Tearfund Track Partner User Guide

V3 08.05.26

Contents

1. Introduction

What will this chapter cover?

This chapter provides context on what Tearfund Track is and why it was created. It provides an overview of the main benefits of using Track and lists Track's key functions. Finally it explains how Track is administered and defines the supporting structure for Track users.

Who will find this chapter helpful?

All users of Track

1.1 Context

Track is Tearfund's design, monitoring & evaluation system. Track allows users to track projects, programmes and initiatives throughout the entire project cycle; from the inception and design phase through to implementation and reporting.

The idea for Track came in 2015 when there was a corporate project to look at joining up Tearfund's IT systems. We recognised that programmatic data was being collected and managed in many different ways. As a result, it was not easy to track our projects or programmes. We wanted to know the impact we were having across the world and wanted to be able to streamline reporting and to learn from our projects. We wanted to provide better IT solutions to enable data capture and management on projects, programmes and initiatives across our community development, humanitarian response and advocacy work.

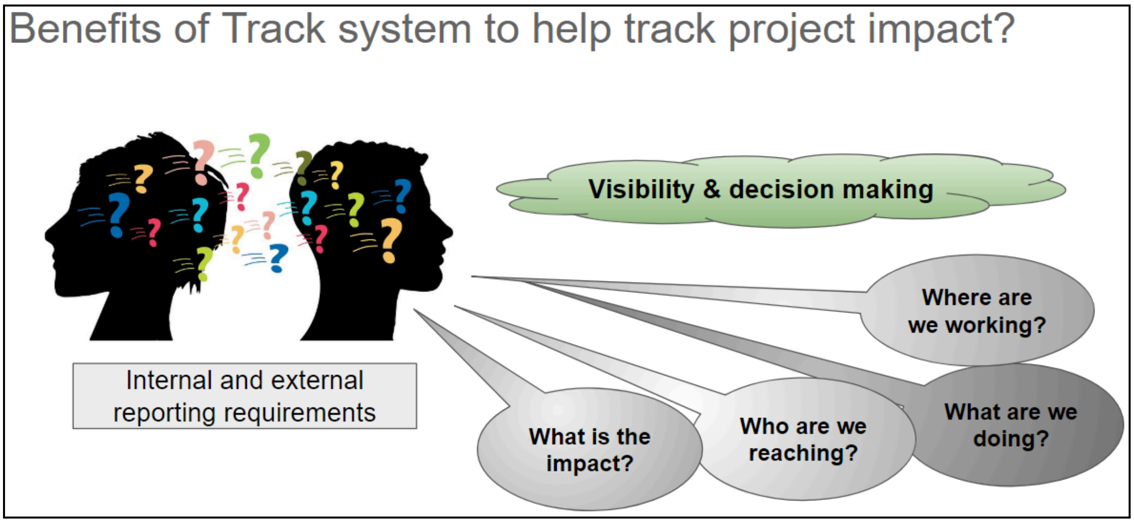
Tearfund spent 2 years engaging and consulting with its stakeholders across the world. This included piloting and testing the concept and prototype with partners. Eighteen months were spent talking with clusters to define the requirements. Track is the result of this process. Track is the first key component of this integration across all IT systems.

Track was designed in an 'agile' way. This means the Track support team can continue to learn from, improve and adapt the system to help and support those who use Track both now and in the future.

1.2 What are the benefits of Track?

One of the key benefits of Track is that it improves programme management and quality. Track increases confidence in the evidence that we collect. This helps Tearfund to know what works, for whom, and under what conditions.

Figure 1: The benefits of Track



Track delivers:

- **Visibility** of strategy, project, programme and initiative data. Dashboards provide visibility of data. This means that users can see how well a project is progressing at a quick glance. Users can also look across many programmes and initiatives. Track is accessible to staff across all parts of Tearfund. Partners also have their own dashboards. Partners can see their projects and progress in a clear way**.**
- a **consistent approach** to capture and assess data across all our projects, programmes and initiatives. A lot of work has ensured the consistency of how we tag the data against common categories. This gives the opportunity to filter and view similar data across all our work. Track provides a menu of standard indicators. Tearfund is encouraging users to use these. This will mean that over time we will be able to track progress globally across similar measures.
- Assurance of the **quality** of data. Track has data validation and approval points built into the system. This allows for better decision-making and insights at all levels. It enables reliable evidence of impact. This improves communication and engagement with funders. This allows Tearfund to maintain and grow income.
- It is the first building block towards our **Global Systems Programme.** Track is a pioneering project and is integrated across Tearfund's financial, partner, grant and logistics management systems.

1.3 Track overview

Track is an IT system that is accessible to all Tearfund staff and partners. Track aims to:

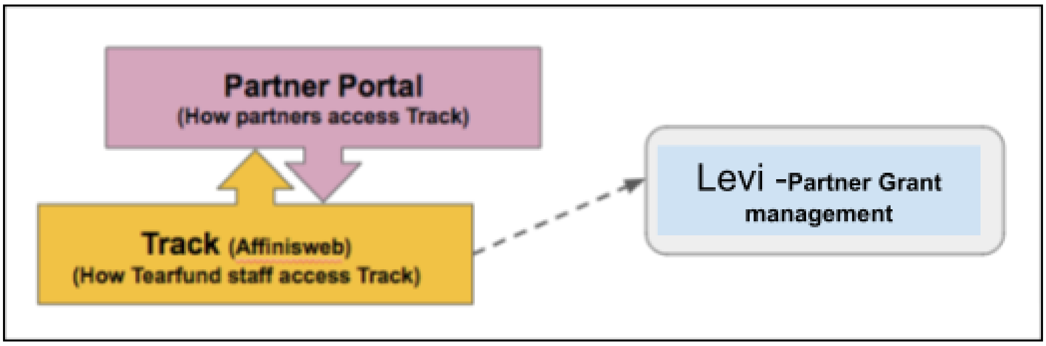
- capture project proposals for all programmatic work across Tearfund

- support the monitoring and tracking of activities and indicators

- help to report against these projects.

There are 2 different ways to access Track. Think of these as 2 different doors by which to enter the same house, with the house being Track.

Figure 2: The 2 different ways to access Tearfund Track



- **Track-Tearfund Staff** will be used by Tearfund staff to enter country strategies, project proposals, reports, stories and evaluations.
- The **Partner Portal** can be accessed online at https://partner.tearfund.org/ by partners once they have been trained. This is where partners can go into the system to complete their proposals and reports.
- Track is linked to **Levi Our partner Grant management system**

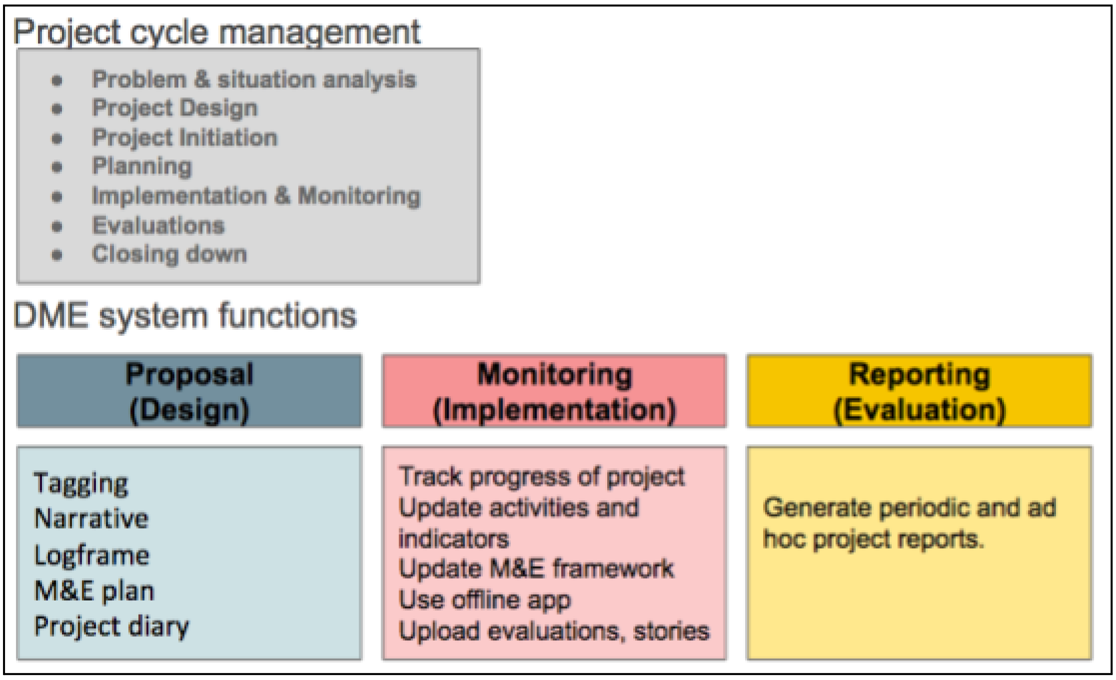
1.3.1 Track functions

Track has been structured around the key stages of the project or programme cycle. This is because it is at the heart of how we design and manage projects, programmes and initiatives. It is important to say that Track is a system that will enable users to capture their thinking and planning. However, it will not do all the thinking for you! We recommend that Track users continue to collaborate and plan their work together with staff and partners. Track can support users to think through the logic on a project. Track serves as a tool for tracking and monitoring the performance of projects, programmes or initiatives. It provides access to:

- a set of standard indicators aligned with industry standards
- the Sustainable Development Goals
- the Light Wheel

The diagram below shows the key functions of Track:

Figure 3: The key functions of Track



Project Cycle Management

Track facilitates good project cycle management (PCM). PCM is the process of planning and managing projects and programmes. PCM is based around a project cycle. This ensures that all aspects of projects are thought about. It involves a set of planning tools which feed into the logical framework (known as a log frame). The process is important for project success, sustainability and organisational learning. Track holds the tools to ensure Tearfund and their partners perform PCM effectively. This helps to ensure successful projects. Roots 5 provides guidance on the whole project cycle and can be found on the Tearfund Learn Hub.

Proposals (Design)

1. Create project proposals using one of the following templates:
    a. Tearfund Standard Template
    b. Emergency Response Template.
    c. Donor Template (for Institutionally funded projects)

2. Review, edit and approve project proposals

Monitoring (Implementation)

3. Create project calander events
4. Amend project design and details during project implementation
5. Update progress against activities and indicators online
6. Upload documents against a project such as stories, evaluations and case studies
7. Monitor progress of projects against team/country strategies

Reporting (Evaluation)

8. All reports (eg 6 monthly, annual etc) will be initiated and completed in Track
9. Progress of projects can be tracked via customised dashboards and reports

10. Pull out aggregated counts for reports (e.g. beneficiary numbers, categories of groups reached through Tearfund's work)

1.3.2 Track users

The following table sets out the key users of Track. This includes Tearfund staff and partners:

Figure 4: The key users of Track

1.3.3 Track admin roles

Track will be administered at three levels:

1) UK - The Track support team is responsible for adding new countries/clusters to the system and ensuring that all Track users have access to the system
2) Country office - The designated Track administrator will be responsible for adding partner organisations to the system
3) Partners - Within each implementing partner organisation one member of partner staff will be the Track administrator. This person will be responsible for creating and managing user accounts

1.4 Track support

If you need any support when using Track please contact your Track administrator or your link person at the Tearfund country office.

1.4.1 Other resources

The Roots 5 Guide to project cycle management can be found on the [Tearfund Learn Hub](https://learn.tearfund.org).

2. How to access Track

What will this chapter cover?

This chapter explains how to access and login to Track. It also explains how partner 'admin' and 'user' accounts can be set up and managed. Finally there is a section which explains how to navigate within Track, which also highlights some of the key features that a user will see.

Who will find this chapter helpful?

All users of Track

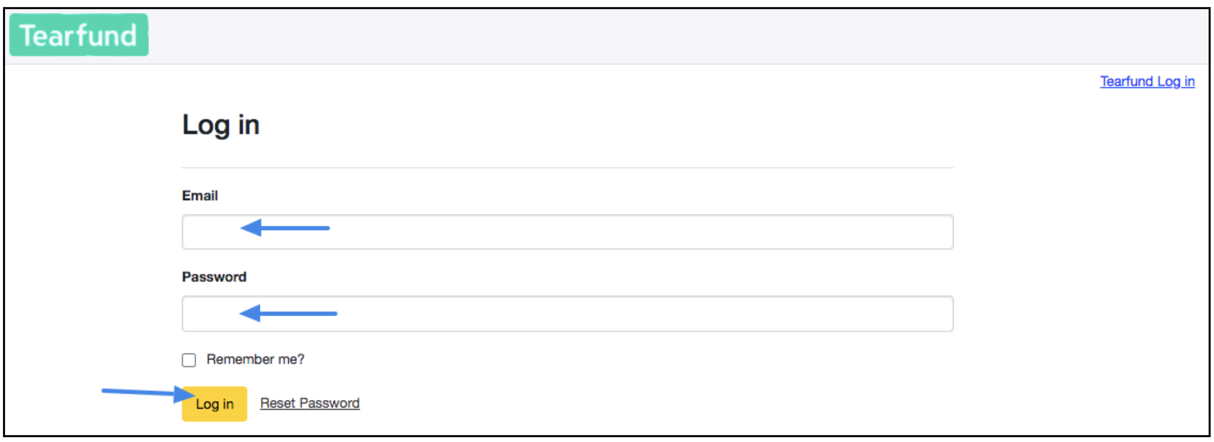
In order to be able to access Track, **users must have Google Chrome** set up as their default browser. Guidelines on how to do this can be found in the Appendix.

In order to be able to use Track, partner organisations must have an account created for them. Partner organisations must also have a designated staff member to be the Track administrator. The partner environment is managed by the partner and Tearfund does not have access to it. However, Tearfund will need to set-up one partner staff member as the Track partner administrator before handing it over to the partner.

2.1 How to login as a partner 'administrator'

Once the partner account has been set up by Tearfund, the partner administrator will receive an email including the login details for Track.

1. Enter the url **partner.tearfund.org** into the chrome browser



2. Enter email address and password and click on **login**

3. If you have forgotten your password, click on reset password.

4. You will receive an email with a link to reset your password.

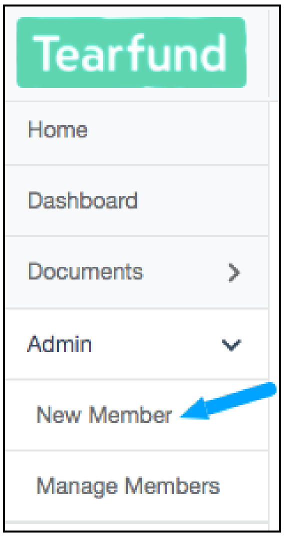
2.2 Managing the partner environment

The partner administrator is responsible for managing the setup and maintenance of the partner portal for their staff.

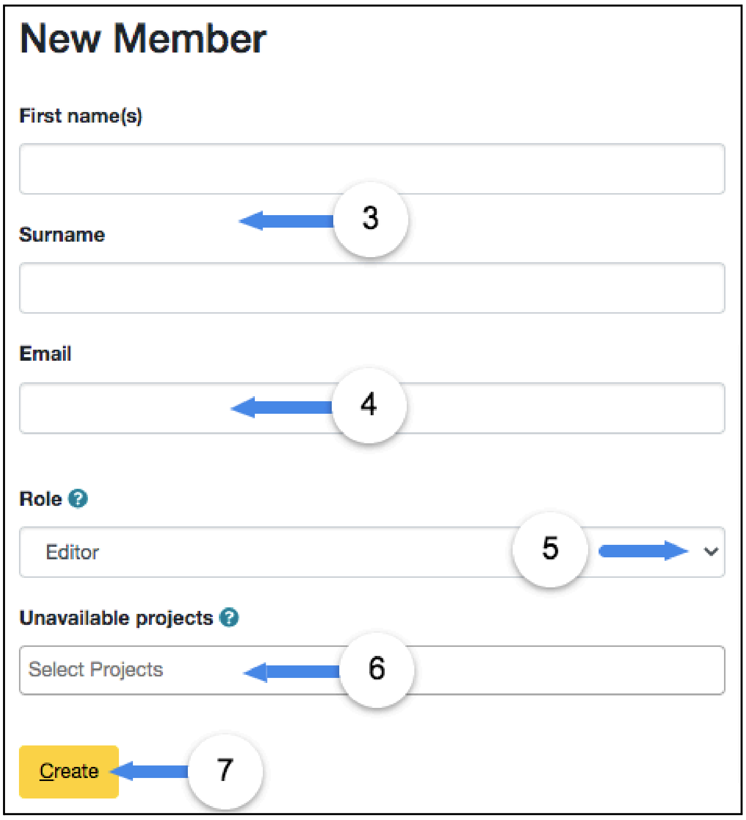
2.2.1 Create a new member account

This section will explain how to set up new partner users in Track.

1. Login to the partner environment (https://partner.tearfund.org/)



2. Under admin In the left hand navigation menu select **new member**



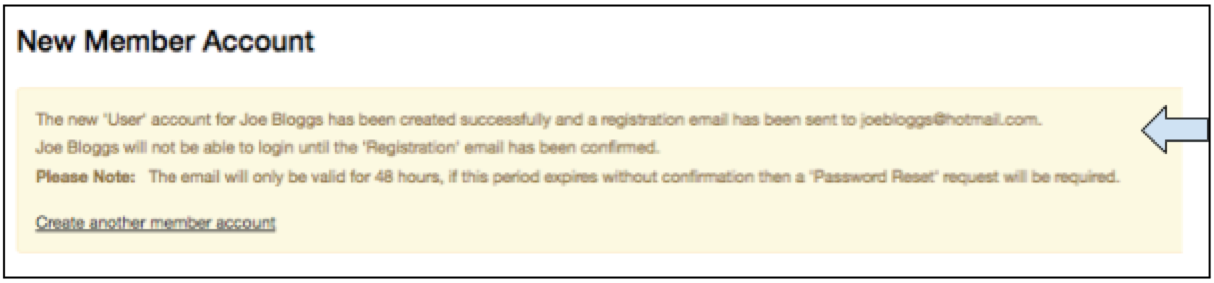
3. Enter the **name and surname** of the partner staff member

4. Enter the **email address** of the partner staff member (*this must be a work email address*)

5. Select whether the user will be set up as an **admin** role or as a **user** role.
(The Track administrator will be set up as the 'admin' for the partner organisation. Unless there is a requirement for extra admin roles, all other partner staff should be set up as 'user' roles).

6. In the ‘**unavailable projects**’ field, add the ID numbers of any projects that the member of staff should not see or have access to.

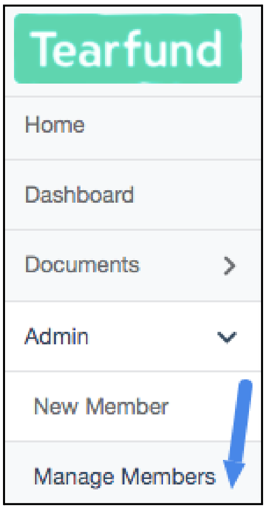
7. Click on **create**



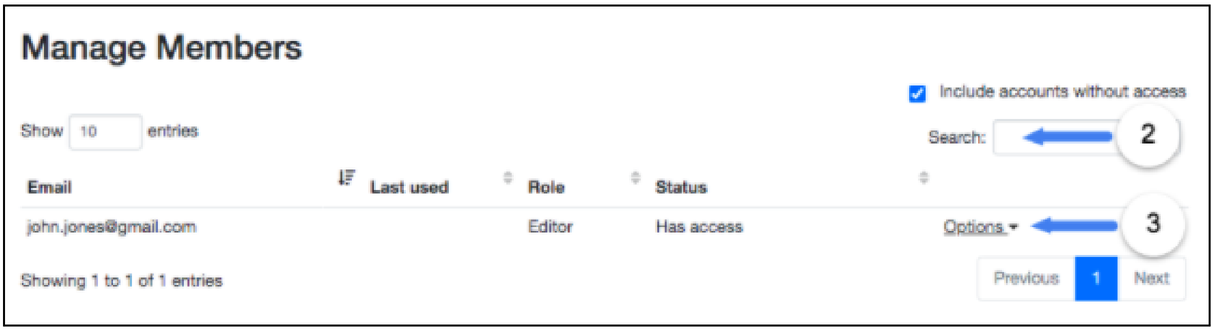
8. A notification message will appear confirming that the new account has been created for the user. The user will receive an email notification and will need to register on the system within 48 hours. (It is important that the account user responds to this email within 48 hours, otherwise they will need to be setup again)

2.2.2 Manage members

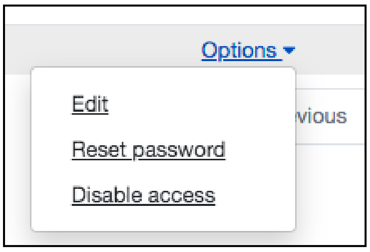
Once the new member account has been created, the partner administrator can manage this and other member accounts.



1. Under admin in the left hand navigation menu select **manage members**



2. Type in the **search** box to find a user



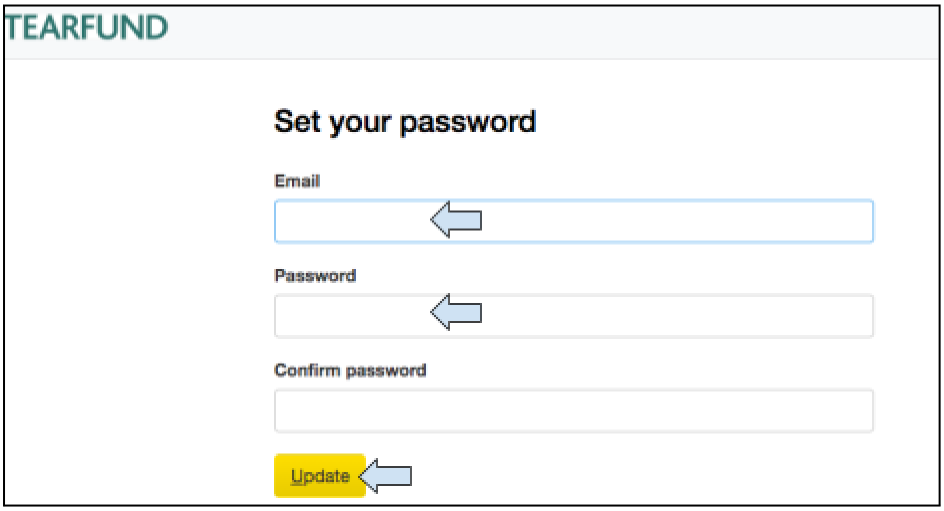
3. Click on the **options** drop menu to 'edit' the member account details, to 'reset password' or to 'disable access' to the account.

If there are any issues with setting up partner accounts, please contact your country office link person in the first instance or email tracksupport@tearfund.org.

2.3 How to login as a partner 'user' or 'viewer'

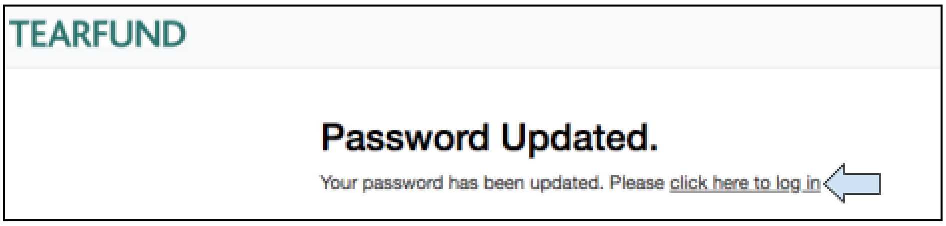
Once a partner user account has been created by the partner administrator, the partner user will receive an email with a link to Track.

1. Click on the link to be taken to the Tearfund Track partner login page.



2. Add your email address and password

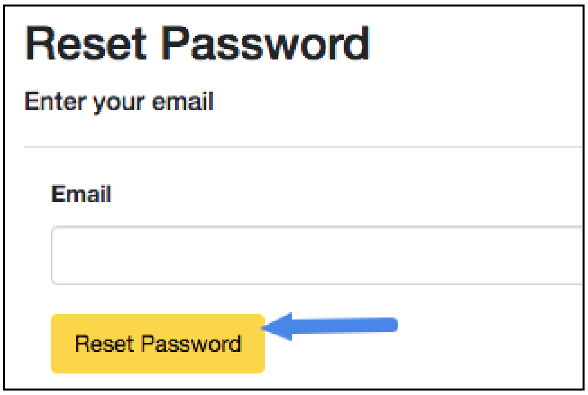
3. Click on **update**



4. Once the password has updated, click on the **link to login**

5. Enter your email address and password and click on **login**

6. If you have forgotten your password, click on **reset password** next to the login button.



7. Enter your email address and click on reset password.

8. You will receive an email with a link to reset your password.

3. System navigation

What will this chapter cover?

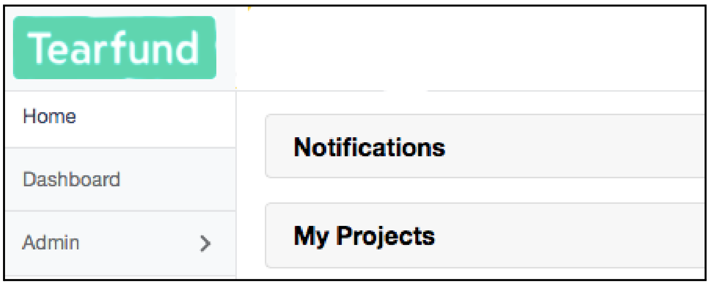
This chapter will explain how to navigate within Track and will highlight some of the key features that a user will see.

Who will find this chapter helpful?

All users of Track

3.1 Home screen

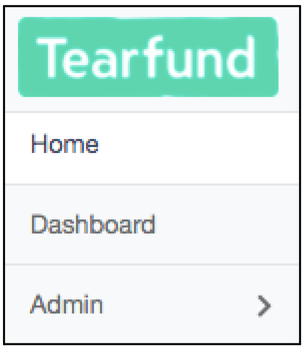
Once the system has been logged into, the user will see this **home** screen.



Two boxes with drop arrows will allow the user to view any recent **notifications** or to access projects they are working on in **my projects**.

(Further information about how to open and edit a proposal can be found in Section 4: 'Design: Projects').

3.2 Left hand navigation panel



In order to ease navigation through the system a navigation panel is provided on the left hand side of the screen. Detailed information on how to use each section is provided later in the manual.

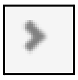
3.3 Process bar

Within a document in the projects section, a process bar shows each tab which needs to be completed. Clicking on **save and continue** at the end of each section, will automatically move the user forward to the next. The tab titles in the process bar will turn blue once the section has been completed.

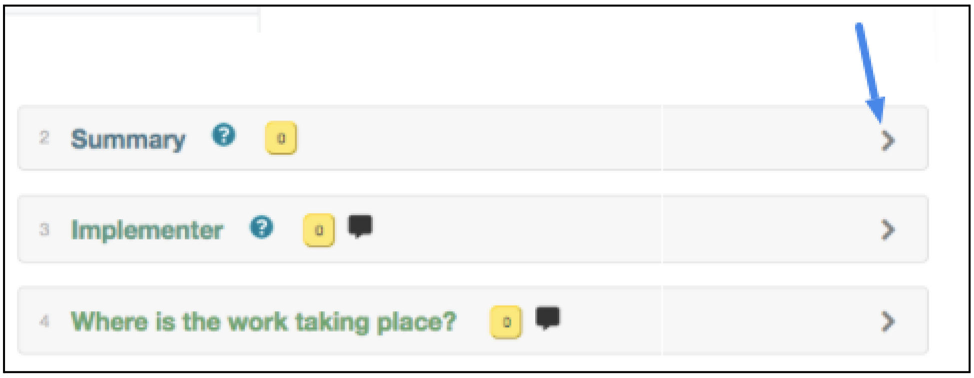
3.4 Other symbols and icons

Throughout Track, various small symbols can be found. The following section explains the meaning of these symbols and describes where they are located.

3.4.1 Expand box

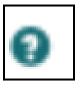


This symbol indicates that there is additional information to be viewed in a particular section. It can be found at the right hand side of the grey title boxes in each screen.

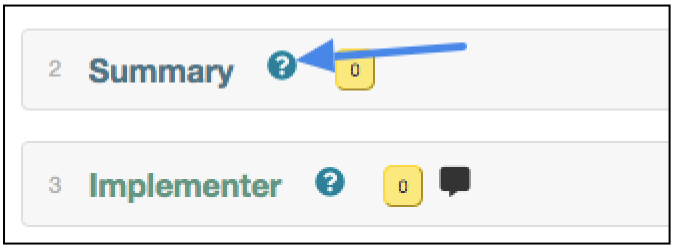


Click on the icon to expand the box and reveal the additional information.

3.4.2 Definition

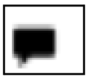


This symbol indicates an explanation or a definition of a word. It can be found next to words in many sections of Track.

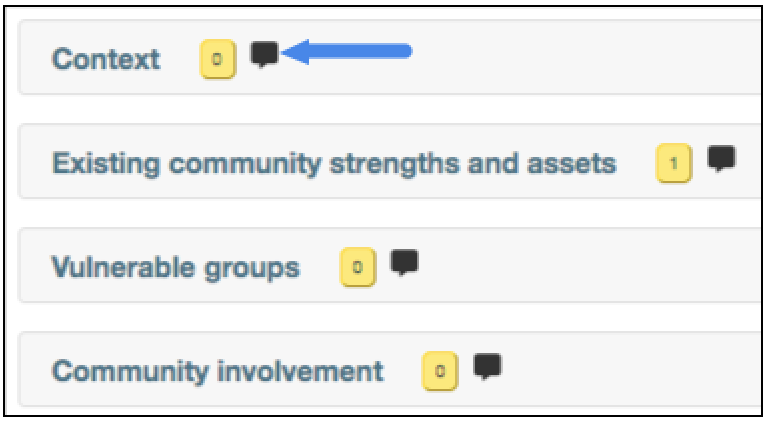


Click on the icon to open a pop up box and view the explanation or definition.

3.4.3 User notes

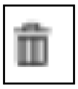


This symbol indicates that user notes can be added to a particular section. It can be found in many sections of Track. Once information has been added, the icon turns green.

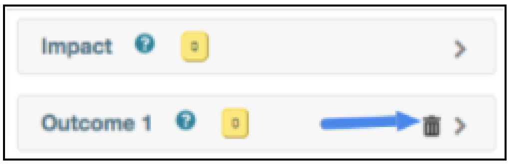


Click on the icon to open a pop up box in which to write personal notes.

3.4.4 Delete



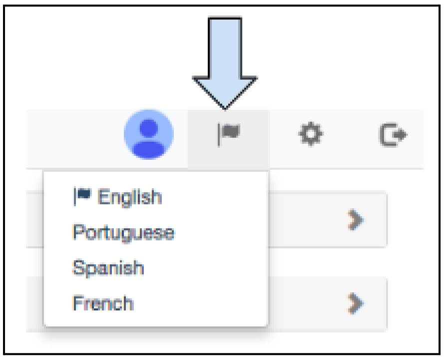
This symbol indicates that a section can be deleted or removed. It can be found in several sections of Track, for example below in the project logic section.



Click on the icon to delete or remove something from Track.

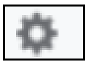
3.4.5 Change the system language

This symbol indicates that the Track system language can be changed. It can be found in the top right hand corner of any screen within Track.

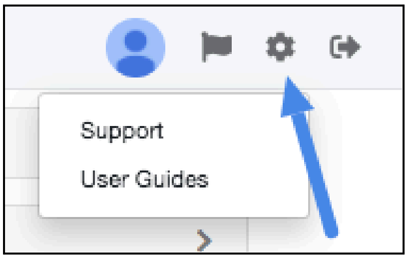


Click on the icon to **choose** between English, French, Spanish or Portuguese as a system language.

3.4.6 Amend settings

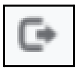


This symbol enables the user to amend their settings. It can be found in the top right hand corner of any screen within Track.

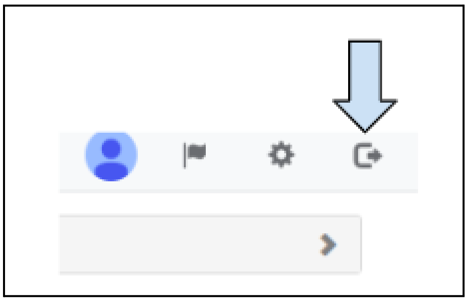


Click on this icon to access a list of **support email addresses** or to view a selection of **Track user guides**.

3.4.7 Logout



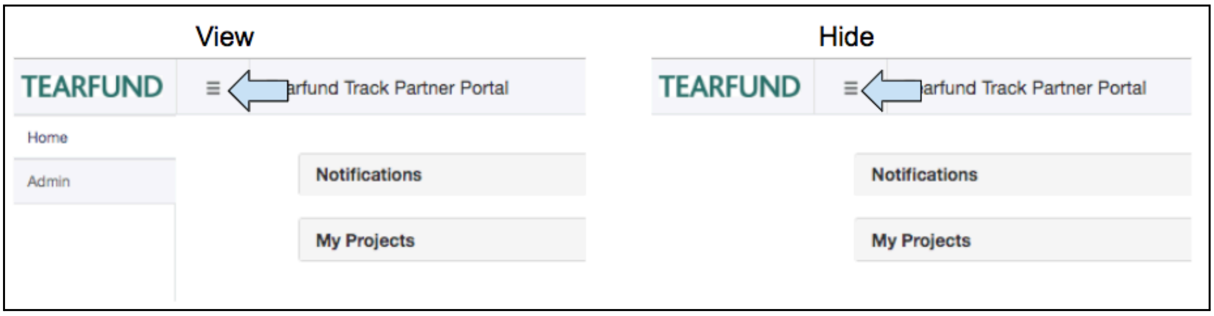
This symbol enables the user to logout of the system. It can be found in the top right hand corner of any screen within Track.



Click on this icon to **logout** of Track.

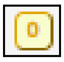
3.4.8 View / hide the left hand navigation panel

This symbol enables the user to view / hide the left hand navigation panel. It can be found in the top left hand corner of any screen within Track, next to the Tearfund logo.

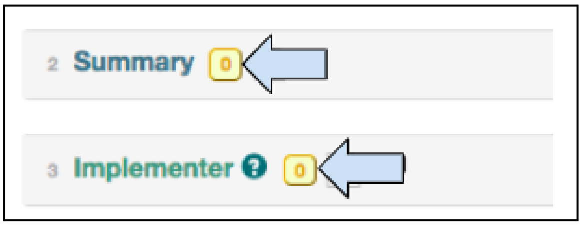


Click on the icon to view / hide the left hand navigation panel

3.4.9 Collaboration button

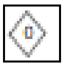


This symbol allows partner users to collaborate on the design of a proposal by creating a conversation thread within the document in Track. It can be found next to the section titles on each page within Track.

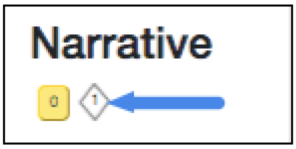


Click on the icon to start a collaboration conversation with another partner user or a Tearfund user. (For more information on using the collaboration button see Section 4.4 'Collaboration')

3.4.10 Amendment request



This symbol allows Tearfund and partner users to make a request to amend a proposal. An amendment request can only be made if the project is in **implementation status**.



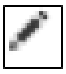
Click on the icon to start an amendment request conversation with the project approver. (For more information on using the amendment request button see Section 5.2 'Amend a Project').

3.4.11 Activities list

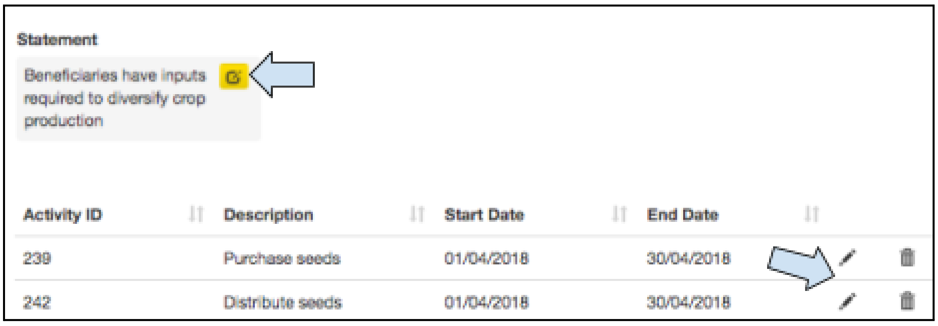
This symbol can be found in the logic section of Track inside the output row (see logic tab in the process bar).

Click on the icon to add activities to outputs.

3.4.12 Edit

These symbols can be found in any section that allows a user to add / edit narrative.



Click on the icon to edit

4. Design: Projects

What will this chapter cover?

This chapter explains how to enter a Micah Global Development proposal into Track, including the entering of the project logic.

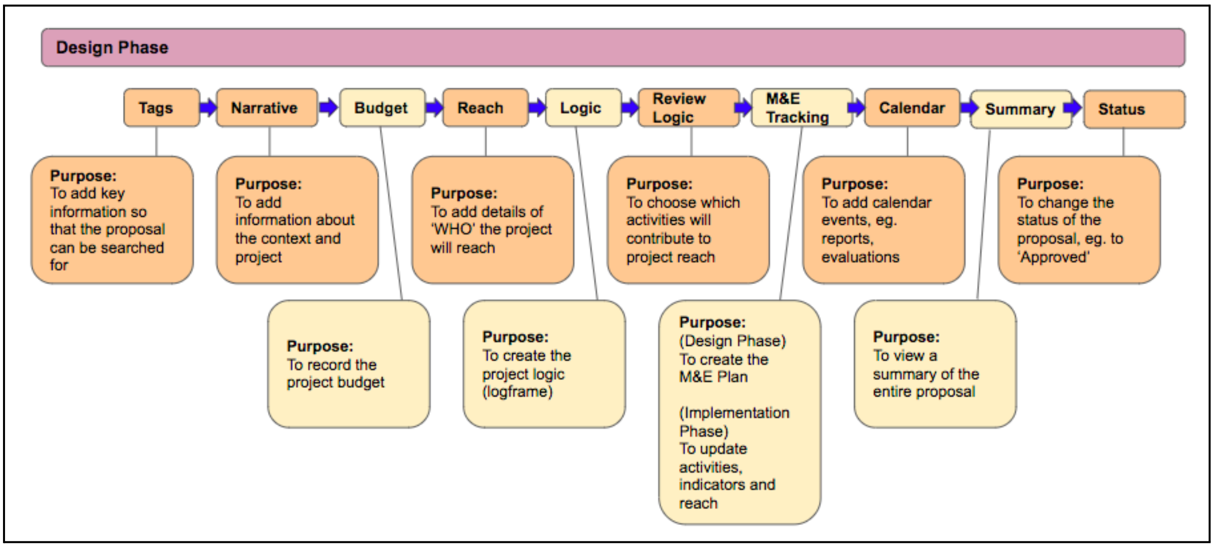
Who will find this chapter helpful?

Any user that creates, makes edits to or collaborates on a proposal.

It is recommended that a user plans and designs the project proposal before trying to enter it into Track. This planning process can be supported by using the Micah Proposal Template and the Tearfund approved thematic indicators. Both of these documents are available on the Resources Hub.

The diagram below shows an overview of the steps required to complete a proposal in Track. It aims to present a structured, user-friendly and visual map of the proposal.
(Users will note that the steps mirror the sections to be completed in a template).

Figure 5: The steps for creating a proposal in Track



4.1 Receiving a project proposal from Tearfund

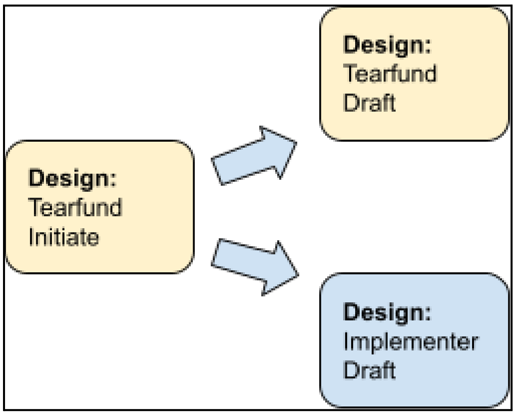
4.1.1 Where does a proposal come from?

The template for a project proposal is created in Track by a Tearfund staff member called the project initiator.

The project initiator 'tags' the project (for more information on how to tag a project see Section 4.2 'Tags') and can then choose either to send the proposal to an implementing partner or to keep it as a Tearfund proposal.

The Tearfund project initiator would send the project to an implementing partner by changing its status. (For more information on how to change project status see Section 4.12 'Status'). Once a partner receives a proposal for the first time, it is in 'Design: Implementer Draft' status.

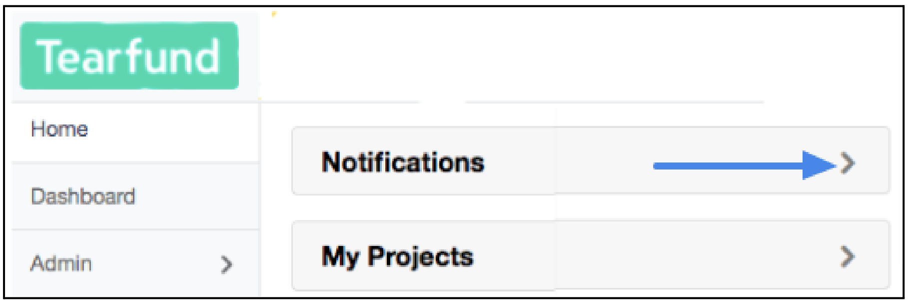
Figure 6: Change of status from Design: Tearfund Initiate to Design: Implementer Draft



4.1.2 How to access a proposal

Once a partner user has logged into Track (see Section 2.3 'How to Login as a Partner User') they can access a project proposal that has been sent to them.

