di Monitoring

User's Guide

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Contents

Introduction

Welcome to di Monitoring!

di Monitoring is a web-based data management application intended to facilitate the monitoring and evaluation of program and project indicators within a larger framework. The application is powered by DevInfo database technology.

Key features

The following represents some of the key features of di Monitoring:

- Allows for easy monitoring of program and project indicators within any framework in a single web-based application
- Enables users to quickly filter records to view which indicators are on track, almost on track, and off track
- Provides an easy method to view indicators by various user-defined dimensions, such as those associated with a particular donor or partner
- Allows data entry operators to enter actual data values online on a rolling basis
- Enables administrators to create customized indicator frameworks

User levels

di Monitoring can be accessed on four different user levels:

- **Normal user** – A normal user can view data within a structured framework consisting of classified and indexed indicators, to facilitate program monitoring and evaluation.

- **Data entry operator** – Besides being able to perform the same functions as a normal user, a data entry operator can also enter actual data values and comments against the framework indicators.
- **Administrator** – Besides being able to perform the same functions as a data entry operator, an administrator can also edit frameworks designated to them by the Site Administrator, create/modify users, edit the range breaks used to calculate the indices, and edit/translate the language strings displayed in the user interface.
- **Site Administrator** – Besides being able to perform the same functions as an Administrator, the Site Administrator can create new frameworks (consisting of classified program indicators, dimensions, baselines, targets and planned data values) and create/modify Administrator users.

Learning di Monitoring

Detailed information on the various features of di Monitoring can be found in the following chapters of this User's Guide:

- Chapter 1, "Using di Monitoring as a Normal User," explains the various application features available to normal users.
- Chapter 2, "Using di Monitoring as a Data Entry Operator," explains the various application features available to data entry operators.

Please consult the separate *di Monitoring Administrator User's Guide* to learn about the Administrator/Site Administrator functions of di Monitoring.

CHAPTER 1

Using di Monitoring as a Normal User

In di Monitoring, normal users can view data within a structured framework consisting of classified and indexed indicators, to facilitate program monitoring and evaluation. This chapter explains the various application features available to normal users.

Accessing di Monitoring

di Monitoring is an online data management application hosted on a web server. The application can be accessed using an Internet browser.

Follow the steps below to access the application on your computer:

- Open MS Internet Explorer, Mozilla Firefox, Google Chrome or Apple Safari
- Enter the web address provided by your local di Monitoring administrator and press **ENTER**

The application opens to the di Monitoring login window (Fig. 1.1)

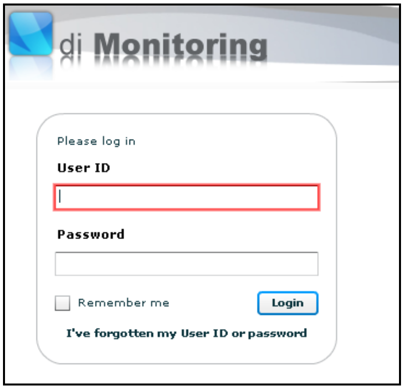

Fig 1.1 – di Monitoring login window

Enter the user name and password provided by the di Monitoring Administrator to access the di Monitoring application.

di Monitoring user interface

The di Monitoring user interface consists of a data view displaying a collapsible framework below a single menu bar (Fig. 1.2).

