu (green) under 'Projects' menu item.

How do I create a dashboard?

Creating and managing dashboards is one of the advanced yet flexible and powerful features in M&E system. Dashboards are represented by custom-developed Dashboard web part that can be placed in unlimited number of pages within M&E web site and its sub sites.

Click to play video tutorial

To create dashboards you need to have at least Design permissions on the M&E site.

To create a page and a dashboard on it from scratch, follow these steps:

1. Navigate to M&E web site by clicking 'Monitoring & Evaluation Database' link in top navigation menu:

2. Click on 'Site Actions' menu link and in expanded menu click on 'New Page':

3. In opened popup page specify some page name and press Create button:

4. When redirected to newly created page, ensure that the cursor is located in main content field area.

5. In Ribbon click on Insert tab and press 'Web Part' button:

6. At the left of the appeared panel locate 'Menarid' web part category and click on it.

7.   In the Web Parts list select Dashboard and press Add button at far right of the page:

8.   At the top right corner of the just added web part locate a small arrow and click on it. Then, after menu opens, click 'Edit Web Part' menu item:

9.   Now that the dashboard is created, tables and charts could be added to it via the tool pane:

10. To save any changes made to dashboard markup click Save button on the tool page or Save button in the ribbon's Page tab:

To learn how to add charts and tables to the dashboard refer to the chapters 'How do I add new chart? ' and 'How do I add new data table? '

How do I edit existing dashboard?

To create dashboards you need to have at least Design permissions on the M&E site.

Click to play video tutorial

How do I edit existing dashboard?

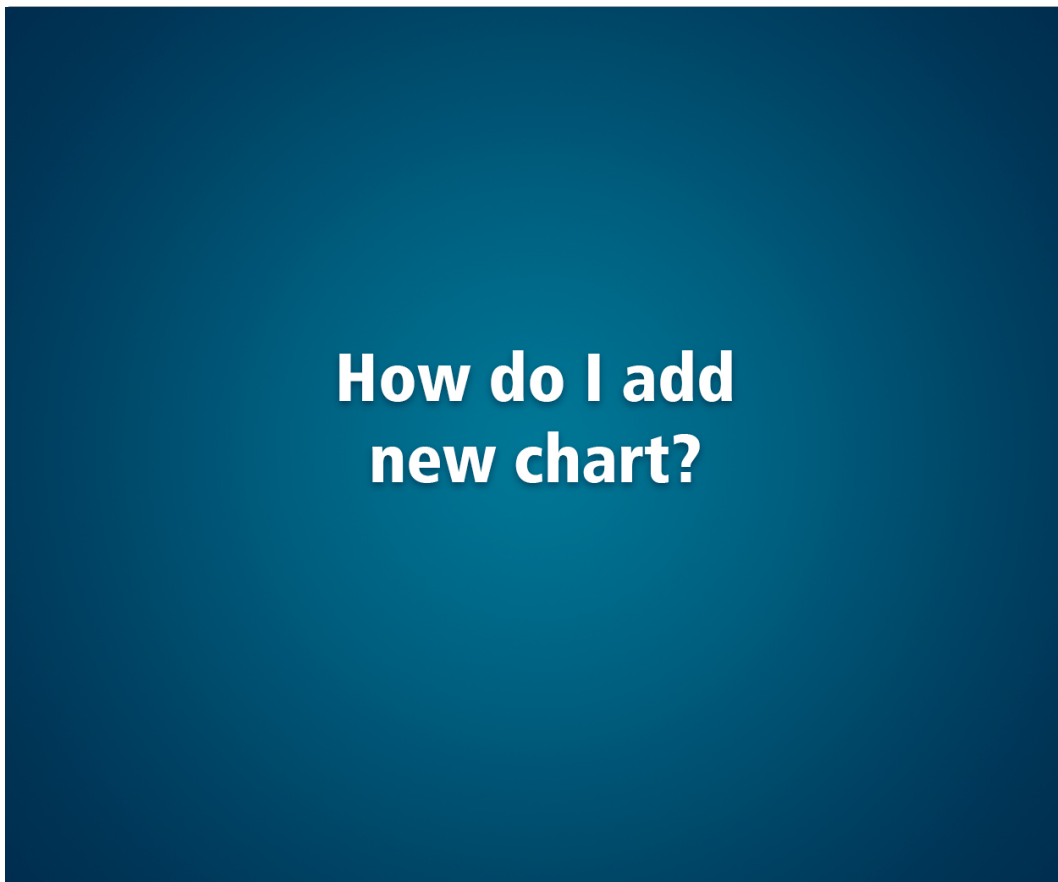**To edit existing dashboard follow these steps:**