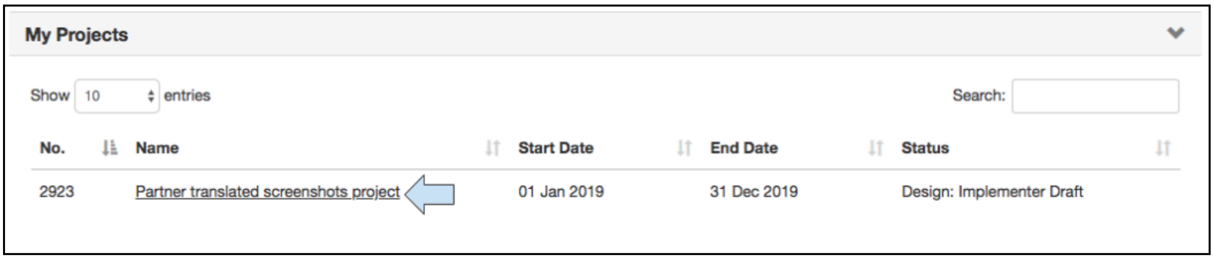
In the **home** screen, the user will notice two boxes with drop arrows. These will allow the user to view any recent **notifications** or to access **my projects**.



1. Click on the drop arrow next to **notifications** to open the box.

This box would be populated by projects that have been sent from Tearfund staff either for the first time or after review.

2. Click to **acknowledge** receipt of the proposal and it will disappear from the box.



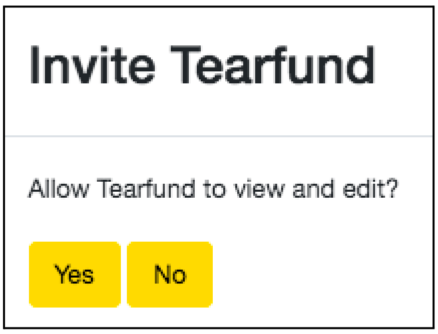
The project will also appear in the **my projects** box.

3. Click on the **title link** to open the project.

4.1.3 Invite Tearfund?

Tearfund users do not have access to a project in 'Design - Implementer Draft' status. When the project is in this status Tearfund users are denied access to the project and can only view a brief project summary.

When a partner receives and opens a project proposal, a pop up box opens displaying the following message:



A partner user with the ‘admin’ role is able to allow or deny Tearfund access.

- Access is managed at individual project level
- If YES is selected, then Tearfund can access the project.
- If NO is selected, then Tearfund is denied access to the project.
- The display box is only displayed for partners when the project status is ‘Design - Implementer Draft’ status.

A partner may want to allow Tearfund access to the proposal in the following circumstances:

- If there are tight deadlines and the proposal needs completion asap e.g. during a crisis response, so that the work is shared
- If the implementer is experiencing connectivity issues and Tearfund can help with the proposal development
- In order for the partner and Tearfund to share expertise when proposals are complex.

1. The Partner administrator should click on **Yes** or **No**

If Tearfund access is granted then a Tearfund user would access the project with the same visibility and editability rights as granted by their current project level role. e.g. viewer, editor, approver etc.

4.2 Tags

The tags section would be completed by Tearfund staff before sending the proposal to an implementer. Once the tags page is opened, the partner user will see which tags were selected in each individual section. The tags can be amended by a partner from within the partner environment.

How projects are “tagged” matters as it is this that allows us to search for and find the projects from across all of Tearfund’s portfolio. It also allows us to aggregate data from projects across specific thematic areas, and we can analyse and learn from what we are doing.

The idea of the tags page is to get people to think up front about their projects and this is the change in culture that Tearfund is looking for.

There are guidelines for how to enter certain types of project into Track (eg. Church & Community Transformation or Peacebuilding & Fragile States) in the appendix. However, if a user is finding it hard to fit a project into the tags screen, they should be asking themselves WHY they are doing the project…

Project tagging - How do we find the projects we are interested in?

Projects are tagged in the following ways:

- Project title and start and end date (time)
- By type of project (project type)
- Project details (description of project objective)
- By who it is that is doing the work (implementer)
- By the location that the work is being done (geography)
- By the global approach taken by the project to address this issue (global approach)
- By the issue that the project is seeking to address (theme/Approach)
- By the categories of people that the project is working on (target groups)
- By the Sustainable Development Goals (SDGs)
- By corporate priority
- What country strategy objective does it relate to?

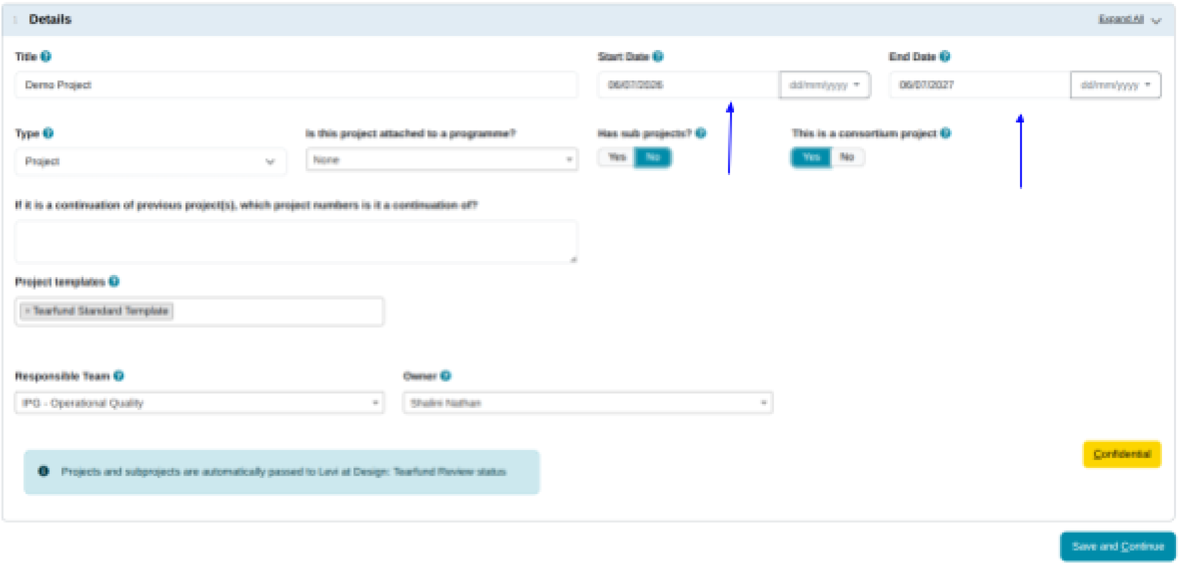
Please contact your DME Officer if support is required whilst completing the tags section

Auto Save Function

Information entered into the different sections of the tags page is saved dynamically every time a user clicks out of a box. A green tick will appear when the information has been successfully saved. If internet connection is lost, Track continues to try to save the information in the background so that once connection is restored, the information will be automatically saved.

Instructions

4.2.1 Details



This section will have been completed by the Tearfund project initiator.

1. The project **start** and **end** dates can be edited if required.

4.2.2 Summary

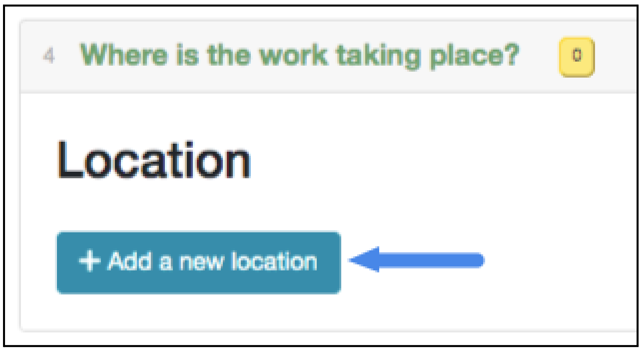
1. In the <u>summary</u> box, enter a short **description** of the project

4.2.3 Implementer

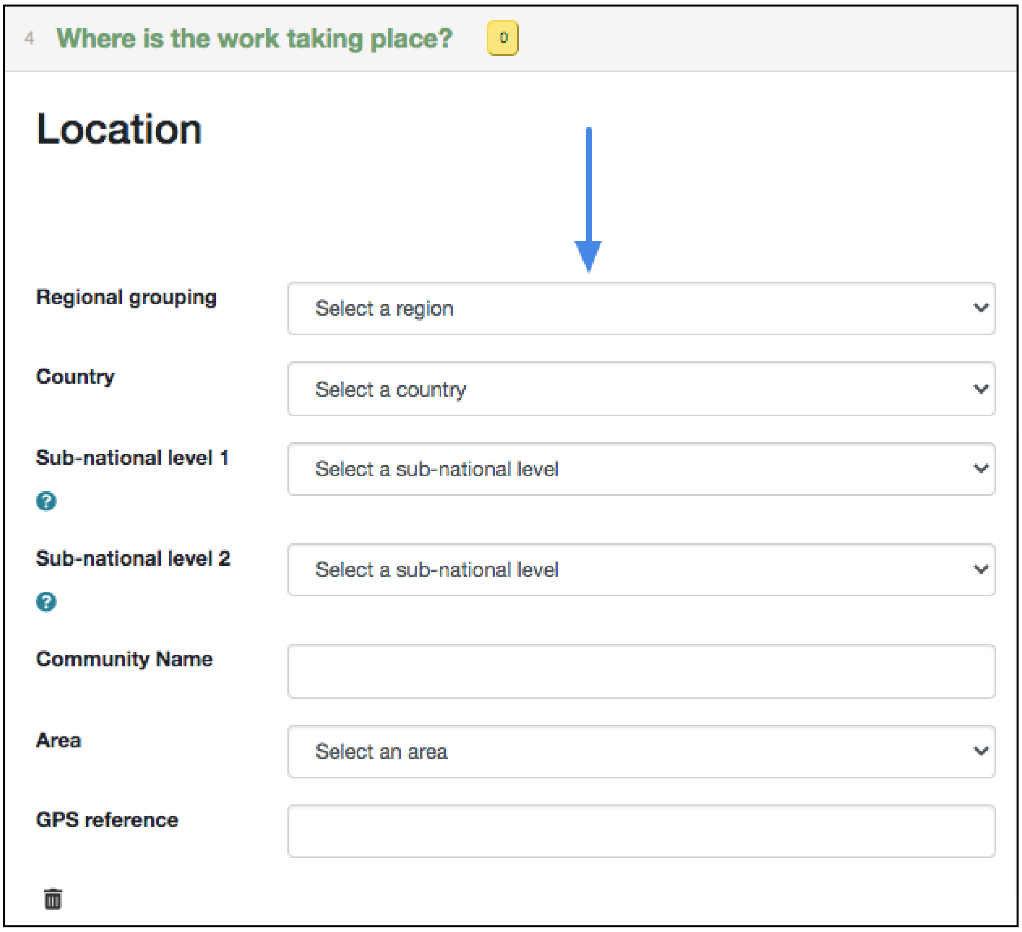
This section will have been completed by the Tearfund project initiator and is not editable.

4.2.4 Where is the work taking place?

In this section, users would enter the location of the project or programme.



1. Click on **add a new location**



2. In the **location** box, click on all the drop down menus to enter the relevant information regarding the region, country, sub-national levels and community in which the project is taking place.

> **Sub national levels 1 and 2**
> These represent the administrative subdivisions at levels lower than national and should have been entered by the regional administrator.
>
> **Community Name**
> Each community in which an intervention will be implemented and measured should be entered individually.

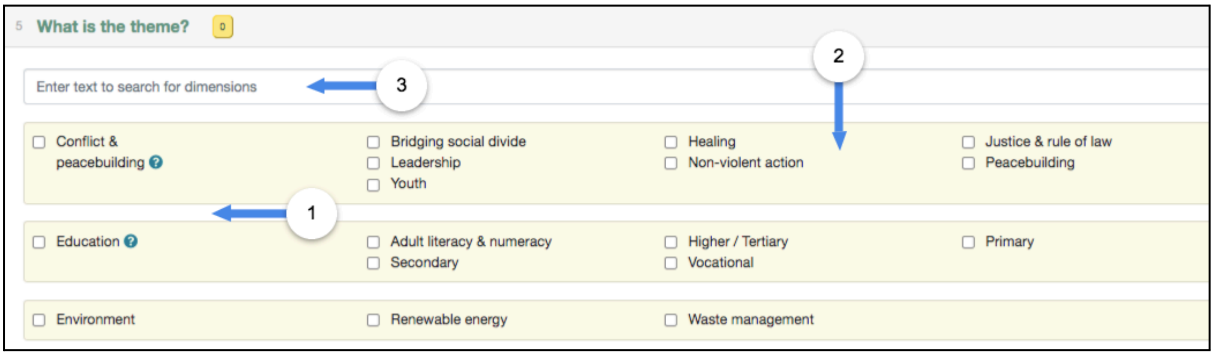
3. To delete a location click on the **trash symbol**

4. Click on **add a new location** for a new set of drop down menus in which to enter additional community locations

4.2.5 What is the theme?

In order to complete this section we consider the questions, '**WHAT** is the problem or problems that the project is trying to address?' and 'What elements of that problem will the project be focusing on'?

The indicators available in the project logic section later will be suggested according to the themes chosen here in the tags page.

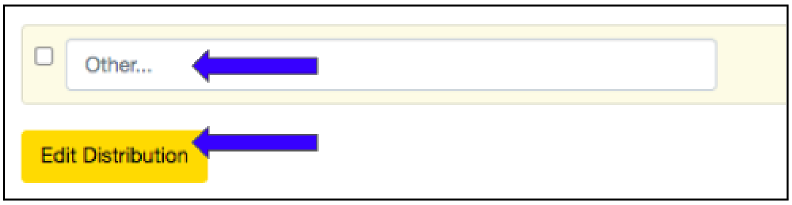


For support with entering specific types of projects, please see the [Church and Community Transformation (CCT)]() or [Peacebuilding & Fragile States in Track Guidelines]() in the appendix.

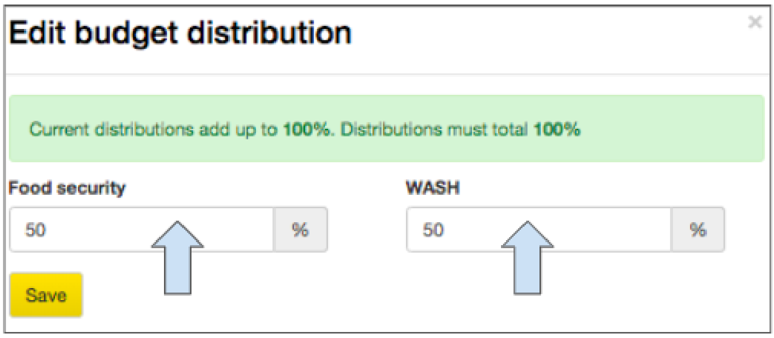
1. Select the **theme(s)** from the left hand column which best relates to the project

2. Select the specific **sub-theme(s)** under each theme which best relates to the project

3. For a **quick search** through the themes and sub-themes, start typing in this box and the relevant words will be highlighted.



4. If you can't find the theme you are looking for, add its title here. It will appear on your project and can be searched for by 'theme / other'.



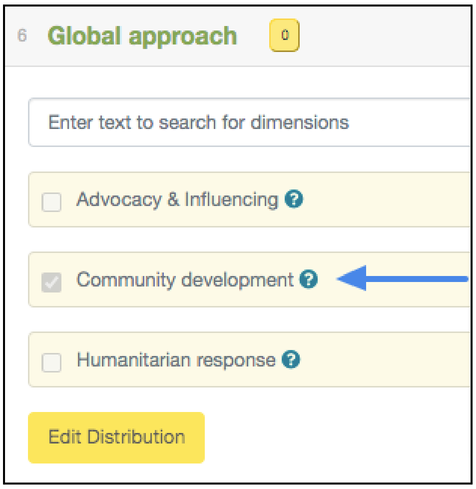
5. Click the **edit distribution** button in order to amend the proportion of budget allocated to each of the selected themes

6. Click on **Save**

4.2.6. What is the global approach?

This section provides the user with the opportunity to link the project to Tearfund's global approaches:

i) Advocacy and influencing
ii) Community development
iii) Humanitarian response



1. Select the **global approach(es)** from the left hand column which best relate to the project

2. Click the **edit distribution** button in order to amend the proportion of budget allocated to each of the selected items

4.2.7 Target

In order to complete this section we consider the question '**WHO** does the project aim to reach?' or 'who are the main types or groups of people that the project is seeking to help, influence, mobilise, connect?'

There are 2 groups of targets to choose from in the tags page.

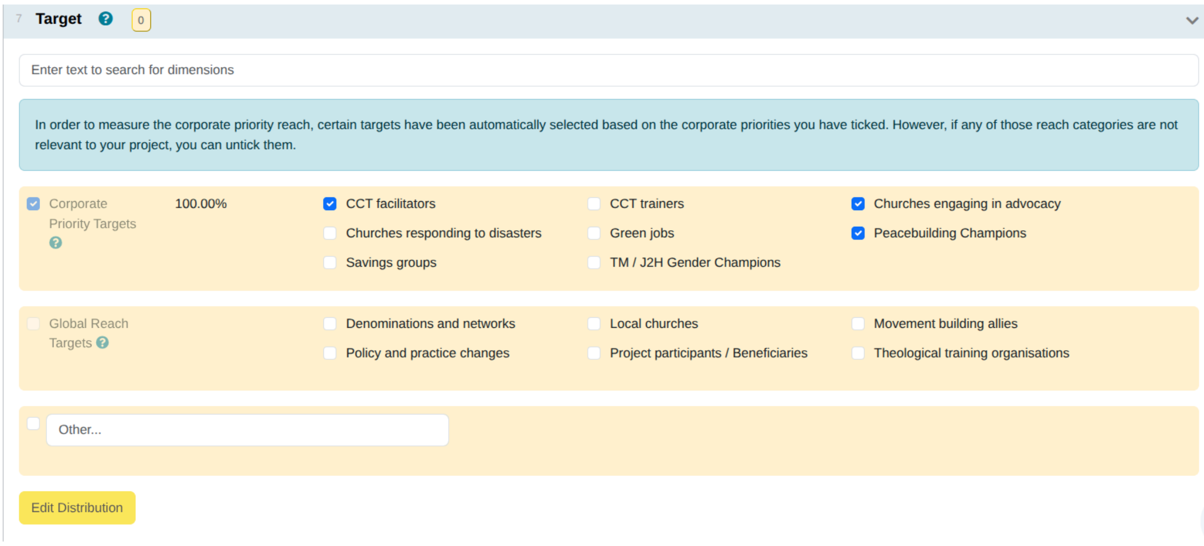
- Corporate priority Targets
- Global Reach Targets

Each of these groups of targets has a number of sub-groups within it.

WHO is chosen here will inform the project reach data so it is important to select a target type to represent exactly who will be counted as activities are implemented.

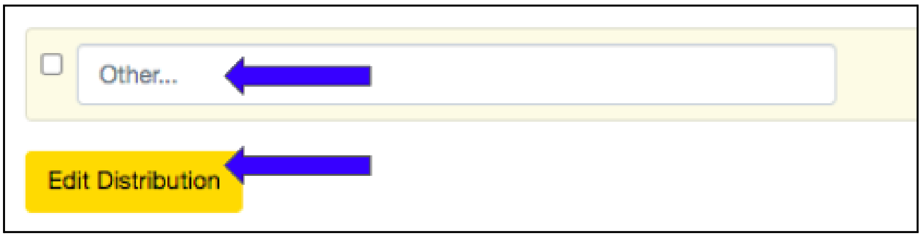
Any target that relates to people, eg., facilitators, Project Beneficiaries, can later be disaggregated by age, gender, disability.

Instructions



1. Select the **'sub-group'** types that the project is targeting (this is essential in order to be able to update reach)

2. For a **quick search** start typing in this box and the relevant words will be highlighted

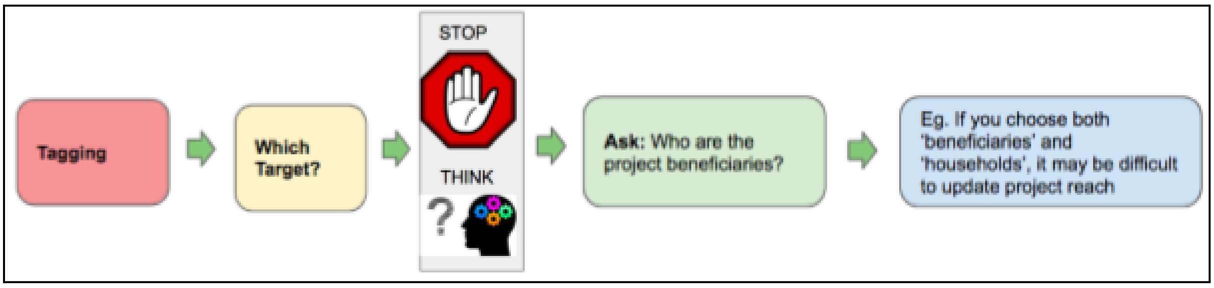


3. If you can't find the approach you are looking for, add its title here. It will appear on your project and can be searched for by 'approach / other'.

4. Click the **edit distribution** button in order to amend the proportion of budget allocated to each of the selected items

The target section of the tags tab is the first place where the user needs to think first in order to avoid double counting

Figure 7: Steps to avoid double counting #1



It is possible to create a double count at this stage if the user selects several targets with which they will update the same direct project reach. The example below will demonstrate how a double count could be created and will provide advice on how to avoid it.

Example

A project may be aiming to improve food security for 400 households. In the tags / target screen the user may be unsure whether to select 'beneficiaries' or 'households' as targets, or both.

Q: Which target should the user select?

A: The user needs to think through the project design clearly in order to make this decision. The target type needs to match the indicator count type in order to be able to update the indicators later in Track.

Scenario 1
By thinking through her project, User 1 would plan activities to include eg. 'training of farmers' and choose an indicator and count type such as 'number of people (beneficiaries) trained'.
In this scenario, the user would need to choose 'beneficiaries' as a target type

Scenario 2
By thinking through his project, User 2 would plan activities to include, eg. 'distribution of food and non-food items' and choose an indicator and count type such as 'number of households receiving NFIs'
In this scenario, the user would need to choose 'households' as a target type

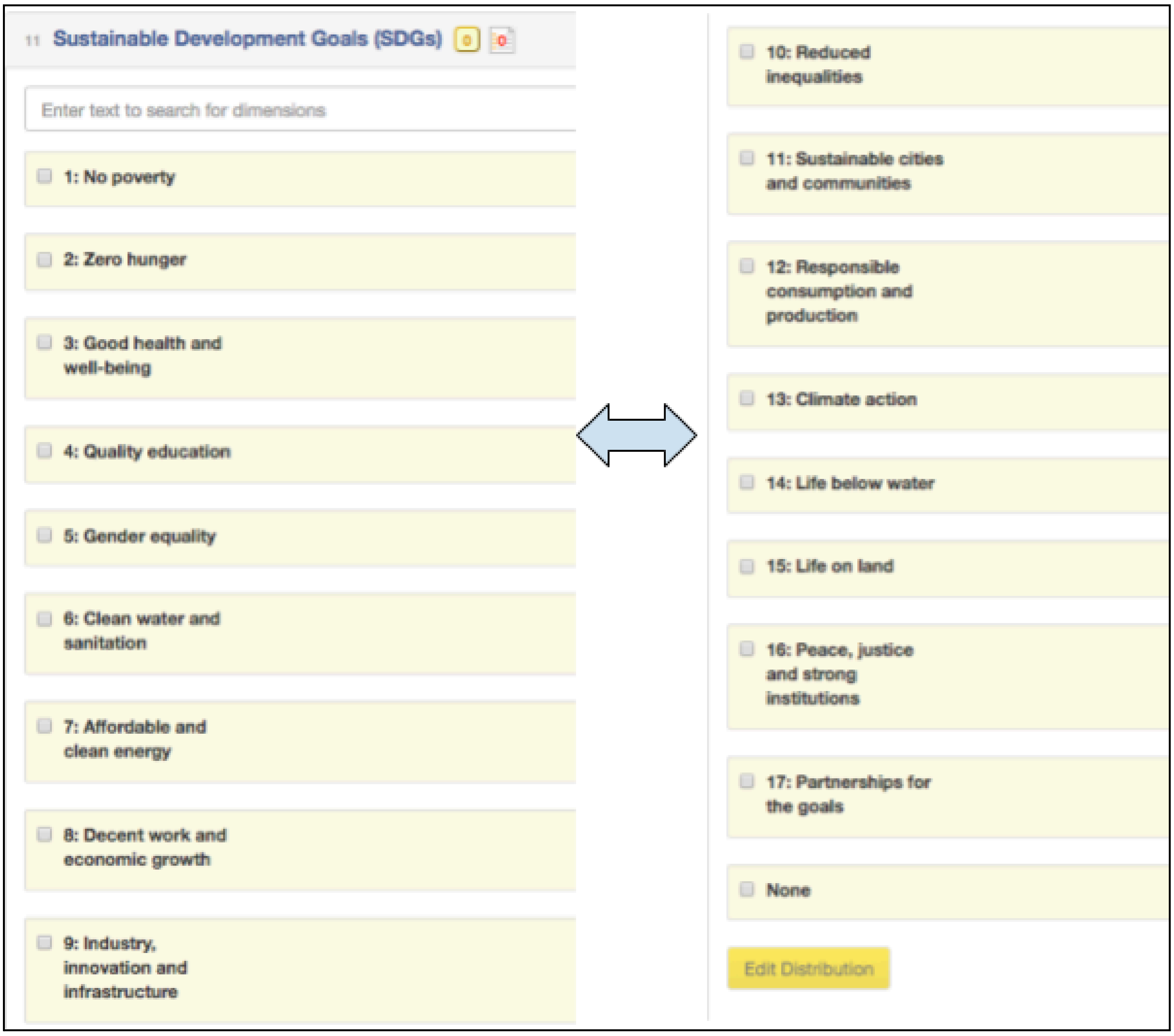
If User 1 had chosen both 'beneficiaries' (for the farmer training activity) and 'households' (whose food security is to be improved), there may have been a risk of double counting when the activities were updated later in Track.

How to avoid a double count at the 'target' stage
The user must think through the entire project and ensure that targets chosen in the tags section will match the indicator count types so that project indicators can be updated.

4.2.8 Sustainable development goals (SDGs)

On 1 January 2016, the 17 Sustainable Development Goals (SDGs) of the 2030 Agenda for Sustainable Development - adopted by world leaders in September 2015 at an historic UN Summit - officially came into force. Over the next 15 years, with these new goals that universally apply to all, countries will mobilise efforts to end all forms of poverty, fight inequalities and tackle climate change, while ensuring that no one is left behind.

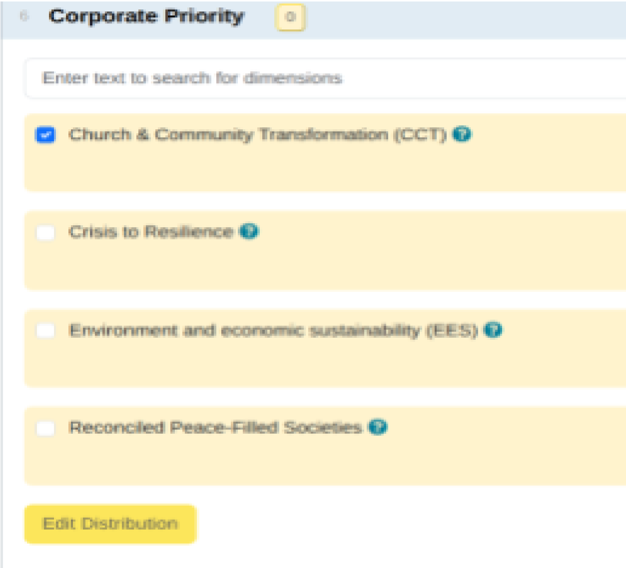
The SDGs build on the success of the Millennium Development Goals (MDGs) and aim to go further to end all forms of poverty. The new goals are unique in that they call for action by all countries, poor, rich and middle-income to promote prosperity while protecting the planet. They recognise that ending poverty must go hand-in-hand with strategies that build economic growth and address a range of social needs including education, health, social protection and job opportunities, while tackling climate change and environmental protection.



1. Select the **SDG(s)** which the project will contribute to

2. When the tags section is complete, click on **save and continue** to move to the strategy links section.

4.2.9 Corporate priority



1. Select the **corporate priority** which the project will contribute to. This will allow us to track the focus areas of our work around the globe.

2. Click the **edit distribution** button in order to amend the proportion of budget allocated to each of the selected items

3. When the tags section is complete, click on **continue** to move to the narrative section.

4.Depending on your Corporate priority selection, Track will auto select the target and you have to review and unselect the target that are not applicable for the project.

4.3 Narrative

The narrative section can be completed by either an implementing partner user or by a Tearfund user. This page will look familiar to users who have experience completing a proposal template.

For information about differences in the narrative tab in the other templates, see Section 4.13 ‘

[Emergency Response Template’](#).

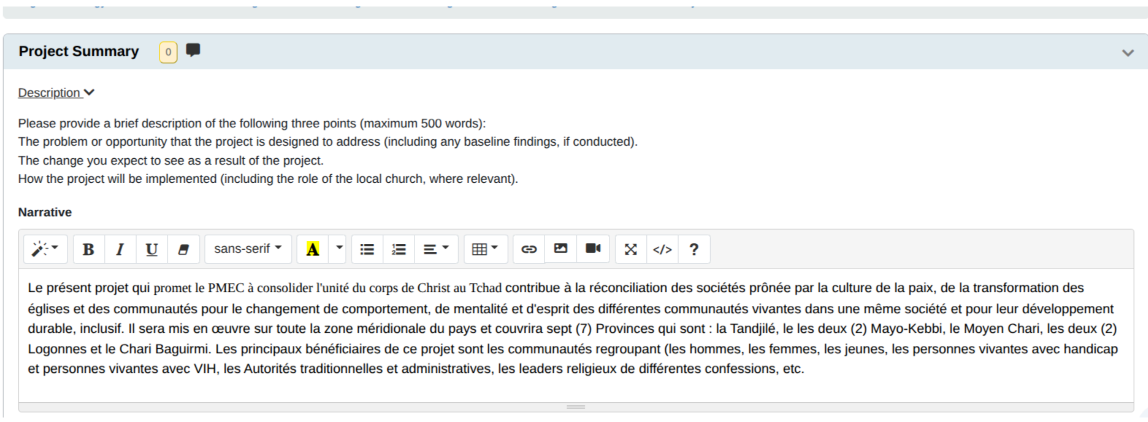
Auto Save Function

Information entered into the different sections of the narrative page is saved dynamically every time a user clicks out of a box. A green tick will appear when the information has been successfully saved. If internet connection is lost, Track continues to try to save the information in the background so that once connection is restored, the information will be automatically saved.

Instructions

1. Click on each section on the left hand side within the narrative tab to view its subsections.

2. Click on the arrow at the end of each subsection row to add information.

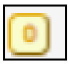


3. The example above is for the **context** subsection of the ‘strengths, needs, targeting and inclusion’ section, however all the sections can be completed in the same way. Use the Global Development template guidelines for an explanation of the type of information that is required.

4. Add information about the project to the **narrative** field in each subsection. The text can be edited and tables, images or video links can be inserted.

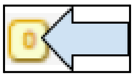
5. A word count can be seen at the bottom of each subsection. This is for guidance only and, if the word count is exceeded, the word count number will become red.

4.4 Collaboration

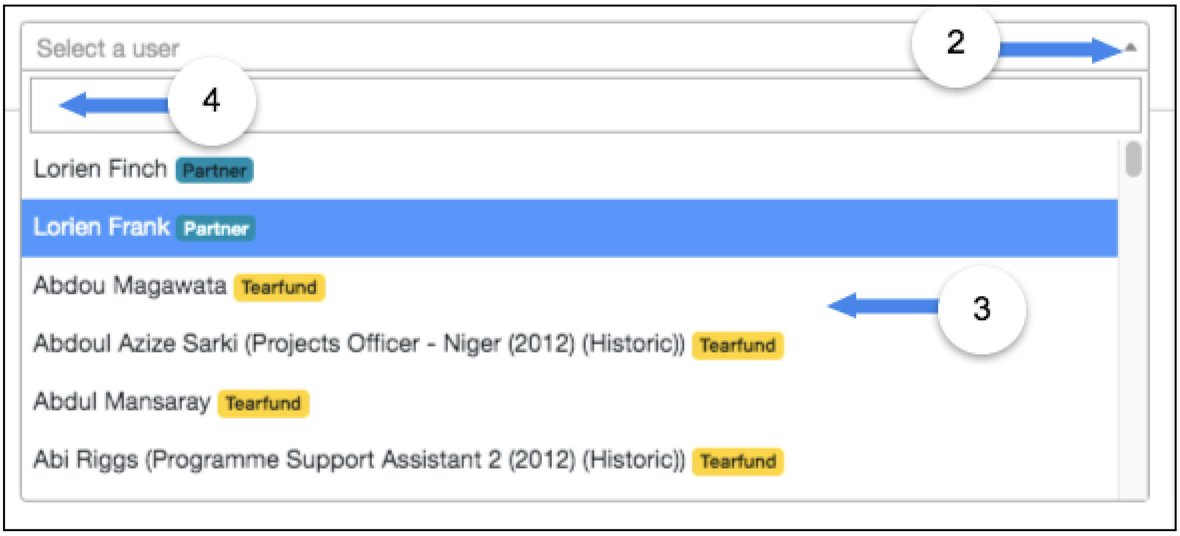


This symbol can be seen next to the title of each section in Track. It facilitates collaboration by allowing comments to be sent between partner staff who are working within a document. It can also be used for collaboration between Tearfund and partner staff.

4.4.1 Sending a collaboration message



1. Click into the **collaboration** symbol to open a new message screen.



2. Click on the drop menu to view a list of recipients who are identified as either Tearfund or partner staff.

3. Select your recipient from the dropdown list.
4. Alternatively, start typing a name into the box and select the correct recipient.

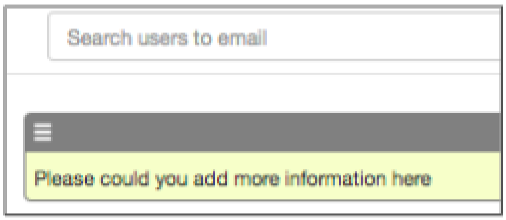
Collaboration

Sending to Tearfund staff: you can send a collaboration message to anyone listed as an editor on that project (in most cases that includes everyone in the respective country team or implementing team).

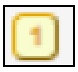
Sending to partner staff: you can send a collaboration message to other members of staff within your organisation.

5. Type the collaboration message into the box at the bottom of the page.

6. Click **send** and the message will be saved in a yellow conversation box (see image below). An email will also be sent to the person's inbox.



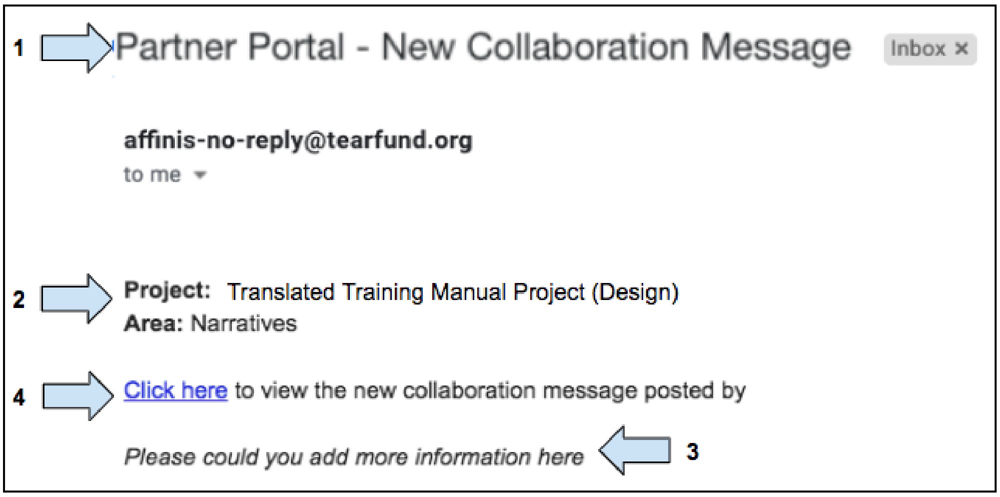
Once the message is sent, close the box and notice that the collaboration symbol has changed to a:



This is called an "unresolved collaboration".

4.4.2 Receiving a collaboration message

Once a user sends a collaboration message from within Track, an email is sent to the person's inbox.

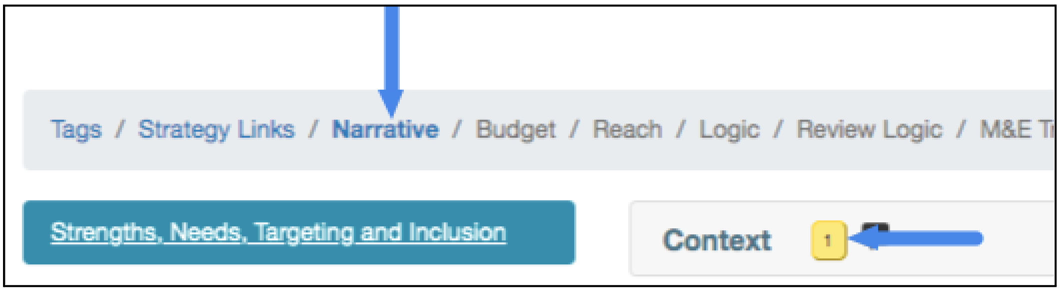


1. The email will be entitled '**partner portal - new collaboration message**'

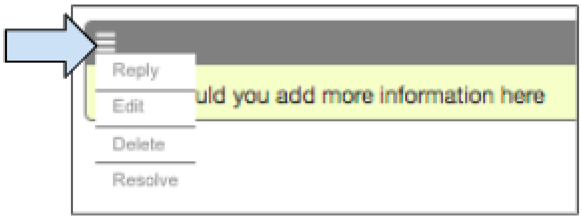
2. The **project title** is shown, as is the section (**area**) in which the collaboration message is written

3. The collaboration **message** is displayed

4. Click on the **link** to be taken to the collaboration message within Track (if the user is not logged in they will first be taken to the Track login page)



5. Click on the collaboration message to **view/action** the collaboration message.



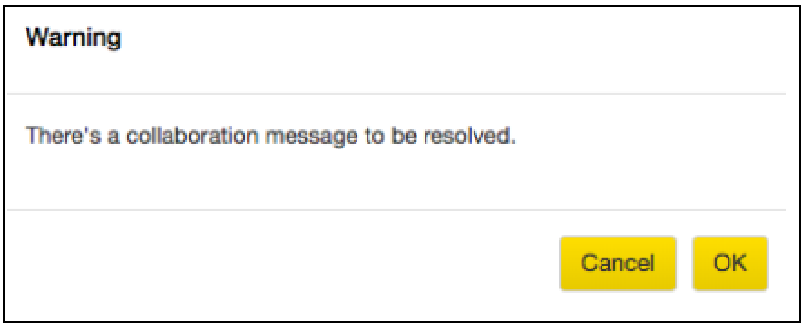
6. Click on the drop menu on the left hand side above the collaboration message to view the possible actions.

- Select **reply** to continue the collaboration conversation if necessary
- Select **edit** to edit the original collaboration message
- Select **delete** to remove the collaboration message from Track
- Select **resolve** if the action has been completed

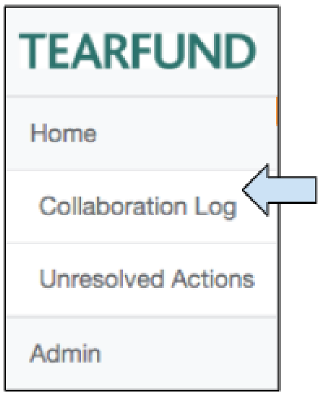
4.4.3 Resolving collaborations

Anyone who is an editor or approver on a project can resolve a collaboration in Track.

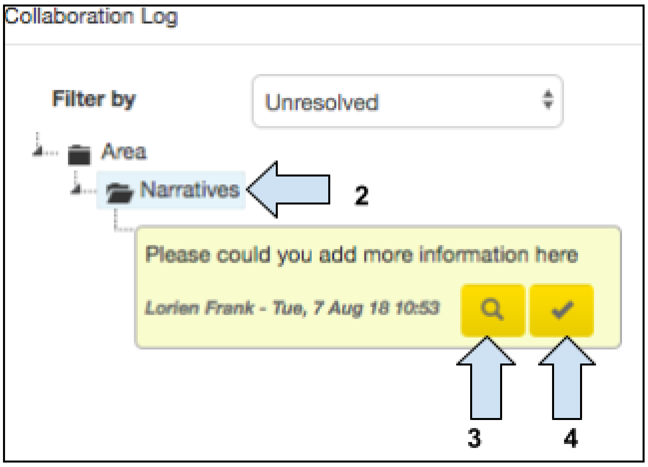
A proposal cannot be moved to approved status whilst it has unresolved collaborations. If an attempt is made to do so, the following error message will appear:



If there are unresolved collaborations, a tab entitled **collaboration log** will appear in the left hand navigation bar under projects.



1. Click on **collaboration log** to open a new window showing a file directory of collaboration message locations.



2. Click on the **folder icon** to open and view the collaboration message.

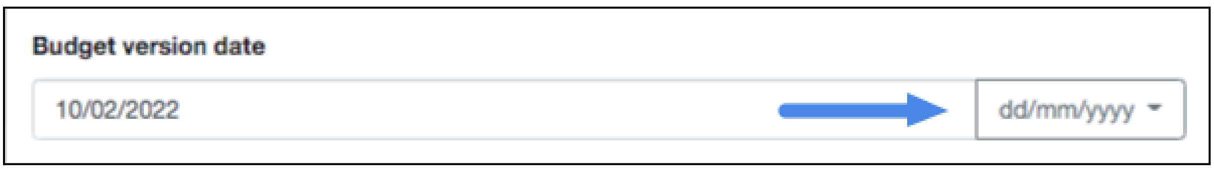
3. Click on the **search icon** to be taken to the relevant area in Track.