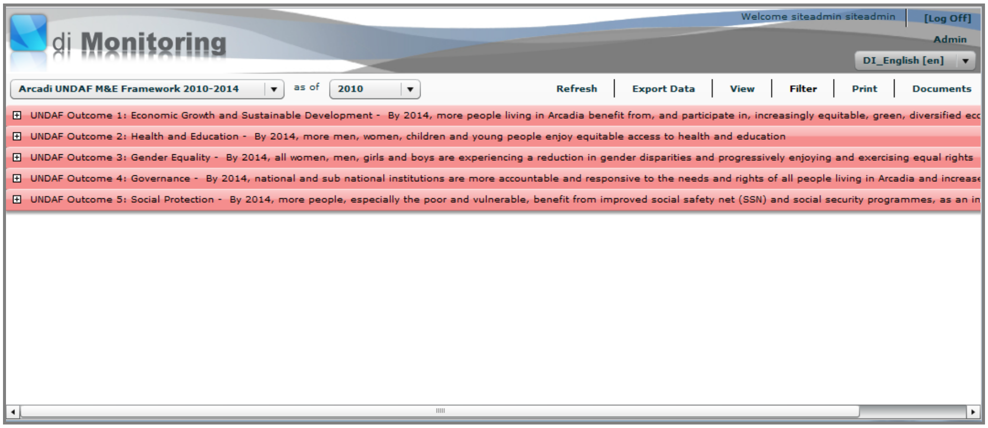

Fig 1.2 – di Monitoring user interface

First, select the desired framework from the drop-down list in the framework box at the left of the menu bar. Users may only view the frameworks assigned to them by the Administrator or Site Administrator. Note that a framework refers to a structured plan to organize program goals and objectives. A framework typically consists of several levels (e.g., pillars, outcomes, outputs, etc.), with indicators assigned to the various levels to help monitor framework goals and objectives.

If a framework has been translated into multiple languages, users may select the desired language from the drop-down list in the language box at the right of the menu bar.

Next, select the desired time period from the drop-down list in the time period box on the menu bar, for which you wish to view the applied color indices. The color indices allow you to see at a glance which indicators are performing on track and which ones are performing off track, for the selected time period.

Click at the right of any row to view more details on that particular framework element (Fig. 1.3).

Fig 1.3 – Viewing framework element details

Click the **+** sign at the left of any row to expand it, displaying the next framework level. Keep expanding the levels until you reach the indicators (Fig. 1.4).

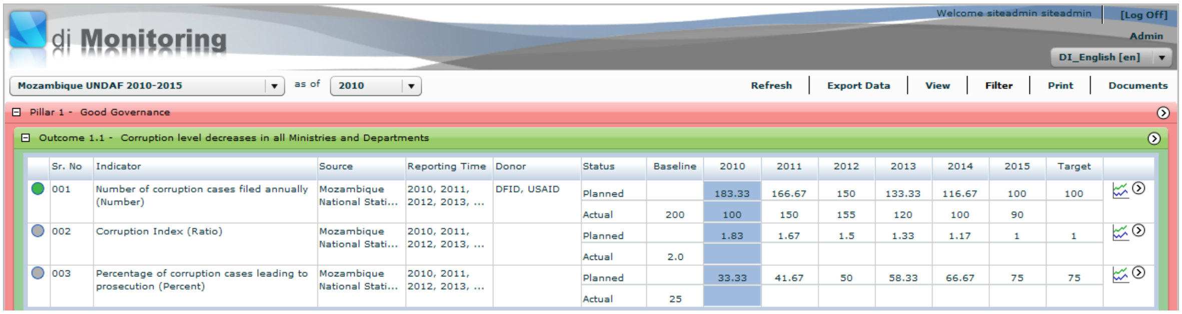

Fig 1.4 – Viewing indicator data

The data view displays data for each framework indicator in the following columns:

Index color Displays green if the data value for the indicator is on track for the selected year, yellow if it is almost on track, and red if it is off track. The different colors are assigned based on an index, whose formula is set by the Administrator. Note that if either the planned or actual data value is missing for a particular time period, the index will not be calculated and a grey color will be displayed.

The index colors allow the user to quickly determine which indicators are performing well and which are under-performing.

Sr. No Displays the serial number of the indicator

Indicator Displays the indicator name, along with its unit and subgroup

Dimensions Displays information on various user-defined indicator attributes, such as assumptions and risks, donors, implementing partners, etc.

Note that dimensions are customizable and differ from framework to framework.

Status Displays whether the data values in the columns to the right are planned or actual

Baseline Displays the baseline data value for the indicator

Time periods Displays the planned and actual data values for the indicator, when available, for all framework time periods (for example, years, quarters, etc.)

