1. MandE 2.0 Module 1: Introduction to MandE 2.0

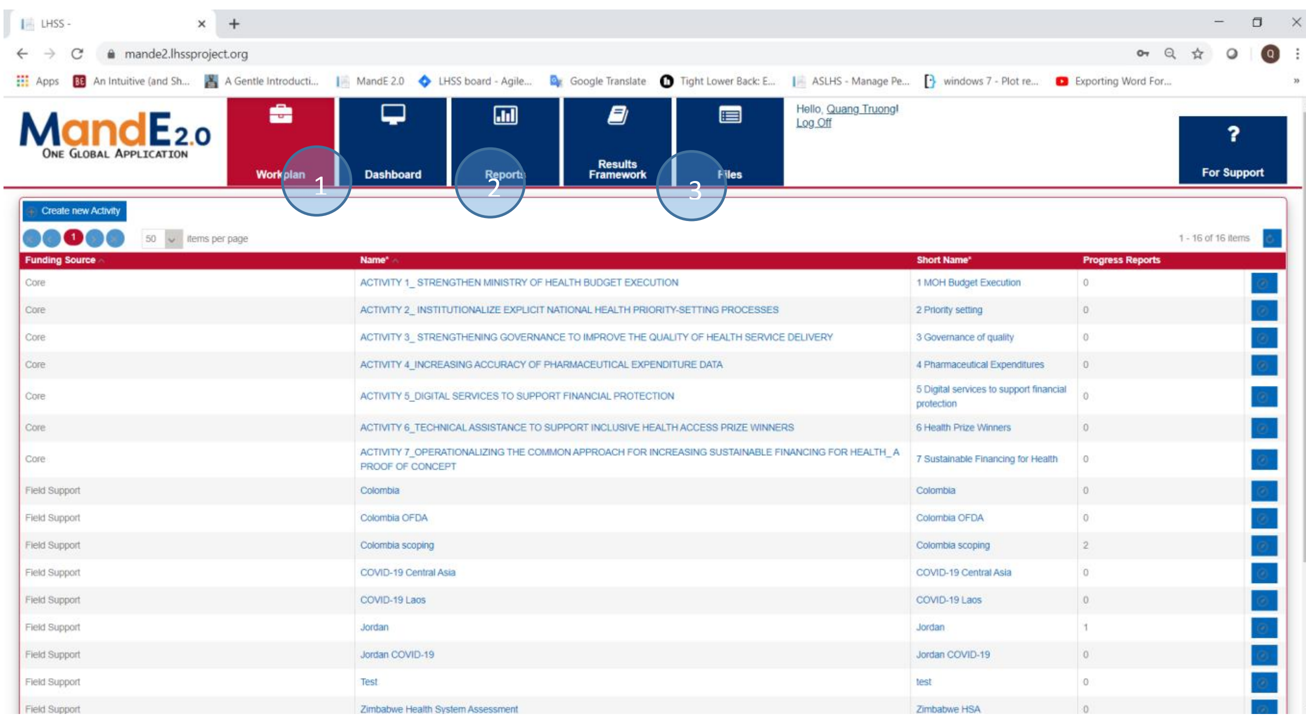
1.1. Overview of MandE 2.0:

This is a brief tutorial on Abt's MandE 2.0 system. What is MandE 2.0? MandE 2.0 is a custom-built web application for the LHSS Project that manages project implementation data for the entire project. It serves 3 main purposes (*see 1, 2, and 3, in the diagram*):

1: Project Progress Tracking: Since LHSS could potentially have over 50+countries and Activities buy-in to it, MandE 2.0 is a systematic way of documenting and tracking progress across these different Activities. Country teams enter-in their yearly workplans, results frameworks, and indicators, and the system will aggregate this information to create live dashboards that managers can use to quickly see what is happening throughout the project.

2: Report Submission: MandE 2.0 helps compile quarterly reports from all of the project Activities into a single report for USAID. Report creation and review process has been streamlined compared to the previous version of MandE.

3: Storage of Files: MandE 2.0 is a useful repository for project-related files and documents that can be accessed by anyone affiliated with the project, as long as they can be connected to the internet.



Ultimately, MandE 2.0 will be used by a variety of staff on the LHSS project including:

- Country teams, who will enter in data and outputs from their projects,
- Managers who will view dashboards to get a sense of what is happening within projects and across projects,
- LHSS partners who may want to see the data collected, progress of their affiliated activities, and completed reports, and
- Potentially could be used by the USAID client, to see the achievements of results and indicators.