4. Click on the **tick icon** to resolve the collaboration.

5. A warning message will appear asking if the user is sure they want to resolve the collaboration. Click **OK** and the collaboration message will be removed from the collaboration log. The collaboration symbol will return to a (0).

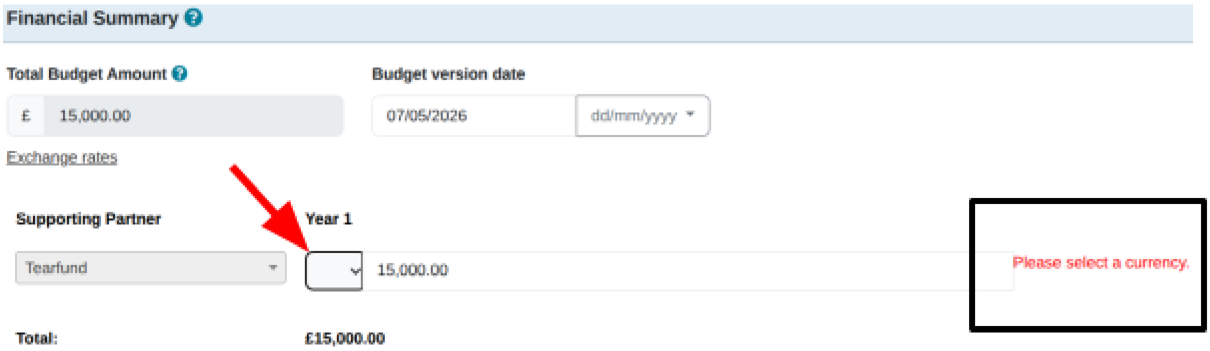
4.5 Budget

This section is intended to show the overall financial situation for the project. The details will be given in the separate financial template which can be attached.



1. Enter the **date** of the most recent budget that you will attach.

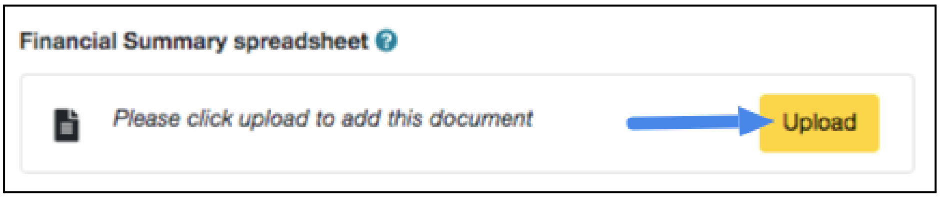
2.Please select the right currency from the drop down before you proceed



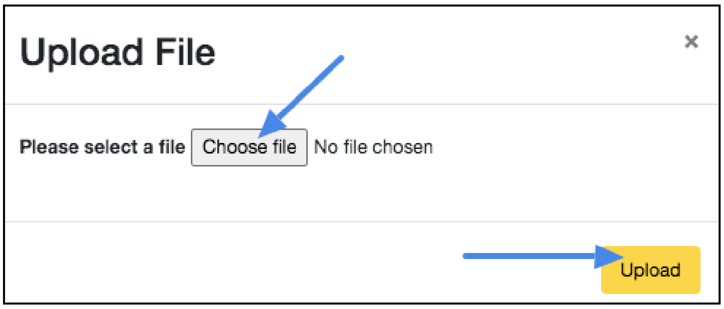
3. Based on the project start/end dates, a user might see multiple years on this screen.

3. Add additional supporters if necessary to provide a complete overview of the funds you are applying for from different funding partners; this helps everyone to be clear about what percentage they are contributing.

A list of funding partners is available from the drop menu but you can also type your own and select it to add it to the project.

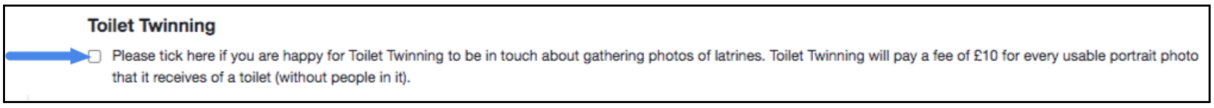


4. Select **upload** to add a detailed project budget (in local currency)



5. A pop up box will appear in which you can **choose a file** from your computer. Click **upload** once the file has been selected.
(NB. Once a financial document is uploaded there will be a date and time stamp to show when it was uploaded to Track).

6. Check the **share settings** for the document you have uploaded.

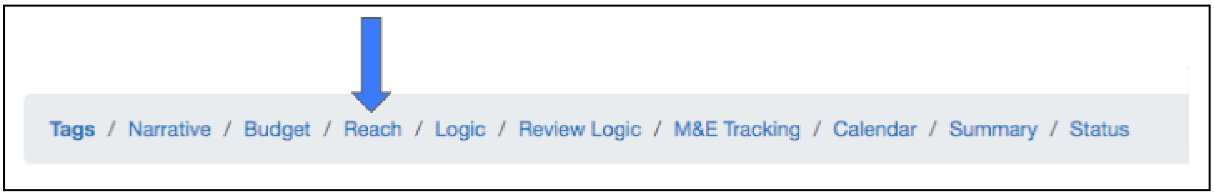


7. Select the checkbox if you are happy for the toilet twinning team to be in touch about gathering photos.

8. When the budget screen is complete, click on **save and continue** to move to the next screen

4.6 Reach

Go to https://learn.tearfund.org/en/misc/partner_area/ to watch a tutorial video which provides more information on 'How to enter reach data'.



In this section users will learn how to enter reach data into Track.

What do we mean by Reach?

Reach is anyone or anything that is affected by an intervention, ie. beneficiaries, churches etc..

Why does Tearfund need reach data and how is the data used?

We need to count the number of people reached because:

a) Reach data is an important part of monitoring progress

b) Reach is reported to donors and supporters (for example through donor reporting and our annual report and impact and learning report)

Reach tells us about the breadth of our work and helps us know if we are meeting targets. It also informs future decision-making such as what we can scale up.

Reach data, along with depth data (research, evaluations and impact studies) enables us to make evaluative judgements about efficiency, impact and effectiveness.

Of course, reach on its own is not the full picture. We also need to know what has changed for the people, groups and organisations, etc. we have reached and how sustainable the changes are.

How do we enter reach data into Track?

Reach data is entered into Track in line with the groups and subgroups which were selected in the 'target' section of the tags tab. It is important to remember the link between reach and targets, both at this stage and throughout the design of the project logic.

There are 2 groups of targets to choose from in the tags page.

- Corporate priority target
- Global reach target

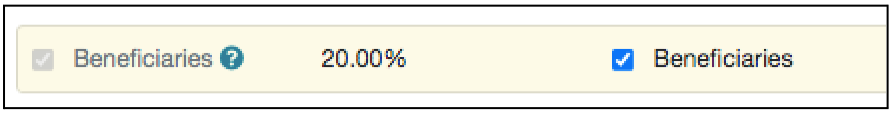
Each of these group target types has a number of sub-groups within it.

> If you find that your reach data tab is empty, go back and ensure you have selected target types from the 'sub-group'.

The following sections will explain how to enter reach data into each of the target groups.

Instructions

4.6.1 Project participants / Beneficiaries



If **Project participants / Beneficiaries** was selected in the target section of the tags tab, reach data will be entered as follows:

(Note: In the donor template there are a number of additional 'beneficiary' subgroup types from which to choose, such as IDP etc.. The process for completing the reach tab for those subgroups is the same as the process indicated here for 'beneficiaries').

1. Add the number of **direct and indirect Project participants / Beneficiaries**

2. Add narrative to the **notes** if required

What is a direct beneficiary?
A person, group or organisation that has been directly involved in a programme/project and has received a direct service through the programme/project.

What is an indirect beneficiary?
Someone who benefits from an intervention, but is not the direct target of project activities. An indirect (or secondary) beneficiary can receive that benefit *through* the direct beneficiary or be reached in more *remote* ways by the project.

We do not want to mix beneficiaries with whom we've had a direct interaction – like through a workshop or distribution– with people whose interaction with us has been more remote – like through a street theatre performance or publication or radio broadcast.

Example 1:
A project trains 500 women on business management skills. The average household size in the project location is 4. In this example the number of direct beneficiaries is 500 and the number of indirect beneficiaries is 1500. The indirect beneficiaries have received the benefit *through* the direct beneficiary. The indirect beneficiary figure was obtained by multiplying the number of households = 500 x the average HH size (4) minus the direct beneficiary = 3. 500 x 3 = 1500.

Example 2:
A project wants to increase access to credit for 200 women and does this by providing loans. The average household size in the project area is 5. The project also involves a regular slot on a radio show to discuss expanding access to finance. The radio show is listened to by 5,000 people. In this example the number of direct beneficiaries is 200. These 200 women received a *direct service* from the project. The 5000 listeners to the radio show did not receive a direct service but were reached *remotely* by the project so can be counted as indirect beneficiaries. The total number of indirect beneficiaries for this project is 5800. 800 people were reached indirectly through the 200 women (200 HHs x 4) plus the 5,000 people who were remotely reached by the project.

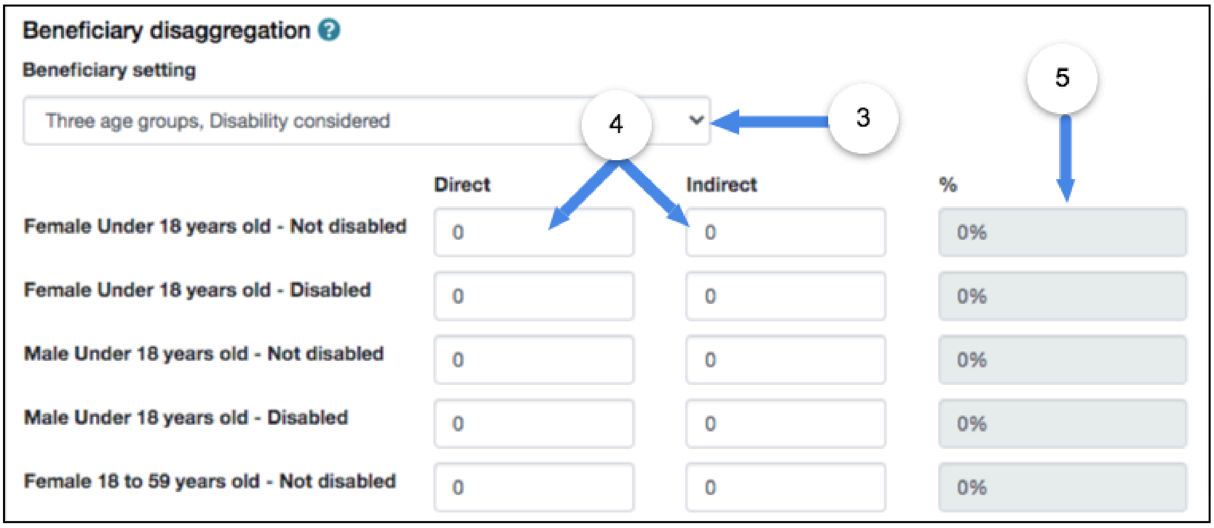
Why do we need to count indirect beneficiaries?
Counting indirect beneficiaries helps to understand Tearfund's multiplier effect in the communities we serve. A multiplier effect is a calculation of the extension of the project or activity beyond the direct beneficiaries. For example, if you develop the capacity of peer trainers, and each peer trainer recruits and trains other peer trainers, then the effect of your original training is multiplied. Counting these indirect beneficiaries – people trained by your peer trainers – is important, because it shows that the results of your activities are extending beyond your original activity.

For advocacy activities, counting your beneficiaries will be different than for other kinds of projects. Your objective will be to change a policy or funding level by a specific decision maker.
There is some helpful guidance here:
(https://views-voices.oxfam.org.uk/2016/10/real-geek-measuring-indirect-beneficiaries-attempting-to-square-the-circle) for thinking about indirect beneficiaries in advocacy projects.

Beneficiary disaggregation

There are four settings for beneficiary disaggregation in Track

1) Three age groups
2) Three age groups, disability considered
3) Six age groups
4) Six age groups, disability considered

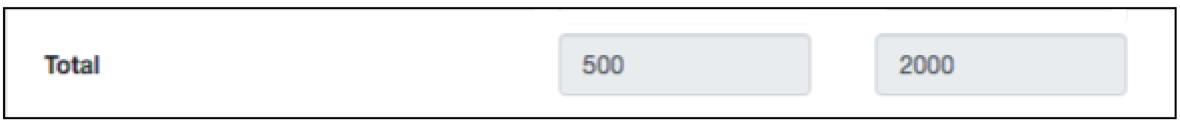


3. Select the relevant setting for **beneficiary disaggregation**

4. Enter the number of **direct and indirect beneficiaries** the project aims to reach

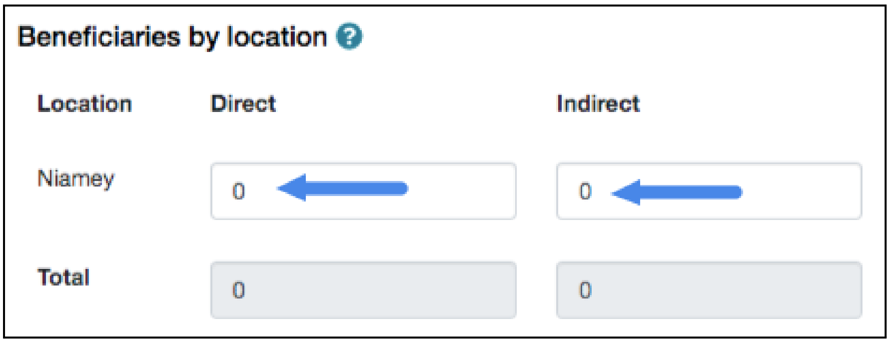
Warning!
In order for the entered data to be saved, the user must click outside of the data box.

5. The **%** column will automatically update



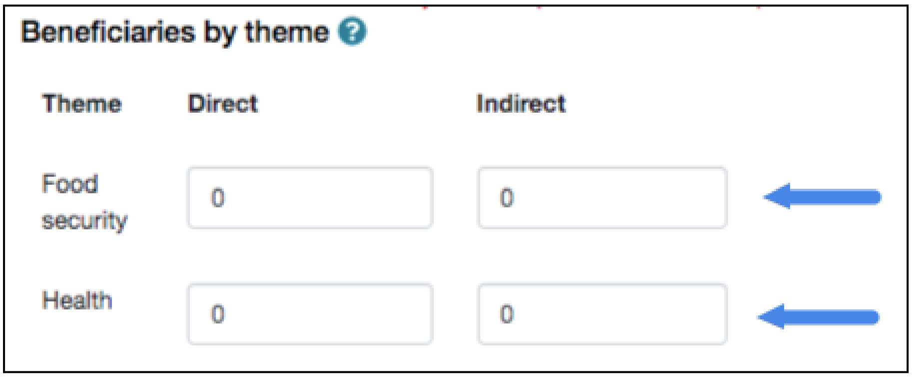
6. The **total** column will automatically update. Please check the total column is correct before moving on!

The total number of beneficiaries in the disaggregated table **MUST** match the total number of beneficiaries entered in step 1 otherwise it will not be possible to change screen.

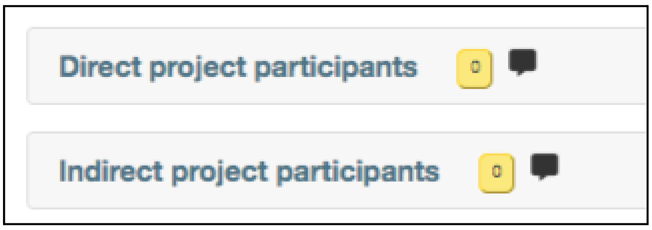


7. Add the number of direct and indirect beneficiaries that will be reached in each **project location**

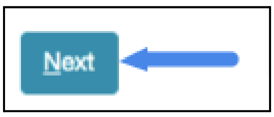
The total number of beneficiaries added by location **MUST** match the total number of beneficiaries entered in step 1 otherwise it will not be possible to change screen.



8. (Optional) Add the number of beneficiaries that will be reached under each **theme**

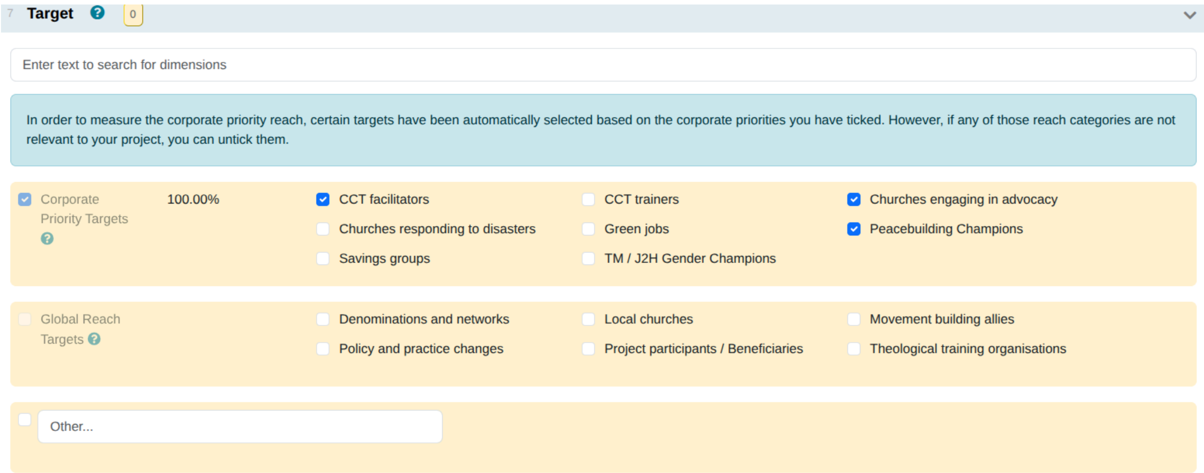


9. At the bottom of each reach tab, are two sections into which users can explain how the number of **direct and indirect project participants** have been counted including any assumptions made.



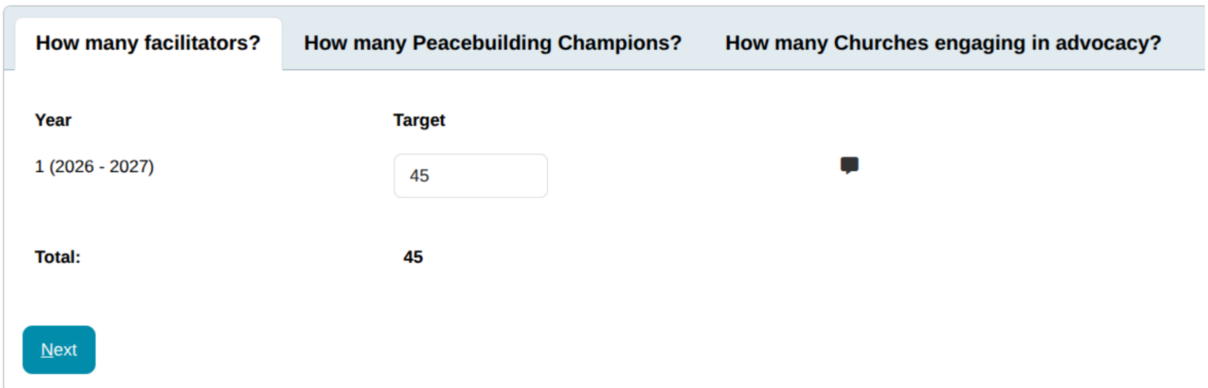
10. Click on **next** to enter reach data in the next tab.

4.6.2 All other types of targets



If any other type of target was selected in the target section of the tags tab, reach data will be entered as follows.

(The same information is displayed on each tab)

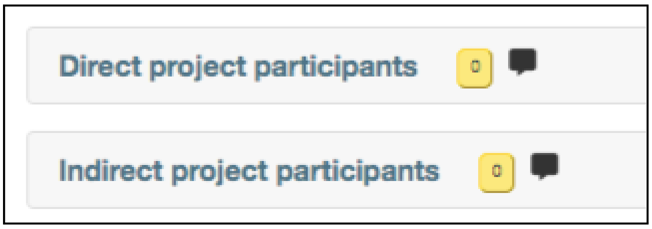


1. Select the relevant tab

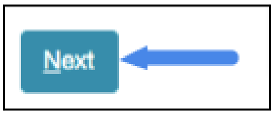
2. Add the **number of targets** that the project will reach

3. Add narrative to the **notes** if required

4. Click on **next** to add data to the next Reach tab



5. At the bottom of each reach tab, are two sections into which users can explain how the number of **direct and indirect project participants** have been counted including any assumptions made.



6. Click on **next** to enter reach data in the next tab.

7. Once project participants have been added to all the Reach tabs, click on **continue** to move to the next Track tab

4.7 Logic

Project logic terminology

The following table provides some definitions of terms which can be found in the logic section of Track.

Impact:
i) Higher level long term changes beyond the scope of any one specific project/programme.
ii) Positive and negative long-term effects produced directly or indirectly be a development intervention. The effects can be intended or unintended.

Outcome:
The overall change the project/programme is expected to achieve. It is measurable and time limited, although it may take a while to determine its full effect. The outcome should be largely within the control of the project/programme. The change should be directly related to the outputs of the programme/project/intervention.

Output:
The specific, direct deliverables of the project which are relevant to the achievement of the outcome.

Activities:
An action or process designed to turn resources into products or services delivered to target beneficiaries.

Indicator:
A variable we can observe, measure or validate in some way to tell us about progress made towards an intended result or other aspect of performance, or if the result or performance has been achieved.

Qualitative indicator:
Measures the how or why and can take the form of observations, interviews and focus groups, stories, films etc..

Quantitative indicator:
Numerically measures how many, how much or how often and is expressed as a number or as a percentage

Risks and assumptions:
External events, conditions or decisions outside the control of the project which must be taken into consideration as they will influence the ability to achieve the desired results.

Means of verification (MOV):
The data sources, approaches and methods that will be used to collect data against the set indicators at the output, outcome and impact level.

Baseline:
The point of reference prior to an intervention against which progress can later be measured and compared.

Milestone:
A point part way through a project, programme or strategy where you can assess progress.

In this section users will learn how to create the project logic for their project. This section of Track has been built on the principles of the logical framework, however some information will be presented differently to how a user may be used to seeing it in a paper document.

For help on how to create a project logic either contact your Track administrator or your country office link person. Alternatively refer to Tearfund's online resources which can be found here: (https://sites.google.com/a/tearfundfriends.net/evidence-effectiveness/home/evaluation-resources) or in Section 2.4 of Tearfund's Project Cycle Management guide - Roots 5

Indicators

Tearfund's thematic advisers have created a menu of standard indicators in order to help with the quality and consistency of project design. The indicators are selectable on the Logic page in Track and are filtered for each project depending on the thematic area or approach that has been selected in the tags tab.

Guidance for each indicator can be found when selecting it in the logic tab. Users are invited to 'view in indikit' by following a link to Tearfund's Indikit website (www.tearfund.indikit.net) which provides information about how to use and collect data for the indicator.

Indicators which count a percentage (%) are only available at impact and outcome level.

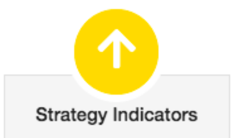
> Percentage indicators cannot contribute to a project's reach.
>
> If only percentage indicators have been chosen in the logic tab, it will not be possible for Track to perform its cross check in the review logic tab where the indicator milestones are compared with the project reach.
>
> In this case, Track will raise the following warning message:
> *"The project's reach target is not achievable based on the indicator milestones. Please review the indicator milestones or reach target".*
>
> In order to count beneficiaries, users will need to choose an indicator that also counts beneficiaries.

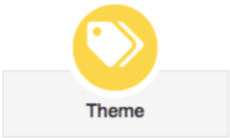
Tearfund recognises that users may not always be able to find an appropriate indicator in the database therefore Track offers the option to create a custom indicator. More information about this is provided in Section 4.7.4 'Custom Indicators'.

Over time Tearfund will be analysing the data and reviewing which indicators are being used and continuing to refine the database.

The following diagram is provided to help users start to think about which indicators they would like to choose for the Project Logic.

Figure 8: Which indicator?

	**Strategy indicators:** enable a user to link a project's indicators to its country / team strategy indicators

	**Thematic indicator**: enables a user to select indicators according to a certain theme eg. WASH, Food security etc.
Custom indicator:	**Custom indicator:** for when thematic / approach indicators do not fit. ● First ask why you can't find an indicator? ● Does your project fit with the corporate/country/team strategy? Custom indicators can be tagged against a theme for the thematic advisors to assess whether new indicators need to be added to the database.

Indicator count types

When selecting indicators, it is important to think about who/what is being counted.

For each target group selected in the tags tab, there needs to be one indicator with the correct count type that matches it in the logic tab in order for the target to be reached.

For example, if you have selected beneficiaries as your target group and one of your indicators is the number of people that have been trained. In order to update how many beneficiaries have been reached you must ensure that beneficiaries is the indicator count type.

- Target: <u>beneficiaries</u>
- Indicator: number of people trained
- Indicator count type: <u>beneficiaries</u>

Care must be taken not to choose an indicator with a count type that is different to the target type, else it will not be possible to accurately update reach, eg.

- Target: <u>beneficiaries</u>
- Indicator: number of target households provided with ….
- Indicator count type: <u>beneficiaries</u>

In the above example, your reach figures would not be updated as the count type is different to the target that you selected at the tagging stage.

Custom count types

There may be times when you need to count additional items that are different to the tags that you selected. If this is the case you can manually create a 'custom count type'. For more information about this please see Section 4.7.4 'Custom indicators'.

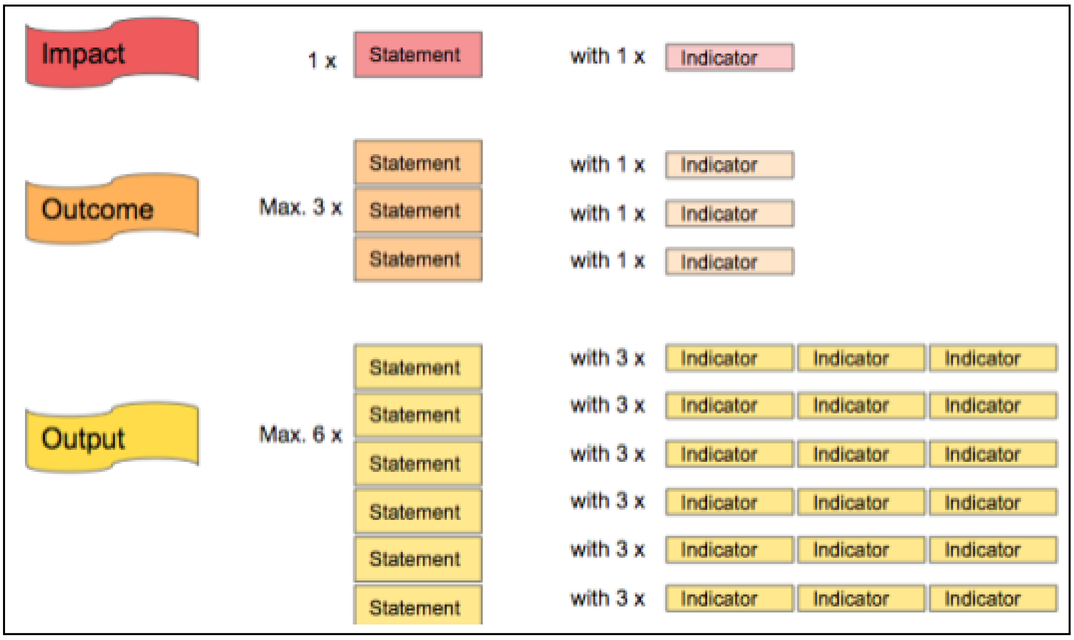
Tearfund recommendations

When constructing the project logic, the following rules apply:

- 1 impact statement and 1 impact indicator
- Max 3 outcome statements with 1 indicator each
- Max 6 -10 output statements (with 6 being best practice and more than 6 needing to be questioned) with max 3 output indicators each

The following diagram shows how to structure a project logic:

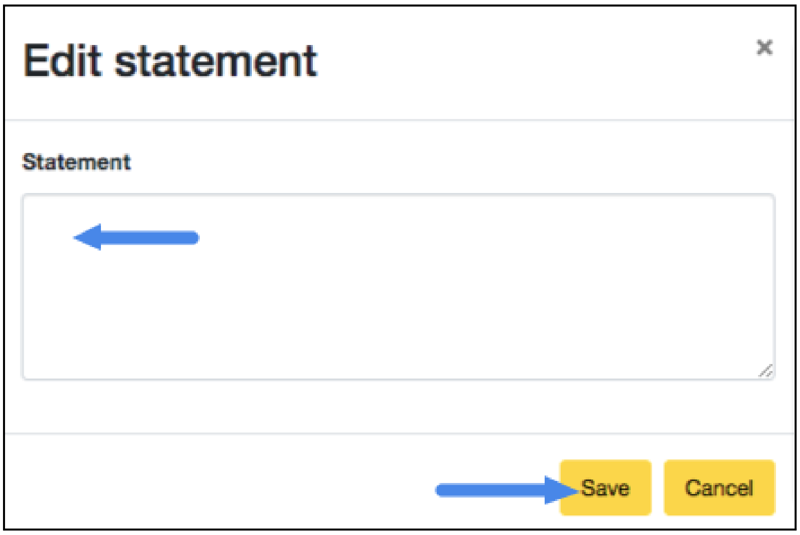
Figure 9: Tearfund recommendations for creating project logic



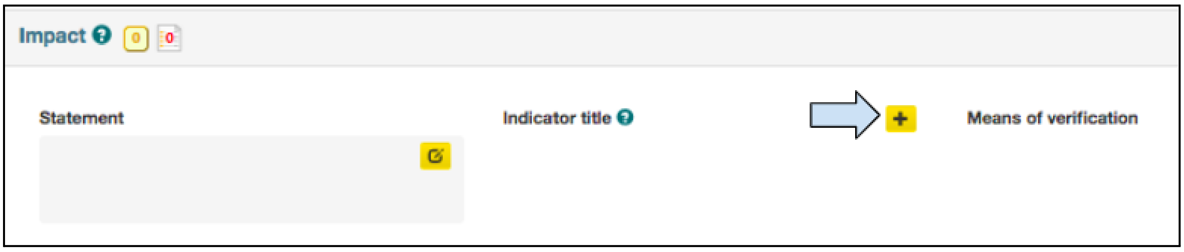
Instructions

4.7.1 Add an impact row

Go to https://learn.tearfund.org/en/misc/partner_area/ to watch a tutorial video which provides more information on the 'Impact row'.



1. Type the **impact statement** in the box and click on **save**

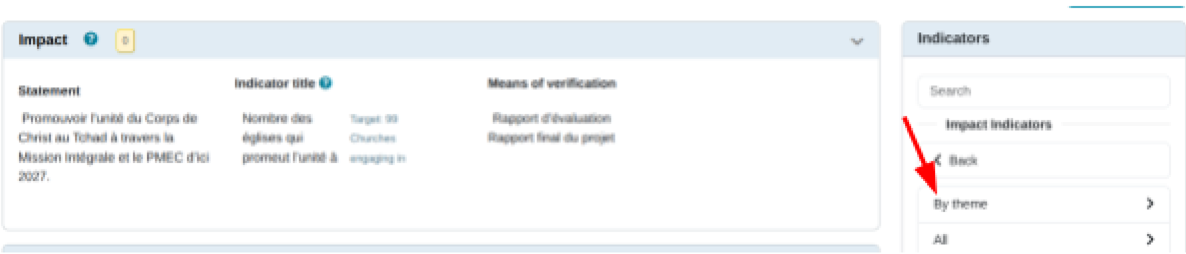


2. Click on the **'>'** symbol to add an indicator from the Indicator Picker Panael to your right hand side

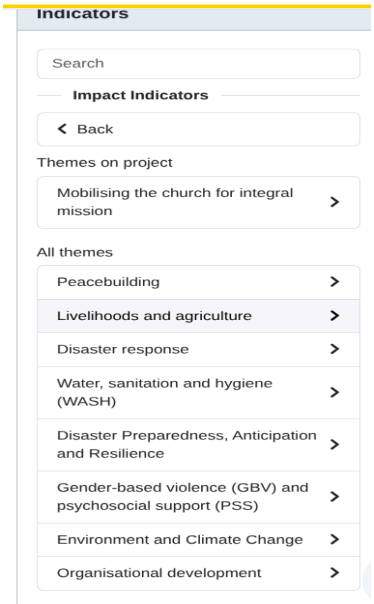
Indicators will be made available in the logic section according to the **approaches / themes** that were selected in the tags tab.

Strategy indicators will be available if the Tearfund project initiator has linked to a strategy's **objectives** in the strategy links tab.

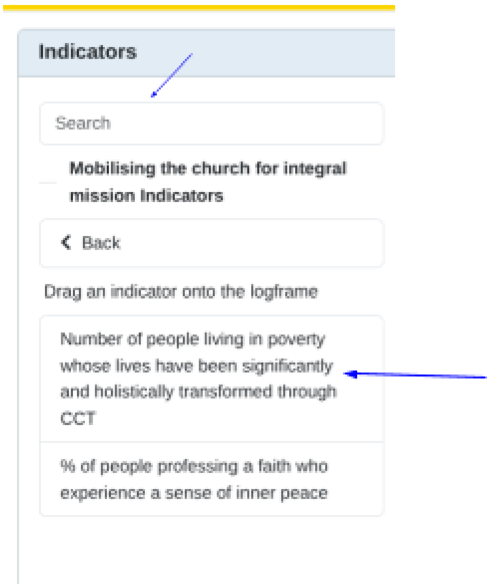
3. Click on **theme** to open the thematic indicator database
(In this example, we will use a thematic indicator. However the process is the same when choosing strategic or approach indicators).



4. Indicators are listed by theme. Click on the required theme to select from a drop list of indicator choices.

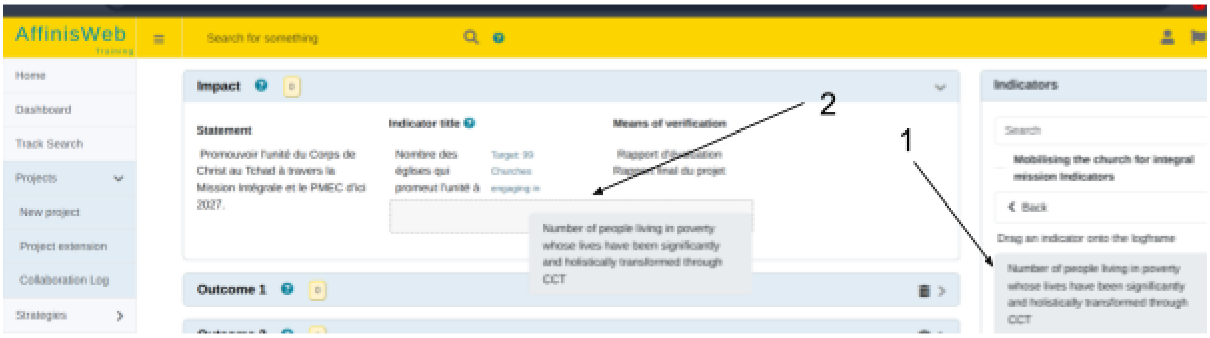


(If the theme that you require is not listed, return to [Section 4.2.5 'What is the theme?'](#) on the tags page and select it).



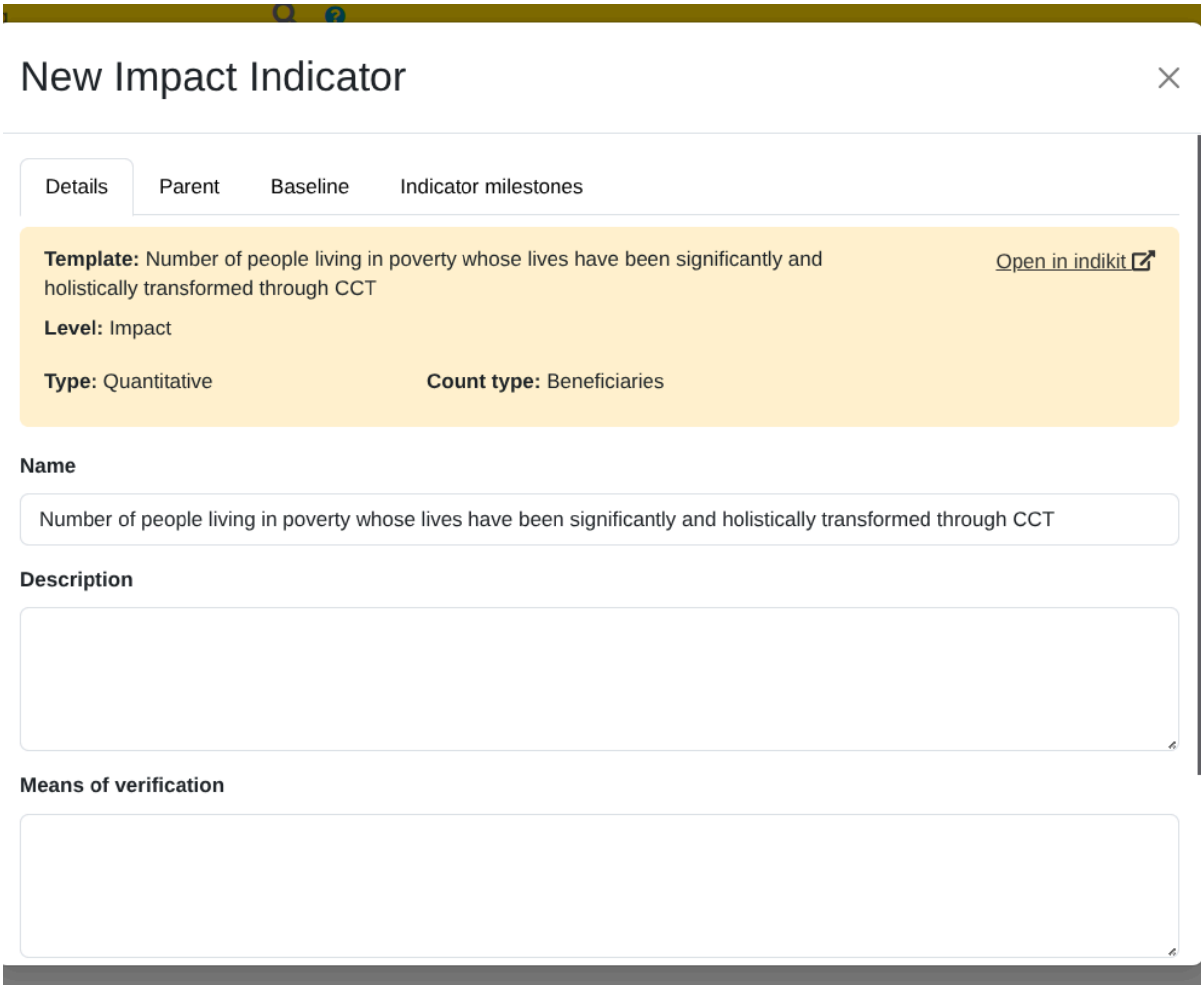
5. Type a keyword in the **filter field** to filter the indicators, if there are too many in the list.

6. Drag and drop the indicator under the indicator title



7. Click on **view in indikit** to be taken to the Indikit website for an explanation of how to use the indicator or select '**use indicator**'.

(Please note this is a % indicator. An example of adding a 'number of' indicator is provided in Section 4.7.2 'Add an outcome row' below).



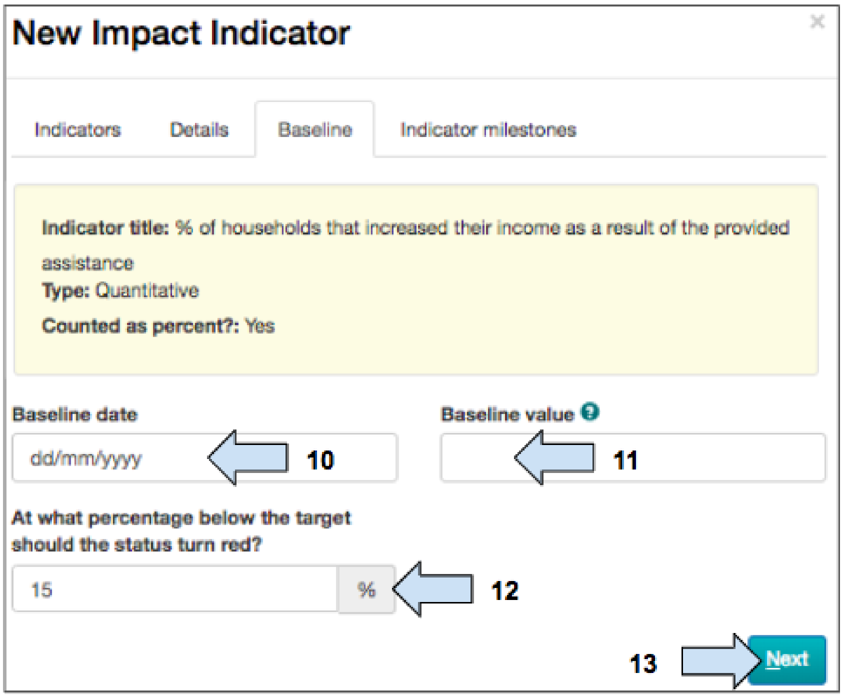
8. Add a **description** of the indicator.
(This description will appear as text when a user hovers over the indicator in the M&E plan and in the

indicator section on the M&E tracking tab).