1.   Navigate to a page where the dashboard you want to edit is located. Switch to page edit mode either clicking Edit icon at the top left of the page or selecting 'Edit Page' menu item under site actions menu:

2.   At the top right corner of the dashboard web part locate a small arrow and click on it. Then, after menu opens, click 'Edit Web Part' menu item:

3. Now when the dashboard is in edit mode, tables and charts could be added and edited via the tool pane:

4. To save any changes made to dashboard markup click Save button on the tool page or Save button in the ribbon's Page tab:

To learn how to add charts and tables and how to edit charts and tables to dashboard refer to chapters 'How do I add a new chart/data table' and 'How do I edit an existing chart/data table' respectively.

How do I add new chart?

Click to play video tutorial

To add a new chart to a page follow these steps:

1. Create a dashboard or edit existing dashboard and switch to its edit mode (refer to previous chapters to learn how do add or edit a dashboard).

2. When dashboard is in edit mode click 'Chart' icon on the tool pane (icon text is visible on mouse hover).

3. Clicking 'Chart' button opens so called 'Chart Builder' in modal dialog window.

The 'Chart Builder' consists of configuration pane on the left and preview pane on the right. Once you change a parameter in configuration the preview is updated so that the changes are visible immediately. In the 'Chart Builder' there are various configurations of a would-be chart. Let's describe those one by one:

- Chart Type – there are various types of charts that could be built in Chart Builder. On below picture there are the most

popular ones. Clicking on 'Show advanced charts' link extends the list of available chart types.

- Axis X Displays – this axis configuration specifies what values should be displayed as series.

  Example: let's assume that the user selected five random projects in Projects section (see later in this chapter):

  ○ Each of FIVE values along horizontal axis in column, line or stock chart represents a single project from the FIVE selected projects;

  ○ Each of FIVE values along vertical axis in bar chart represents a single project from the FIVE selected projects;

  ○ Each of FIVE sectors of a circle in pie and doughnut chart represents a single project from the FIVE selected projects;

  ○ Each of FIVE axes on radar chart represents a single project from the FIVE selected projects.

- Axis Y Displays – as could be seen the textbox in this configuration is disabled.

  The textbox is disabled because the Y axis always accounts for indicators data. As a result any number on charts and data tables always reflect the indicators data. How this data is aggregated and filtered depends on other configuration parameters (discussed in in sections Indicators, Countries, Projects and Year range).

  Alongside the textbox there are two flags (checkboxes):

  ○ Compare to targets – if selected, additional series displaying target indicator value is added to each displayed series;

  ○ Show Legend – specifies whether to show legend in the chart.

- Axis Z Displays – this axis configuration specifies where aggregate data should be taken from.

  For example, selecting FIVE Projects for X Axis and TWO Indicators for Z Axis means that:

  ○ In column chart, there are TWO vertical bars with indicator value for each of the FIVE selected projects:

  ○ In bar chart, there are TWO horizontal bars with indicator value for each of the FIVE selected projects:

  ○ In line chart, there are TWO lines with indicator values on the chart across FIVE selected projects:

- Aggregation Function – specifies what Math function should be used to aggregate data. Recommended default value is **Sum**, which means: indicators data for Z axis will be summed up. **Avg** function would give average value from the Z axis data.

- Indicators – specifies what indicators data should be taken to chart.

It is not recommended to leave the list of indicators empty as it would make the chart engine sum all the indicators in the system, thus giving no meaningful picture for analysis.

- Countries – specifies what countries data should be taken for.

When no countries are selected the data is taken for ALL countries (same as when all countries are selected).

- Projects – specifies what projects data should be taken for.

When no projects are selected the data is taken for ALL projects (same as when all projects are selected).

- Year range – specifies what year range the data should be taken for.