Target Displays the target data value for the indicator

Displays the trend graph for the planned and actual data values for the selected indicator (Fig. 1.5)

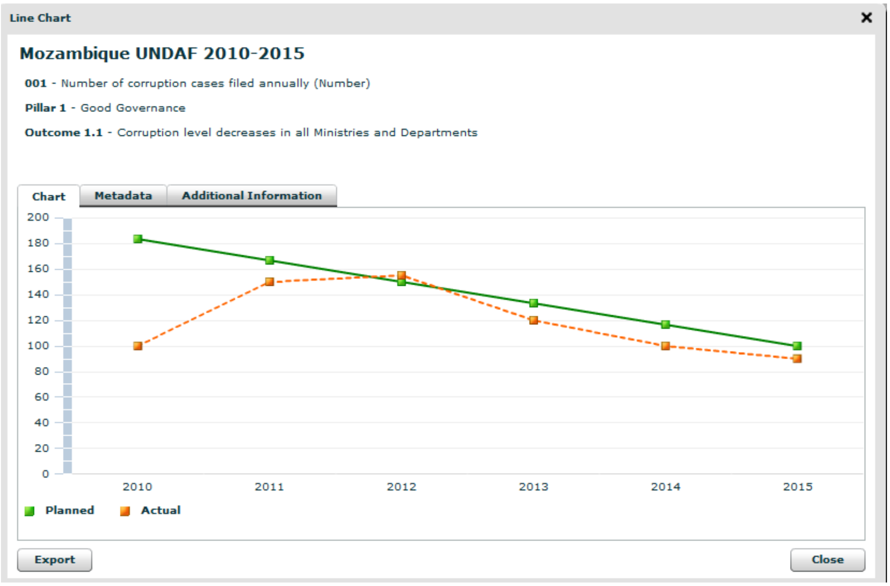

Fig 1.5 – Trend graph displaying planned and actual data values

The green line represents planned data values, while the red line represents actual data values. As such, the graph allows users to easily view, analyze and monitor indicator performance.

Displays comments, where available, for the selected indicator

Hiding and re-arranging columns in the data view

To hide or re-arrange columns in the data view, click **View** from the menu bar. The **View** window opens, allowing you to manage the column display in the data view (Fig. 1.6).

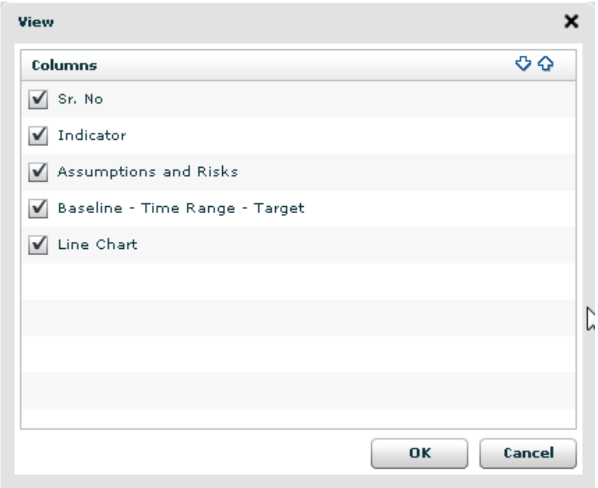

Fig 1.6 – Managing the column display in the data view

To hide a column in the data view, clear its check box. To make it visible again, select its check box.

To modify the column sequence in the data view, highlight a column and use the  arrows to move the column to the desired position.

When you are satisfied with your changes, click **OK**.

Filtering the data view

To filter the data view by dimension values or by index color, click **Filter** from the menu bar. The **Filter** window opens, allowing you to select which parameters you wish to filter by (Fig. 1.7).