9. Means of verification: Add the **data source** or methods that will be used to collect data against this indicator.
This could include, but is not restricted to:

- Household surveys
- Key documents
- Official statistics
- Attendance lists

9. Click on **next**



10. Add the **date** on which the baseline survey was completed

11. Add the baseline value for this indicator

12. Select the percentage below target at which the indicator status will be marked as red.

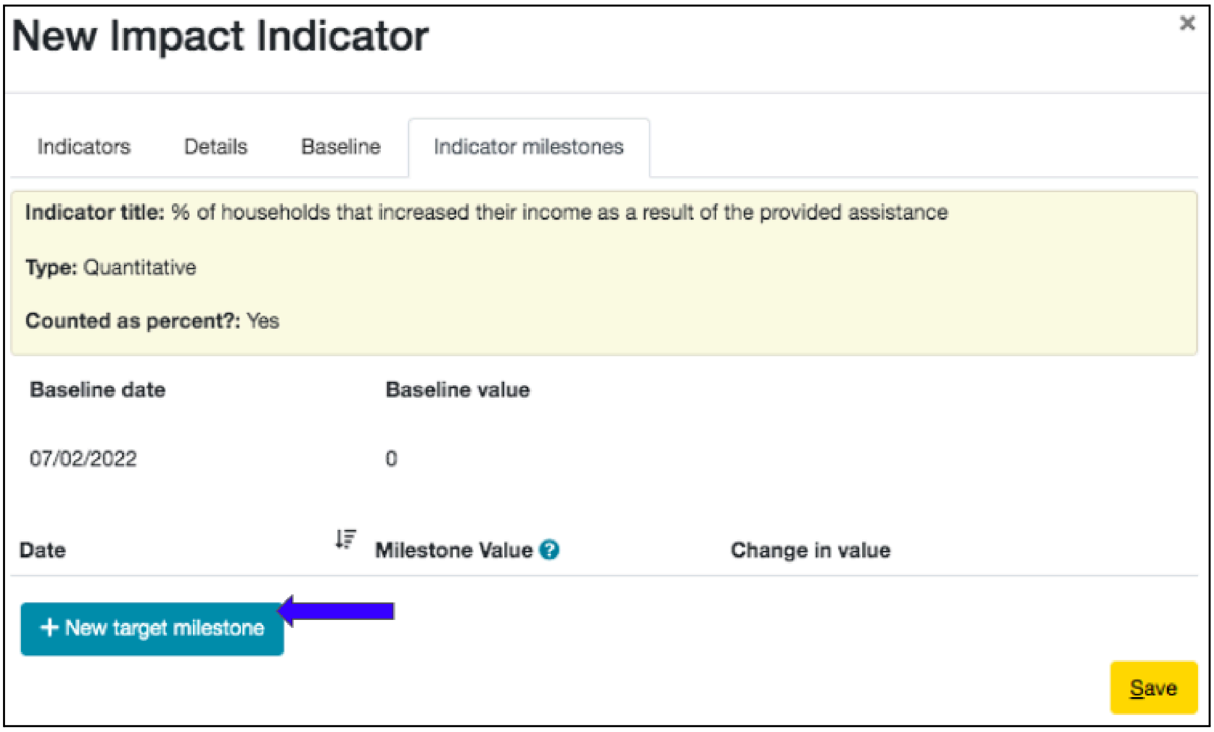
When an indicator is created with a baseline and milestone target dates, Track applies a RAG status to it.

RAG = R (red), A (amber), G (green)

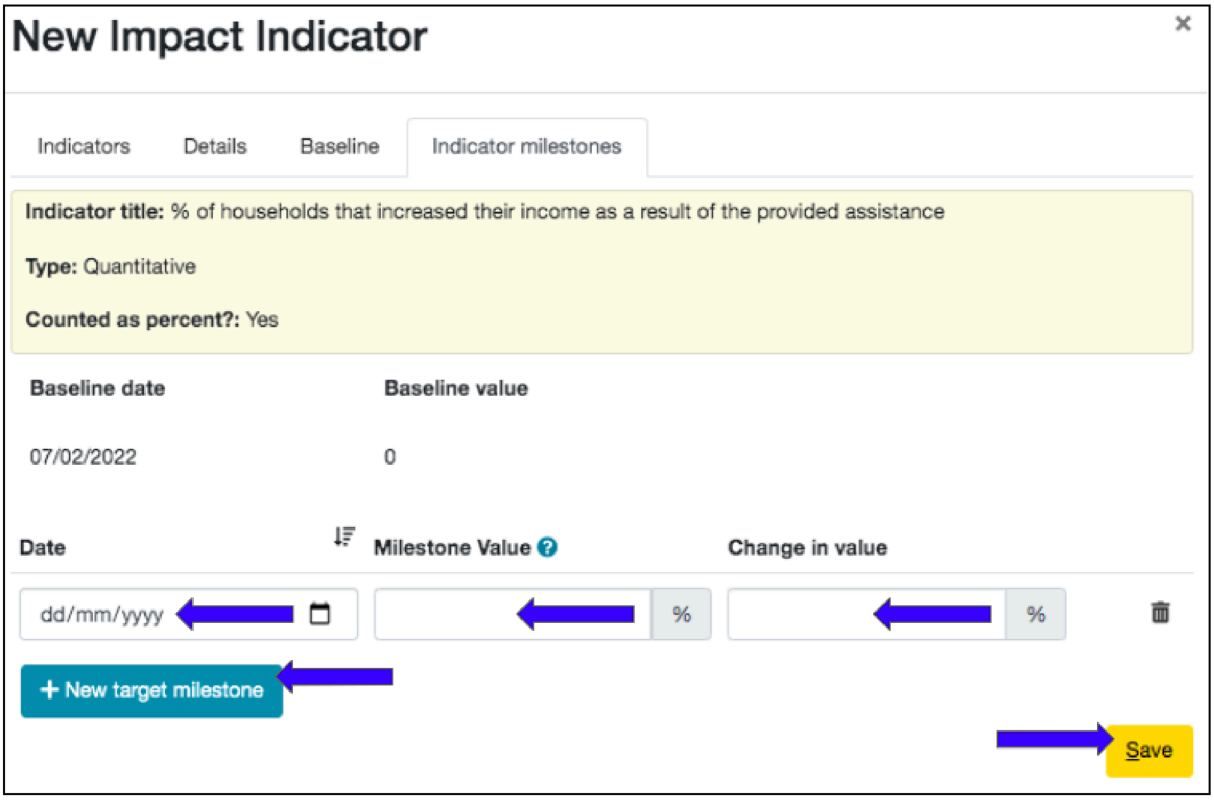
The RAG status tells the user whether or not a project is on target. Track calculates this by comparing an activity update (date and value) with the indicator milestones (date and value).

- Green = on or above target
- Amber = 85% - 99% of target
- Red = <85% of target
- In step 12, the question "At what percentage below the target should the status turn red?" is asking the user to define at which point (% below target) they would like the indicator status to change from Amber to Red as a warning. Track has set this as a default value of 15% below target, but the user is free to amend this as required.

13. Click on **next**



14. Click on **new target milestone** to add milestones.
(Please note: You must have at least one milestone target for each indicator, so it is possible to see what should be achieved by the end of the project. If you try and proceed without any milestone targets, Track will show the message 'indicators must have at least one dated milestone target').



15. Either add the **date and milestone value** (the 'change in value' will automatically update and will incorporate the baseline figure).
16. Or add the **date and change in value** (the 'milestone value' will automatically update).

17. Add as many milestones as required. This is especially important for multi-year projects. (The milestone values will not be seen in this page but will be displayed later in the M&E tracking tab if you click the graph. Reports will include any milestones within the reporting period.)

Milestone values in Track do not accumulate.

Regardless of how many target milestones are set during the project, the final milestone for the end of the project MUST be either 100% or the total number to be reached.

Example of milestones for use with a **'number of' indicator** in a project aiming to reach 500 beneficiaries:

Indicator title: number of people directly supported through food security programming

Baseline date	Baseline value
01/01/2022	0

Date	Milestone Value	Change in value
31/03/2022	150	150
30/06/2022	300	150
30/09/2022	400	100
31/12/2022	500	100

Example of milestones for use with a **'%' indicator** in a project aiming to reach 50 households:

Indicator title: % of households reporting an increase in their agricultural production

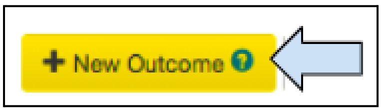
Baseline date	Baseline value
01/01/2022	0

Date	Milestone Value	Change in value
31/03/2022	25	25
30/06/2022	50	25
31/12/2022	100	50

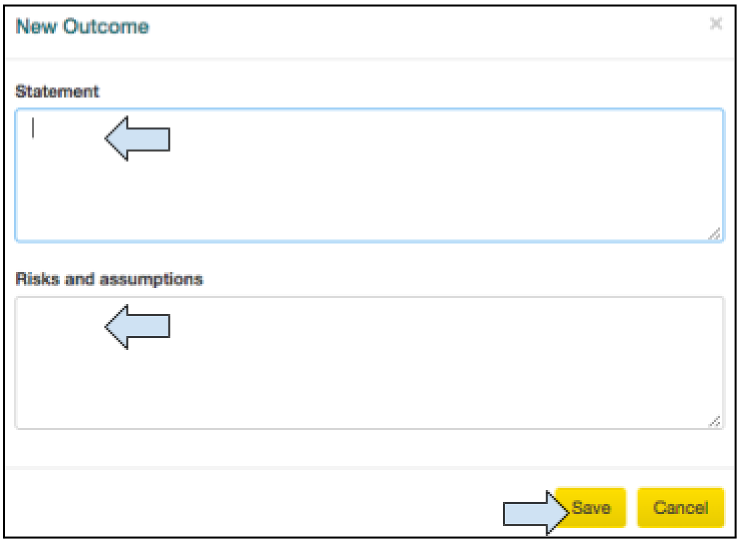
18. Click on **save** to return to the project logic tab and view the completed 'impact statement' row of the project logic.

4.7.2 Add an outcome row

Go to https://learn.tearfund.org/en/misc/partner_area/ to watch a tutorial video which provides more information on the 'Outcome row'.



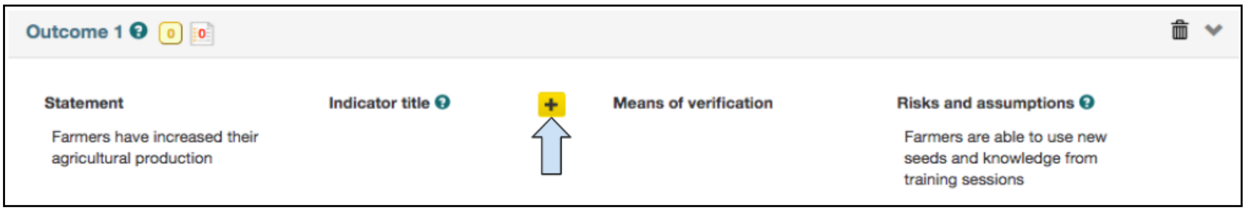
1. In order to complete the outcome row of the project logic, click on **new outcome**



2. Type the **outcome statement** in the box

3. Add the **risks and assumptions** related to the outcome

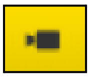
4. Click on **save**

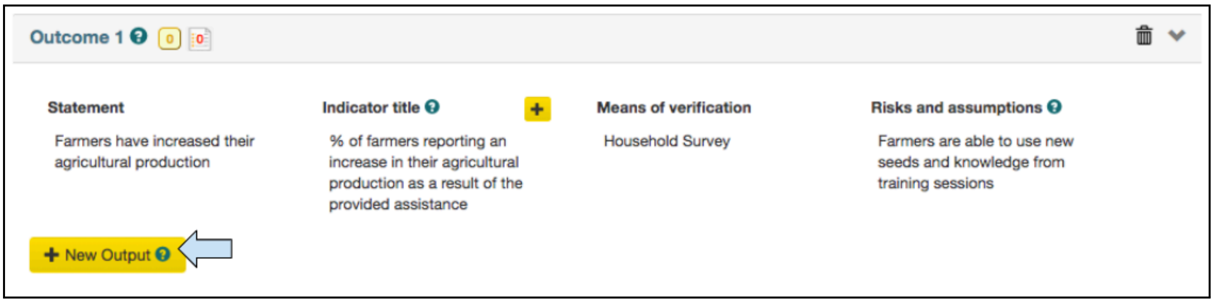


5. Click on the **'+'** symbol to add an indicator then follow all the same instructions as for the impact statement section above. (Remember to take into consideration whether the indicator is a '%' or a 'number of' indicator when adding your milestones).

6. Additional outcome statements can be added if required by clicking on the '**+ new outcome**' button

4.7.3 Add an output row

 Go to https://learn.tearfund.org/en/misc/partner_area/ to watch a tutorial video which provides more information on the 'Output row'.



1. In order to add an output statement(s) and indicator(s), click on **new output** and follow the same instructions as for the Impact and outcome statement sections above.

(Remember to take into consideration whether the indicator is a '%' or a 'number of' indicator when adding your milestones).

2. Additional output statements can be added if required by clicking on the '**+ new output**' button

4.7.4 Custom indicators

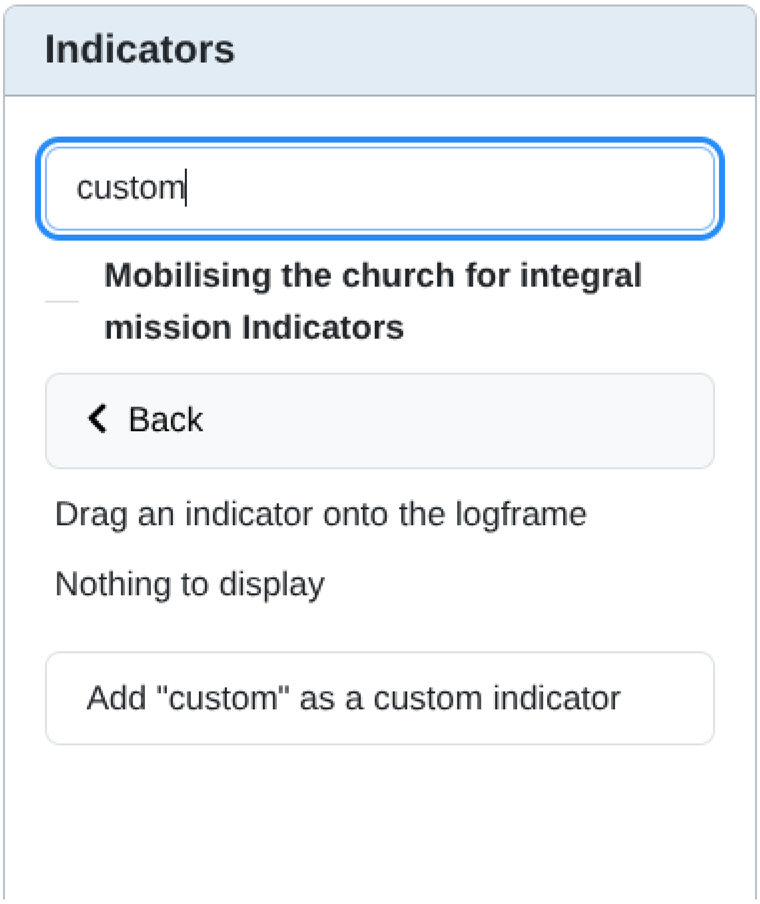
Tearfund recognises that users may not always be able to find an appropriate indicator in the database therefore Track offers the option to create a custom Indicator. This should be considered as a last resort however with users first asking themselves the following questions:

- Why can't I find a thematic indicator?
- Does my project fit into a strategy?
- Or is there an indicator missing?

If the user is certain that a custom indicator needs to be created they should inform their DME officer and discuss its suitability. DME officers will feed the custom indicators back to the Track support team and, if over time they are being used repeatedly, they may be added to the indicator database.

If you are creating custom indicator, work with your DME officer/advisor to make sure that it is:
Clear: indicators should be precise
Relevant: appropriate to the changes and evaluation
Economic: can be obtained at a reasonable cost
Adequate: the ability to provide sufficient information
Monitorable: easily monitored, and amenable to independent validation.

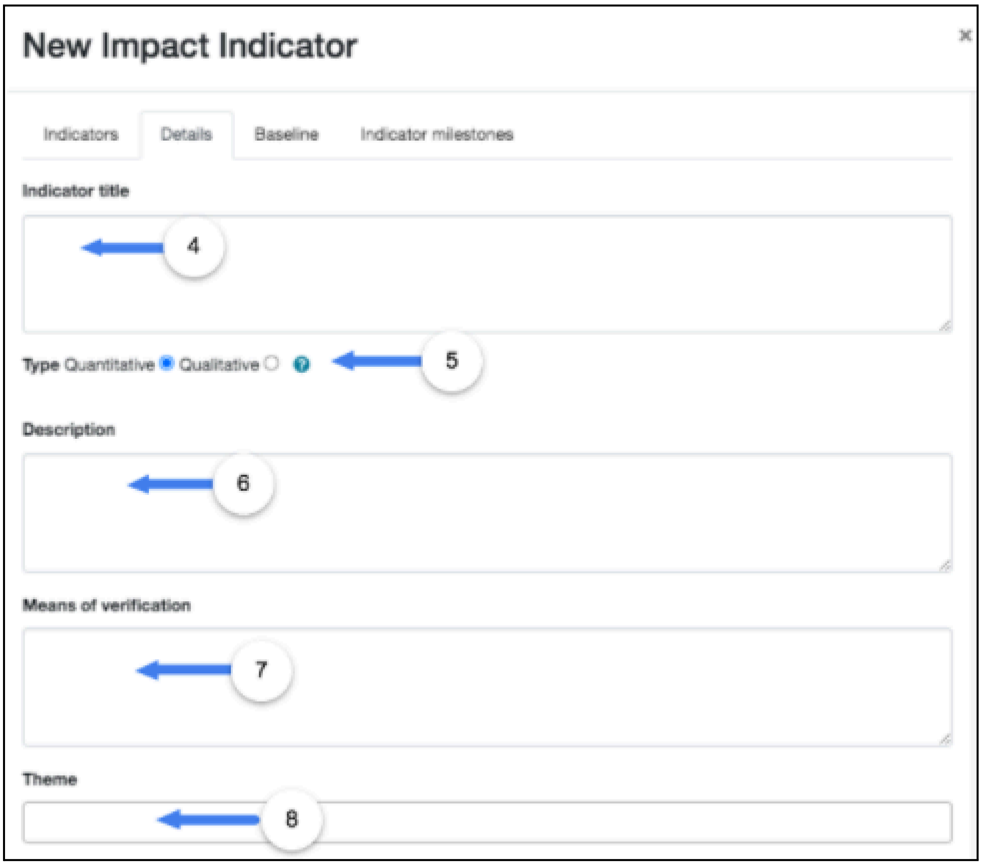
[Instructions](#)



1. Type on the **'Serach as Custom'** you will see an custom Indciator option to add an indicator

2. Click on the **theme, approach or strategy** icon to open the relevant indicator database, then select the relevant theme or approach.

3. Drag and drop the custom indicator to '**create custom indicator**'.

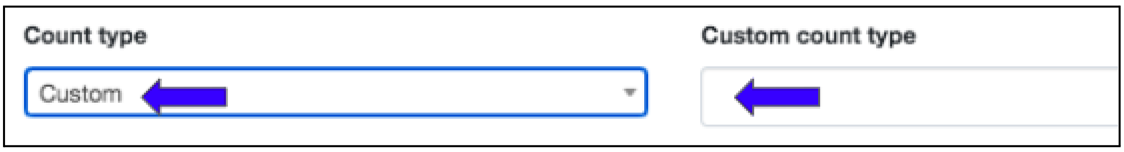


4. Enter the **title** of the custom indicator.

5. Select whether the indicator will be measured using **quantitative or qualitative** data

6. Add a **description** of the indicator
7. Add the **means of verification**

8. Select the **theme** to which the indicator should belong



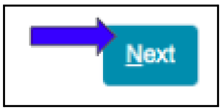
9. Click on the **count type** drop menu and select either a **standard** count type or manually add a **custom** count type**.**

Custom indicators require the manual input of a count type.

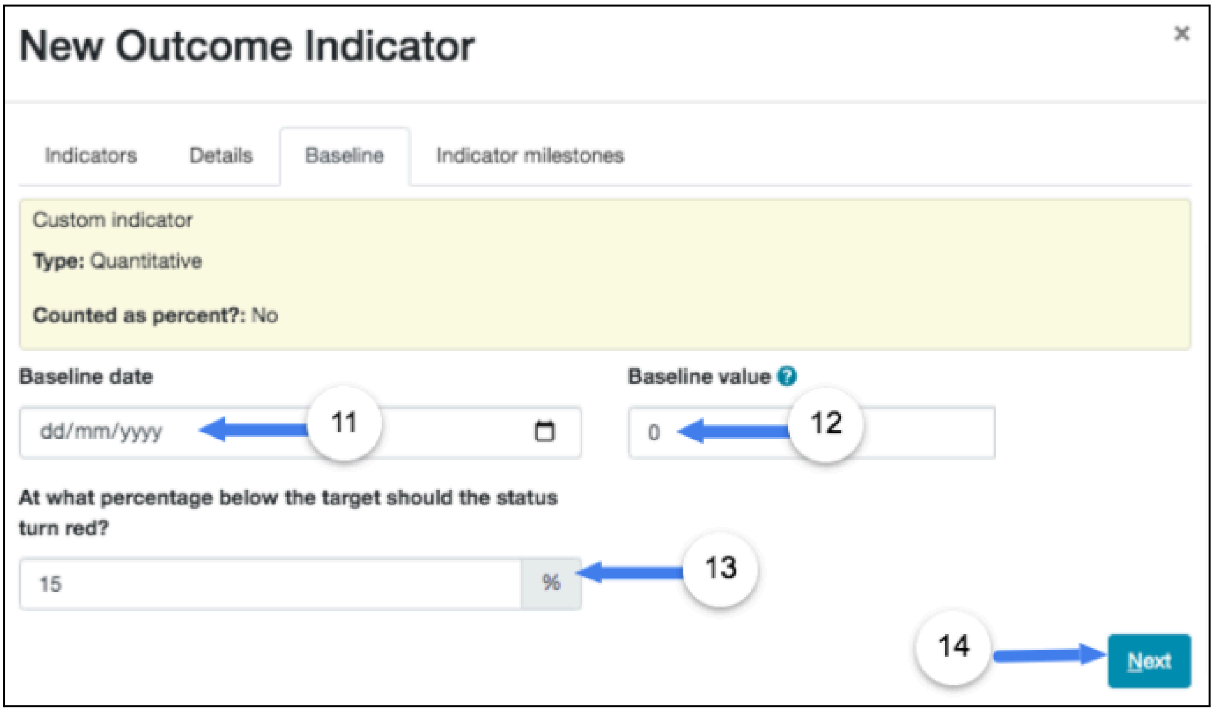
A set of standard count types relating to the targets chosen in the tags page are available in a drop menu. If, for example, beneficiaries and households were selected as target types, then beneficiaries and households would appear in the count type drop menu.

'Custom count types', ie. count types that do not relate to the targets chosen in the tags page (eg. wells), can be added manually.

If a custom indicator has been entered that relates to 'beneficiaries' and it is counted as a percentage (%), then the user must also select percentage (%) as the 'count type'. This cannot contribute to the beneficiaries reached.



10. Click on **next** when the indicator is complete



11. Add the **date** on which the baseline survey was completed

12. Add the **baseline value** for this indicator

13. Select the **percentage below target** at which the indicator status will be marked as red.

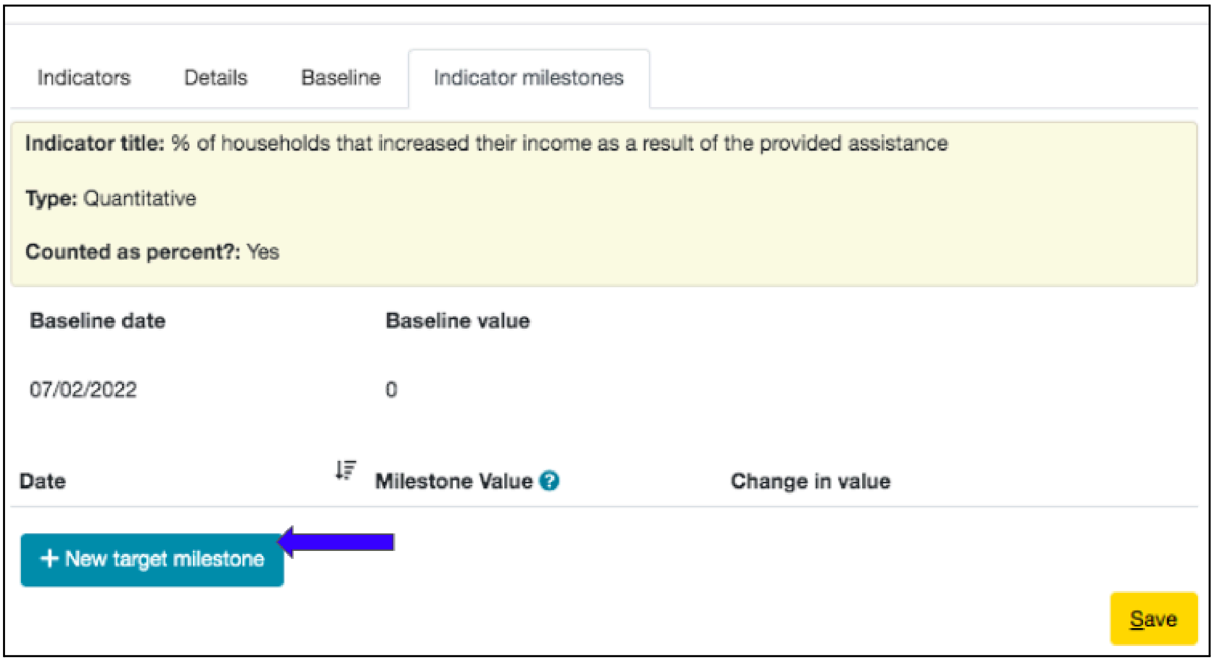
When an indicator is created with a baseline and milestone target dates, Track applies a RAG status to it.

RAG = R (red), A (amber), G (green)

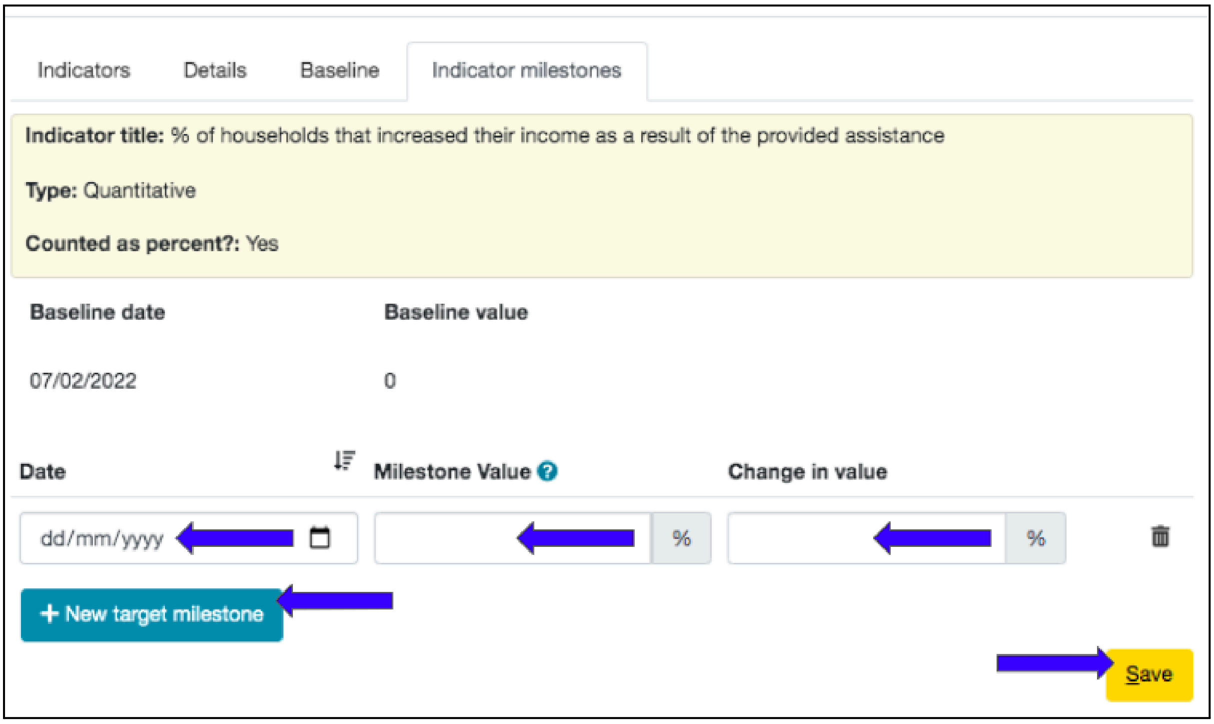
The RAG status tells the user whether or not a project is on target. Track calculates this by comparing an activity update (date and value) with the indicator milestones (date and value).

- Green = on or above target
- Amber = 85% - 99% of target
- Red = <85% of target
- In step 13, the instruction 'select the **percentage below target** at which the indicator status will be marked as red' is asking the user to define at which point (% below target) they would like the indicator status to change from Amber to Red as a warning. Track has set this as a default value of 15% below target, but the user is free to amend this as required.

14. Click on **next**



15. Click on **new target milestone** to add milestones



16. Either add the **date and milestone value** (the ‘change in value’ will automatically update and will incorporate the baseline figure).

17. Or add the **date and change in value** (the ‘milestone value’ will automatically update).

18. Add as many milestones as required. This is especially important for multi-year projects. (The milestone values will not be seen in this page but will be displayed later in the M&E tracking tab if you click the graph. Reports will include any milestones within the reporting period.)

<u>Milestone values in Track do not accumulate.</u>

Regardless of how many target milestones are set during the project, the final milestone for the end of the project MUST be either 100% or the total number to be reached.

Example of milestones for use with a **'number of' indicator** in a project aiming to reach 500 beneficiaries:

Indicator title: number of people directly supported through food security programming

Baseline date	Baseline value
01/01/2022	0

Date	Milestone Value	Change in value
31/03/2022	150	150
30/06/2022	300	150
30/09/2022	400	100
31/12/2022	500	100

Example of milestones for use with a **'%' indicator** in a project aiming to reach 50 households:

Indicator title: % of households reporting an increase in their agricultural production

Baseline date	Baseline value
01/01/2022	0

Date	Milestone Value	Change in value
31/03/2022	25	25
30/06/2022	50	25
31/12/2022	100	50

19. Click on **save** to return to the project logic tab and view the completed row of the project logic.

4.7.5 Downward trend indicators

Downward trend indicators are phrased in such a way that the expected result is a <u>decrease</u> in value.

So for example, if the indicator is measuring the 'number of deaths per year due to malaria', we would hope that by the end of the intervention the number of deaths per year would have decreased.

The following table lists the downward trend indicators that are currently in the Track database. They are a mix of impact and outcome indicators.

Figure 10: The downward trend indicators in the Track database

Theme	Level	ID	Indicator
WASH	Impact	W3.1	% of target group members who in the past two weeks had at least 3 loose or liquid stools in one day
WASH	Impact	W3.2	Average number of school days lost due to children having diarrhoeal diseases in the past 30 days
WASH	Impact	W3.3	Number of days in the past 6 months when the water supply system was not operating
Health	Outcome	H2.7	% of people aged 15 - 49 who experienced sexual violence in the past 12 months
Health	Impact	H3.1	The number of neonatal deaths per 1,000 live births
Health	Impact	H3.2	Deaths due to malaria per 100,000 population
Environment	Outcome	EN2.4	Number of hectares of agriculture land in the project target area affected by severe surface erosion
Protection	Outcome	P1.7	Number of target group members who think it is acceptable for a husband to physically discipline a wife
Protection	Outcome	P2.6	% of women aged 15 - 49 who experienced severe physical violence in the past 12 months
Protection	Outcome	P2.7	% of women aged 15 - 49 who experienced sexual violence in the past 12 months
Conflict & Peacebuilding	Outcome	CP2.3	% of people in the project area who agree that access to services varies with their ethnic, racial or cultural background
Conflict & Peacebuilding	Impact	CP3.2	% of people in project area who have suffered from physical violence over the last 4 months perpetrated by someone outside of the household
Conflict & Peacebuilding	Impact	CP3.3	% of people that have experienced prejudice in the last 4 months due to their faith, race or ethnic group
Organisational Development	Outcome	OD2.5	Average value of the Staff Turnover Rate among Tearfund supported organisations

Instructions

The following indicator will be used as an example:

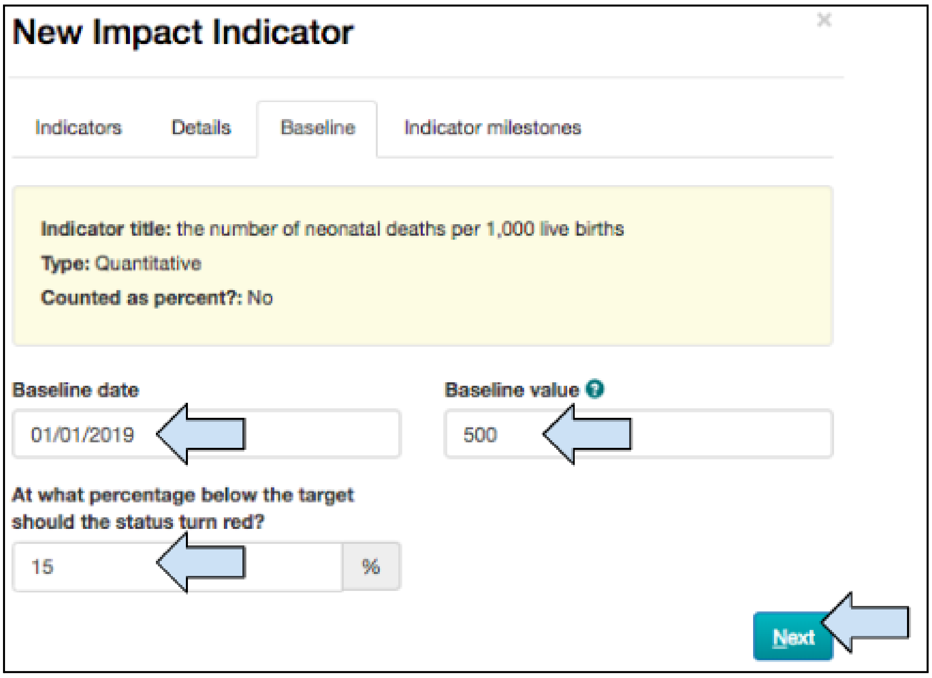
Theme	Level	ID	Indicator

Health	Impact	H3.1	The number of neonatal deaths per 1,000 live births

To add a downward trend indicator, a user must choose the indicator from the Track database in the usual way.

For a reminder of how to create an impact row and choose an impact indicator please see user guide Section 4.7.1 Add an Impact Row (steps 1-9).

Starting from Step 10 of Section 4.7.1, please follow these revised instructions:



1. Add the **baseline date** and **value**. Track uses the difference between the baseline and the final milestone to determine whether or not it is a negative trend indicator.

When an indicator is created with a baseline and milestone target dates, Track applies a RAG status to it.

RAG = R (red), A (amber), G (green)

The RAG status tells the user whether or not a project is on target. Track calculates this by comparing an activity update (date and value) with the indicator milestones (date and value).

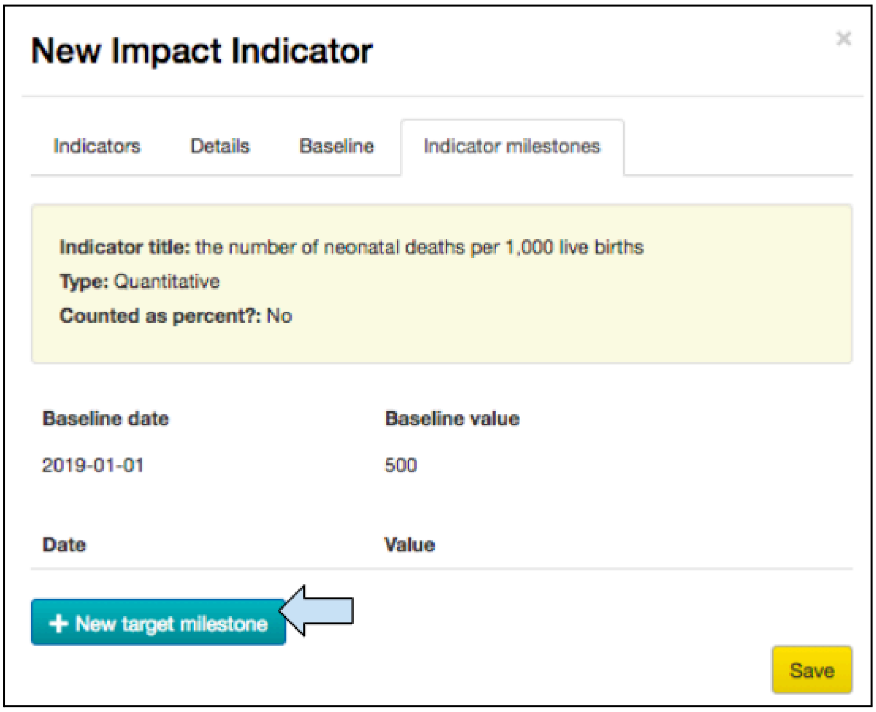
In this example we will say that when the baseline was measured, there were 500 neonatal deaths per 1000 live births.

If the final milestone is 200 neonatal deaths per 1000 live births, Track recognises that the project is aiming to decrease the number of deaths over the implementation period.

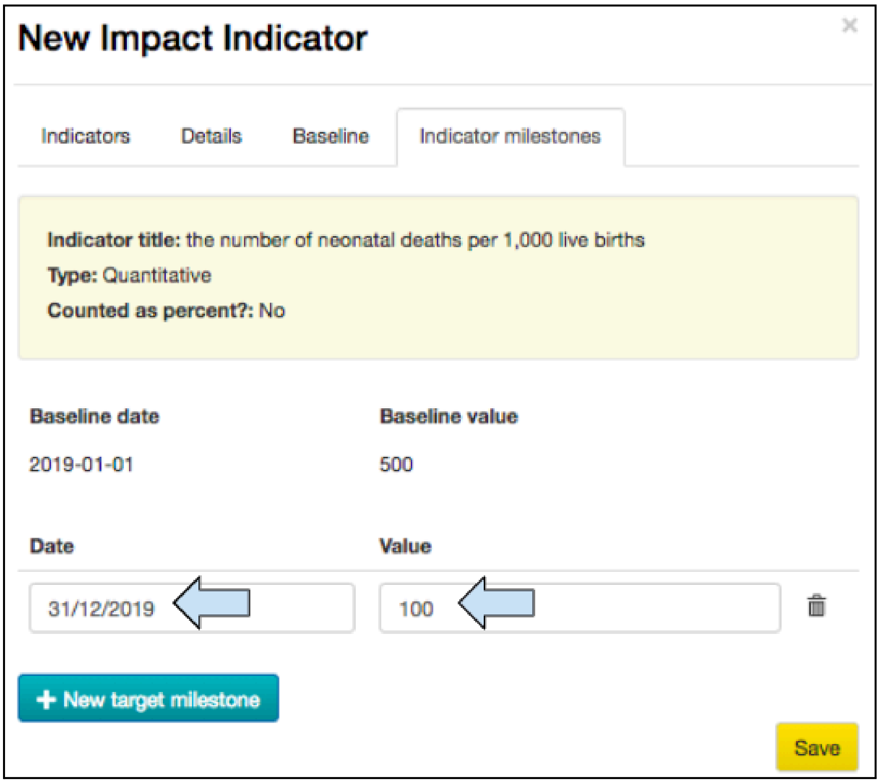
Track will automatically allocate a **green** (RAG) to a value of 150, an **amber** (RAG) to a value of 220 and a **red** (RAG) to a value of 400.

2. Track automatically sets the red RAG status as a default value of 15% below target but the user is free to amend this as required.

3. Click on **next**

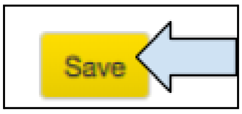


4. Click on **new target milestone**



5. Add the **milestone date** and **value**

In this example we will say that by the end of the project, the number of neonatal deaths will have decreased to 100 per 1000 live births.



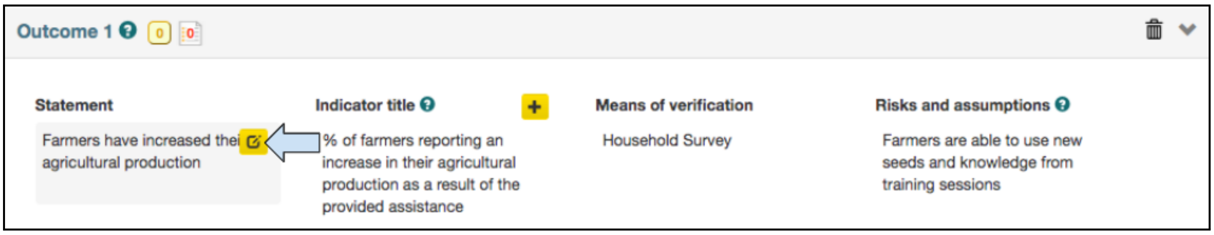
6. Click on **save** to complete the indicator

In this example we have added a downward trend impact indicator.

Users should follow the same steps to add a downward trend outcome indicator.

Remember that the milestone value should be lower than the baseline value to show a decrease as a result of the intervention!

4.7.6 Edit a cell in project logic



1. It is possible to edit any cell in the project logic by hovering over it and clicking on the **edit icon**. This opens the cell and the user can make the required amendments.

4.7.7 Delete a cell / row in project logic

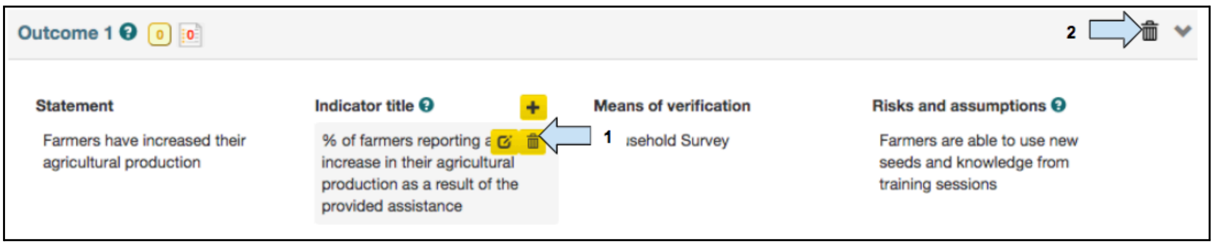
The Track project logic is constructed in such a way that there is a hierarchy of information and a resulting order in which things can be deleted.