  By default all years for which data is available in the system are selected (full range).

- Select Color Scheme – specifies the color palette that should be used to colorize the chart.

- Width/Height – specifies width and height of the generated chart image.

  The dimensions can be tailored according to desired level of graphics detail.

4. After having configured the chart and checked that the preview chart corresponds to desired configuration press Save button, and after dialog closes press Save button in ribbon's Page tab:

5. Done.

How do I edit existing chart?

Click to play video tutorial

To edit existing chart you need to follow these steps:

1. Switch dashboard with target chart to edit mode (learn how to do it in 'How do I edit existing dashboard?' chapter).

2. When in dashboard's edit mode, you can open existing chart for edit these two ways:

    • double-click target chart image

    • select target chart and click Chart icon on tool panel

3. The above actions open 'Chart Builder' with configuration of the target chart.

4. After making necessary changes in chart configuration, press Save button. Dialog closes.

5. Press Save button in ribbon's Page tab.

6. Done.

How do I add a new data table?

Click to play video tutorial

To add a data table to a page follow these steps:

1. Create a dashboard or edit existing dashboard and switch to its edit mode (refer to previous chapters to learn how do add or edit a dashboard).

2. When dashboard is in edit mode click 'Data Table' icon on the tool pane (icon text is visible on mouse hover).

3. Clicking 'Data Table' button opens 'Chart Builder' in modal dialog window:

4. Configuration of data table is the same as for chart. To learn how to configure a chart, refer to chapter 'How do I add new chart?'

5. After having configured the data table press Save button, and after dialog closes press Save button in ribbon's Page tab.

6. Done

How do I edit data table?

To edit data table perform these steps:

1. Enter dashboard web part edit mode (refer to chapter 'How do I edit existing dashboard?' on how to do it).

2. Put mouse cursor in any place within existing data table.

3. Press 'Data Table' icon in the tool pane – as a result the 'Chart Builder' opens in modal dialog corresponding to current data table configuration.

4. Change configuration as needed and save it.

5. Done.

How do I add user filters to dashboards?

Click to play video tutorial

Dashboard Filters is a custom developed web part that allows site visitors to filter dashboards on the same page by the following optional parameters:

- Projects
- Countries
- Indicators
- Years

To add user filter to a page perform the following steps:

1. Follow paragraphs 1-6 of the chapter 'How do I create a dashboard?' and instead of Dashboard web part select Dashboard Filters web part, press Add button.

2. When the web part is added, switch to web part edit mode to see its properties:

3. In web part properties expand 'Miscellaneous' properties group (at the bottom).

4. There are four filters that could be either shown or hidden depending on whether respective checkboxes are selected. Select filters that should be displayed on this page and press OK button.

5. Save the page by pressing Save button in the ribbon's Page tab.

6. Done.

How do I edit dashboard filters?

The dashboard filters are edited very much the same way as they are created. Refer to chapter 'How do I add user filters to dashboards?' to learn more about it.

How do I import content from csv files?

Click to play video tutorial

The import tool implemented in M&E system allows importing of content to SharePoint lists.

NOTE:

To be able to import content through this functionality you need to be SharePoint site collection administrator (ultimate administration role on Menarid site).

To import specific content to M&E system follow these steps:

1. Navigate to M&E web site clicking 'Monitoring & Evaluation Database' link in the top menu of the MENARID home page:

2. Click on 'Site Actions' menu link and in expanded menu click on 'Site Settings':

3. On 'Site Settings' page under 'Monitoring & Evaluation Administration' section click 'Import Tool' link:

4. On 'Import Tool' page press Browse button and select csv file containing import data from the file system:

5. When the file is selected, its name is displayed beside Browse button:

6. If the target list where the data should be imported should be emptied before import, select respective checkbox 'Remove all items before import'.

7. To start import press Import button. Wait until import finishes. If there are errors or warning arising during import, they will be displayed on the same page.

8. Done.

IMPORTANT:

There are certain rules the imported files should follow for import to succeed:

- The import is possible in batches, i.e. several files with import data could be packed in Zip archived and imported at once. All the files within such archive should conform to THESE rules.