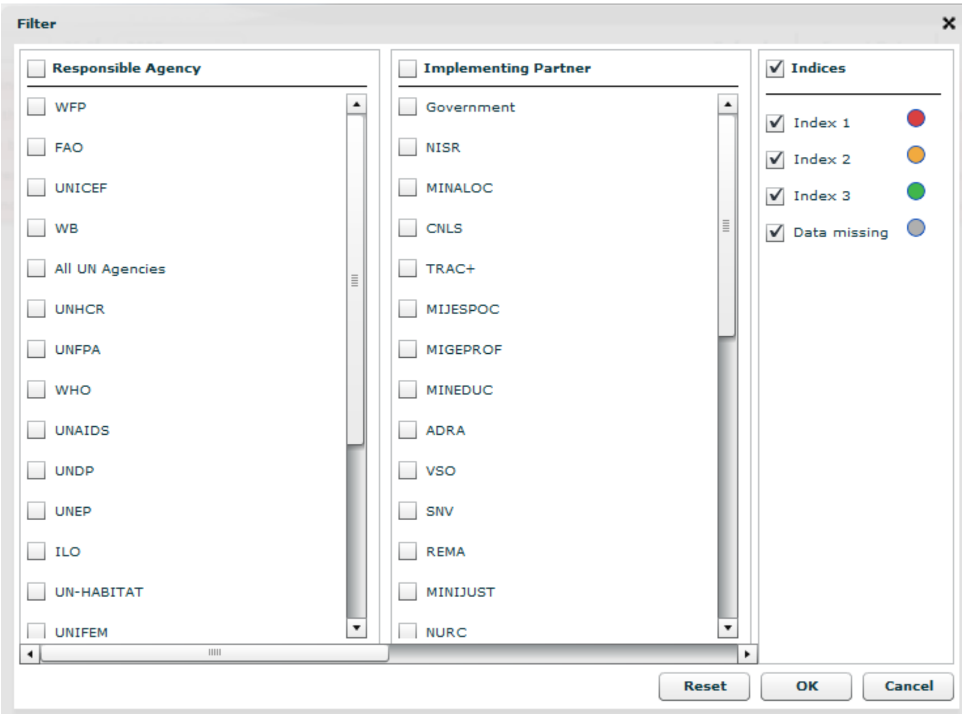

Fig 1.7 – Filtering the data view

The left pane displays the available dimensions and their values in the data view. By default, all dimension values are cleared. To display only those indicators associated with a particular dimension value, select its check box. This feature is useful when you wish to filter for certain dimension values for quick monitoring (for example, filtering for a particular donor in order to display only those indicators associated with that donor).

The right pane displays all the “traffic light” indices used in the data view. By default, all indices are selected. To display only those indicators associated with a particular index, clear the other indices. This feature is useful when you wish to isolate a certain index (for example, selecting the red index in order to only display those indicators which are off track).

To clear all previously applied filters, click **Reset**.

When you are done with your filter selections, click **OK**.

Printing reports

To print a database report, click **Print** from the menu bar. The **Print** window opens, allowing you to select which report you wish to print (Fig. 1.8).

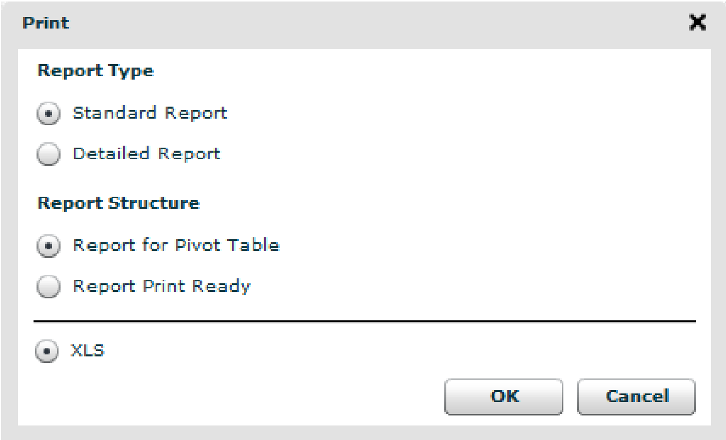

Fig 1.8 – Printing reports

Under **Report Type**, select **Standard Report** to print an MS-Excel document containing the contents of the current data view. Note that if any filters have been applied or if any columns have been hidden, the Standard Report will replicate the current data view. Select **Detailed Report** to print an MS-Excel document containing the contents of the entire database, regardless of whether any filters have been applied or columns hidden.

Under **Report Structure**, select **Report for Pivot Table** to display data in a basic, unformatted MS-Excel table that can be edited as desired. Select **Report Print Ready** to export the framework to MS-Excel in the same formatted display as it appears in di Monitoring, including index colors and ordering of framework elements.