It is not possible to delete any item which has information dependant on it, eg. it is not possible to delete an outcome row if there are outputs associated with it. Similarly, it is not possible to delete an output if there are activities attached to it.

The user should start with the lowest statement entered into the project logic. In the case of an impact / outcome row, first the indicator should be deleted, then the entire statement row can be deleted. In the case of an output row, first the activities should be deleted, then the Indicator and finally the statement row.

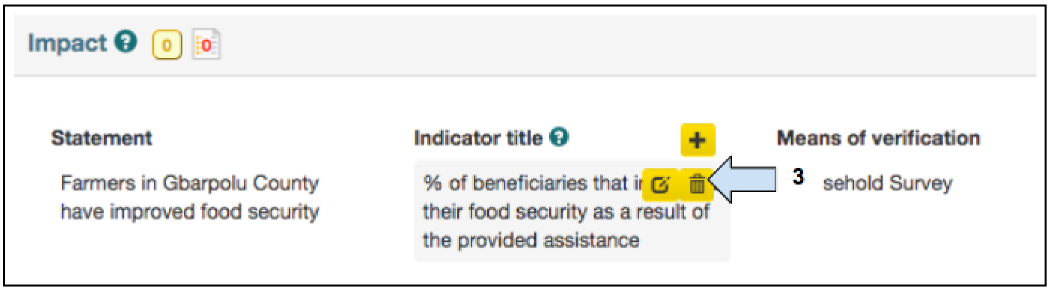
The user should continue moving up the statement levels, each time deleting the indicator first, then the entire statement row.

This section explains the order in which the user would delete information from the project logic section.



1. Hover over the outcome indicator cell and click on the **waste bin** icon to delete the outcome indicator

2. Click on the **waste bin** icon to delete the entire outcome statement row



3. Hover over the impact indicator cell and click on the **waste bin** icon to delete the impact indicator (It is not possible to delete the impact statement once it has been entered but it can be edited).

Remember…

If the user has gone so far as to add activities to output statements, the order in which items should be deleted is:

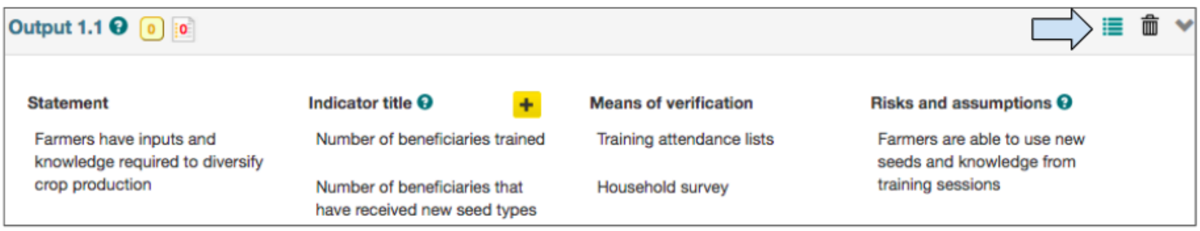
1) Activities
2) Output indicator
3) Output row
4) Outcome indicator
5) Outcome row
6) Impact indicator

4.7.8 Add activities to an output

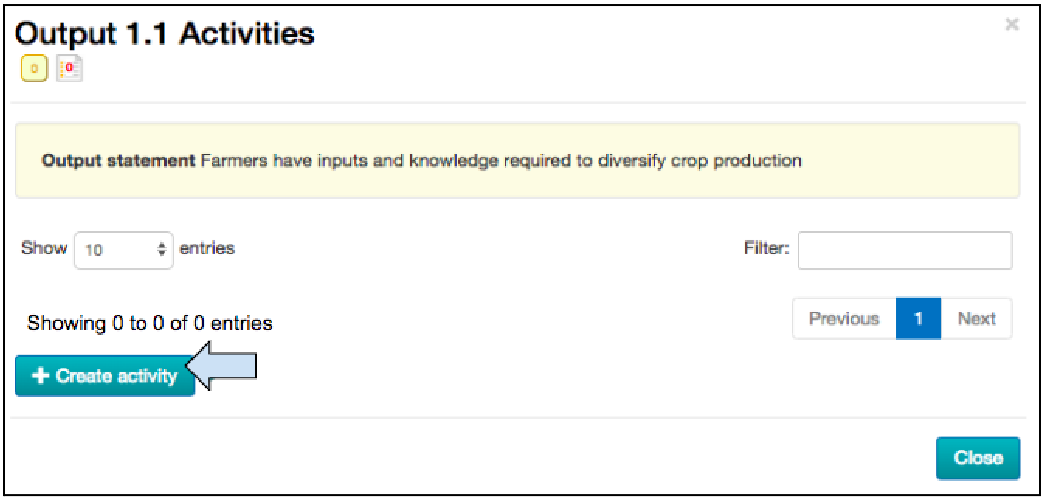
Go to https://learn.tearfund.org/en/misc/partner_area/ to watch a tutorial video which provides more information on 'adding project activities'.

This section will explain how to add activities to an output.

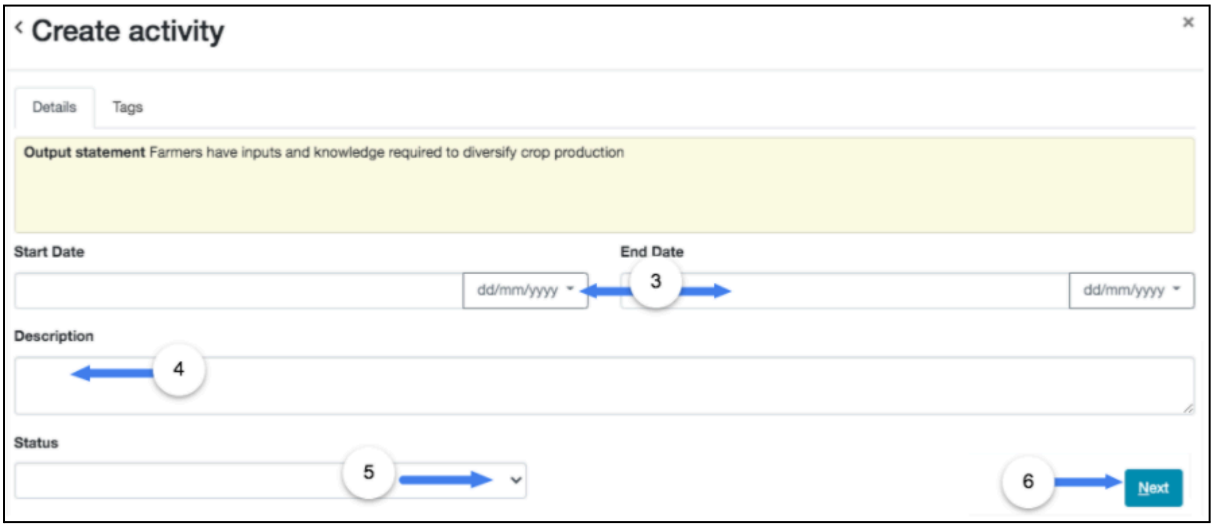
Track is designed in such a way that the activities cannot be shown directly underneath the outputs as in a standard logframe. Instead, they are shown in a different table which can be viewed in the M&E tracking tab.



1. In the project logic section, click on the **list icon** which can be found on the right hand side of the output row



2. Click on **create activity**

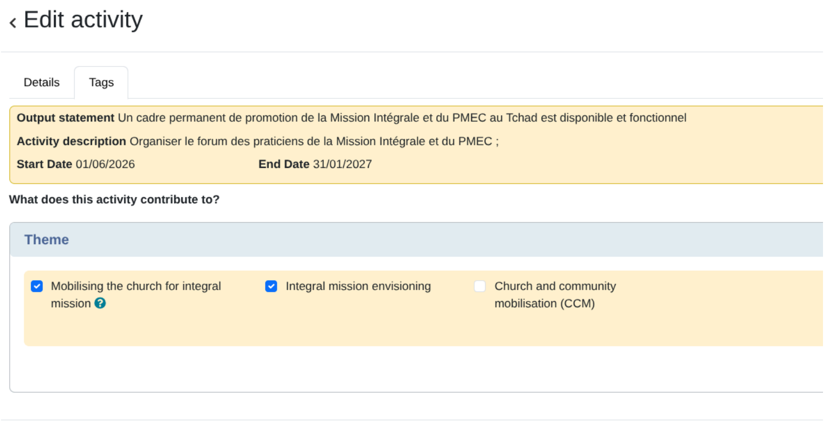


3. Enter the activity **start and end dates**

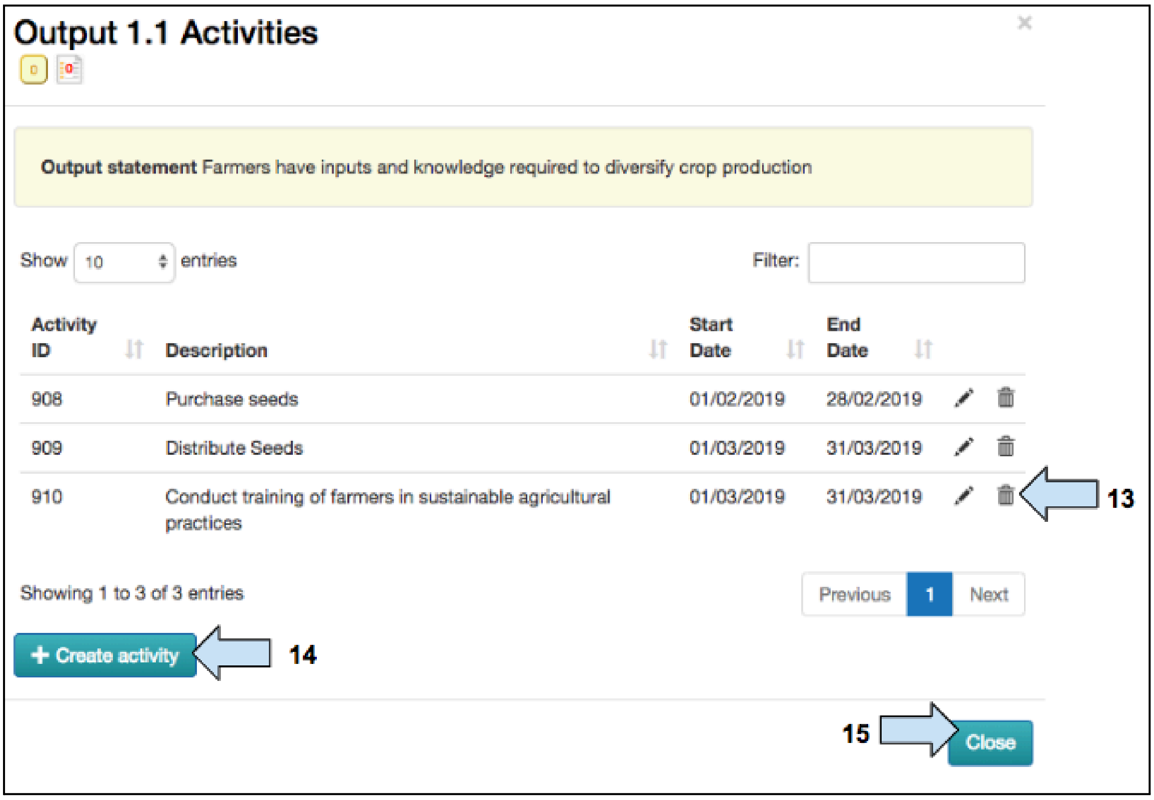
4. Enter a **description** of the activity

5. Enter the **status** of the activity

6. Click on **next**



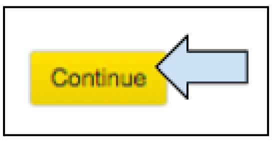
8. Then click on **save** to return to the activity box.



9. Use these icons to **edit** or **delete** the activity if required

10. Click on **create activity** to add more activities to the output

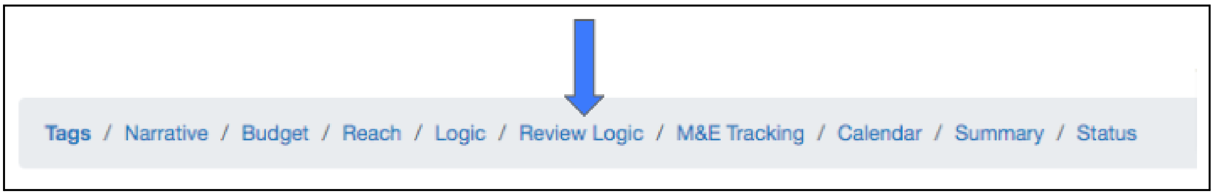
11. Click on **close** when all activities have been added



12. Once all the project logic information has been entered, click on **continue** to save and move to the next tab.

4.8 Review logic

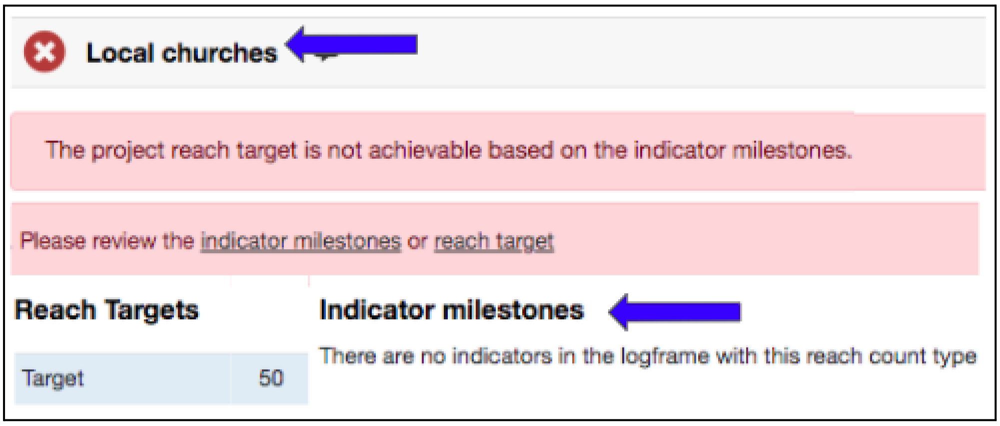
Go to https://learn.tearfund.org/en/misc/partner_area/ to watch a tutorial video which provides more information on 'Review Logic'.



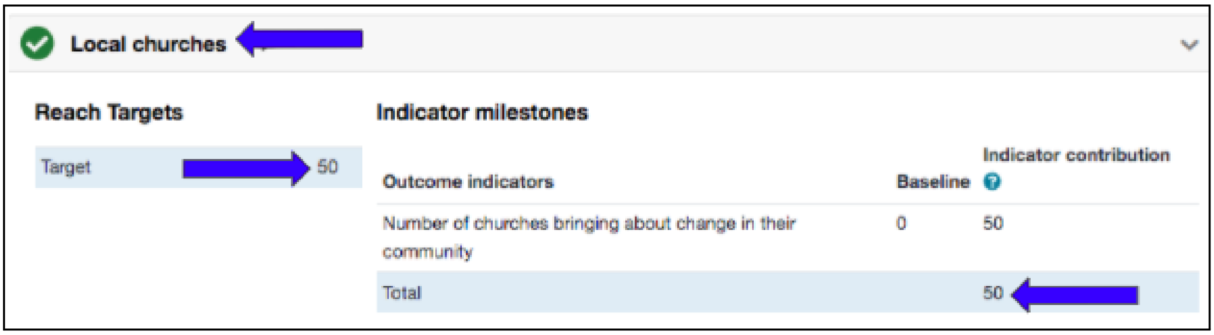
The review logic tab can be used to check that the project's reach targets are achievable based on the indicator milestones.
i) An error message will be displayed if a given reach target is not achievable
ii) A notification will be displayed if participants could potentially be reached multiple times.

1. Use the examples below to check whether the 'logic' tab has been correctly completed in order for the project's reach targets to be achieved.

Example 1: Reach target is not achievable.

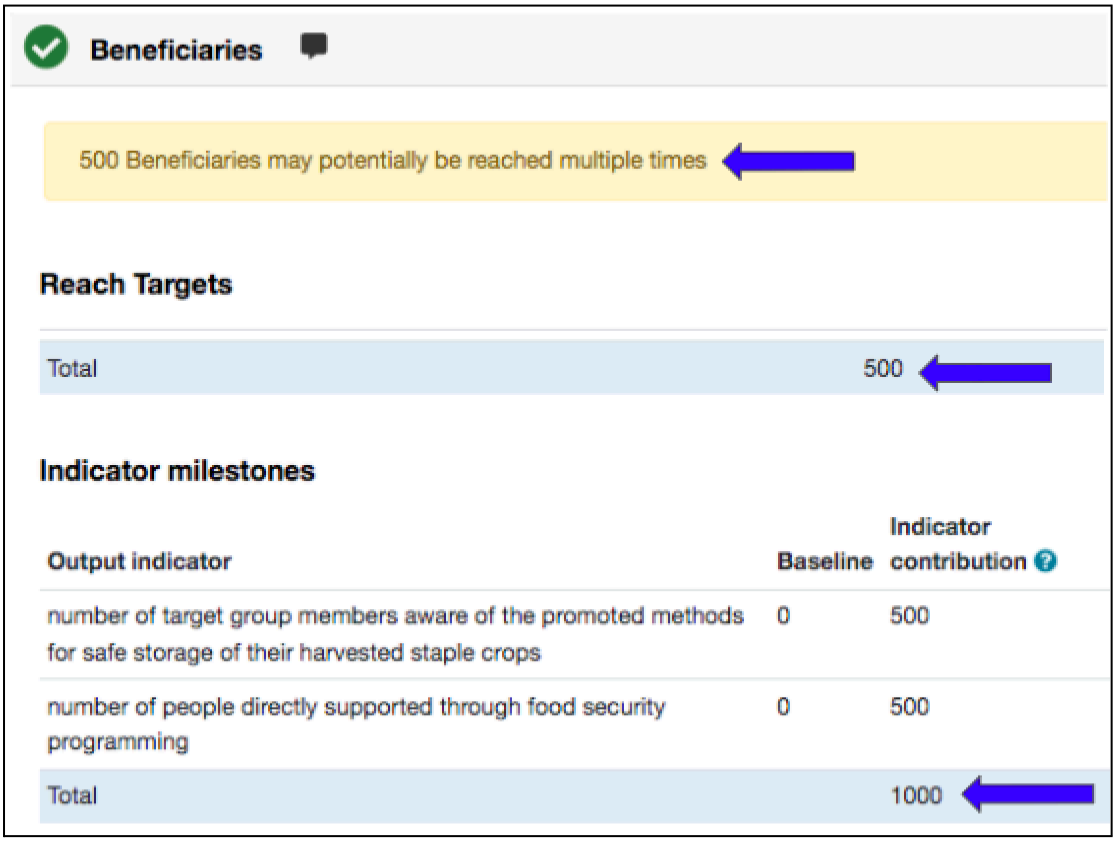


A cross in a red circle will indicate a **mismatch** between the reach target and the indicator milestones in the project logic. This means that the reach target is not achievable. The user should go back to the project logic tab and amend either the reach target or the indicator milestones as necessary.



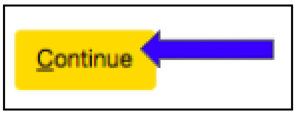
A tick in a green circle will indicate a **match** between the reach target and the indicator milestones in the project logic. This means that the reach target is achievable.

Example 2: Double counting - participants could potentially be reached multiple times.



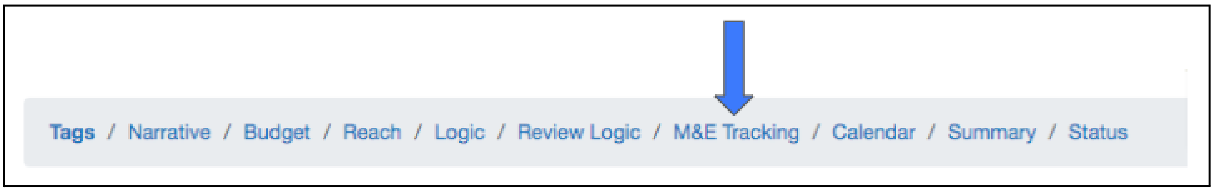
This is just a warning message and aims to make the user stop and think. It is possible for a project to be approved where a beneficiary is reached multiple times. Users will have to remember and consider this when updating the project reach at a later point, to ensure that there is no double counting of the number of people assisted.

If the intention is not to reach project participants multiple times, users should go back to the project logic tab and amend the indicators as necessary.



2. Once all the project's reach targets are achievable based on the indicator milestones, click on **continue** to move to the next tab.

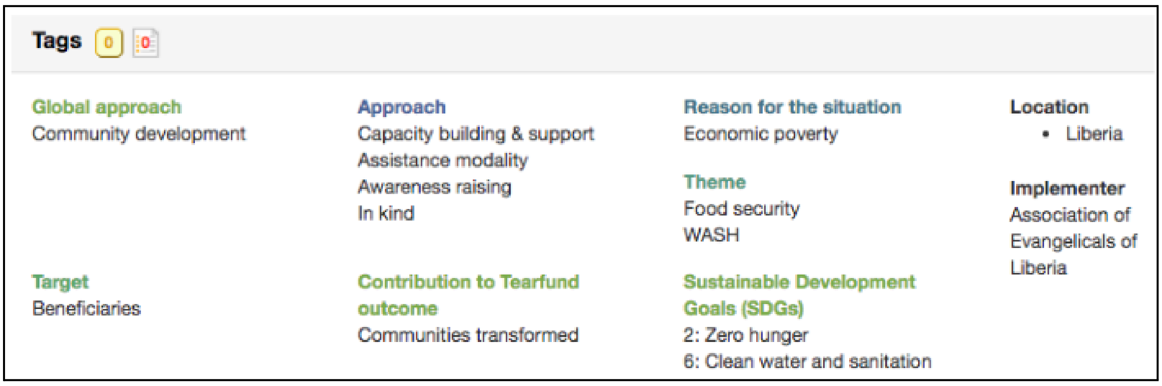
4.9 M&E tracking



The M&E tracking page is used both during the design phase of the project and in the implementation phase, ie. once it has been approved.

During the design phase, the user can view a summary of the information entered into the project so far. The user can also create an M&E plan.

4.9.1 Tags



The tags section shows a summary of what was chosen in the tags tab.

4.9.2 Reach

Reach 0 0

Beneficiaries

Beneficiaries

	Number directly affected		Number indirectly affected	
	Target	Actual	Target	Actual
Female Under 18 years old	100	0	300	0
Male Under 18 years old	100	0	300	0
Female 18 years old and over	100	0	300	0
Male 18 years old and over	100	0	300	0

The reach section shows a summary of the disaggregated direct and indirect project reach targets.

4.9.3 Activities

Activities 0 0

Show 10 entries Filter:

Activity ID	Description	Start Date	End Date	Status
1.1.1	Purchase seeds	01/02/2019	28/02/2019	Draft
2.1.1	Build Wells	01/10/2019	30/11/2019	Draft
1.1.2	Distribute Seeds	01/03/2019	31/03/2019	Draft
1.1.3	Conduct training of farmers in sustainable agricultural practices	01/03/2019	31/03/2019	Draft

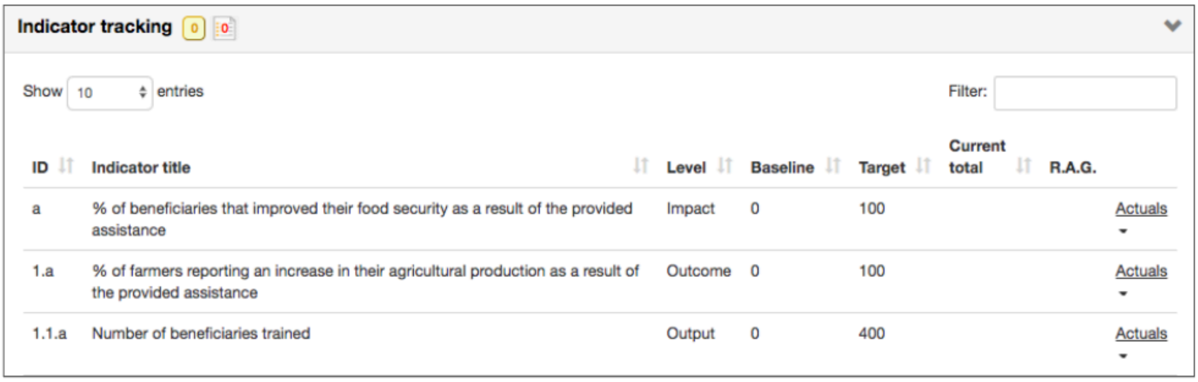
Showing 1 to 4 of 4 entries Previous 1 Next

+ Create activity

The activities table lists all activities that were added whilst creating the project logic. This table also shows us the activity status.

Once the project is in the implementation phase, this table would be used to add narrative to update the activities. This narrative can be pulled through into the report.

4.9.4 Indicator tracking



Indicator tracking 0 0

Show 10 entries Filter:

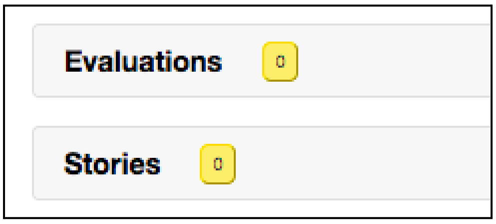
ID	Indicator title	Level	Baseline	Target	Current total	R.A.G.	
a	% of beneficiaries that improved their food security as a result of the provided assistance	Impact	0	100			Actuals
1.a	% of farmers reporting an increase in their agricultural production as a result of the provided assistance	Outcome	0	100			Actuals
1.1.a	Number of beneficiaries trained	Output	0	400			Actuals

The indicator tracking table lists all the indicators that were chosen whilst creating the project logic. Each indicator has an ID letter and number according to its level:

- Impact indicator ID: ‘a’ (if a second impact indicator existed it would have ‘b’ as ID)
- Outcome indicator ID: ‘1.a’ or ‘1.b’ or ‘2.a’ etc..
- Output indicator ID: ‘1.1a’, or ‘1.2a’ or ‘2.1a’ etc..

Once the project is in the implementation phase, the indicator tracking table would be used to manually update the project indicators.

4.9.5 Evaluation and stories



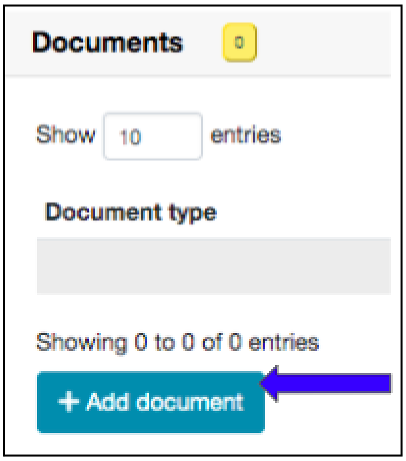
Any evaluations or stories that are available for a project can be accessed via a link in these sections. (Links to the documents can only be added once the project is in the implementation phase. For more information on how to add a document, please see Section 7. ‘Upload / Link to a Document’).

4.9.6 Accountability

One of Tearfund’s 8 quality standards is to be accountable to our beneficiaries so we have introduced a way for feedback from beneficiaries to be recorded on Track.

This section would be completed once the project is in the implementation phase and more information about this is provided in Section 5.5 ‘Accountability’.

4.9.7 Documents



1. Click on **Add document**

2. Select the **type** of document you wish to upload from the drop menu.

3. Select '**choose a file**' and find it on your computer.

4. Click on **upload** once all the necessary information has been added.

- When a document is uploaded to a project, the document is set to be owned by the project owner.
- If a document is uploaded twice in the same location, the content of the document is updated and a new version is displayed, rather than a new document being created
- Files uploaded to the M&E page are visible to everyone in Tearfund.

4.9.8 M&E plan

M&E Plan

Level	Objectives/Results Chain	Indicator	Data Source and Method	Who is collecting the data?	Data collection frequency	Who is verifying & analysing?	Who will the information be shared with?	Information sharing frequency	Indikit Link
Impact	Farmers in Gbarpolu County have improved food security	% of households that increased their income as a result of the provided assistance	Household survey	M&E Officers	End of Project	Project Manager	Country Director Donor	End of Project	
Outcome	Farmers have increased their agricultural production	% of households reporting an increase in their agricultural production as a result of the provided assistance	Household survey	M&E Officers	End of Project	Project Manager	Country Director Donor	End of Project	
Output	Farmers receive training and inputs for increased production	number of people directly supported through food security programming	Distribution lists Training attendance lists	M&E Officers	End of Project	Project Manager	Country Director Donor	End of Project	

The M&E plan is an editable table in which the user can create their project M&E plan.

The table below provides some definitions of terms which can be found in the M&E plan.

Objectives / results chain:
The impact, outcome and output statements entered into the project logic screen

Data source and method:
The method by which the data will be collected eg. primary sources (collected by Tearfund staff through observations, interviews etc.) or secondary sources (collected by other organisations in the form of documents, videos etc.)

Data collection frequency:
How often will the data be collected?

Who is verifying and analysing?
Describe how the data will be verified and which people are involved in the verification and sign-off. Describe how the data will be analysed and which people are involved in the analysis.

Information sharing:
Describe which stakeholders the analysed information will be sent to and in what format e.g. reports, verbal presentation, summary sheet... Describe who will be responsible for sharing this information.

Information sharing frequency:
Describe how often the information will be shared with the key audiences e.g. MONTHLY community meetings, QUARTERLY reporting

Instructions

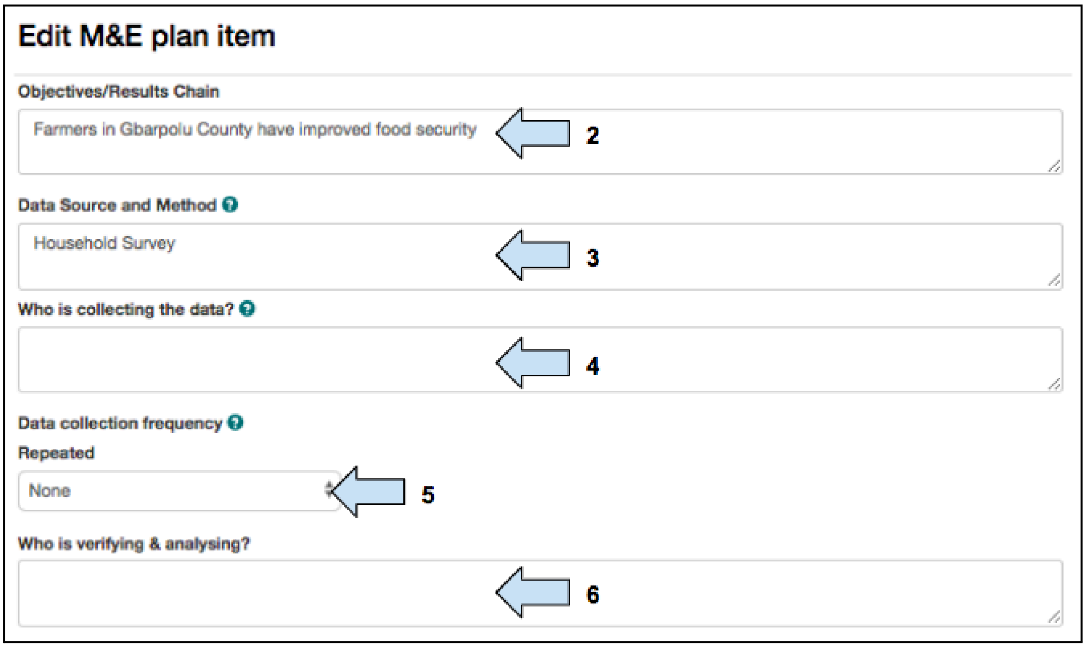
Go to https://learn.tearfund.org/en/misc/partner_area/ to watch a tutorial video which provides more information 'How to complete the M&E Plan'.

Creating the M&E plan

M&E Plan 0 0

Level	Objectives/Results Chain	Indicator	Data Source and Method	Who is collecting the data?	Data collection frequency	Who is verifying & analysing?	Who will the information be shared with?	Information sharing frequency
Impact	Farmers in Gbarpolu County have improved food security	% of beneficiaries that improved their food security as a result of the provided assistance	Household Survey					
Outcome	Farmers have increased their agricultural production	% of farmers reporting an increase in their agricultural production as a result of the provided assistance	Household Survey					

1. Click on the **edit icon** to add details to the M&E plan table



2. The **objective statement** will have been automatically entered by Track

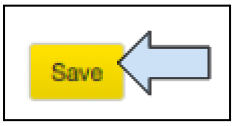
3. The **data source and method** will have been automatically entered by Track

4. Enter details about **who** will carry out the data collection

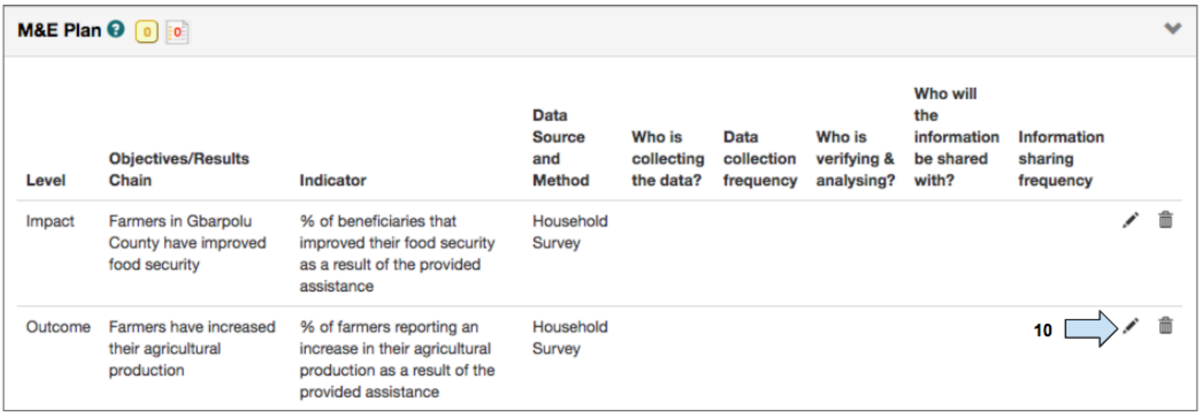
5. Select **how often** the data collection will take place
6. Add details of **who will verify** the data

7. Add details of **who the information will be shared with**

8. Add details of **how often** the data will be shared



9. Click on **save** to exit the M&E plan table

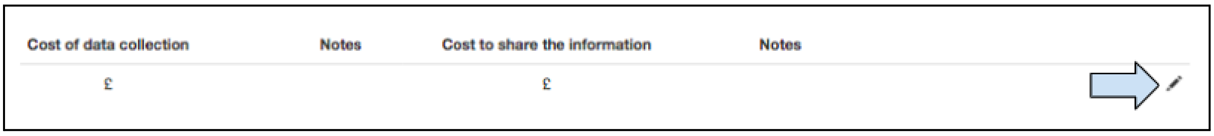


M&E Plan 0 0

Level	Objectives/Results Chain	Indicator	Data Source and Method	Who is collecting the data?	Data collection frequency	Who is verifying & analysing?	Who will the information be shared with?	Information sharing frequency
Impact	Farmers in Gbarpolu County have improved food security	% of beneficiaries that improved their food security as a result of the provided assistance	Household Survey					
Outcome	Farmers have increased their agricultural production	% of farmers reporting an increase in their agricultural production as a result of the provided assistance	Household Survey					10

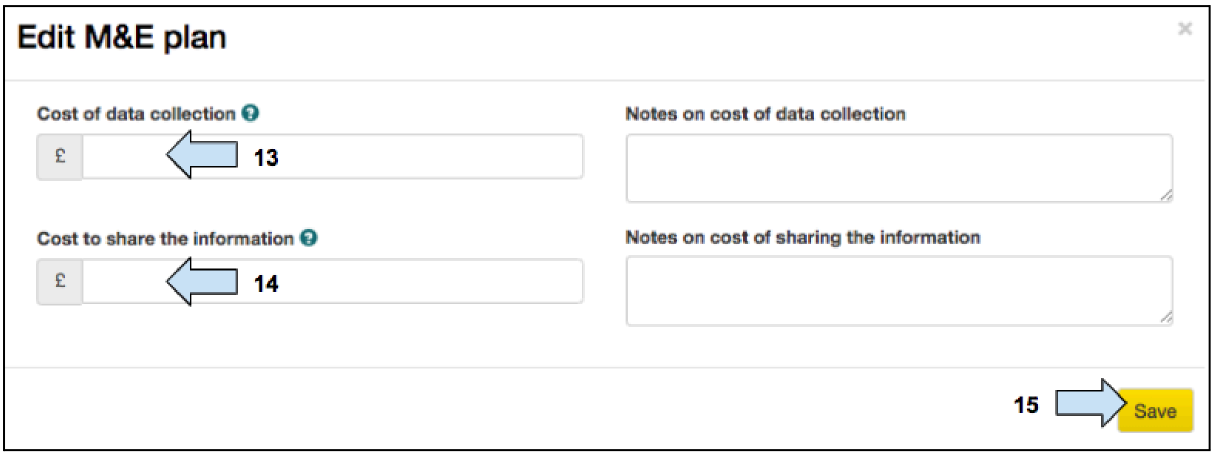
10. Click on the **edit icon** to add details to the next row of the M&E plan table

11. Click on **add plan item** to add a new row to the M&E plan if required.



Cost of data collection	Notes	Cost to share the information	Notes
£		£	

12. Click on the **edit icon** to add details of the costs of data collection and sharing



13. Add details of **how much it will cost** to collect the data

14. Add details of **how much it will cost** to share the data

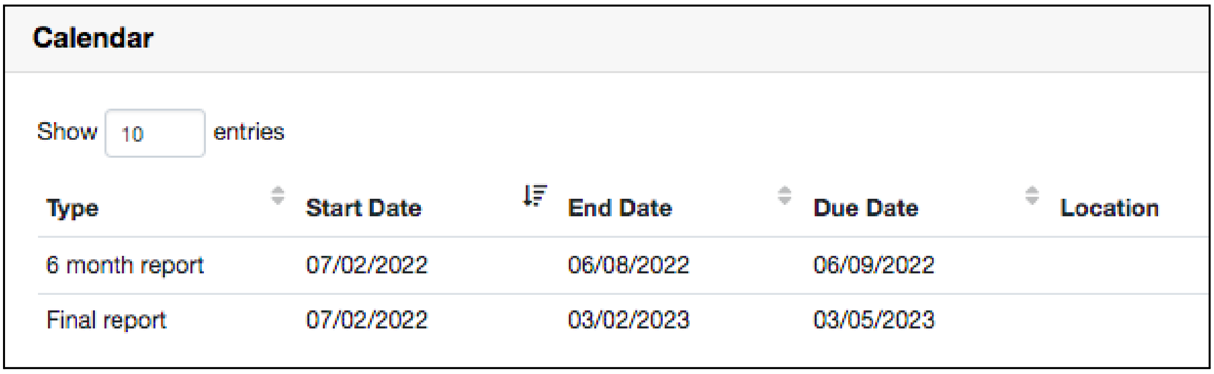
15. Click on **save**

16. Click on **continue** to move to the next tab

During the implementation phase, the M&E tracking page will be used to update activities, indicators, reach count and the M&E plan (see Section 5: Implementation: Projects).

4.10 Calendar

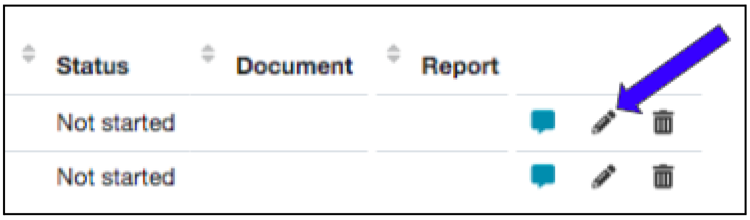
The calendar can be used as a project diary to keep track of reporting requirements.


Calendar

Show 10 entries

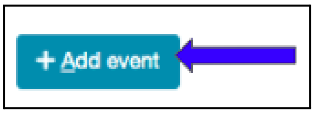
Type	Start Date	End Date	Due Date	Location
6 month report	07/02/2022	06/08/2022	06/09/2022	
Final report	07/02/2022	03/02/2023	03/05/2023	

The calendar will automatically be populated with a 6 month report, annual report and final report based on the project start / end dates entered in the 'details' section of the tags page. Monthly, quarterly or interim reports can be added as necessary.



Status	Document	Report
Not started		
Not started		

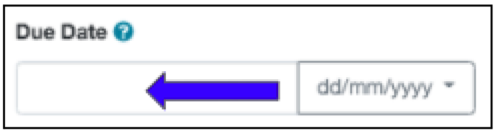
1. To amend the information about the calendar event, click on the **pencil icon** at the end of the report row in the Calendar table.



2. To create a different type of report or calendar event, click on '**add event**'.

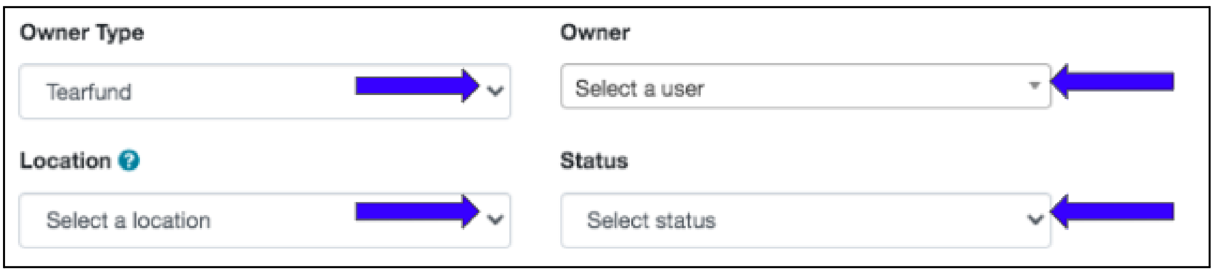
3. Click on the arrow next to the drop menu and select the **event type.**
(NB. This field will be auto-populated if you have chosen to edit a report that was automatically entered into the calendar tab by Track).