- The name of the file that is being imported (or contained in archive) should be exactly as the name of the list where the data should be imported. On the above screenshot the file name is 'Indicators' meaning the data is imported in 'Indicators' list.

- The first row of the file contents must contain comma-separated list of list columns that are affected during import.

- The other rows must contain comma-separated text values for each of the respective columns. Empty values are allowed (i.e. ',,').

- The file content should strictly conform to .csv file format, i.e. comma-separated values. Example of such file could be as follows:

As could be seen from the file contents above, the import data is aimed to be imported in 'Projects' list and affects six list columns (first row) and creates ten list items with respective data.

NOTE: .

csv files are easier to work with via spreadsheet applications, for example Microsoft Excel. This is how the above file looks like when opened in MS Excel:

	A	B	C	D	E	F
1	Title	ProjectFullName	ProjectOveralBudget	ProjectCountry	ME_ProjectId	ME_ProjectMembers.
2	Conservation of biodiversity in cultural parks (Algeria)	Conservation of Glo	0	Algeria	3952	
3	Institutional Strengthening and Coherence for INRM (Iran)	Institutional Strengt	0	Iran	2732	
4	Mainstreaming INRM practices (Jordan)	Mainstreaming Sust	0	Jordan	2631	
5	Control of Desertification in the High Plateaus (Morocco)	Participatory Contro	0	Morocco	2632	
6	Circular Economy project (Morocco)	A circular Economy J	0	Morocco	3989	
7	Reducing risks to the NWSAS (Regional)	Reducing risks to the	0	Regional	3645	
8	Sustainable Land Management in Siliana (Tunisia)	Support to Sustainal	0	Tunisia	2709	
9	Land and Water Management (Tunisia)	Second Natural Reso	0	Tunisia	3669	
10	Eco-tourism and Conservation (Tunisia)	Ecotourism and Con	0	Tunisia	4035	
11	Adaptation to climate change using biodiversity (Yemen)	Adaptation to climat	0	Yemen	3267	

It simplifies data edition and could be afterwards saved as a valid .csv file.

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As a Project Manager

How do I configure scheduled report for a project?

Click to play video tutorial

Scheduled reports are automatically generated by M&E system, includes all indicators data for specific project (or entire Program) and are sent annually or with custom schedule.

Note: To manage scheduled reports you must be included in 'Menarid Admins' or 'Menarid Owners' groups.

To setup scheduled report for a project perform the following steps:

1. Navigate to M&E web site clicking 'Monitoring & Evaluation Database' link in the top menu of the MENARID home page:

2. In left menu click 'Schedule automatic report' link:

3. When on 'Schedule automatic report' page, select desired project from 'Current project' dropdown list:

4. Once the project is selected, its current scheduled report settings are displayed. The settings are saved for selected project once Save button is pressed. The settings include:

    • Whom the generated report will be sent – displays e-mail addresses where generated reports for selected project should be sent when scheduled time comes. These e-mail addresses are set in in 'Stakeholder E-mail Addresses' field

of respective project item in Projects list (learn how to add stakeholders emails in chapter 'How do I manage list of projects?'). If no e-mail addresses are set, no report is generated for such project.

- Next report for project will be generated and sent on – by default the date is empty. Empty date in this field means that the report is not auto-generated until the date is set. Once a day the M&E system checks whether any project's next report date (this setting) has come. If so, a new report is generated and sent in PDF format to the e-mail addresses specified in the above setting.

- Also one can specify the images (full URLs) that are used as report header and footer. If no header and footer image is specified for a project, values from Entire M&E program are taken.

5. When all desired settings are made press Save button.

6. Done.

> **NOTE:**
>
> All generated scheduled reports are saved in M&E site. The list of generated reports could be seen for each selected project separately by clicking 'See Generated Reports' link (the link is visible only if there is at least one generated report for the selected project):
>
>

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How do I get sample report for a project before it is sent to stakeholders?

Click to play video tutorial

M&E system allows project managers and administrators to generated sample PDF reports for projects they have permissions to. The sample report is exactly the same as one being sent to stakeholders, except for generating it manually doesn't send it anywhere.

To generate a sample report do the following:

1. Navigate to 'Schedule automatic report' page (to learn how to do it see chapter 'How do I configure scheduled report for a project?').