Other functions

Use the following menu commands to perform various additional functions in di Monitoring:

Refresh	Refreshes the current view, to reflect edits/changes to the underlying database made through the Admin Panel (for example, new data values or indicators added)
Export Data	Exports the entire framework as a zipped DevInfo database (.mdb file), which can be subsequently opened in the DevInfo database software (User and Data Admin modules)
Documents	Allows you to view various documents related to the selected framework

CHAPTER 2

Using di Monitoring as a Data Entry Operator

di Monitoring gives users who are assigned data entry operator privileges (including the Administrator) the ability to enter actual data values and comments against the various framework indicators. This chapter explains how a data entry operator can perform these functions in di Monitoring.

Entering actual data values

After logging in to di Monitoring, expand the framework levels in the data view to display the indicator for which you wish to enter data values (Fig. 2.1).

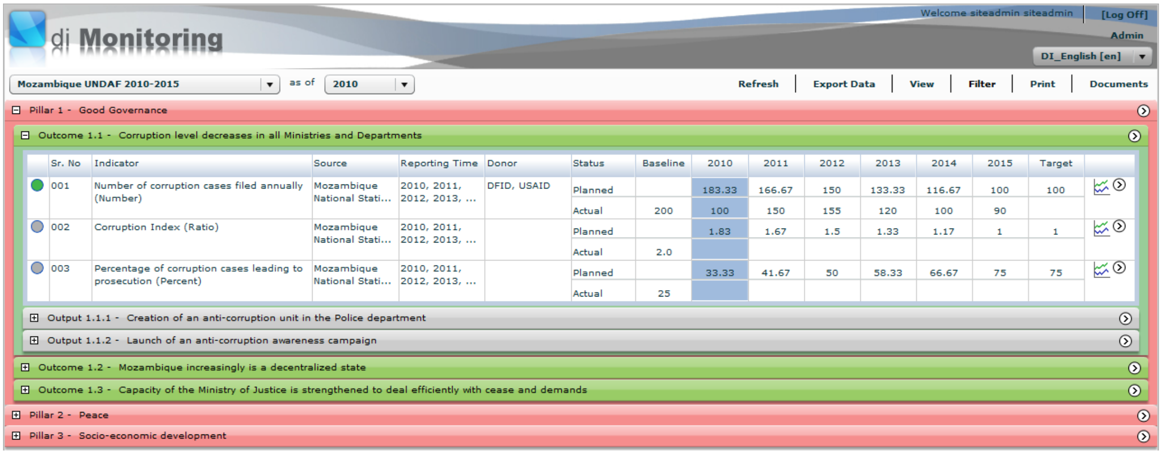

Fig. 2.1 – Generating the data view for entering data

Click the desired cell in the data view in which you wish to enter a data value. Note that you can only enter data for actual values, because planned values can be entered only by the Administrator.

Suppose you wish to enter a data value for the year 2010 for a particular indicator. Clicking the 2010 cell opens the **Data Entry** window shown below (Fig. 2.2).