4. Alternatively, click on the '**other type**' link and manually add a new event.



5. Enter the event **due date**. This is the submission date used to determine the RAG status of the calendar event.

6. Select the **date format** and add the **event start and end dates**

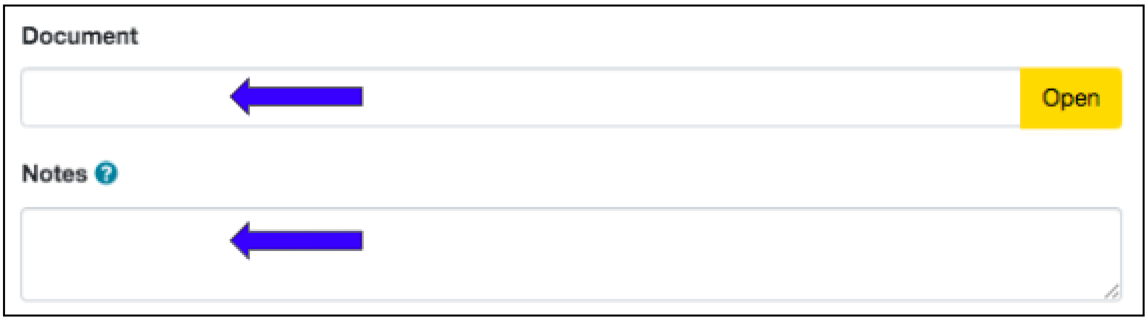


7. Click on the drop arrow and select the **owner type**, ie the organisation (Tearfund / partner) that owns the event**.**

8. Click on the drop arrow and select the **user that owns the event**

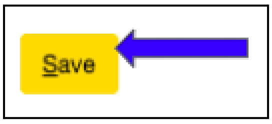
9. Click on the drop arrow and select the **event location**

10. Click on the drop arrow and select the **event status**

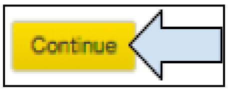


11. Enter the URL of the Google document that the calendar event relates to then click on ‘open’ to access the document

12. Add **user notes** if required

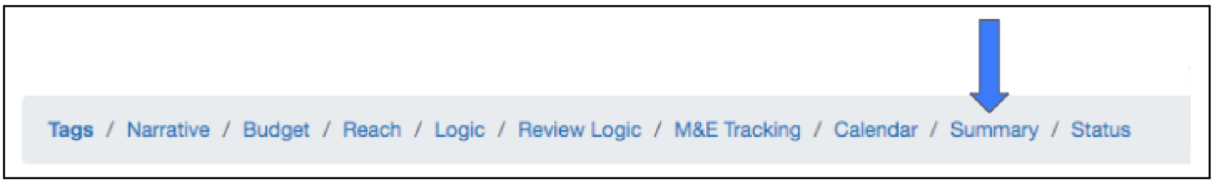


13. Click on **save.** The screen will refresh and the event(s) will be saved in the calendar.



14. Click on **continue** to move to the next tab.

4.11 Summary



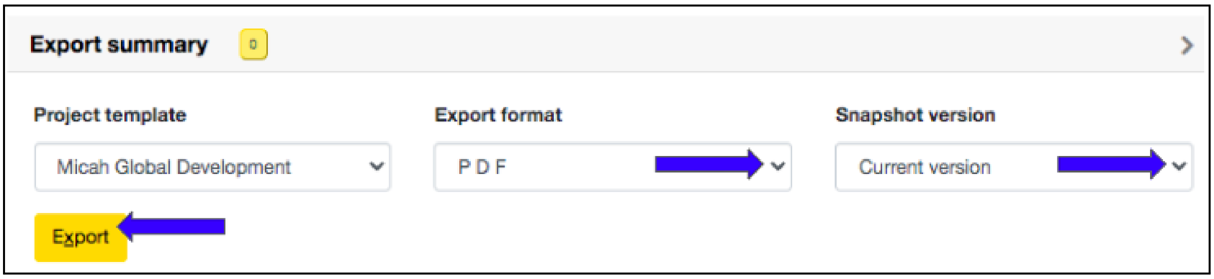
This page provides a summary and overview of the information entered into the proposal.

- Sections A-I and K of the summary page correspond to the information entered into Track.
- Section J relates to the project budget which must be completed on a separate spreadsheet and then attached or linked to Track via the Budget tab.

1. Scroll through the summary page and check the information that has been entered into the proposal. If necessary, click back through the tabs to add / amend information.

4.11.1 Export summary

It is possible to export the proposal summary in various formats:



1. Click on the drop arrow next to **export format** and select to export the project summary as either a PDF, Word, Google doc or copy it to clipboard.

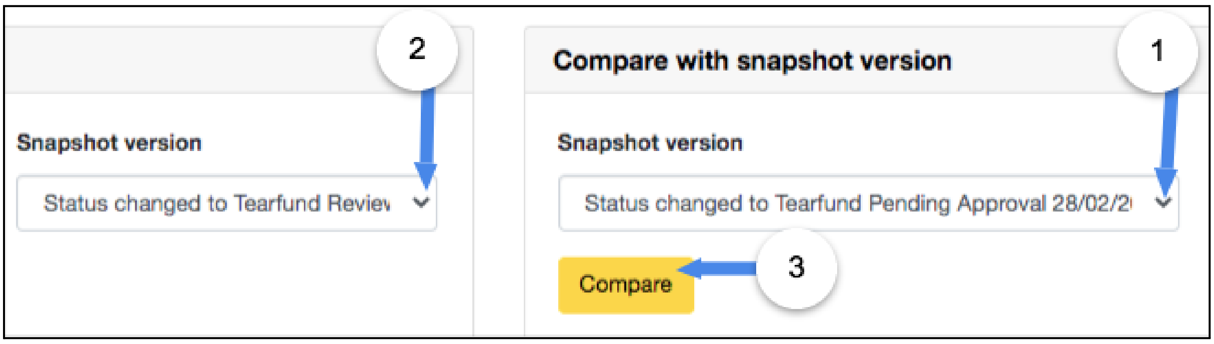
2. Ensure that the **current version** is selected in the drop menu next to 'snapshot version' to select which version of the project summary you would like to export.

3. Click on **export** to create the file

4. The file will be saved to the user's computer and should then be saved into the correct corporate folder.

4.11.2 Compare with snapshot version of summary

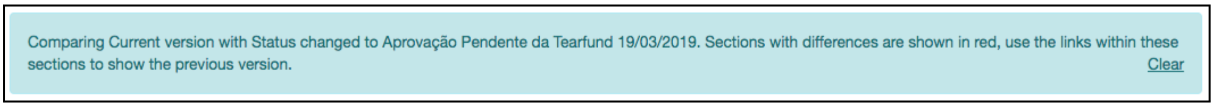
The 'compare with snapshot version' function allows users to compare the current version of a proposal summary with a previous version.



1. Click to open the drop menu in the '**compare with snapshot version**' table, then select the version of the project you would like to compare.

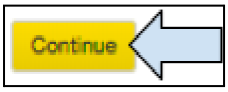
2. Select a previous version of the project in the '**snapshot version**' drop menu.

3. Click on **compare.**



4. An info box will appear to confirm which versions of the proposal are being compared.

5. The sections with changes will be highlighted in red.



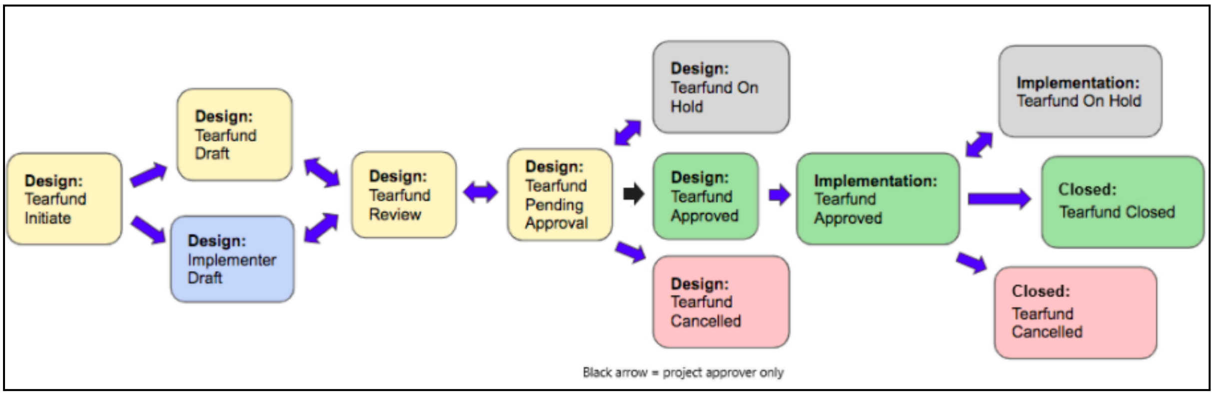
6. Click on **continue** to move to the next tab.

4.12 Status

The status of a project indicates how far through the project creation cycle a project has progressed. A proposal can either be in a ‘design’ phase or in an ‘implementation’ phase. Both the ‘design’ and ‘implementation’ phases are made up of several project statuses.

The following diagram shows the different phases and statuses that a proposal will move through between the start and the end of a project. (The diagram can also be found on the status page by clicking on 'status workflow').

Figure 11: Project phases and statuses



Design phase

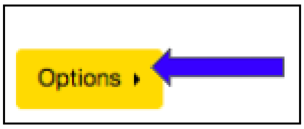
A project can be moved forwards and backwards through the statuses in the design phase.

- Changes in status of a Global Development proposal (ie. with an implementing partner) involve moving the project between the partner and Tearfund environments
  (Please note, once a proposal has been sent to a partner, a Tearfund user may not be able to see or edit it again until the partner sends it back to Tearfund. It is possible for the partner to allow Tearfund access to the proposal if they wish. For more information on this see Section 4.1.3 'Invite Tearfund?')
- Tearfund staff can review a project and insert comments for review using the collaboration button.
- The country director or cluster lead (or anyone they have delegated to) can approve, reject or put a project on hold. A full list of who can do this can be found in the status tab under 'options / who can approve?'.

Once a project moves into Levi status, a message is sent to Levi for an payment to be set up. The whole project needs to be set up in Track before a grant can be paid.

Implementation phase

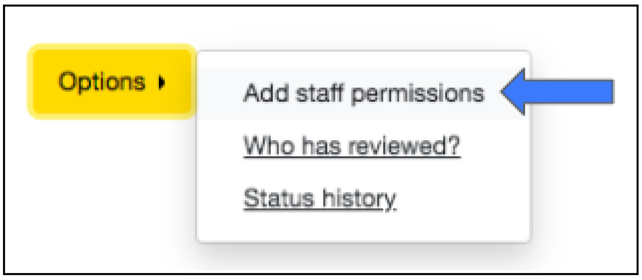
Once a project has passed through approved status, it can be moved into the implementation phase by any editor, including partners.



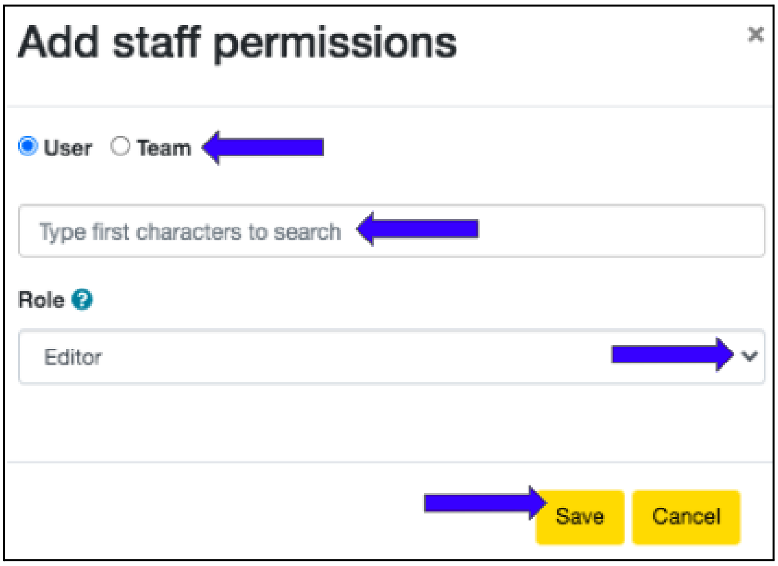
There are various functions available under the **options** button at the bottom of the status page:

4.12.1 Add staff permissions

'Add staff permissions' has replaced the 'add an editor' function



1. Select '**add staff permissions**' from the 'options' drop menu.



2. Select whether the document will be shared with an individual **user** or with a **team**

3. Start typing, then select the name of the person / team

4. Click on the drop arrow and select if the user will be granted editor, viewer or approver rights. (Only a project approver is able to add an additional project approver).

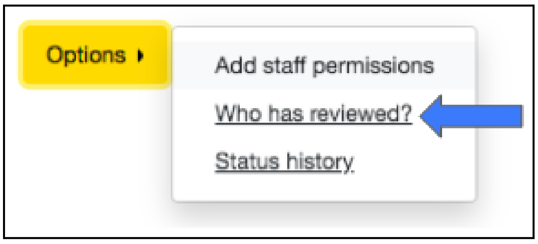
5. Click on **save**

Once the staff permissions have been saved they can be viewed in this screen:

6. Use the **filter** to search for editors

7. Use the **pencil icon** to make changes to the editor status.

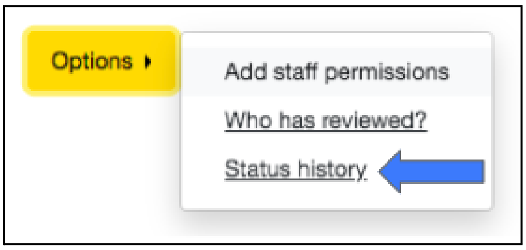
4.12.2 Who has reviewed?



1. Select '**who has reviewed**' from the 'options' drop menu.

2. A pop up box will appear listing all members of staff who have reviewed the project, as long as they have checked the box in the Project Reviewers section on the status page.

4.12.3 Status history



1. Select **status history** from the 'options' drop menu.

2. A pop up box opens with a list of dates on which the status of the project changed. Click on **view** to see a snapshot of the project summary page as it was during that status.

4.12.4 Move status

As mentioned above, changing the status of a project allows it to be sent back and forth between Tearfund and an implementing partner during the design phase.

When the status of a project is changed, an email with a link to the Track login page is sent to the implementer/Tearfund staff member to give them access to the proposal.

The proposal can be moved back and forth during the design phase until the final status of 'Design: Tearfund Approved'.

Once a project is approved, the status can be changed to Implementation: 'Tearfund Approved'.

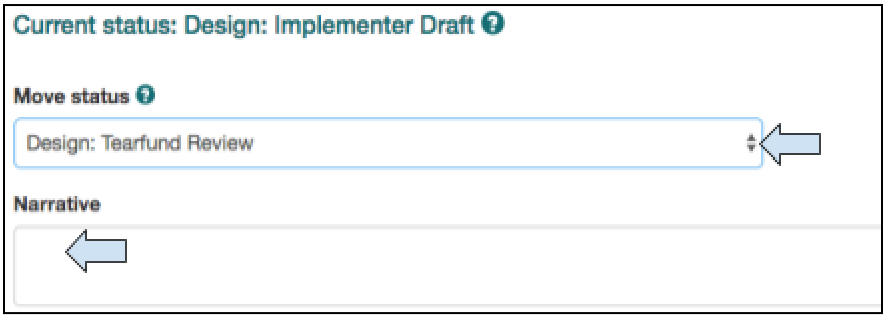
As a reminder ….

A project must be moved through the following statuses in the design phase in order for it to reach 'approved status'.

- Tearfund initiate
- Tearfund / implementer draft
- Tearfund review
- Tearfund pending approval
- Tearfund approved

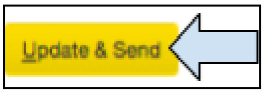
(See Figure 7: 'Project phases and statuses' in section 4.12)

Instructions



1. Click on the drop arrow and select to move the project to the next **status**

2. Add **narrative** if required



3. Click on **update and send** to move the project to the next status

NB. Each time a user wants to send the proposal to another user (implementing partner or Tearfund), the status must be changed.

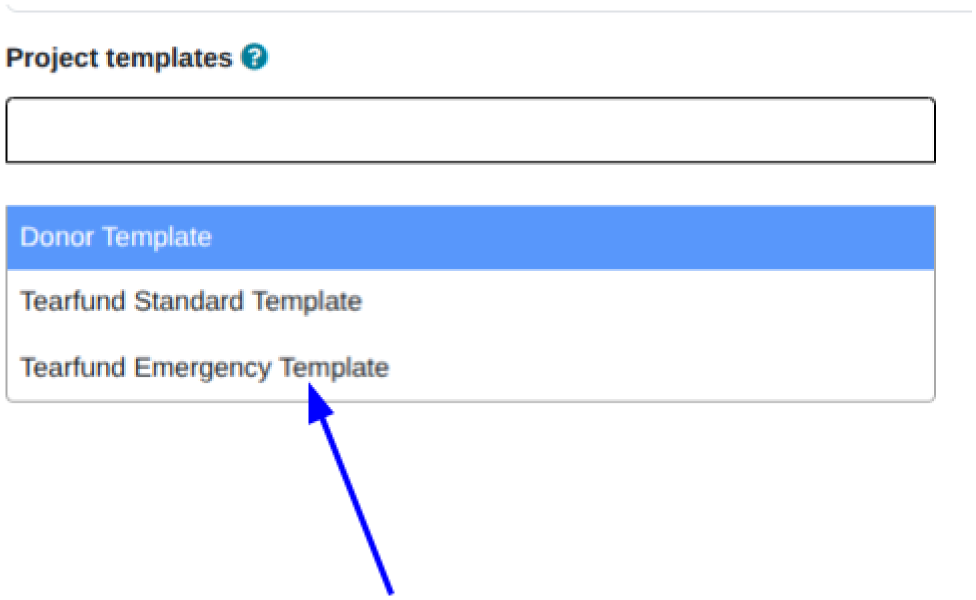
4.13 Emergency Response Template

The Emergency Response Template can, for the most part, be completed in the same way as the Micah Global Development Template.

This section highlights the parts of the template that are different.

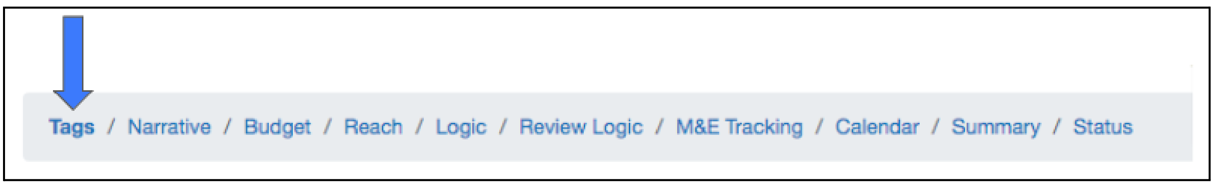
4.13.1 Create a new project - details

1. In the create project / details section, select the Tearfund Emergency Response Template.



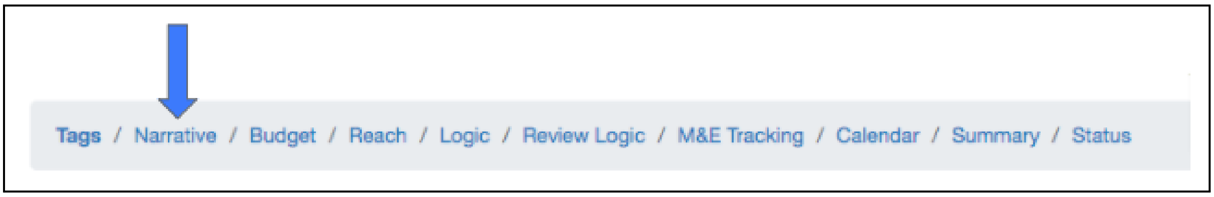
- Open the Tearfund Emergency Template.
- Confirm whether you are preparing a **full** proposal or a **short** proposal.
- For **full variation** you are required to submit all proposal details immediately.
- For the **short variation** you are required to submit only the minimum required information for a rapid-onset emergency.

4.13.2 Tags



1. Click on the **type of emergency** section header, then select the type of emergency that the project will respond to.

4.13.3 Narrative



The sections in the narrative tab are different to those in the Standard development Template. However, guidance is provided within each section on what information to include and how to complete it.

Emergency template - Short/Full version project design proposal system guide

5. Implementation: Projects

What will this chapter cover?

This chapter explains how to update activities, indicators and reach once a project is in implementation. It also explains how to amend a project once it is has been approved.

Who will find this chapter helpful?

Any user who updates activities, indicators and reach or needs to amend a proposal

5.1 Change status

Once a project has been approved, its status is changed from ‘Design: Tearfund Approved’ to ‘Implementation: Tearfund Approved’.

(For more information on how to change status see Section 4.12.2 'Move Status')

In the implementation phase, it is possible to request and make amendments to a project, to update activities, indicators and reach and to create reports.

Please note that once a project has been moved to the implementation phase it cannot be rolled back to design phase and can therefore no longer be amended.

5.2 Amend a project

Once a project is in the implementation phase, it may be necessary to make amendments to it. Most sections within Track are read-only in the implementation phase and therefore uneditable. Changes to a project can only take place through an amendment request which is sent to the project approver. When an amendment request is approved, any partner or staff member named as an editor on that project will be able to make changes on that section.

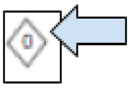
The following project details **CANNOT** be changed via an amendment:

- Project title
- Project type
- Project start & end dates (these can be changed through the extensions)
- Links to a programme
- Has sub projects
- The template being used
- Summary section (text)
- Changing an implementer (this can only be done by cloning then closing the original project)
- Adding an implementer (with the exception of sub grantees)
- Existing project locations
- Existing project tags

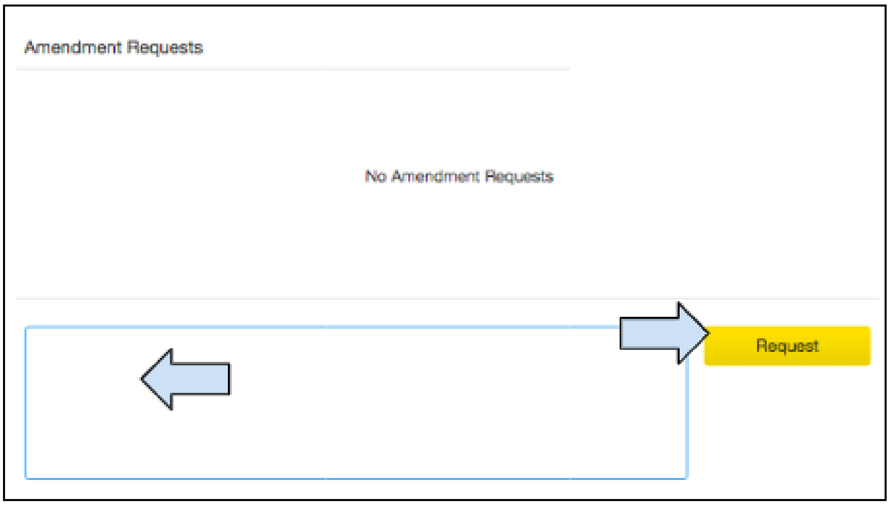
5.2.1 Making an amendment request

Go to https://learn.tearfund.org/en/misc/partner_area/ to watch a tutorial video which provides more information on 'How to make an amendment request'.

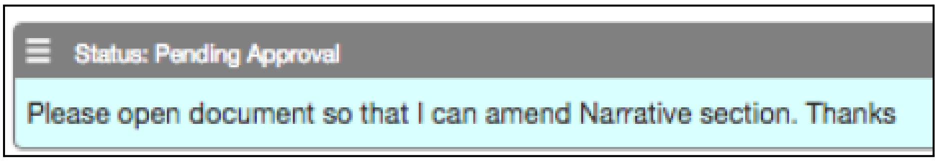
Requesting an amendment is done by clicking on the following diamond symbol which can be found in the tags, narrative, budget, reach, logic and review logic tabs of a project in Track.

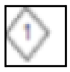


1. Click on the amendment request icon and a new screen will open.



2. Type the amendment request in the box then click on **request**.



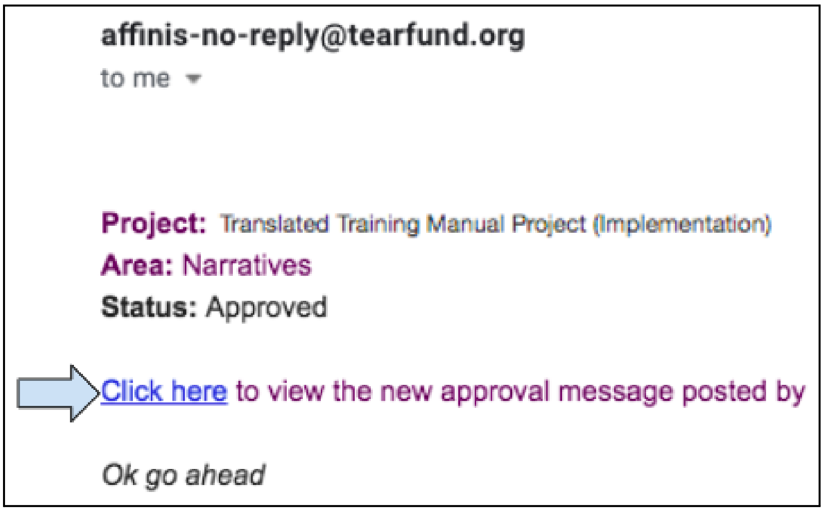
A copy of the message will appear in the amendment request box and the amendment request symbol will have changed to a . An email will be sent to the project approver.

5.2.2 Action an amendment request once it has been approved

Once an amendment request request has been approved, the user has 14 days during which to make the amendment. After 14 days the proposal is locked again and subsequent changes would have to be requested and dealt with again in the same way.

Once an amendment request has been approved, (this may take some time depending on how quickly the project approver actions the amendment request), the user who made the request will receive an email with a link to the project in Track.

Please note that an approved amendment opens only the specific section in which the amendment was requested e.g. if an amendment is requested on the narrative page, only the narrative page opens for editing.

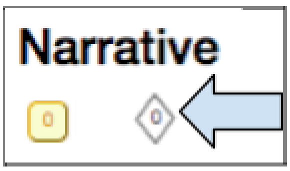


The email displays the name of the person who has approved it / declined the amendment request. It also highlights that the changes made to the project are visible on the comparison versions on the summary tab.

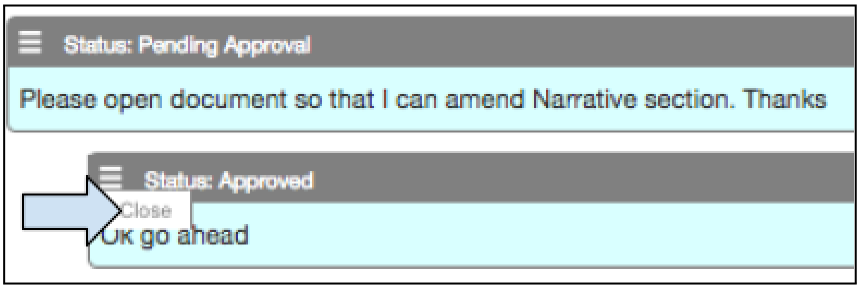
1. Click on the link in the email in order to open the page in Track which needs to be amended. (The user may need to login to Track first).

Please note that it is possible to add new tags to the tags tab via an amendment request but it is not possible to remove tags.

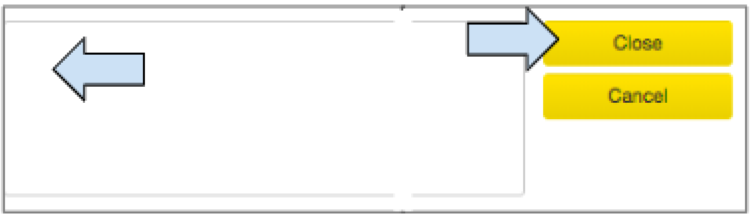
2. Make the necessary amendments to the page.



3. Once the amendment action is complete, click on the amendment request icon to open the message box.

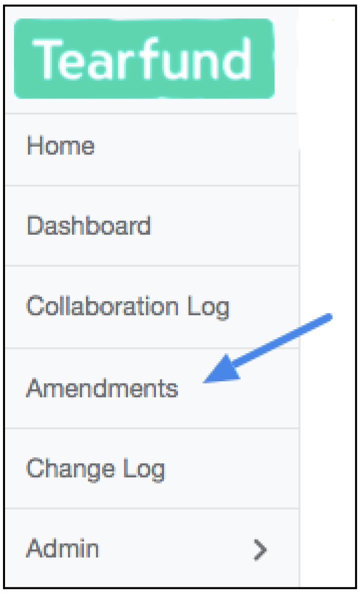


4. In the left hand menu, select **close** in order to close the request and to return the status to "read only". Once the amendment is closed, the proposal is returned to read-only, ensuring that no other changes are accidentally made.

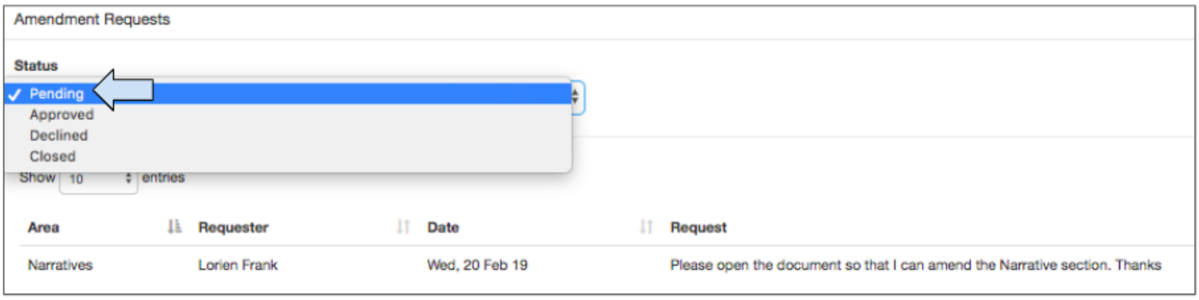


5. Type the closing message into the box then click on **close**.

5.2.3 View an amendment request

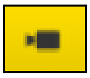


1. Click on the tab called 'amendments' In the left hand navigation panel.

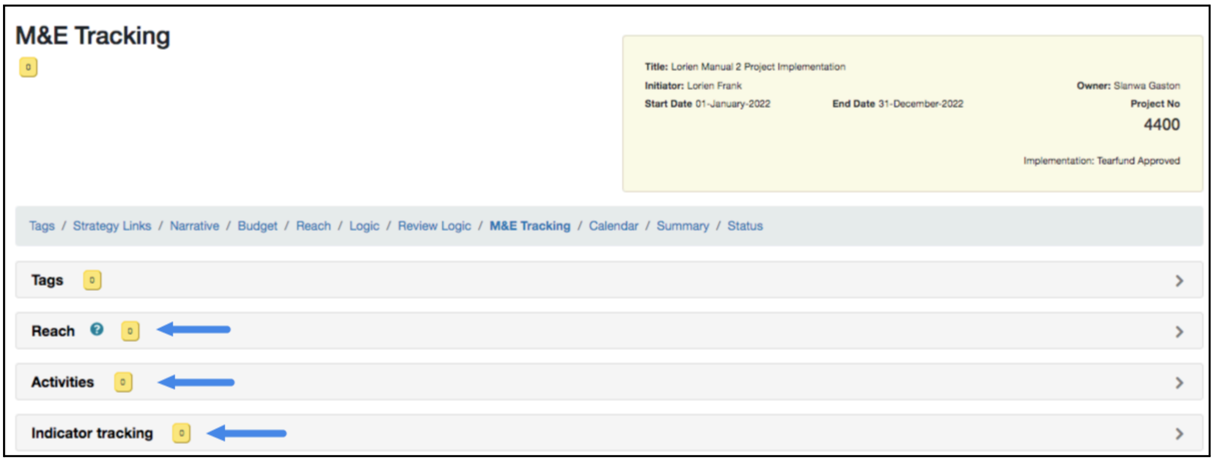


2. An 'amendment requests' box will open in which the user can view all pending, approved, declined or closed requests and the area in which they are located.

5.3 Update activities, indicators and reach count

 Go to https://learn.tearfund.org/en/misc/partner_area/ to watch a tutorial video which provides more information on ''How to update activities, indicators and reach''.

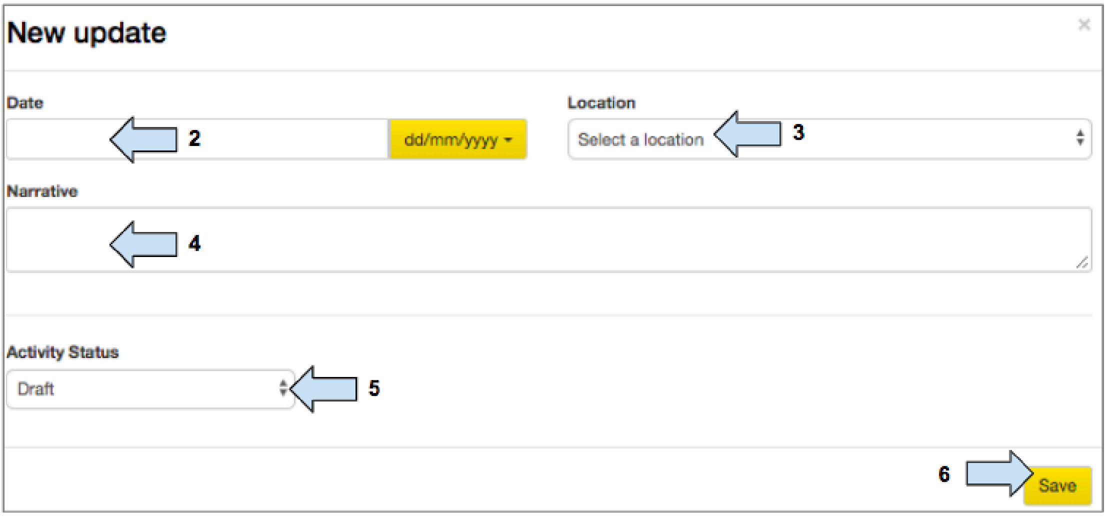
When a project is in the implementation phase it will automatically open in the M&E tracking tab. This tab is where the user will update activities, indicators and reach.



5.3.1 Activity updates

The following section will explain how to update activities in Track.

1. In the activities Table, click on **the '+' icon** which is located on the right hand side of the activity.



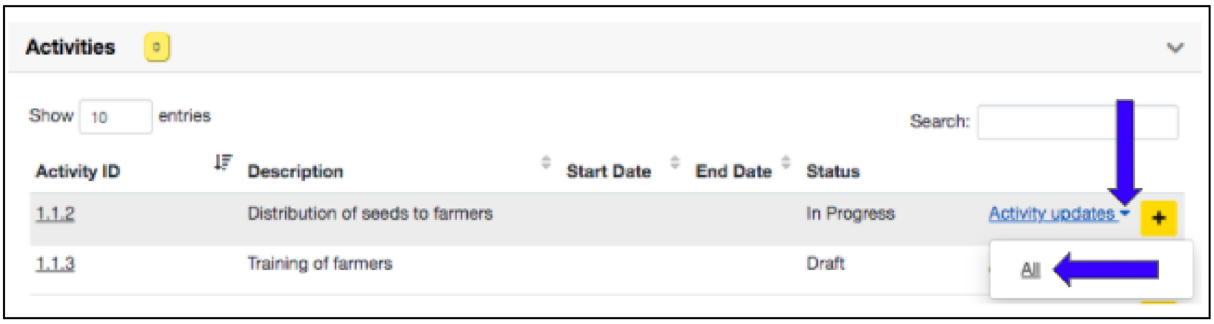
2. Add the **date** of the activity update

3. The location of the activity update will be automatically provided (the default is country level) however this field is editable if required.
4. Add **narrative** to the activity update. This will be automatically pulled through into the report.

5. Change the **activity status**

6. Click on **save** to return to the activities box and view the updated activity status

5.3.2 Edit / delete an activity update



1. Click on '**all**' which is located in the activity update drop menu next to an activity

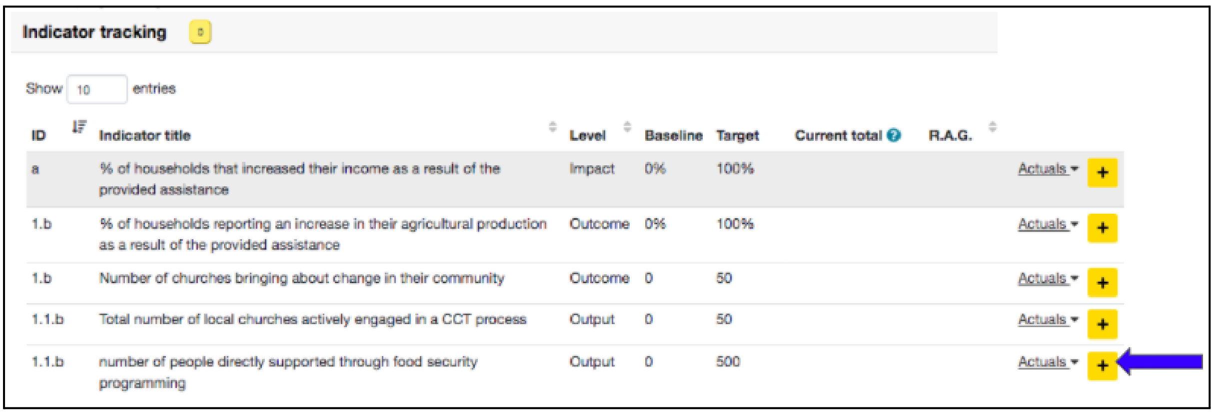
2. Click on the **pencil icon** to edit an activity update. This will open the Edit Update box and allow the user to edit the information inside.

3. Click on the **waste bin** icon to delete an activity update

4. A pop up box will appear asking if the user is sure they want to delete the activity update. Click on **OK**

5.3.3 Indicator updates

Output indicators are now manually updated in the indicator tracking table, in the same way as outcome and impact indicators. This section will explain how to update all indicators in Track.

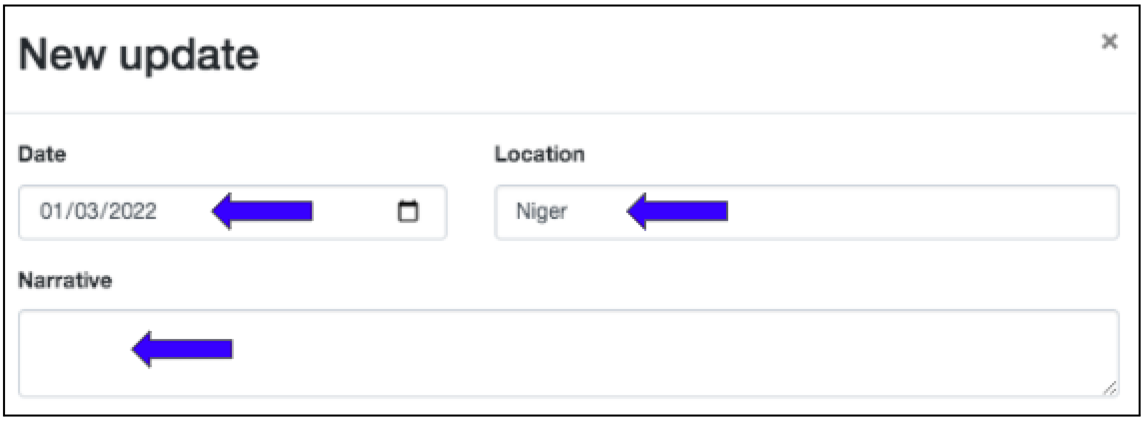


Indicator tracking

Show 10 entries

ID	Indicator title	Level	Baseline	Target	Current total	R.A.G.		
a	% of households that increased their income as a result of the provided assistance	Impact	0%	100%			Actuals	+
1.b	% of households reporting an increase in their agricultural production as a result of the provided assistance	Outcome	0%	100%			Actuals	+
1.b	Number of churches bringing about change in their community	Outcome	0	50			Actuals	+
1.1.b	Total number of local churches actively engaged in a CCT process	Output	0	50			Actuals	+
1.1.b	number of people directly supported through food security programming	Output	0	500			Actuals	+

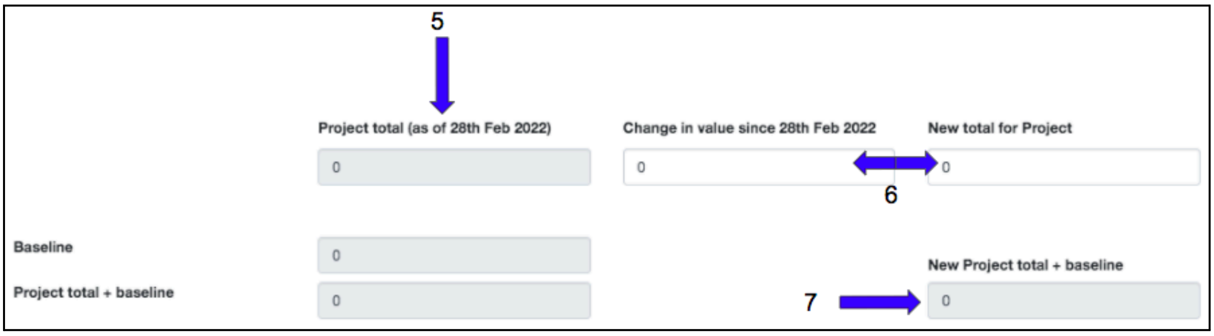
1. In the indicator tracking table, click on **the '+' icon** which is located on the right hand side of the indicator row that you wish to update.