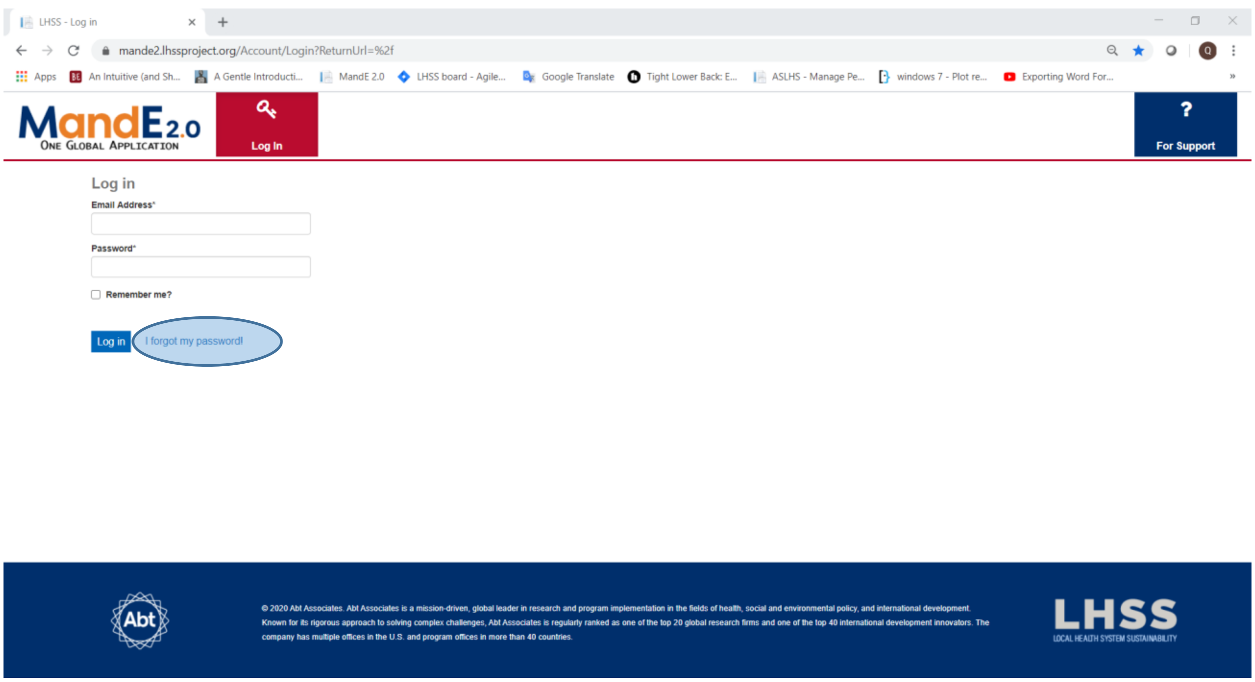
1.1.1. Note on terminology

This tutorial uses project management terms specific to the LHSS project. For a glossary with definitions on these terms (i.e. Activities, Interventions, Tasks, Deliverables etc.) please refer to the attached document (LHSS Glossary of Terms)

1.2. Using MandE 2.0

1.2.1. Getting Started:

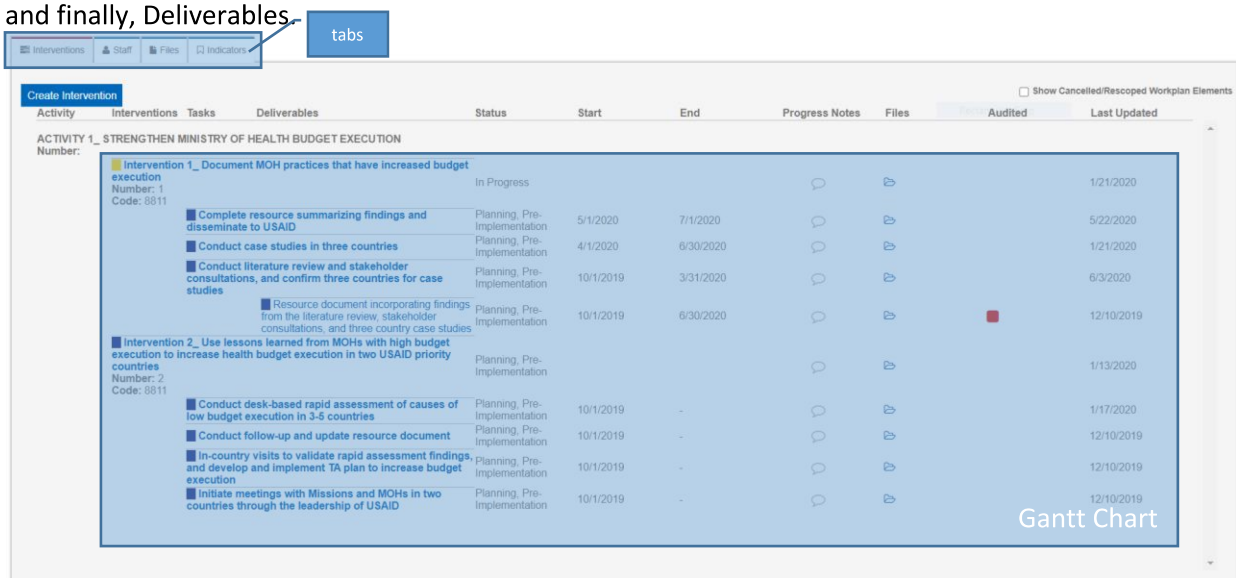
- If you have never used MandE 2.0 before, quickly check in with the MEL team to ensure that login credentials have been created for you to access the site. Once you have confirmed this,
- Log into https://mande2.lhssproject.org/ . All new users will need to click on "I forgot my password" to set your initial password.
- Enter in your username (your official e-mail address) and you will receive an e-mail with a temporary password and hyperlink that will allow you to log in and change your password. To maximize security, we ask that you set a strong password that is not shared with any of your other accounts.
- Once you have selected a new password, you should be all set to log in to https://mande2.lhssproject.org/



1.2.2. Inputting Activity, Intervention, Tasks and Deliverable Data into MandE:

The majority of the data entered into MandE 2.0 will be done through the "Workplan Tab". To see all the activities that are under the LHSS project, simply click on the "Workplan Tab" in the MandE 2.0 website navigation.