2. From 'Current project' dropdown select a project you would like to generate sample report for:

3. At the bottom of the page press Get Sample Report button:

4. Wait until the report is generated, and once done you can open or download the report from browser:

5. Done.

How do I enter project indicators data?

M&E system has centralized place of managing project indicators: 'Manage Project Indicators' page. To navigate there open

M&E site home page and click 'Data Entry Form' item in left menu:

The page itself:

The page has project dropdown where one can select from list of projects. The dropdown contains only those projects on which current user is Project Manager.

All indicators data are grouped by indicator Categories (on the image above there are five categories displayed). Under each category only those indicators are displayed that have indicators or indicator targets data for any year in the timeline (on the image above there are no indicators meaning there is no indicators/targets data on current project).

To enter indicator data perform the following steps:

1.   If the indicator you would like to enter value for is not present on the page, press 'Add Indicator' button:

- It opens a modal dialog for adding indicator to the page:

- Select indicator category in first dropdown, select desired indicator from the second dropdown and press Add button. The dialog closes, selected indicator is added to the specified group on the page:

2. If you wish to add all indicators present in the M&E system, press 'Add All Indicators' button.

3. Enter indicator values in the input fields against desired indicators (only numeric values are allowed in these text boxes):

4. Apart from numeric values, M&E system allows project managers to enter qualitative (text) data. To do it:

- Locate input field corresponding to specific indicator and specific year, right-click this input field and from the context menu select 'Edit Comment' item:

- Afterwards the modal dialog is opened allowing to enter reasonable-length text value for indicator comment:

- Enter comment text and press OK button.

5. Once the comment is added, the related input field gets comment icon signaling that there is a comment for the field:

6. Hovering by mouse cursor over this input field with comment icon shows the comment value entered:

7. Apart from entering indicator values (numeric and text), there is ability to enter indicator target values, i.e. values that will be compared to actual indicator values to assess project efficiency. To enter target value do the following:

- Locate input field corresponding to specific indicator and specific year, right-click this input field and from the context menu select 'Edit Target' item:

- Afterwards the modal dialog is opened allowing to enter indicator target value (numeric only):

- Enter target value and press OK. Now the target value could be seen hovering over input field where target value was entered:

8. When finished entering indicator values (numeric and text) and targets press 'Save All' button at the bottom of the page to save changes.

9. Done.

How do I add and edit dashboard for my project home page?

Each project has at least one project manager. Project Manager is able to configure dashboard on his/her project home page. To navigate to a project's home page find your project in left menu (on all M&E pages) under 'Projects' item and click on respective link:
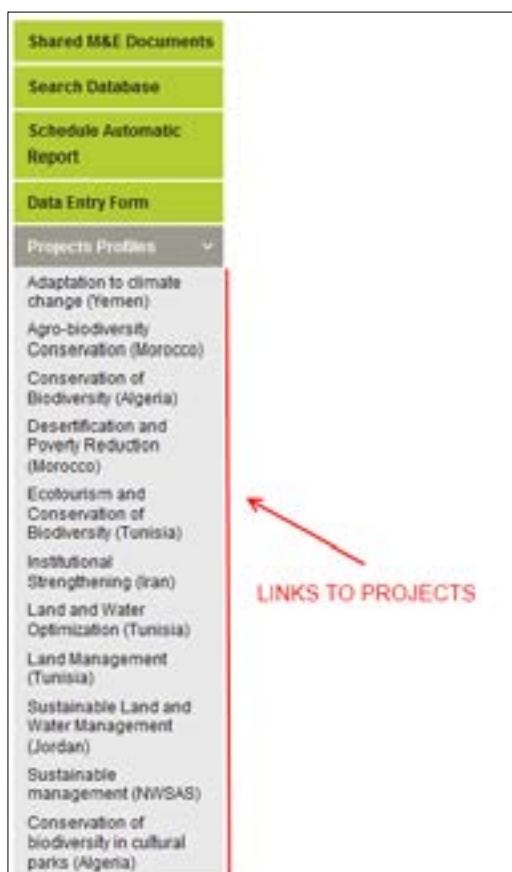

Learn how to create and edit dashboards in chapter 'How do I create a dashboard?'