2. Check and amend the **date** if necessary.

3. The location of the indicator update will be automatically provided, however this field is editable if required.

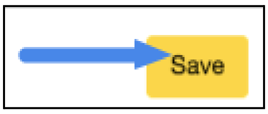
4. Add **narrative** to the indicator update. This will be automatically pulled through into the report.



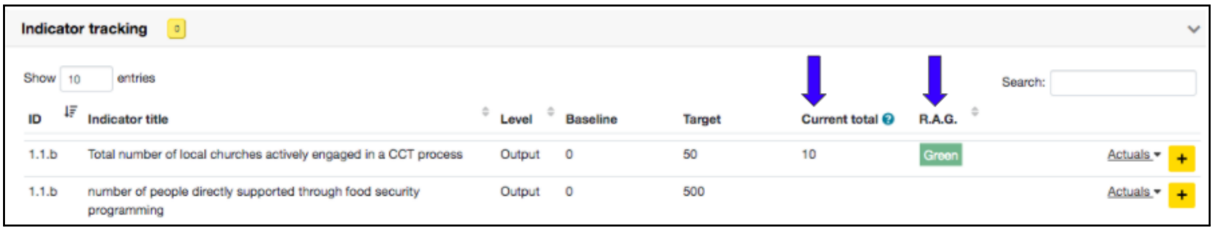
5. The first column shows the total value of the indicator. This figure is the sum total of any previous indicator updates.

6. Enter either the **change in value** since the last update or the **new total** for the project. (Whichever value is entered will automatically update the other field).

7. The **new project total + baseline** field will be automatically updated (this is what has been achieved so far on the project, including the baseline figure).



8. Click on **save** to close the new update box



Indicator tracking

Show 10 entries Search:

ID	Indicator title	Level	Baseline	Target	Current total	R.A.G.	
1.1.b	Total number of local churches actively engaged in a CCT process	Output	0	50	10	Green	Actuals +
1.1.b	number of people directly supported through food security programming	Output	0	500			Actuals +

9. Check in the indicator tracking table that the indicator has been correctly updated:
   - The indicator should have a new **current total** value (this should reflect the update made in the steps above).
   - The indicator RAG column should have been updated.

When an indicator is created with a baseline and milestone target dates, Track applies a RAG status to it.

RAG = R (red), A (amber), G (green)

Once the project is in Implementation phase and an indicator is updated, Track will compare the update (date and value) with the indicator milestones (date and value) and automatically inform the user if the activities are:

- Green = on or above target
- Amber = 85% - 99% of target
- Red = <85% of target

5.3.4 Custom indicator updates

For information on how to create a custom indicator, please follow the instructions in Section 4.7.4 ‘Custom Indicators’.

Custom indicators are updated manually in Track, in the same way as standard indicators. For information on how to update an indicator, please follow the instructions in Section 5.3.3 ‘Indicator Updates’ above.

5.3.5 Downward trend indicator updates

A user should update a downward trend indicator in the same way as a normal indicator. The only difference is that we would expect the update value and the final value to be lower than the baseline value.

For information on how to update an indicator, please follow the instructions in Section 5.3.3 'Indicator Updates' above.

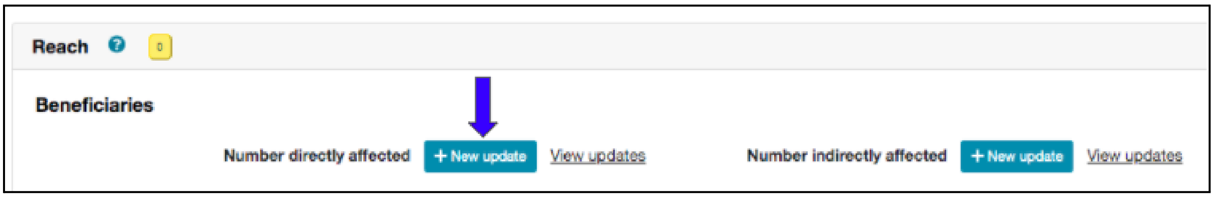
If a user makes several updates of a downward indicator, we would expect the 'new total' value entered each time to decrease.

5.3.6 Reach updates

Direct and indirect reach is manually updated in the reach table in Track. This section will explain how to update reach in Track.

For a reminder of the definition of direct and indirect beneficiaries and why it is important to count indirect beneficiaries, please see Section 4.6.1 'Beneficiaries and/or delegates'.

5.3.6.1 Beneficiary and / or delegates reach updates

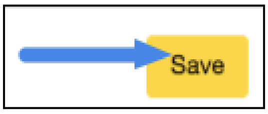


1. In the reach table, click on '**new update**' next to either the direct or indirect reach column that you wish to update.

2. Check and amend the **date** if necessary.

3. The first column shows the **total reach value**. This figure is the sum total of any previous reach updates.

4. Enter either the **change in value** since the last update or the **new total** reach figure for each of the beneficiary / delegate disaggregated categories.
(Whichever value is entered will automatically update the other field).

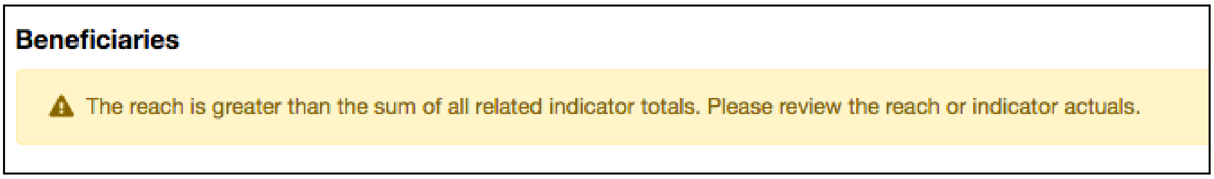


5. Click on **save** to close the 'new reach' update box

6. Check in the **actuals column** of the reach table that the disaggregated reach has been correctly updated.

7. Click on '**view updates**' to see a list of all updates made, including the date, the value and the

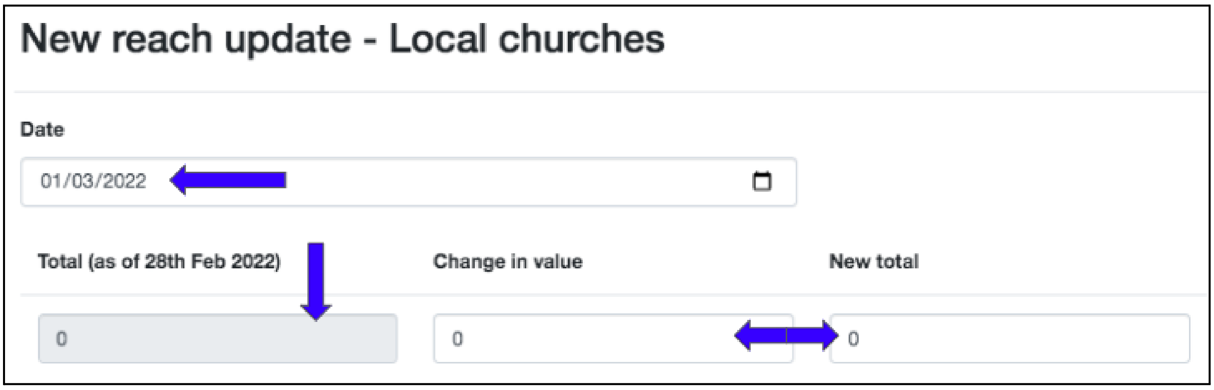
name of the person who made the update. It is also possible to edit the reach update from this screen by clicking on the pencil icon.



8. If reach is updated before the indicator is updated, Track will issue a warning message asking the user to check and amend the reach or indicator as necessary.

5.3.6.2 All other reach types updates

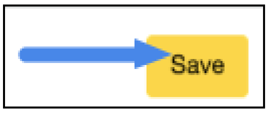
1. In the reach table, click on '**new update**'.



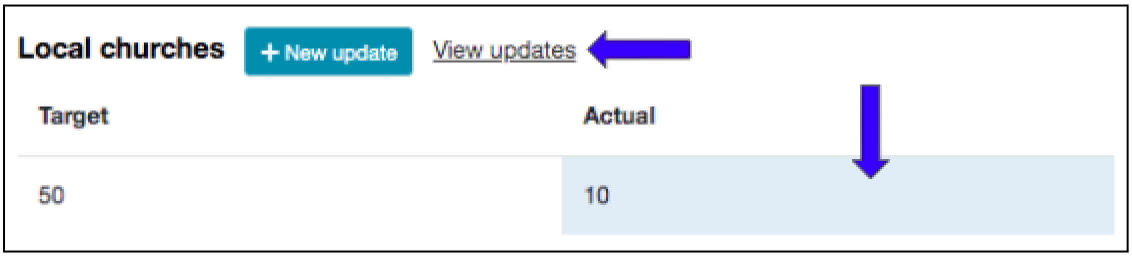
2. Check and amend the **date** if necessary.

3. The first column shows the **total reach value**. This figure is the sum total of any previous reach updates.

4. Enter either the **change in value** since the last update or the **new total** reach figure. (Whichever value is entered will automatically update the other field).



5. Click on **save** to close the new reach update box



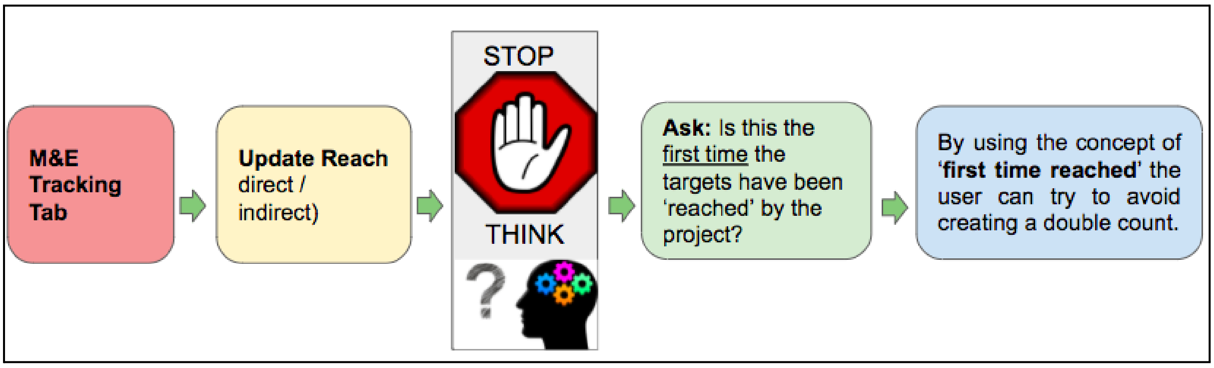
6. Check in the **actuals column** of the reach table that the reach has been correctly updated.

7. Click on '**view updates**' to see a list of all updates made, including the date, the value and the name of the person who made the update. It is also possible to edit the reach update from this screen by clicking on the pencil icon.

5.3.6.3 Avoiding a double reach count

The 'reach updates' section is the second place where users needs to be careful to avoid double counting.

Figure 12: Steps to avoid double counting #2



It is possible to create a double count at this stage if the user counts beneficiaries that have been reached by multiple activities. The example below will demonstrate how a double count could be created and will provide advice on how to avoid it.

The following scenario provides an example of how a double count could be created by accident and ideas for how to avoid it.

Scenario

- Let's say we have 400 beneficiaries, each of whom will benefit from 1) training and 2) provision of a loan.
- Let's say the training was conducted for 200 people. We would want to update the output indicator and direct project reach by entering 200 beneficiaries (disaggregated) into the output indicator and the reach new update boxes.
- Let's say that we now wanted to provide these same 200 beneficiaries with a loan.

Q: What would happen if we, again, updated the reach table with the figure of 200?

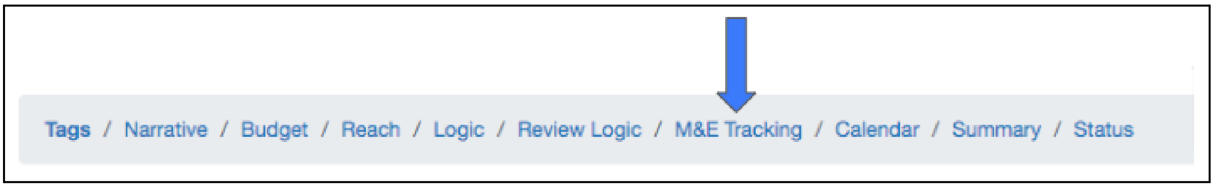
A: Updating the reach section again would result in a double count. By using the concept of 'first time reached' the user can try to avoid creating a double count.

(Please note that if the reach figure is greater than the sum of all the indicators counting beneficiaries, a warning message will appear on the screen. There is also a column in the Track search function called 'reach and indicator updates valid' which will highlight where the reach is greater than the sum of the indicators).

Summary
If 200 beneficiaries were trained AND provided with a loan, we would only have to update the project reach the first time.

5.4 Add a link to an evaluation, a story or a document

It is possible to add a link to an evaluation, a story or a document from within the M&E tracking tab ONLY once a project is in the implementation phase.



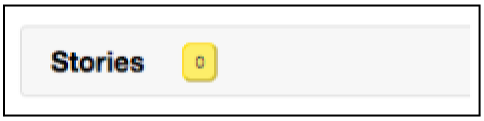
5.4.1 Add a link to an evaluation

1. From within the M&E tracking tab, click on the evaluations section.

2. Click to add a link to a story.

3. For further instructions, please see user guide Section 7. 'Upload / link to a document'.

5.4.2 Add a link to a story

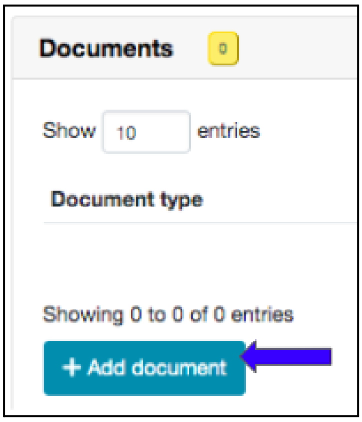


1. From within the M&E tracking tab, click on the stories section.

2. Click to add a link to a story.

3. For further instructions, please see user guide Section 7. 'Upload / link to a document'.

5.4.3 Add a document

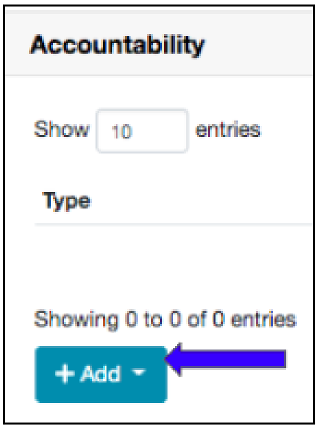


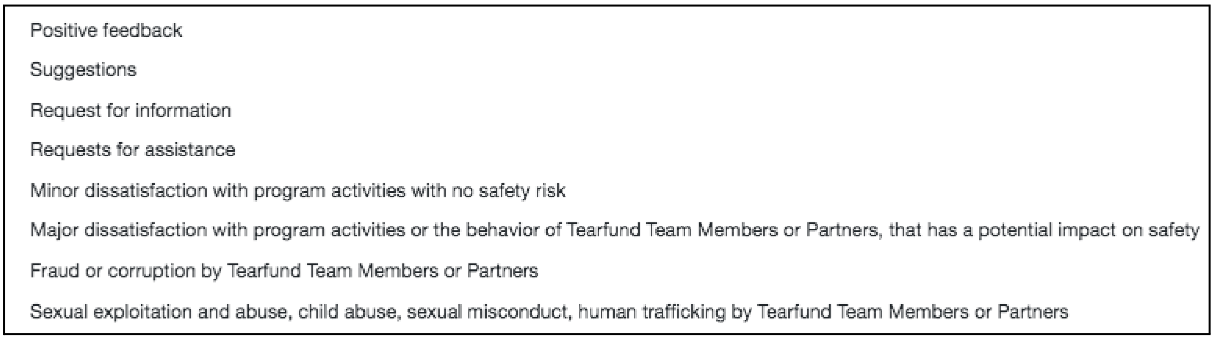
1. From within the 'documents' section, click on **add document**.

2. For further instructions, please see user guide Section 7. 'Upload / link to a document'.

5.5 Accountability

One of Tearfund's 8 quality standards is to be accountable to our beneficiaries so we have introduced a way for feedback from beneficiaries to be recorded on Track.





1. Click on ‘**add**’, then select from the different categories in order to register any feedback received from beneficiaries.

2. Add additional **narrative** in the pop up box if required.

3. Click on ‘**save**’.

If you have any questions about this, or require any help, please get in touch with your contact at the Tearfund country office.

6. Project reporting

What will this chapter cover?

This chapter explains how to create a report in Track once a project is in implementation.

Who will find this chapter helpful?

Any user that creates, makes edits to or collaborates on a project report.

Once a project has been approved and it has changed from the design phase to the implementation phase, it is possible to start writing reports. This section will explain how to write a project report in Track.

Reminder 1

- The calendar will automatically be populated with a 6 month report, annual report and final report based on the project start / end dates that were entered in the 'details' section of the tags page during the design process. These events are required for the IBIS approvals.
- Updates made when the reports are created are automatically shown in IBIS When the reports are approved in Track they are marked as completed in IBIS.
- Monthly, quarterly or interim reports can be added as necessary by Tearfund staff and partners in the calendar tab during the design phase.
- The system checks for report calendar items when the project status is changed to Design: Pending Approval. Diary items are then set up in IBIS once the project has been approved.

Reminder 2

Calendar Status

There are three statuses associated with Reports in the Project Calendar:

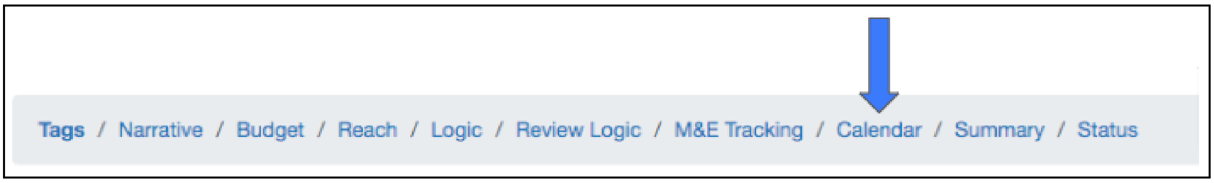
- Not Started
- In Progress
- Completed

RAG Status

There is also a RAG status associated with Reports in the Project Calendar:

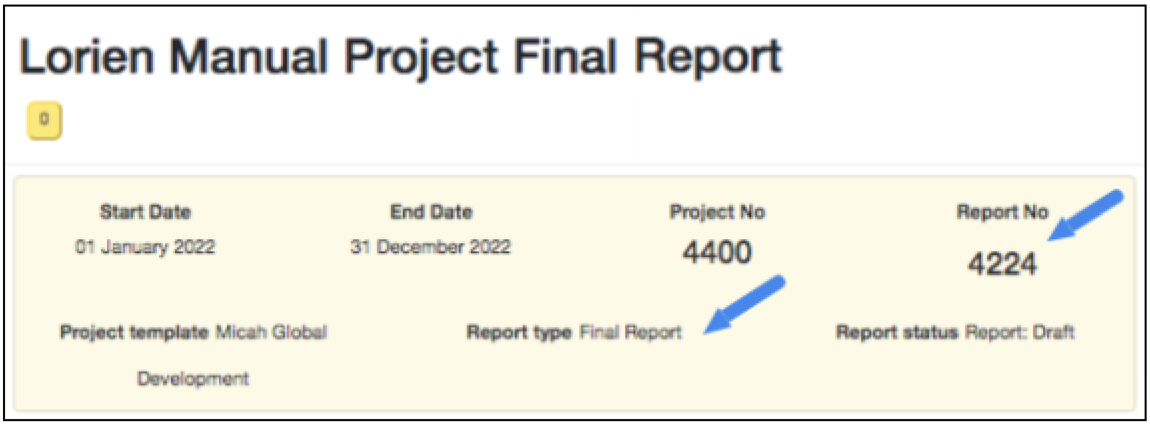
- [no colour] for calendar items which are not started and not overdue
- Green for calendar items which are complete
- Amber for calendar items which are in progress and not overdue
- Red for calendar items which are overdue and not completed

6.1 Create a project report - 'edit' tab



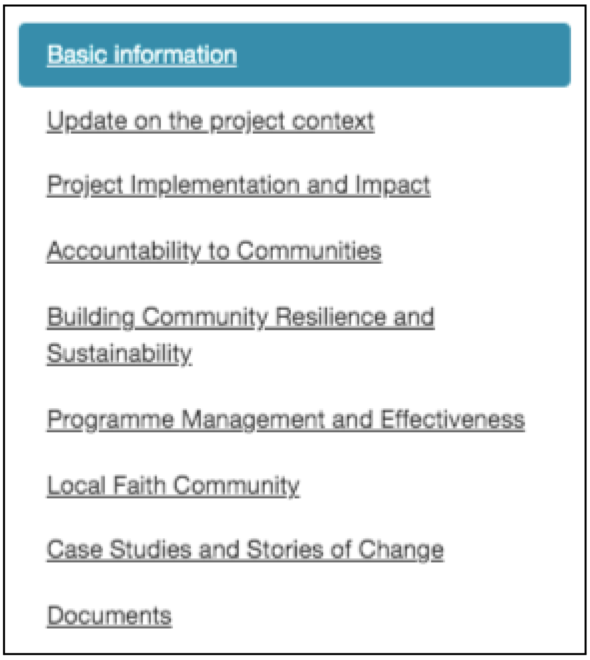
Reports are accessed via the calendar tab in a project in Track.

1. From within the calendar tab, click on the **'+' icon** at the end of the row of the report you wish to create.



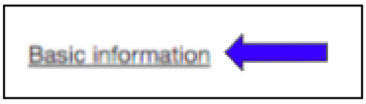
A new screen will open which shows the title of the report. The yellow project box displays the project number and project start and end dates, as well as a new report number and information about the type and status of the report.

The report will open in the **'edit'** tab.



The different sections of the report that need to be completed are listed on the left hand side of the screen.

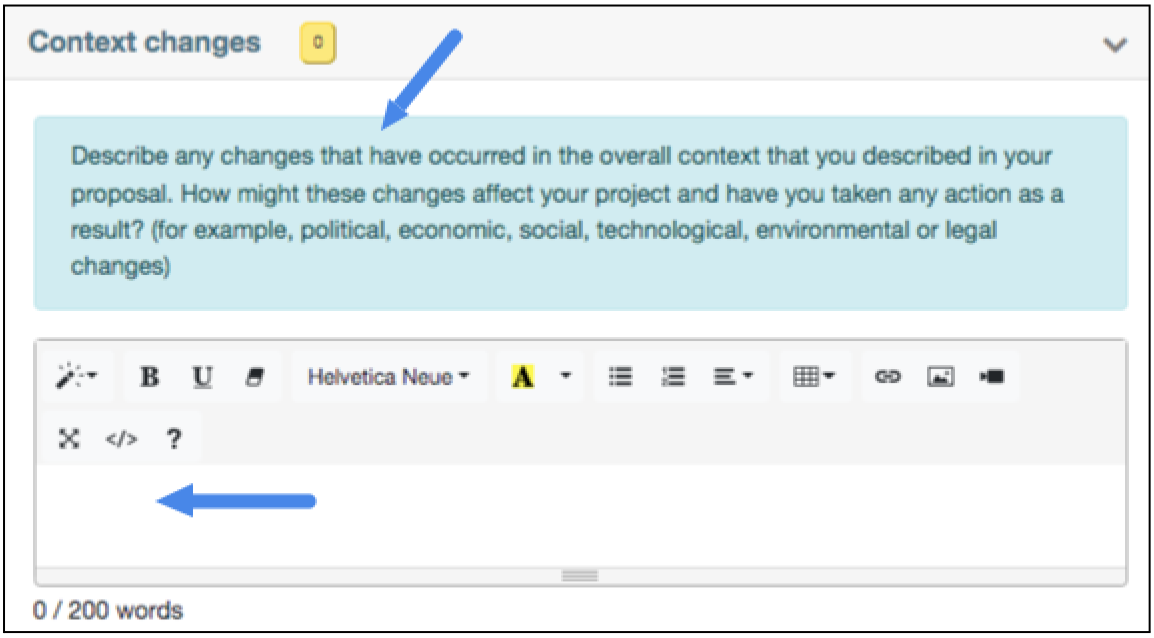
6.1.1 Basic information



The 'basic information' section contains information about the project, such as title, dates, implementer and location. The information is automatically pulled through from the project into the report and is not editable.

6.1.2 Update on the project context

The 'update on the project context' section has four subsections to be completed.

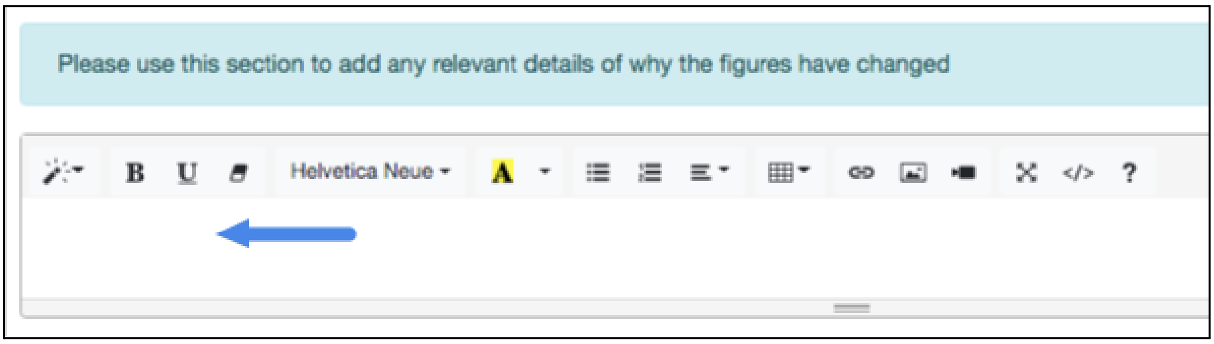


1. Use the guidance notes to help complete each subsection, highlighting the changes which have taken place during the reporting period.

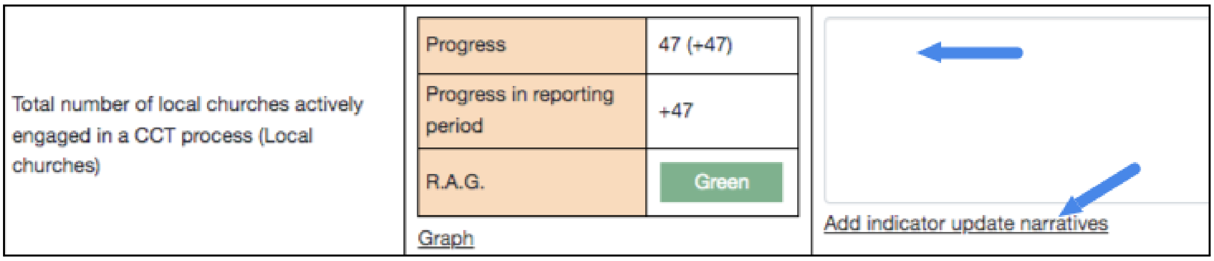
6.1.3 Project implementation and impact

Numerical information from the activity, indicator and reach updates that have been made to the project in the M&E tracking tab are automatically pulled through into the ‘project participant / stakeholder analysis’ and ‘logframe’ subsections in this section.

Track was designed to be used as a live monitoring tool, with frequent indicator updates leading to easy reporting. Attention should be paid to the dates on which activity, indicator and reach updates are made, so that they fall within the correct reporting period. If the dates are incorrectly entered, the updates will be automatically brought through into the wrong report.

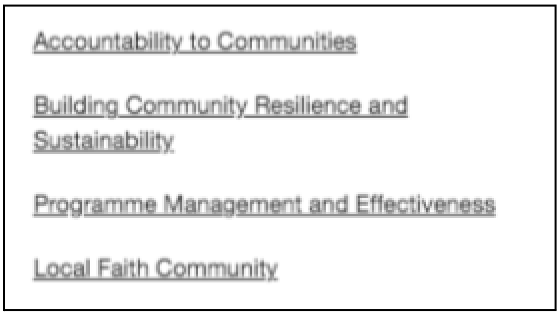


1. Add narrative to each of the subsections using the guidance notes as necessary.



2. Add narrative updates to the indicator fields in the logframe. Alternatively, click on **add indicator update narratives** for narrative updates that were made in the M&E tracking tab to be automatically brought through to the report.

6.1.4 Other sections of the report



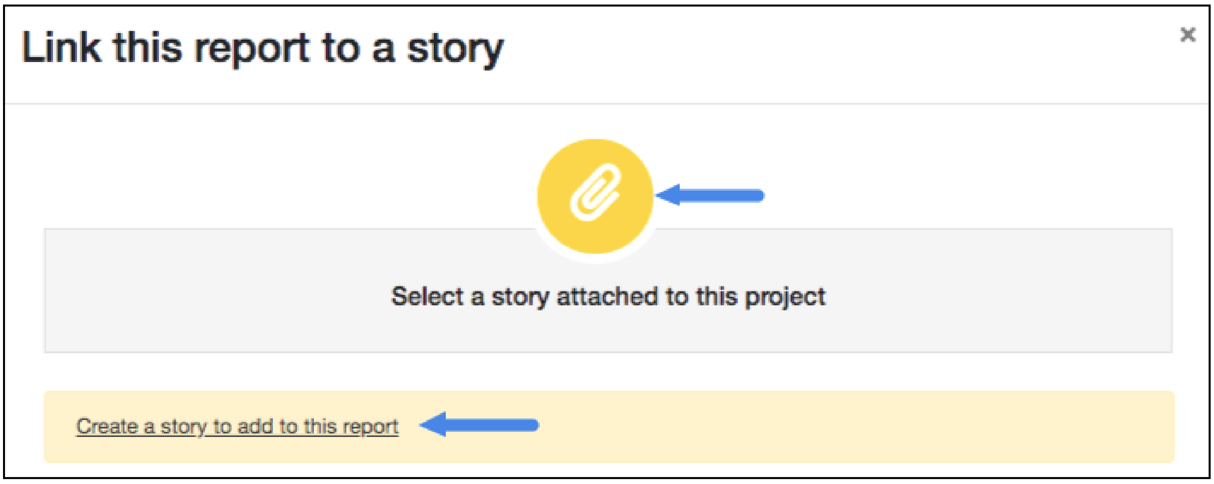
1. Add narrative updates to the subsections in each of the other sections of the report.

2. Add links to other documents, photos and videos by using the toolbar that is available in each narrative field of the report.

6.1.5 Case studies and stories of change

In this section it is possible to add stories and case studies to the report.

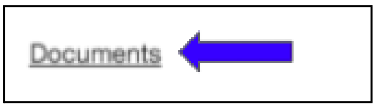
1. Click on **add story link.**



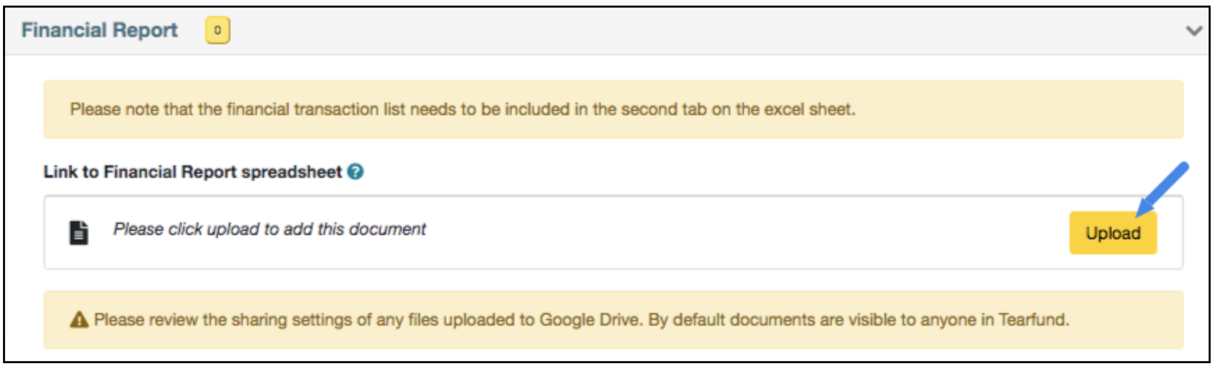
2. If a story has already been added via the M&E tracking tab of the project, it will be available to select from a list under the heading 'select a story attached to this project'. Alternatively, click on **create a story to add to this report**.

You will be taken to the 'about' tab of the 'link this report to a story' screen. For more information on how to add a story to a report, follow the instructions from step 2 of Section 9.1.2.2 'Upload a story'.

6.1.6 Documents

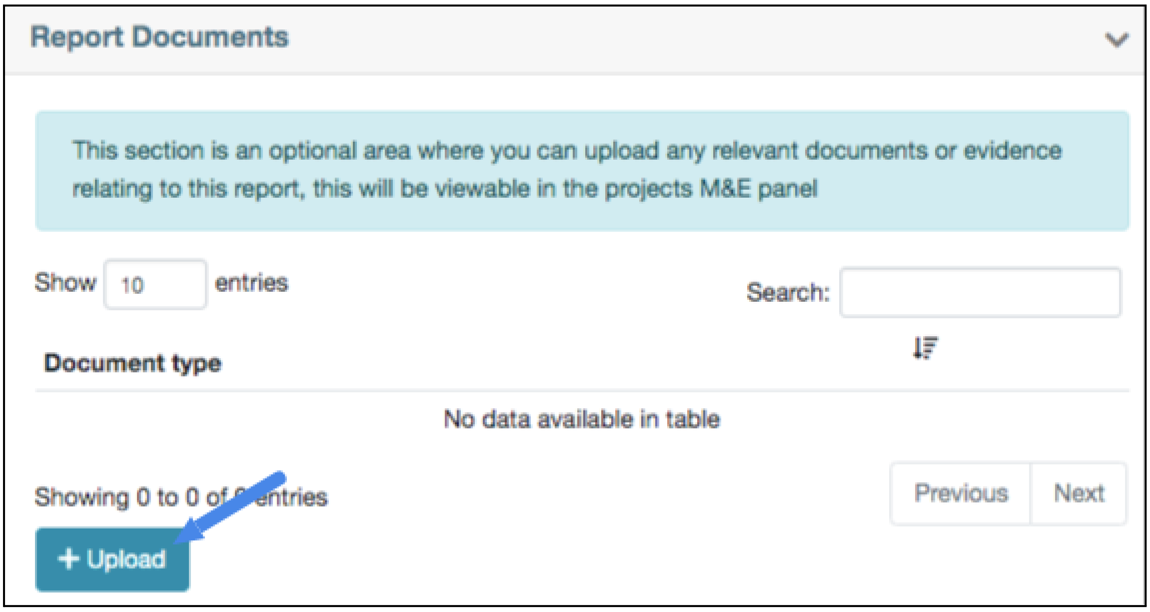


In this section it is possible to add financial reports and other documents to the report.



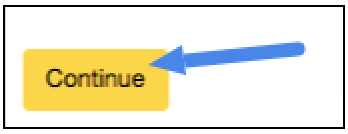
1. In the ‘financial report’ section, click on **upload**.

For more information on how to add a financial report to the report, please follow the instructions from step 2 of Section 9.1.2.4 ‘Add documents’.



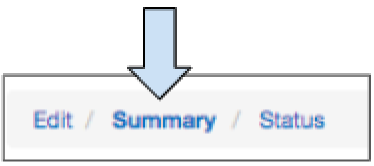
2. In the ‘report documents’ section, click on **upload**.

For more information on how to add a financial report to the report, please follow the instructions from step 2 of Section 9.1.2.4 ‘Add documents’.



3. Click on **continue** when the ‘edit’ tab of the report is complete.

6.2 ‘Summary’ tab

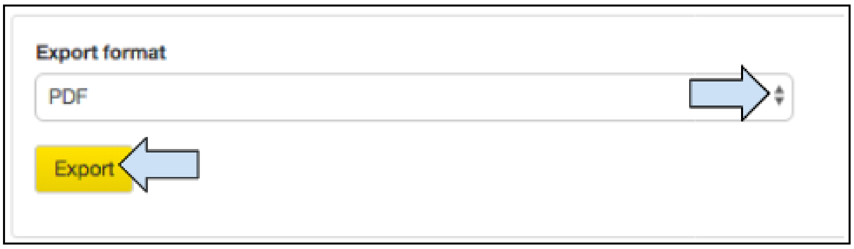


6.2.1 View summary

This page provides a summary and overview of the information entered into the report. Scroll through the summary and check the information that has been entered into the proposal. If necessary, click back through the tabs to add / amend information.

6.2.2 Export to PDF / Google docs / Word / copy to clipboard

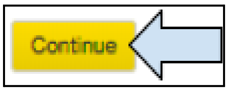
The process for exporting a report is exactly the same as that for exporting a proposal.



1. Click on the drop menu next to Export format and select either **PDF, copy to clipboard, Google or Word.**

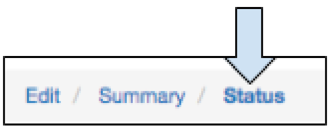
2. Click on **export** to create the file.

3. The file will be saved to the users' computer and should then be saved into the correct corporate folder.



4. Click on **continue** to move to the next tab.

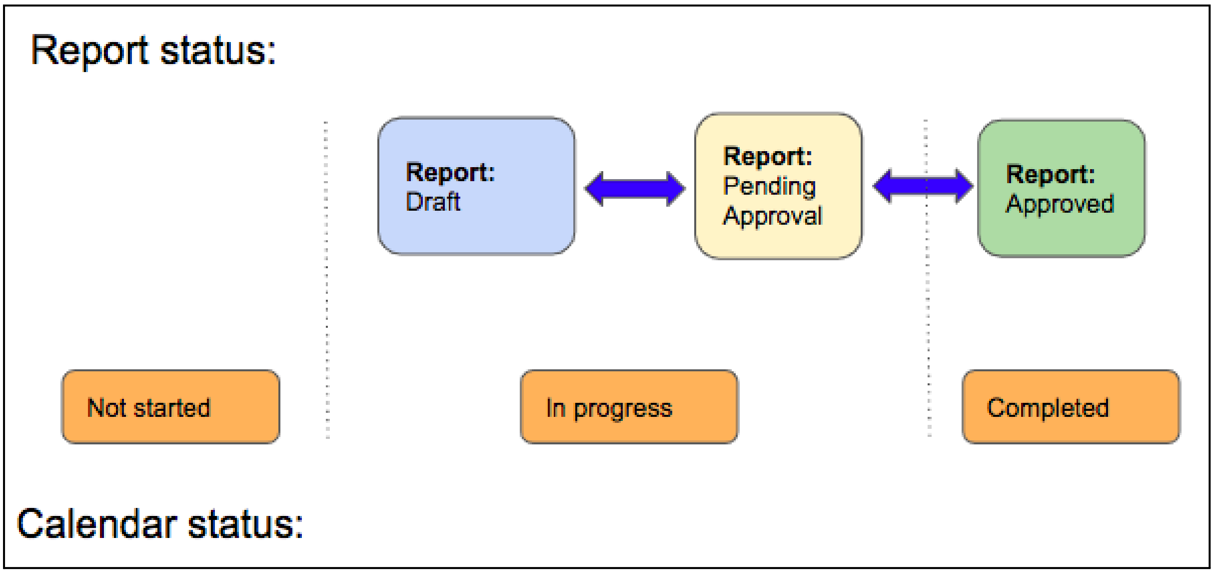
6.3 'Status' tab



Changing the status of a report is very similar to changing the status of a project proposal. Changing the status of a report allows it to be sent back and forth between Tearfund and an implementing partner or between Tearfund staff members.

The following diagram shows the different statuses that a report will move through both in Track and in the project calendar before it is approved.

Figure 13: Report status



Similarly to a proposal, it is possible for a report to move forwards and backwards through the statuses.

When a report changes status to 'Draft', then from 'Pending Approval' to 'Approved', there is an automatic update in the project calendar section of Track.

A reminder..

Report Status

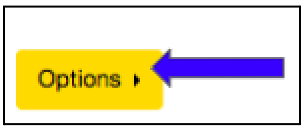
There are three statuses associated with reports in the project calendar:

- Not started
- In progress
- Completed

RAG Status

There is also a RAG status associated with reports in the project calendar:

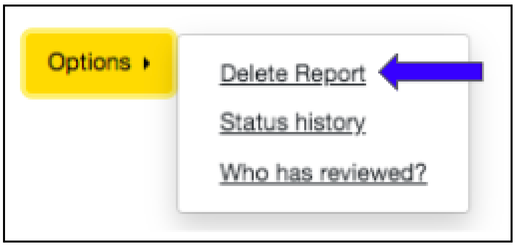
- [no colour] for calendar items which are not started and not overdue
- Green for calendar items which are complete
- Amber for calendar items which are in progress and not overdue
- Red for calendar items which are overdue and not completed



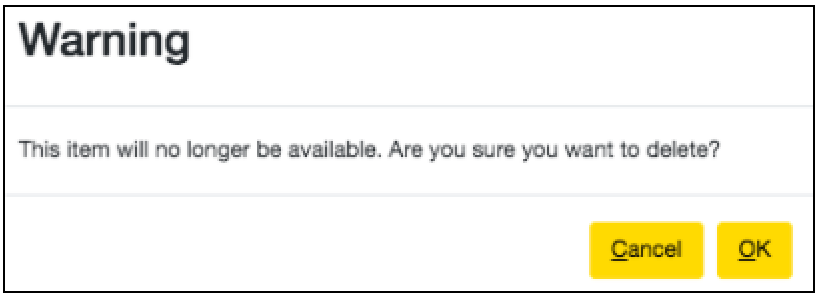
There are various functions available under the **options** button at the bottom of the status page.