Within each Activity is a table view that shows how the Activity is broken down into Interventions, Tasks and finally, Deliverables.



From the Activity screen, it is possible to click into a specific Intervention, Task or Deliverable to view the item in greater detail and make edits and updates as the project progresses.

The Activity, Intervention, Task, and Deliverable levels each have different tabs that allow users to enter in additional information about various aspects of that item:

- Activities tabs:
  - Interventions: default tab with general information about Interventions under the activity
  - Results Framework: tab where users can enter the Activity's Results Framework. This Results Framework is then mapped onto the project wide Results Framework as these contribute to what results are being achieved on the project as a whole.
  - Indicators: tab where users can enter the Activity's Indicators. These Indicators are then also mapped onto the respective project wide indicators they contribute to.
  - Staff*: tab shows the staff on the activity and their roles. Staff included in this tab have write access to the Activity and this access right cascades down to the interventions, tasks, and deliverables associated with the activity.
  - Files**: This shows a list of associated files and documents linked to the activity. They could be loaded as part of associated deliverables (details later) or other activity component
- Interventions tabs:
  - Tasks: default tab with general information about Tasks under the Intervention
  - Intervention Details: tab that allows users to provide additional details on the intervention (such as Problem Statement, Description, Expected results) as it is written in the approved workplan
  - Staff*: tab shows the staff on the intervention and their roles. Staff included in this tab have write access to the Intervention and this access right cascades down to the tasks and deliverables associated with the intervention.
  - Files**: This shows a list of associated files and documents linked to the intervention.
- Tasks tabs:

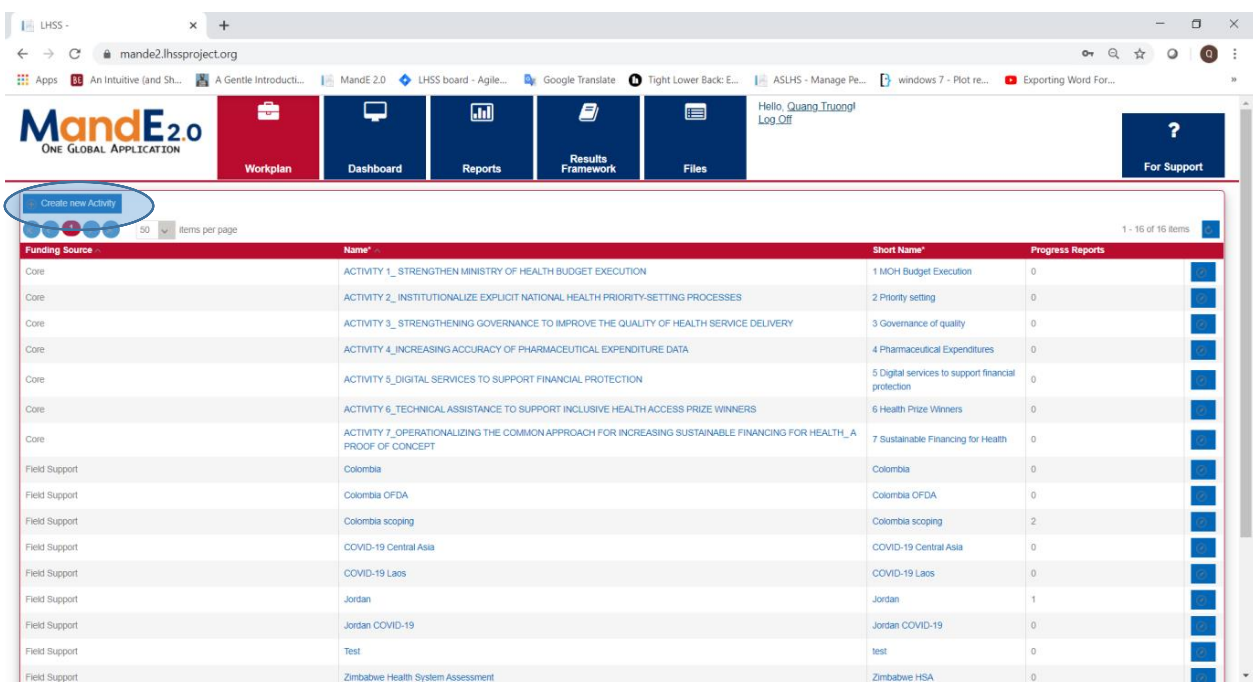
- Deliverables: default tab with general information about Deliverables
- Quarterly Progress: allows users to write progress notes as the specific task progresses. This allows other team members to check in and see progress what has happened. The information here can be logged in on a regular basis and can be pulled into the draft quarterly report during reporting at the end of the quarter.
- Staff*: tab shows the staff on the task and their roles. Staff included in this tab have write access to the task and deliverables associated it.
- Files**: This shows a list of associated files and documents linked to the task.