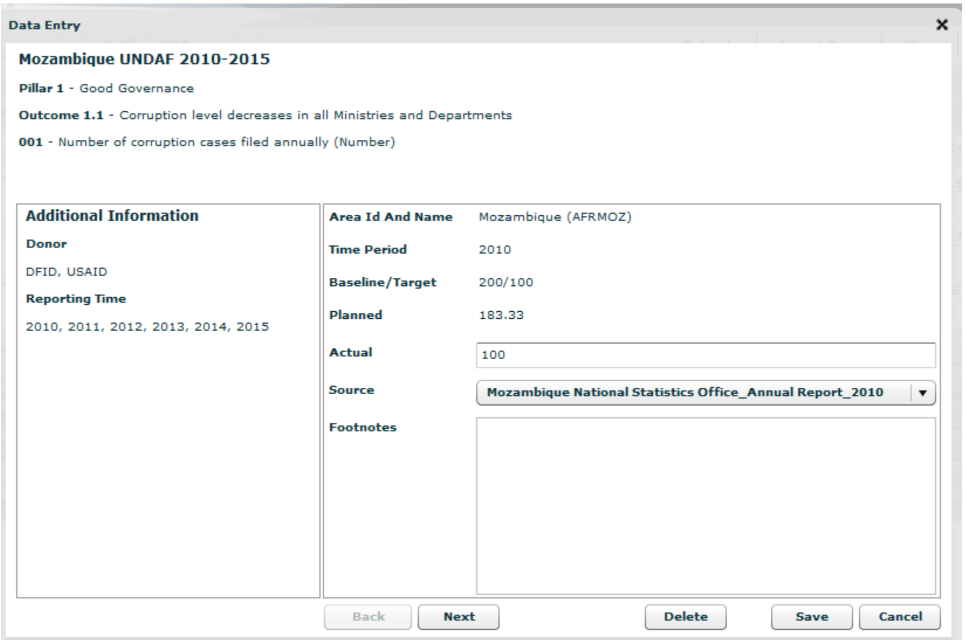

Fig. 2.2 – Data entry window

Enter the desired data value in the **Actual** box. Next, select the desired source from the drop-down list in the **Source** box.

To create a new source, select **New** from the drop-down list in the **Source** box and enter the requested details (publisher, title and year) in the **New Source** window (Fig. 2.3).

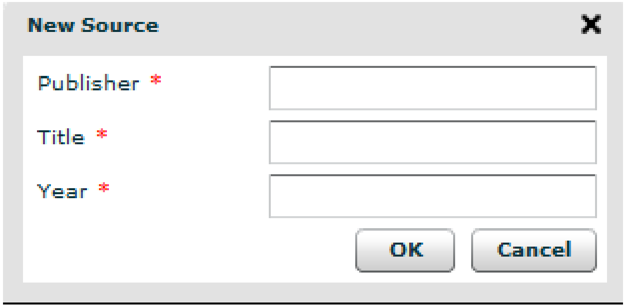

Fig. 2.3 – New Source window

Continue by entering any footnotes, if desired, in the **Data Entry** window. When you are finished, click **Save** to save the entry to the database.

To enter data for the following time period for the same indicator, click **Next**. Similarly, to enter data for the previous time period for the same indicator, click **Back**.

When you are finished entering data for that particular indicator, close the **Data Entry** window or click **Cancel**. Continue entering data for other indicators as desired, following the same procedure outlined above.

Entering comments

To enter comments against any of the framework indicators, click in the last column of the desired indicator row to open the **Indicator Comment** window (Fig. 2.4).

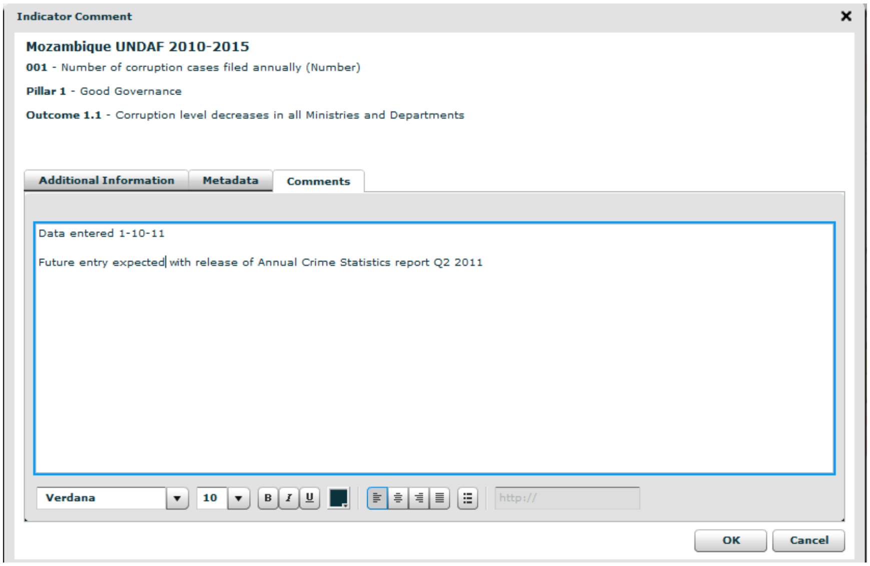

Fig. 2.4 – Indicator Comment window

Enter the desired comment text in the comment box, using the various formatting options below as desired. Click **OK** to save the comment.