As an anonymous (public) user

Anonymous users are empowered, apart from others, to perform the following actions in M&E system:

1. View and analyze graphical as well as tabular data on dashboards build by site administrators and project managers.

2. Filter data in user reports where filters are present:
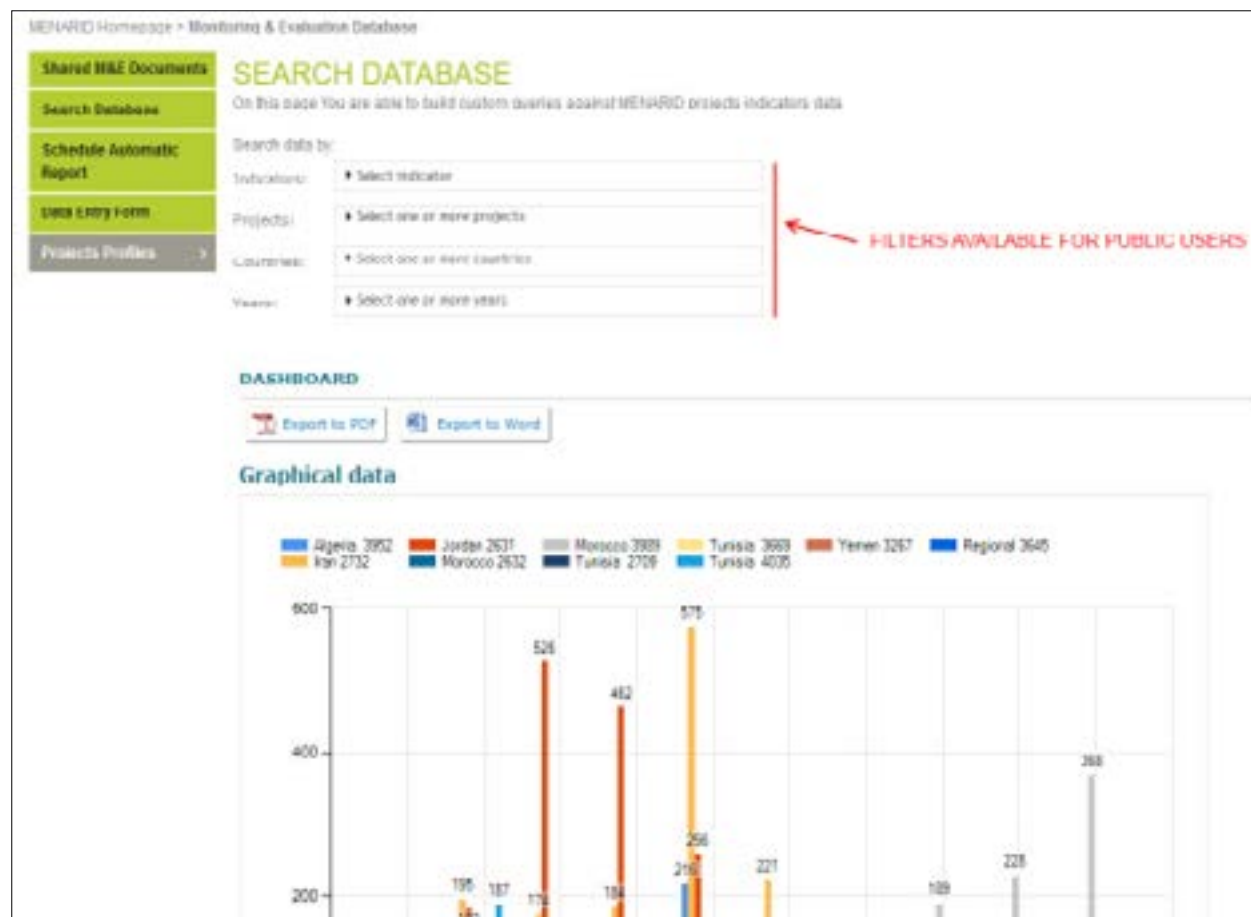
3. Export graphical and tabular data to PDF and MS Word formats from site dashboards and user reports.

4. Visit all M&E program project pages and view project-specific information that is publicly shared by respective project managers.

5. View M&E program shared documents uploaded and published by M&E content editors.

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