- Deliverables tabs:
  - Profiles: tab used to enter specific quantitative information about an indicator (for example, if an indicator is related to capacity building, this would allow a user to record how many people were trained.
  - Outcomes: tab used to provide any addition updates or follow-up on the deliverable. Useful after the deliverable period is ended to track and document any longer term outcome of the deliverable e.g. the change that the deliverable led to, etc.

*All the Staff Tabs are used to assign MandE 2.0 roles to staff on the project, which is useful for setting privileges. These tabs are linked across all levels.
**All the Files Tabs are used to attach relevant files. These tabs are linked across all levels.

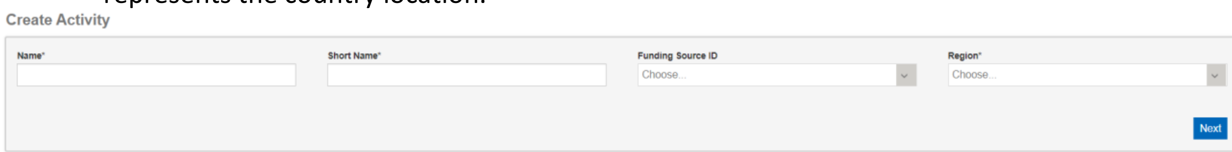
1.2.2.1. Adding an Activity:

Yearly workplans should be entered it into MandE 2.0 no later than 2 weeks after approval by USAID. The first step for entering workplans is to go to the Workplan view by clicking on the Workplan Tab, and clicking “Create New Activity”.



Clicking this button will open a new screen where you will be prompted to fill in details about the Activity:

- Name: This should be written exactly as it is in your approved workplan
- Short Name: This is a shortened name or nickname for the intervention that is easier to write out. This abbreviated name could also come from your approved workplan.
- Funding source ID: All country teams should select ‘Field Support’. All Core activities should select ‘Core’.
- Region: Core activities that directly support activities across LHSS countries should select Cross Bureau. All other Core activities (i.e. those directed at internal research or process improvement, etc) should select Core. All other countries should chose the region that best represents the country location.



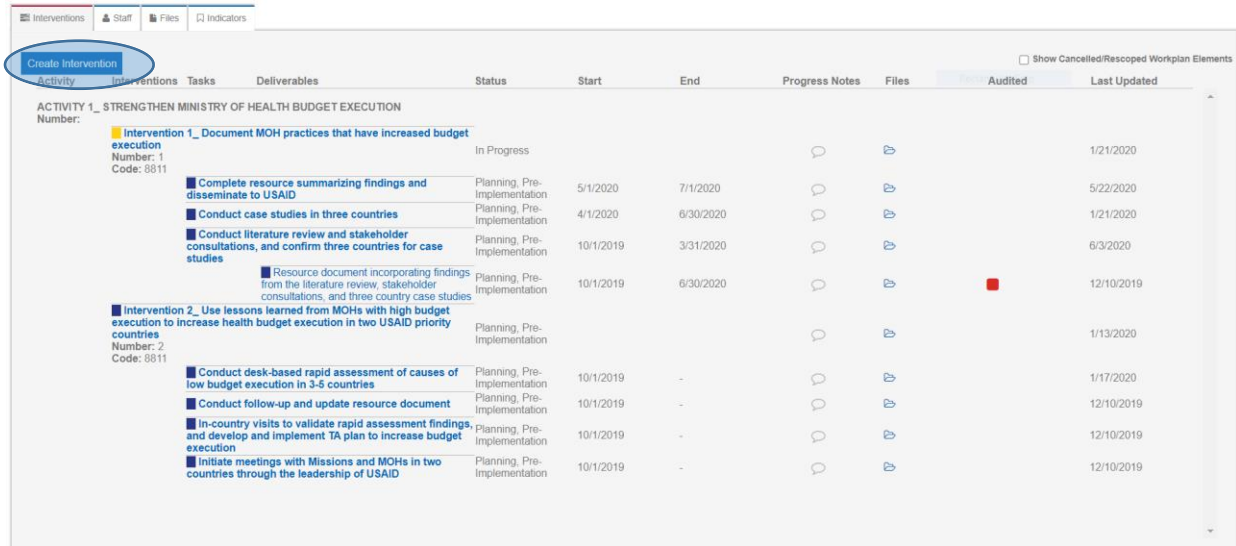
Once you have entered data for all fields, click Next. This will add the new Activity to the Workplan tab. *Please do not overthink any of the responses to the above questions. It’s possible to go back into an Activity and edit any of the data fields if you make a mistake or need to change something in the future*.

Once you have created an Activity, you should:

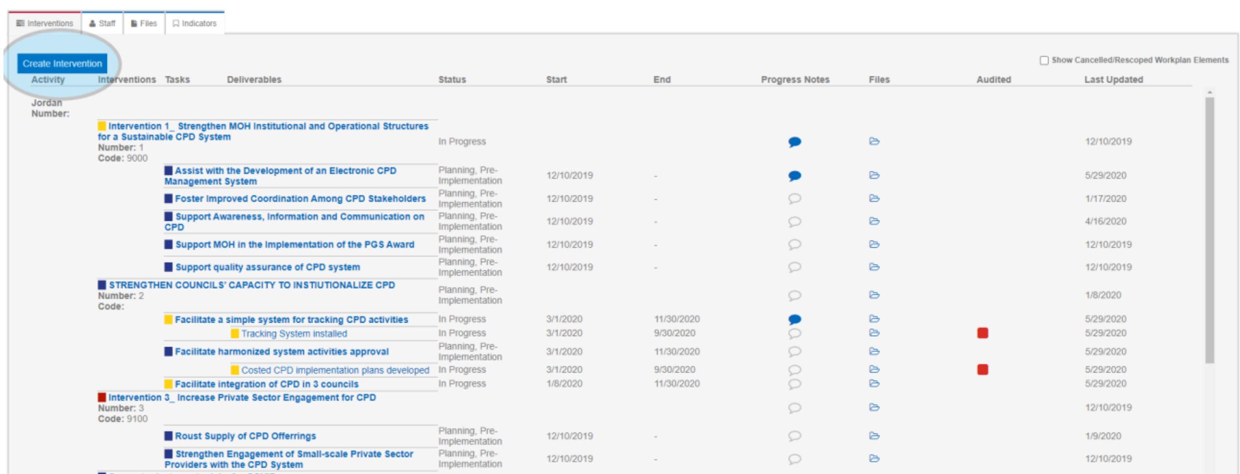
- Click on the Staff Tab: You should notice that you are automatically added as a Staff member for this activity. Please add any additional staff members that are part of your Activity’s team. Adding a team member on this tab will allow them make edits and changes to the activity (including deleting items). People who are not assigned as Staff can VIEW the Activity and the items beneath it, but may not make any changes.
- Click on the Results Framework Tab: This tab will allow you to enter in the Results Framework of your particular Activity. Once done, you must then map each of your results framework objectives to the project wide Results Framework using the drop-down menu on each row.
- Click on the Indicators Tab: This tab will allow you to enter in the Indicators of your particular Activity. Once this is done, you must then map each of your Indicators to the project wide Indicators using the drop-down menu on each row.

1.2.2.2. Adding an Intervention

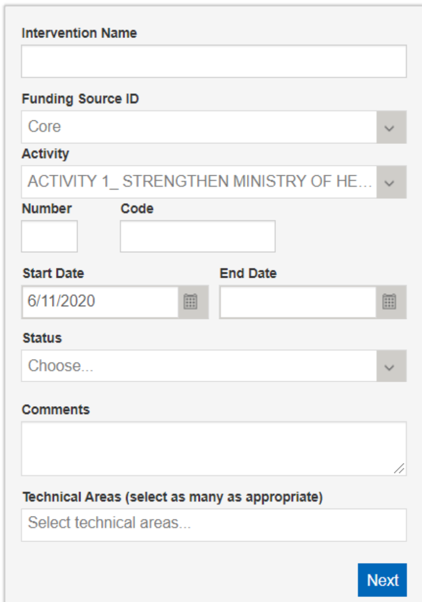
Once you have completed entries in all the tabs in the Activity view, you can then proceed to add in the Interventions as they are listed in the workplan. Simply go to the Interventions Tab in the Activity view and then click on “Create Intervention”.



And for a country-specific example, see below



Clicking this button will bring you to a new screen where you are prompted to fill in details about the Intervention:



- Intervention Name: This should be written exactly as it is in your approved workplan
- Funding Source ID: This should be pre-filled based on the details of the Activity the intervention falls under
- Activity: This should be pre-filled based on the details of the Activity the intervention falls under
- Number: By default, MandE 2.0 will list interventions in alphabetical order. If you want a different ordering (i.e. – the ordering as it is in the workplan), this field allows you to set a sort number that interventions will be sorted by instead. This field is OPTIONAL, but we strongly advise you to set the sort number to align with the order of how the interventions appear in your Activity workplan
- Code: This is the 4-digit task code for that intervention
- Start/End Date: These are based on the intervention/task calendar in your workplans. Consult the task calendar on your workplan (usually located at the bottom of the intervention description) and select the earliest date for the first task, and the latest date for the last task for the start and end dates, respectively.
- Status: Select the status that best indicates your level of progress for this intervention. Remember to update this drop-down as your project progresses as well.
- Comments: This field is OPTIONAL and allows you to write in additional details about the project. It is advisable to include a short summary description of the intervention
- Technical areas: This field is OPTIONAL and allows you to apply certain “tags” to your intervention. This may be useful for you later since there are search features in MandE 2.0 that allow you to search by tags.

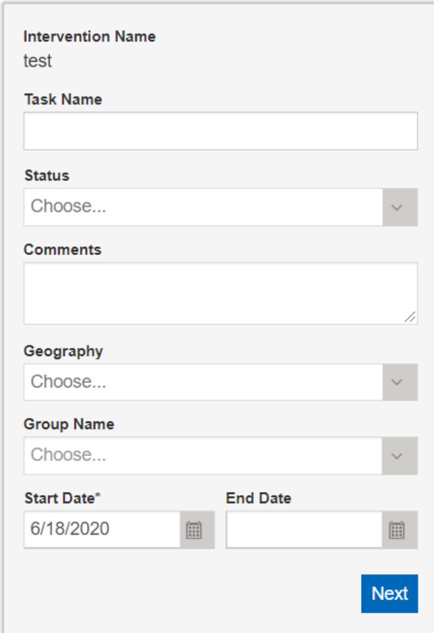
Once you have made all the selections, click Next. This will add the new Intervention to the Activity page. As stated previously, please do not overthink your responses to the above questions. It is always possible to edit Intervention data it if you make a mistake or need to change something in the future.

Once creating an Intervention, you should:

- Click on the intervention details tab: This will allow you to provide additional details on the intervention (such as Problem Statement, Description, Expected results) as it is written on the approved workplan. Please complete these sections as completely as possible as this serves as a useful representation of your Activity workplan. These are useful during reporting as you will note later.
- View the Staff Tab if necessary: note that if someone is assigned to an Activity at the upper level, they will have write and edit permissions for ALL items under that activity. If you would like a staff member to have write/edit permissions for a smaller subset of items, simply assign them to the relevant Intervention, Task, or Deliverable.

1.2.2.3. Adding a Task:

After going through all the tabs in the Intervention view, you can then add in the Tasks as they are listed in the workplan. Simply go to the Tasks Tab in the Intervention view and then click on “Create Task”.



Clicking this button will bring you to a new screen where you are prompted to fill in details about the Task:

- Task Name: This should be written exactly as it is in your approved workplan
- Status: Select the status that best indicates your level of progress for this intervention. Remember to update this drop-down as your project progresses as well.
- Comments: Though OPTIONAL, this field allows you to write in additional details about the project. It is recommended that you include a short summary description of the task
- Geography: This allows you to select the specific country or geography this task is in.
- Start/End Date: These are based on the task calendar on your workplans. Consult the task calendar in your workplan. (usually located at the bottom of the intervention description)
- Once you have made all the selections, click Next. This will add the new Task to the Intervention page. As stated previously, please do not overthink your responses to the above questions. It is always possible to edit Task data if you make a mistake or need to change something in the future. Don't forget to save!

Throughout the project, you should add progress notes to update the status of a task. To do this, go to the "Quarterly Progress" tab and click "Add New Progress Note". This will open up a field for you to enter text or note any progress on a task. It is advisable to enter in this format*: [Date] Comment (Initials or name).* More on this later.

1.2.2.4. Adding a Deliverable:

After going through all the tabs in the Task view, you can then add Deliverables as they are listed in the workplan. Simply go to the Deliverables Tab in the Task view and then click on "Create Deliverable".

Clicking this button will bring you to a new screen where you are prompted to fill in details about the Deliverable:

- As with Activities, Interventions, and Tasks, many of the fields here will be familiar and be filled out in the same way.
- Not all tasks have a deliverable (or a deliverable could be associated with multiple tasks. Please follow the workplan table, and "attach" the deliverable to the last task associated with it. The key is that once correctly entered, your tasks view on MandE2.0 should look like the task table in your Activity workplans in Microsoft word.
- The big difference in deliverables is the "Deliverable Type" field. Your selection here dictates the types of questions and data you will be prompted to enter about that deliverable later on. For instance, if you select that your deliverable type is an Abstract, you will get follow up questions on the Technical Area of the abstract, the publication name and what the abstract will be used for. Selecting "Equipment" as the deliverable type will create a very different set of follow up questions (for instance, on Equipment type and quantity distributed). Please choose the option that comes closest to what your deliverable is. If you feel that your deliverable type is unique to

the ones already listed, not represented, or that additional questions should be asked on a specific deliverable type, please reach out to the M&E Team.

2. MandE 2.0 Module 2: Tracking Workplan Progress on MandE 2.0

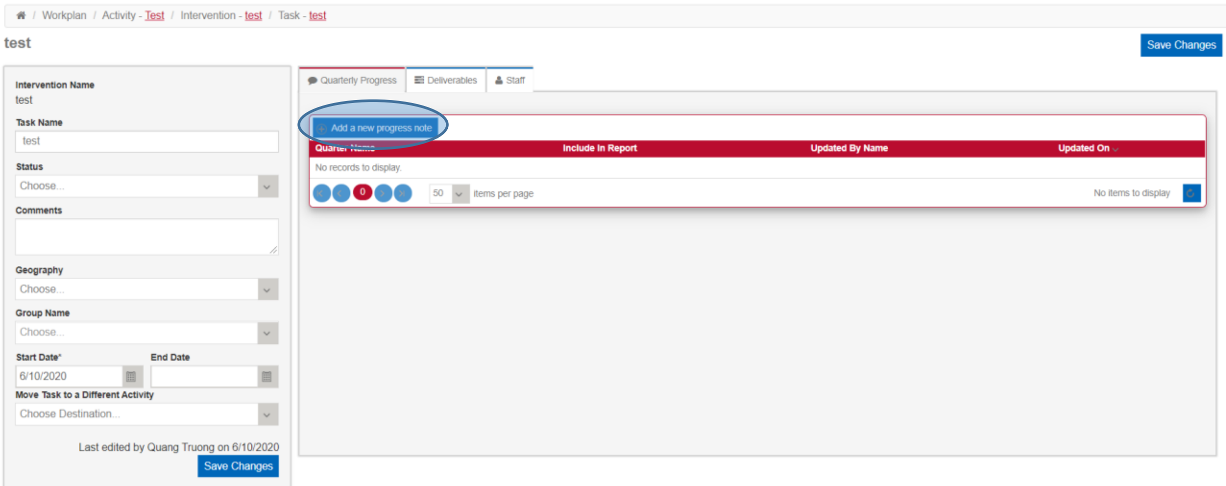
After adding your Workplan to MandE 2.0, it is important to log in periodically to provide updates as tasks and deliverables are completed, enter progress notes, and to submit quarterly reports.

2.1. Adding updates

Throughout the operation, it may be necessary to do things like:

- Update Items: For instance, changing the status of something from “in progress” to “complete” or edit start and finish dates. This is important because the status of these items are directly linked to the dashboards, so that the management team can note whether any Activity is falling behind schedule in accomplishing its associated interventions, tasks, or deliverables.
- Update the Results Framework and Indicators tabs: in the same way, your project’s progress towards indicators and fulfilling the Results Framework objectives are also directly linked to the dashboards, allowing the management team to view progress across all Activities.
- Getting Items Audited: You may have noticed by now a box on certain items that says “audited.” The purpose of these boxes is that it allows management level staff to verify that a task or item marked as complete is actually complete. Only users with certain permission levels in MandE 2.0 are allowed to do this.
- Writing Internal Comments: Within the Activity View, there is a column called “internal comments” with speech bubble icons underneath. This column is OPTIONAL, but allows team members to write memos to each other and their manager that provide additional information about a particular Intervention, Task or Deliverable. For instance, there might be a note saying that an item is overdue because of waiting for confirmation from a project partner.

- Adding progress notes: Progress notes are added to Task Level items. Essentially there is one progress note per quarter, and throughout the quarter, project staff should be diligent in filling it out with any important notes on progress of the specific task. As a convention, progress notes should start with the date you are writing [5/29/2020] for easy recall later, and can be thought of as a diary entry. Progress notes can read by managers and other members of the team to get a quick overview on what has occurred with a task. It is also a helpful feature that is linked to quarterly report templates, enabling useful progress details on the task/deliverable to be pulled into the quarterly report template, avoiding the loss of recall at quarterly reporting



2.2. Completing Deliverables

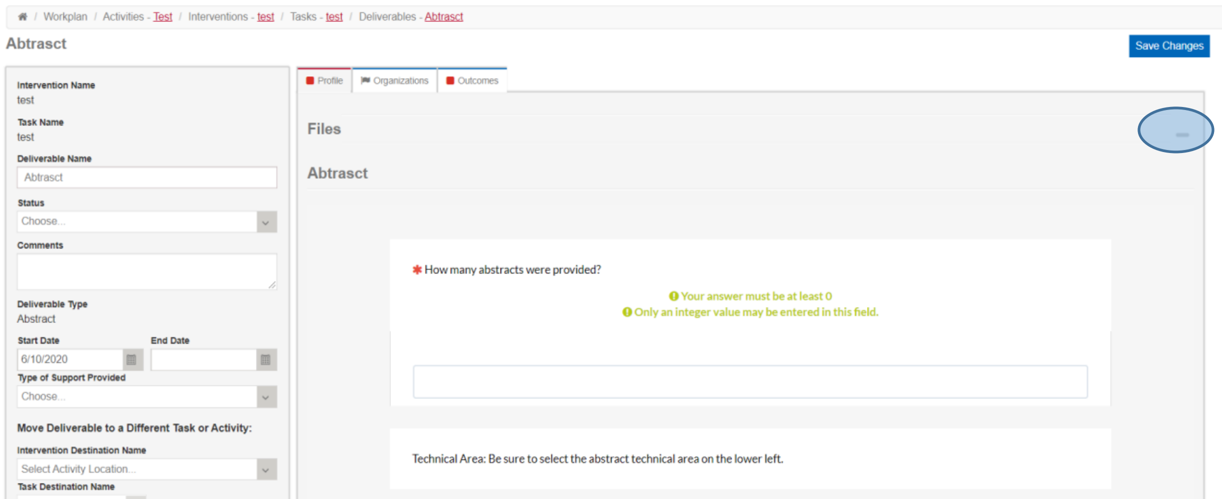
- As your project completes deliverables, it is important to record any relevant information. Do this by going to the Deliverable in question, going to the "Profiles Tab" and filling that out with necessary information.
- In addition, staff should remember to fill out the "Follow-up/Progress" tab within Deliverables if there have been any important updates to the Deliverable since it was completed.
- Moving deliverables: if necessary, deliverables can be moved around. You can move a deliverable to a different task or activity or even move it to the next year's workplan.

Documenting Deliverables helps USAID track that we are achieving on our deliverables and ultimately get paid. LHSS is a contractual agreement and we are held bound to achieving on our deliverables. Additionally, keeping everything up to date is important since it allows MandE 2.0 to provide a record of what was done and any implementation progress in case a staff member leaves.

2.3. Sharing Files:

There are various ways to attach essential files to MandE 2.0:

- Attaching files to Deliverables: If a file is directly connected to a deliverable (for instance, attaching a publication Abstract), you should click on the deliverable in question and go to the "Profiles Tab". At the very top of the tab, you should see a button that would allow you to attach a file. If you don't see anything, look to the right hand side for a minus sign, and click on it to expand the section for attaching files.



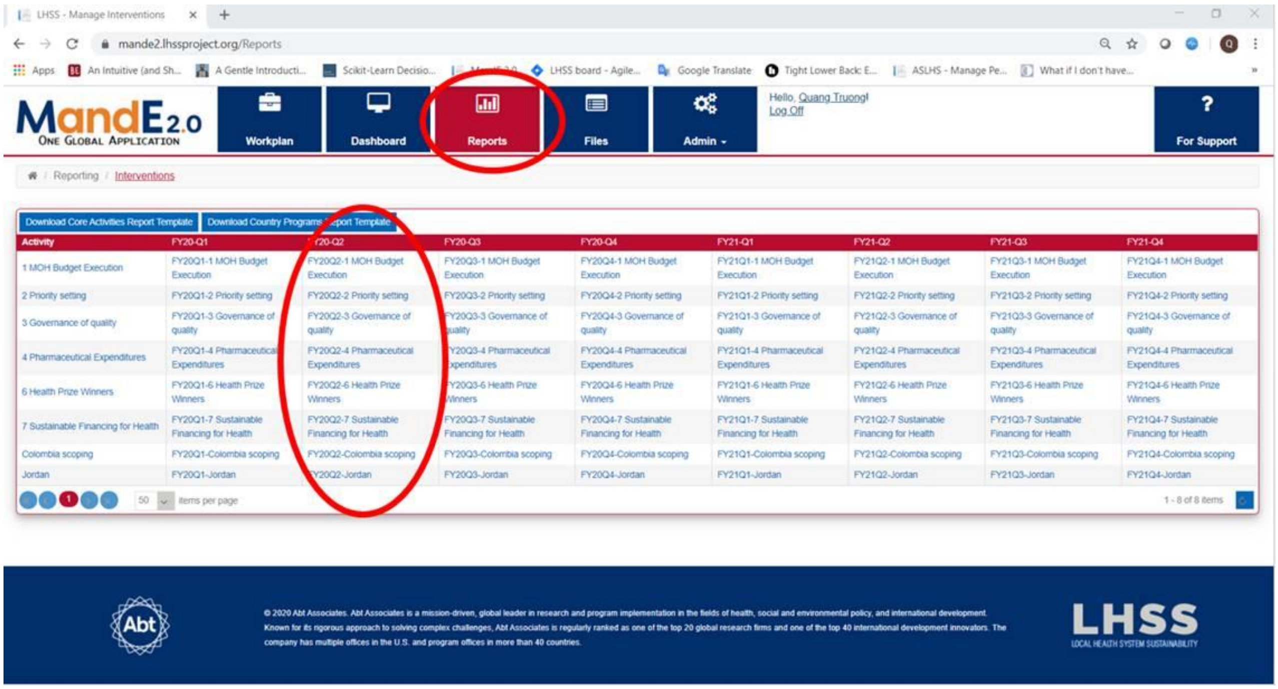
- Attaching files to other items: if a file is connected to an Activity, Task or Intervention, you can upload a file by going to the "Files" tab of that item.

In the future, if you need to find the file, you can navigate to the same area it was uploaded. Alternatively, the Files tab on the Main Screen in MandE 2.0 will allow you to search all files that are uploaded MandE 2.0.

It is important to upload files onto MandE 2.0. Many of our partners don't have access to Abt's internal shared drive. In addition, managers may look at uploaded files during auditing to confirm that an item has been completed.

2.4. Submitting Reports:

Throughout the year, project teams are expected to submit standardized Quarterly Reports, which are the compiled into a project wide report for submission to USAID. Users can access the report submission page clicking on the "Reports" tab.



*NOTE: If you have problems loading the page (if it does not look like the above picture), you may need to first delete your browser's cache:

- Deleting your cache in Chrome (you only have to delete your cache – NOT cookies or passwords – for the last hour)
- Deleting your cache in Firefox

To use this page:

1) Click on either "Download Core Activities Report Template" or "Download Country Programs Report Template", depending what type of activity you are engaged in.
2) Fill out the blank template with information from your project. There are directions as how to fill out the template on the templates themselves. Additionally, you can download any of the previously submitted reports to see an example of how a completed report should look (just click on any of the small "download icons")
3) Go to the correct ROW that your Activity is listed on
4) Move to the correct COLUMN based on what quarter we are in. As a reminder, we are uploading reports for FY20-Q2 right now.
5) Click on the hyperlink for that cell and upload your completed Quarterly Report

* You will know that you have properly uploaded your report if you see a small "download icon" appear. This will let you or others download this report in the future.
* If you accidentally upload the wrong file or need to update the file after uploading it, DON'T WORRY: you can simply delete the file you just uploaded and replace it with another file.

6) After submitting this initial draft, the management team will make edits and comments to all the quarterly reports. Once you receive the commented version of the report please look over the comments and edits *BUT MAKE CHANGES TO THE ORIGINAL TEMPLATE YOU UPLOADED/SUBMITTED* rather than the file you received with edited comments. The reason is

because the templates contain special XML tags that allow the data to be easily scraped by MandE 2.0.

7) Once you have a final version of the quarterly report which includes the edits and comments from the management team, re-upload this final version to MandE 2.0 again, replacing the initial submission/upload.