6.3.1 Delete report

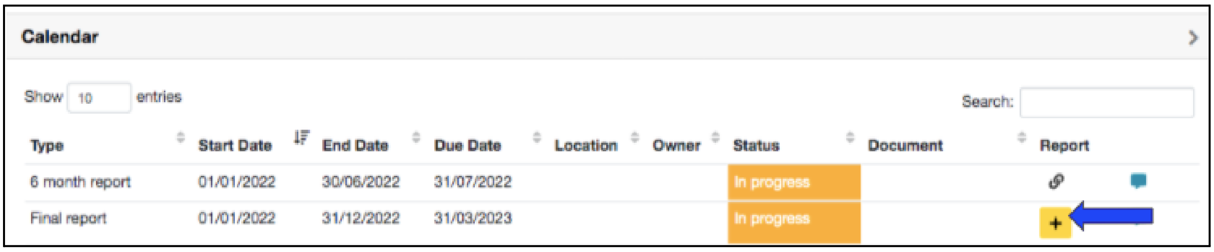
The option to delete a report is only available in '**Report: Draft**' status.



1. Select '**delete report**' from the 'options' drop menu.



2. A pop up warning message will appear asking if the user is sure. Click **OK** to delete the report.

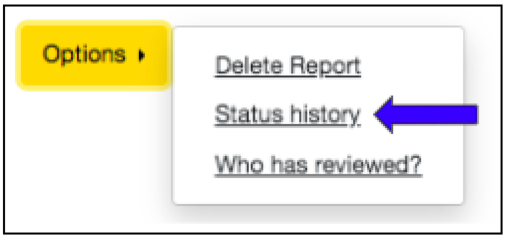

Calendar

Show 10 entries Search:

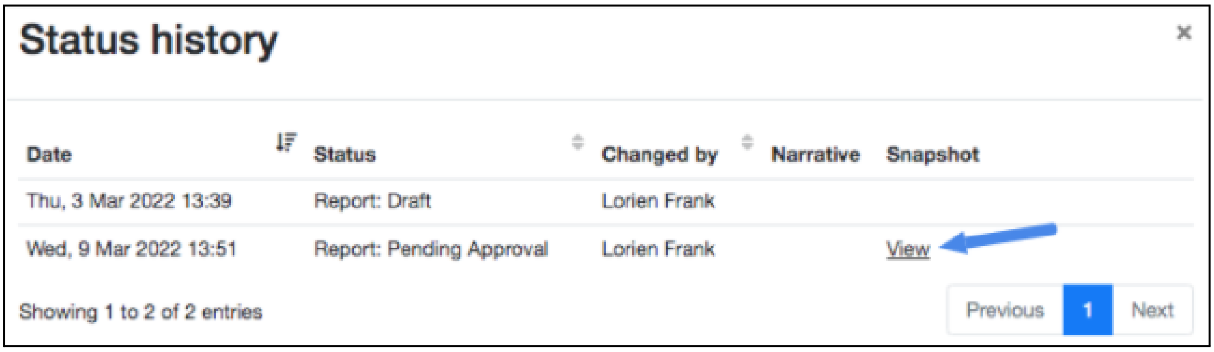
Type	Start Date	End Date	Due Date	Location	Owner	Status	Document	Report
6 month report	01/01/2022	30/06/2022	31/07/2022			In progress		
Final report	01/01/2022	31/12/2022	31/03/2023			In progress		+

3. Once the report is deleted it is possible to create a new one from the calendar tab of the project by clicking on the **'+' icon** at the end of the relevant report row.

6.3.2 Status history

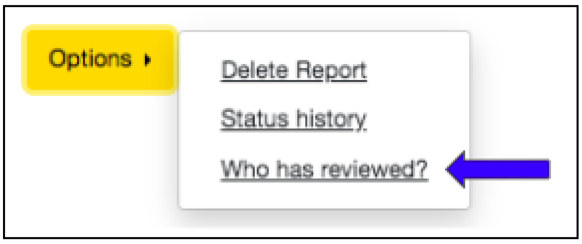


1. Select **status history** from the 'options' drop menu.



2. A pop up box opens with a list of dates on which the status of the report changed. Click on **view** to see a snapshot of the report summary page as it was during that status.

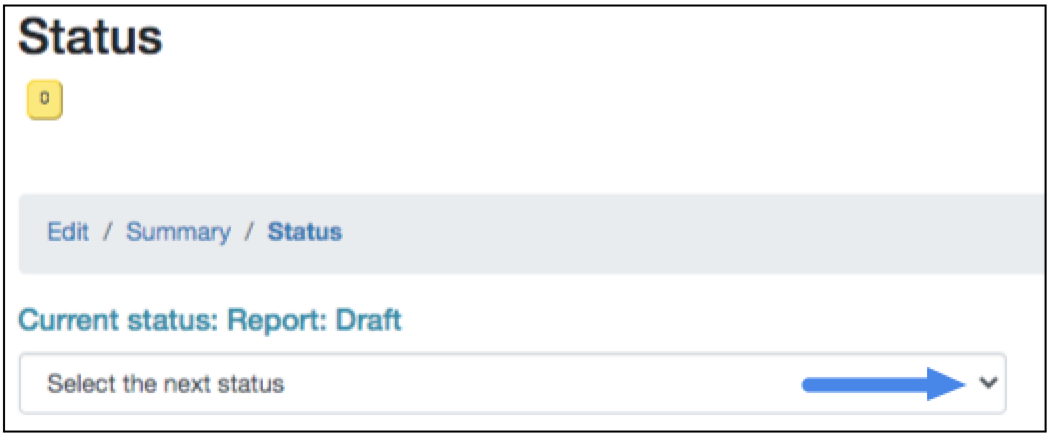
6.3.3 Who has reviewed?



1. Select '**who has reviewed**' from the 'options' drop menu.

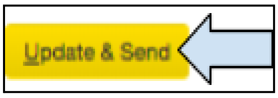
2. A pop up box will appear listing all members of staff who have reviewed the report, as long as they have checked the box in the 'report reviewers' section on the status page.

6.3.4 Move status



1. Click on the drop arrow and select to move the report to the next **status**

2. Add **narrative** if required



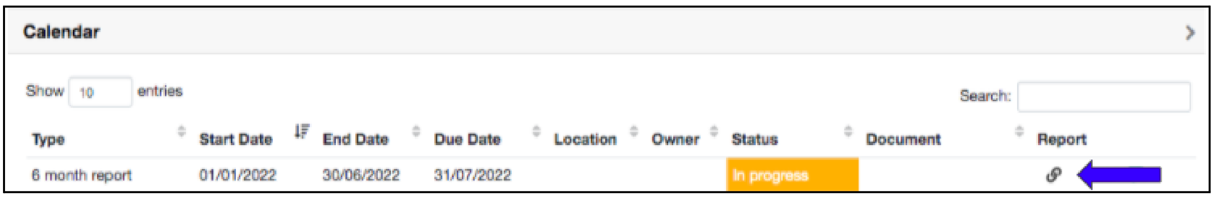
3. Click on **update and send** to move the project to the following status.

Whenever a report changes status, notification emails are sent to the project editors (both Tearfund staff and partners).

(See Figure 13: 'Report Status' for a reminder of which statuses the report must be moved through before reaching Report: Approved status).

6.4 How to access the report at a later date

Once a report has been saved in Track it is possible to access it via the calendar tab in the report.



1. Click on the **link** in the report row to open the report

7. Upload / link to a document

What will this chapter cover?

This chapter explains how to upload or link to a document in Track.

Who will find this chapter helpful?

Any user that wants to create a link to or add a story, evaluation or other document to a project in Track.

7.1 Upload a document

Go to https://learn.tearfund.org/en/misc/partner_area/ to watch a tutorial video which provides more information on 'document uploads'.

There are several ways and places in Track from which it is possible to upload a document.

1) Budget tab - upload a financial spreadsheet
2) M&E tracking tab - add stories, evaluations and other documents
3) Calendar tab - add reports, case studies and other documents
4) Reports - add financial reports, stories and other documents

The processes for each type of document upload are outlined below according to the tab in which the upload takes place.

7.1.1 Budget tab

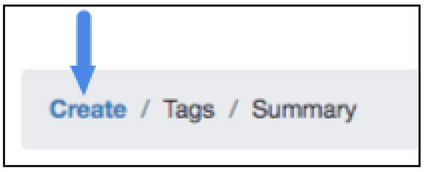
For information on how to upload a financial spreadsheet in the budget tab during the **design phase** of a project, please see steps 4-6 of Section 4.5 'Budget'.

7.1.2 M&E tracking tab

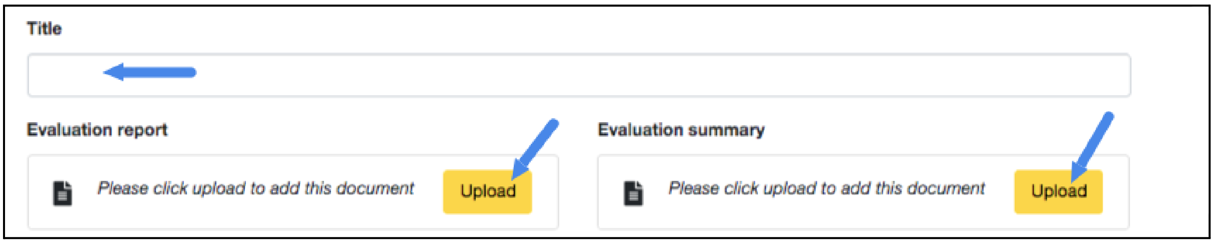
It is only possible to add a story or an evaluation from within the M&E tracking tab once a project is in the implementation phase.

7.1.2.1 Upload an evaluation

1. In the M&E Tracking tab, click on the evaluations section, then click on **evaluation link**. This will open a new screen called ‘upload evaluation’.

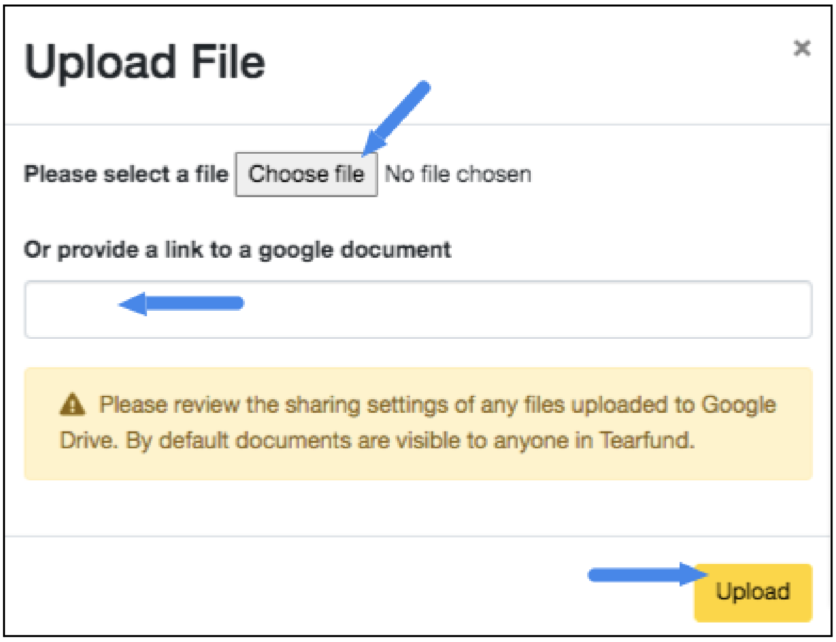


The first tab to complete is the ‘create’ Tab which creates the link between Track and the evaluation which is saved elsewhere.



2. Add the **title** of the evaluation

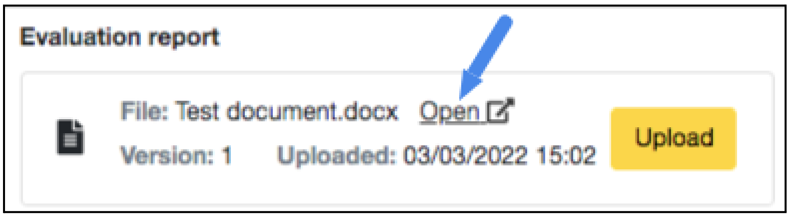
3. Click on **upload** to add the evaluation report or the evaluation summary documents.



4. Either '**choose a file**' that is saved elsewhere OR **provide a link to a google document**.

5. Check and amend the **share settings** of the document you have uploaded if necessary. By default documents in Track are visible to anyone in Tearfund.

6. Click on **upload** once all the necessary information has been added.



7. It is now possible to access the document via Track by clicking on '**open**'.

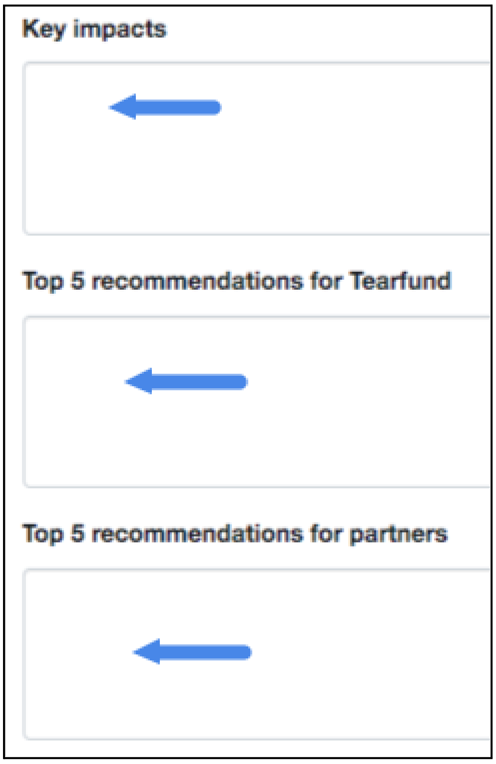
8. Select the **type** of evaluation from the drop menu.

9. Add the evaluation **publication date.**

10. Add the **name** of the contact person for the evaluation report.

11. Select the **type** of evaluation team from the drop menu.

12. Type the **names of the evaluation team members** into the box.



13. Enter details of the **key impact** into the box.

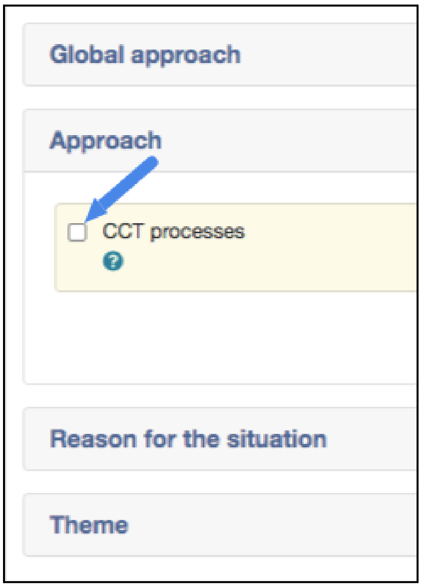
14. Enter details of **recommendations to Tearfund** in the box.

15. Enter details of **recommendations to Partners** in the box.

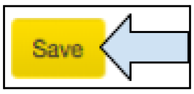
16. Choose whether the evaluation can be shared **externally** (with Tearfund supporters and donors) or **internally only.**

17. Click on **save** to be taken to the 'tags' tab of the process bar.

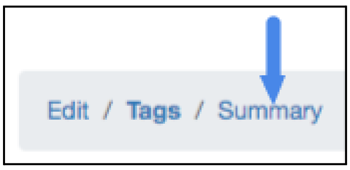
The tags tab will show the sections and subsections that were selected in the tags tab when the project was initially created.



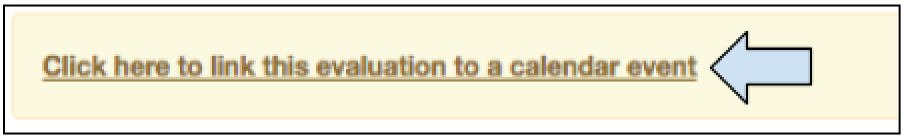
18. Select the tags which are relevant to the evaluation you are adding to Track.



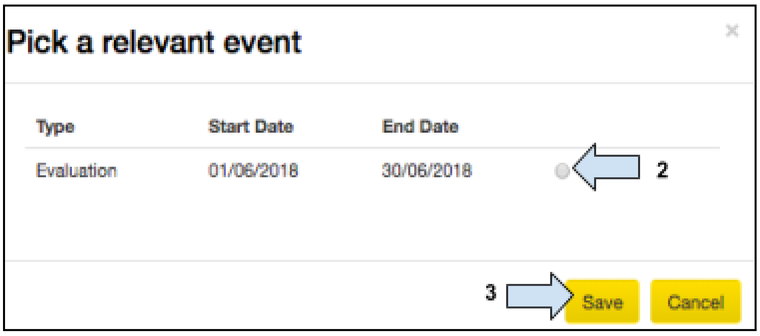
19. Click on **save** to be taken to the 'summary' tab of the process bar.



The summary tab displays all the information that has been entered into the evaluation link.

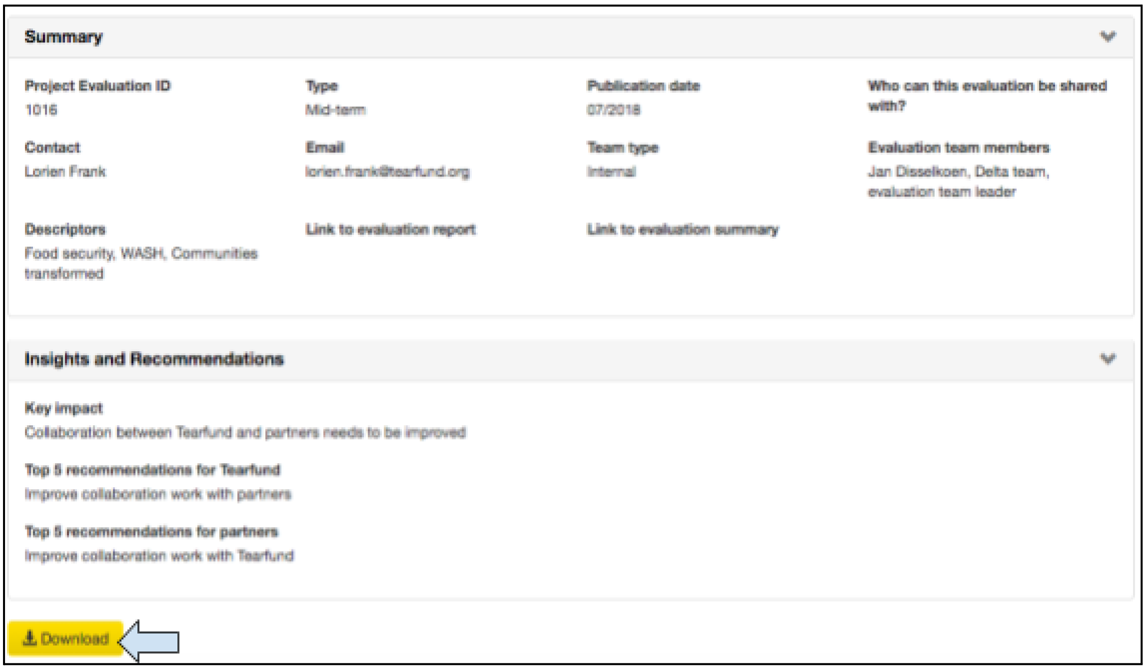


20. Click in the orange box to **link** the report to an event in the Track calendar. (The evaluation event must have been created in the calendar tab during the project design process for it to be visible at this point. If there is no evaluation visible, go back to the calendar tab and add the evaluation by clicking on 'add event'.



21. Click on the relevant **event**

22. Click on **save** and the report will be visible as a link in the Track calendar tab of the relevant project.



23. Check that the information in the report summary is correct then click on **download** if required to create a PDF document.

24. A link to the evaluation has now been created.

7.1.2.1.1 How to access the evaluation at a later date

Once an evaluation link has been saved, there are three ways to access the evaluation in Track.

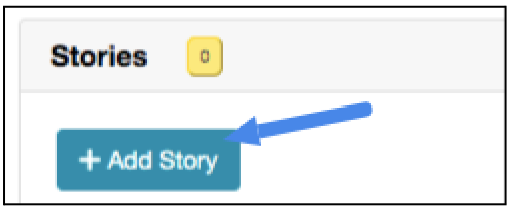
- Calendar tab: Open the ‘calendar tab’ in the relevant project and click on the **document link** on the right hand side of the calendar event row to open the document.
- M&E tracking tab: Open the ‘M&E tracking tab’ in the relevant project and click on the ‘evaluation’ section. Click on the **ID number** next to the relevant evaluation to open the document.

7.1.2.1 Upload a story

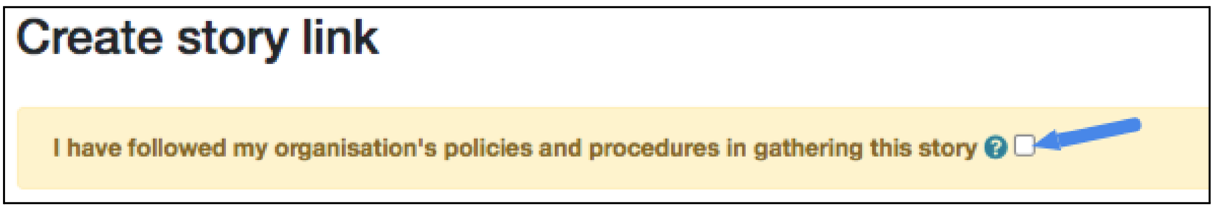
Stories can be added to projects through the M&E tracking tab and they can be linked to reports. In addition:

- Partners are now able to upload stories onto Track as documents that will then be saved on the project owners Google Drive.
- The relevant cluster comms officer and project editors will have editing access

By adding stories to projects in Track, the implementer fulfills their reporting requirements and it enables staff to see how the stories relate to what was planned and achieved.



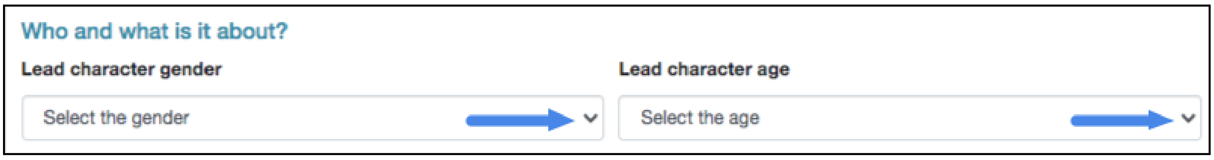
1. In the M&E tracking tab, click on the ‘stories’ section, then click on **add story** for a ‘create story link’ screen to open.



2. Tick the box to confirm that you have followed your organisation's safeguarding, data protection and confidentiality policies and procedures when gathering the information in the story.

The first tab to complete is the 'about' tab which creates the link between Track and the story which is saved elsewhere.

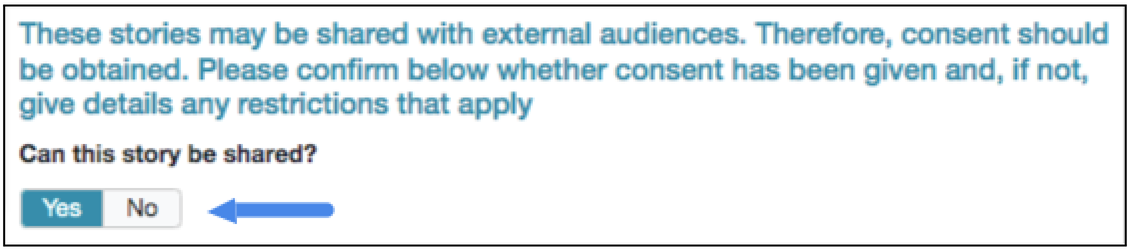
3. Enter the **date** on which the story was gathered and the **name** of the author.



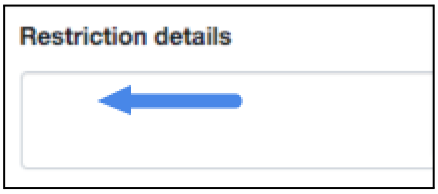
4. Enter the **gender and age** of the person who the story is about.

5. Enter a short **summary** of the key parts of your story (Max 40 words), this will be searchable across Tearfund, this later to help find the stories to communicate with supporters.

6. Enter a **description** of the story.



7. Select **Yes / No** to confirm whether or not you have consent for the story to be shared with external audiences. If no restriction is given, then it is possible to use the story externally.



8. Add additional details about what the specific restrictions are to the story being shared (for example, who the restrictions apply to) and whether these restrictions can potentially be lifted at a later date.

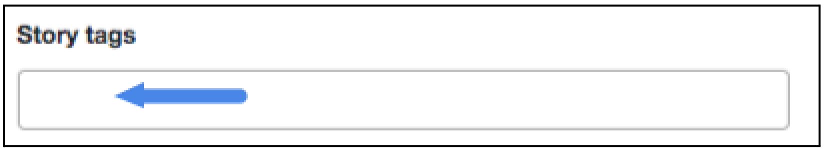
9. Click on **next** to move to the next tab.

The tags tab is where the story and consent forms are uploaded. It will also show the sections and subsections that were selected in the tags tab when the project was initially created.

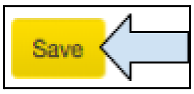
10. Click on **upload** to add the consent form and the story documents. You can upload: "docx", "odt", "txt", "html", "xlsx", "ods", "csv”). By default documents in Track are visible to anyone in Tearfund.

11. Tick the box if the story contains pictures, then add the **embargo end date**. (Here, embargo means the story can't be accessed and used until that end date. After this date the story will be available for use or publicity.

12. Select the tags which are relevant to the story you are adding to Track. These tags are available because they were selected in the tags tab when the project was initially created.



13. Click in the **story tags** box to select additional tags from a drop menu or start typing to add a new tag if necessary.



14. Click on **save** to be taken to the 'summary' tab of the process bar.

15. Check that the information in the story summary page is correct. If necessary, return to the edit tab to amend the information.

16. A link to the story has now been created.

7.1.2.1.1 How to access a story at a later date

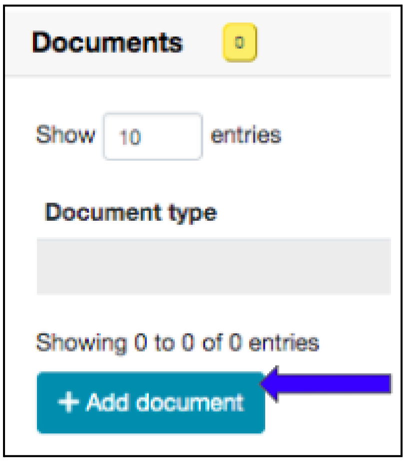
Once a link to a story has been created, there are two ways to access the story in Track.

- M&E tracking tab: Open the ‘M&E tracking tab’ in the relevant project and click on the ‘stories’ section. Click on the **document Link** next to the relevant story to open the document.

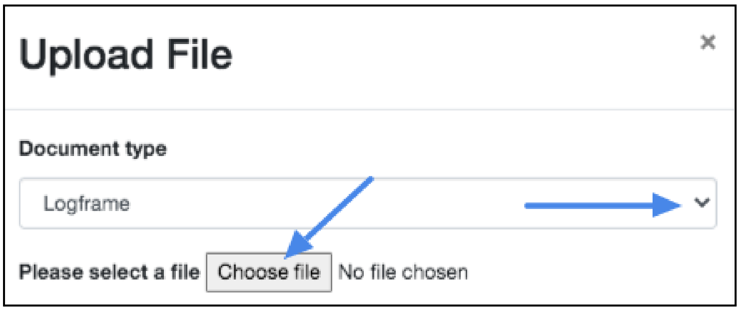
Please note that existing stories are all now searchable by Tearfund in Track. If you are aware of an existing story that should be confidential please change the ‘can be shared’ toggle so that it isn’t shared with audiences beyond Tearfund.

7.1.2.2 Add documents

It is only possible to add a document from within the M&E tracking tab once a project is in the implementation phase.

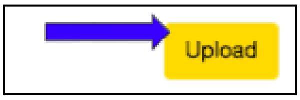


1. In the M&E tracking tab, click on the ‘documents’ section, then click on **add document.**



2. Select the type of document you wish to upload from the drop menu.

3. Click on **choose file** to add a document that is saved on your computer. (You can upload: "docx", "odt", "txt", "html", "xlsx", "ods", "csv"). By default documents in Track are visible to anyone in Tearfund.



5. Click on **upload** once all the necessary information has been added.

- When a document is uploaded to a project, the document is set to be owned by the project owner. In the training environments any uploaded documents will be owned by the current user, for ease.
- Project owners will receive an email notifying them that a they now own a document and will receive any requests by partners to access the document
- If a document is uploaded twice, the content of the document is updated, rather than a whole new document being created
- Files uploaded to the M&E page will only be visible to the project owner, approvers, and editors.

7.1.2.2.1 How to access the document at a later date

Once a document has been uploaded to a project from the M&E tracking tab, it can be accessed again from the M&E tracking tab.

- Open the 'M&E tracking tab' in the relevant project and click on the 'documents' section. Click on the **open** link next to the relevant document to open it.

7.1.3 Calendar tab

It is possible to add reports, evaluations, stories and case studies in the calendar tab of Track by clicking on ‘**add event**’.

For more information on how to add an event in the calendar tab please see instructions starting at step 2 of Section 4.10 ‘Calendar’.

7.1.4 Reports

It is possible to add financial reports, stories or any other documents to reports. Stories and other documents are then shown in the M&E tracking tab.

For more information on how to add case studies and stories of change to a report, please see Section 6.1.5 ‘Case studies and stories of change’.

For more information on how to add financial reports and other documents to a report, please see Section 6.1.6 ‘Documents’.

8. Dashboards

What will this chapter cover?

This chapter explains how to set up a personal dashboard in order to quickly view certain aspects of Track.

Who will find this chapter helpful?

Any user that wants to set up their dashboard to be able to quickly view their projects and calendar items.

What is a dashboard?

A dashboard is an information management tool that visually tracks, analyses and displays live data.

Track has a number of standard dashboard templates that are available. In this way, each user can view the information they individually wish to monitor.

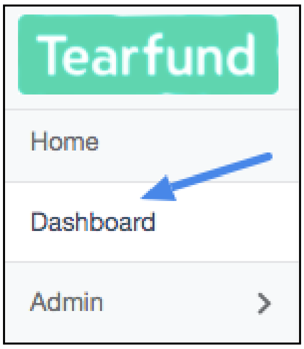
Each time a dashboard is opened, it shows up-to-date information from Track. The more dashboards a user has, the slower it is for Track to load the information.

Track has a number of dashboard templates which you can use to see information relevant to your role. This section will show the different types of standard dashboard templates available and how to create them.

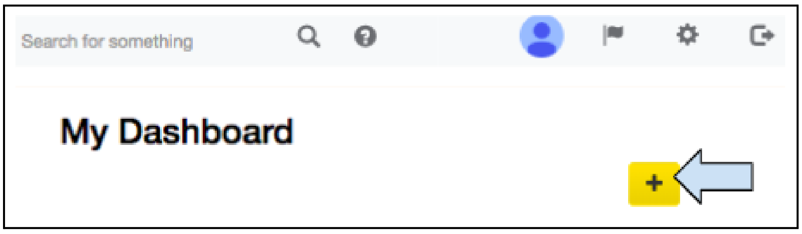
Figure 14: What the dashboard templates display

Dashboard Template	What the dashboard displays
Project calendar	Calendar events in projects that are owned by the current user. Also displays the RAG status of the events.
Projects in design	Projects in design implemented by a selected partner. Includes a summary of project design status.
Projects in implementation	Projects in implementation according to a selected partner. Includes a summary of project progress.
Projects to close	Projects that are due to be closed (in implementation and past the end date). Provides an overview of whether the final report is complete, when indicators were last updated, and if reach has been updated.

8.1 Create a personal dashboard

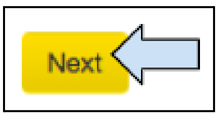


1. Select **dashboard** from the left hand navigation panel

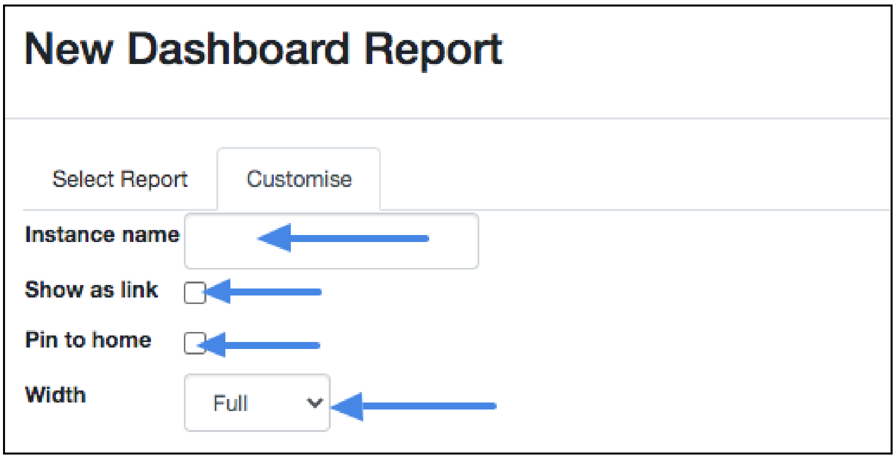


2. In the my dashboard screen click on the **+ sign** to open the ‘new dashboard report’ screen.

3. In the ‘new dashboard report’’ screen select from the available menu of dashboards.



4. Click on **next**

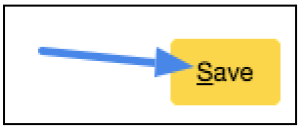


5. In the ‘new dashboard report’ screen, type the **Instance name** (title) under which the report should be saved.

6. Click on **show as link** to display the report as a link on the dashboard

7. Click on **pin to home** to display the report on the home screen

8. Click on the **width drop menu** to choose if the report view should be one third -, half-, two-thirds- or full size on the dashboard



9. Click on **save** for the project calendar report to be saved to the dashboard.

8.1.1 Project calendar dashboard

Lorien's Project Calendar

Show 25 entries — Search:

Name	Owner	Type	End/Due Date	Status	Document
Journey to Healing project - 2021		Final report	4/04/2022	Not started	
Partner Manual Project		Final report	31/12/2022	Not started	
		Final report	31/08/2022	Not started	
		6 month report	31/08/2021	Not started	
Journey to Healing 2020	Noorie Dudley Sam	Final report	31/03/2021	Complete	

The **project calendar report** displays all open calendar events.

Status Colours

The status colour is [no colour] for calendar items which are not started and not overdue
The status colour is Green for calendar items which are complete
The status colour is Amber for calendar items which are in progress and not overdue
The status colour is Red for calendar items which are overdue and not completed

1. Click on the **link** under ‘name’ to view the full project proposal.

2. Click on the **pencil icon** to edit the report. Click on the **waste bin icon** to delete the report from the dashboard.

8.1.2 Projects in design dashboard

Lorien's projects in design

Show 25 entries

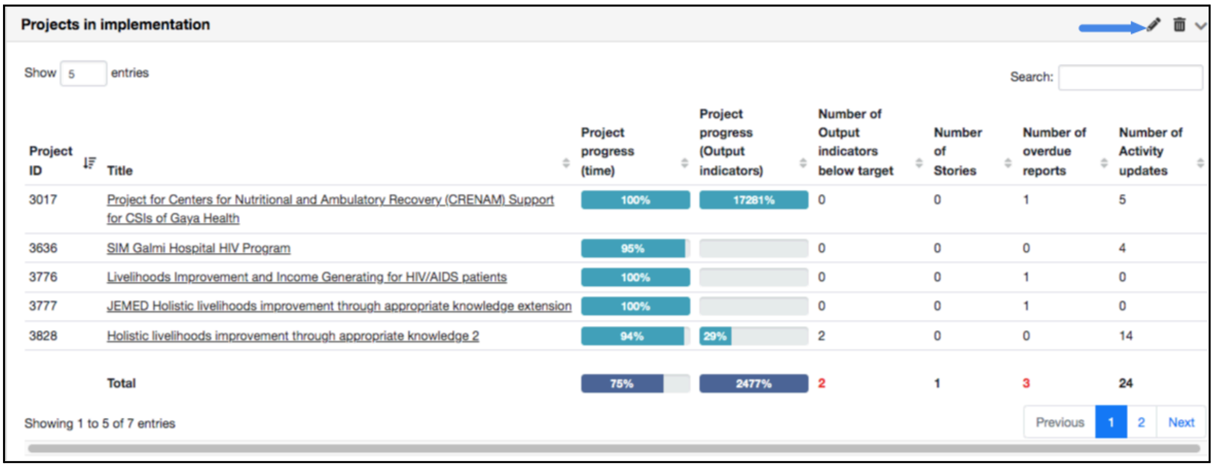
Project ID	Title	Start Date	End Date	Status	Location	Days until start date	Unresolved Actions	Design progress
2559	IRISH AID NUTRITION SENSITIVE WASH PROGRAM LIBERIA	1/05/2019	31/12/2024	Design: Tearfund Initiate	Sinoe	0	0	null%
4163	Food Security and Nutrition Project	15/11/2021	15/06/2022	Design: Tearfund Review	NULL	0	0	100%
4455	Partner Manual Project	1/01/2022	31/12/2022	Design: Implementer Draft	Niger	0	0	33%

The **projects in design report** displays all projects linked to a specific user that are in the design phase. open calendar events. The dashboard displays the extent to which the project design process has been completed.

1. Click on the **link** under ‘name’ to view the full project proposal.

2. Click on the **pencil icon** to edit the report. Click on the **waste bin icon** to delete the report from the dashboard.

8.1.3 Projects in implementation dashboard


Projects in implementation

Show 5 entries Search:

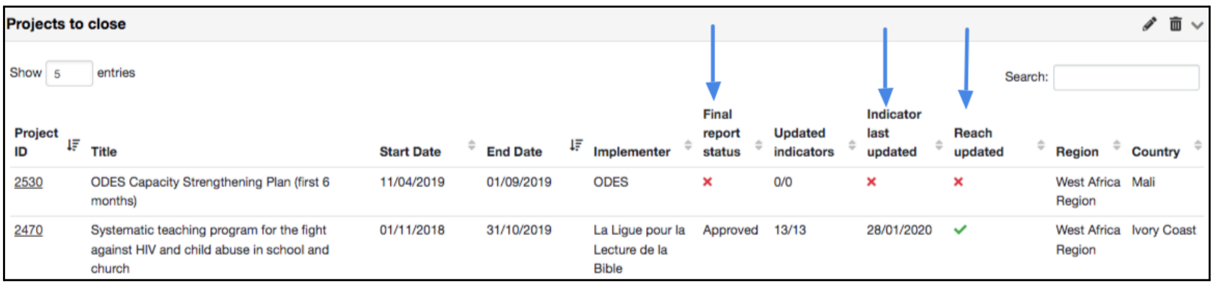
Project ID	Title	Project progress (time)	Project progress (Output indicators)	Number of Output indicators below target	Number of Stories	Number of overdue reports	Number of Activity updates
3017	Project for Centers for Nutritional and Ambulatory Recovery (CRENAM) Support for CSIs of Gaya Health	100%	17281%	0	0	1	5
3636	SIM Galmi Hospital HIV Program	95%		0	0	0	4
3776	Livelihoods Improvement and Income Generating for HIV/AIDS patients	100%		0	0	1	0
3777	JEMED Holistic livelihoods improvement through appropriate knowledge extension	100%		0	0	1	0
3828	Holistic livelihoods improvement through appropriate knowledge 2	94%	29%	2	0	0	14
	Total	75%	2477%	2	1	3	24

Showing 1 to 5 of 7 entries Previous 1 2 Next

1. The **projects in Implementation** report displays the project title and percentage progress in terms of time and output indicator updates. It also displays the number of indicators under target, overdue reports, activities updated and stories attached.

2. Click on the **pencil icon** to edit the report. Click on the **waste bin icon** to delete the report from the dashboard.

8.1.4 Projects to close dashboard


Projects to close

Show 5 entries Search:

Project ID	Title	Start Date	End Date	Implementer	Final report status	Updated indicators	Indicator last updated	Reach updated	Region	Country
2530	ODES Capacity Strengthening Plan (first 6 months)	11/04/2019	01/09/2019	ODES	✗	0/0	✗	✗	West Africa Region	Mali
2470	Systematic teaching program for the fight against HIV and child abuse in school and church	01/11/2018	31/10/2019	La Ligue pour la Lecture de la Bible	Approved	13/13	28/01/2020	✓	West Africa Region	Ivory Coast

The **projects to close report** shows the number of projects in the selected location that are past their end date, and whether the reach has been updated, whether the final report is completed, and other info that will be helpful in managing and closing projects well.

1. Click on the **project ID number** to be taken to the project.

2. Click on the **pencil icon** to edit the report. Click on the **waste bin icon** to delete the report from the dashboard.

9. Appendix

9.1 How to set Google Chrome as your default browser

If you make Chrome your default browser, any links you click will open automatically in Chrome.

If you don't have Google Chrome on your computer yet, first download and install Chrome.

9.1.1 Setting up Chrome for Windows 10

1. On your computer, click the Start menu

2. Click Settings

3. Open your default apps:

    Original version: Click System > Default apps.

    Creators Update: Click Apps > Default apps.

4. At the bottom, under "Web browser," click your current browser (typically Microsoft Edge).

5. In the "Choose an app" window, click Google Chrome.

To easily open Chrome later, add a shortcut to your taskbar:

1. On your computer, open Chrome.

2. In the Windows taskbar at the bottom, right-click on Chrome.

3. Click Pin to taskbar.

9.1.2 Setting up Chrome for Windows 8 and below

1. On your computer, click the Start menu

2. Click Control Panel.

3. Click Programs > Default Programs > Set your default programs.

4. On the left, select Google Chrome.

5. Click Set this program as default.

6. Click OK.

9.1.3 Setting up Chrome for Mac

1. On your computer, open Chrome

2. In the top right, click More 

3. Click Settings.

4. In the "Default browser" section, click Make default.

(If you don't see the button, Google Chrome is already your default browser)

9.2. Troubleshooting

9.2.1 I cannot find indicators relating to my project's theme.

Indicators are listed by theme.

In the project logic tab of Track, click on the '+' sign to add an indicator. Click on 'theme' then select the required theme to view a drop list of indicator choices.

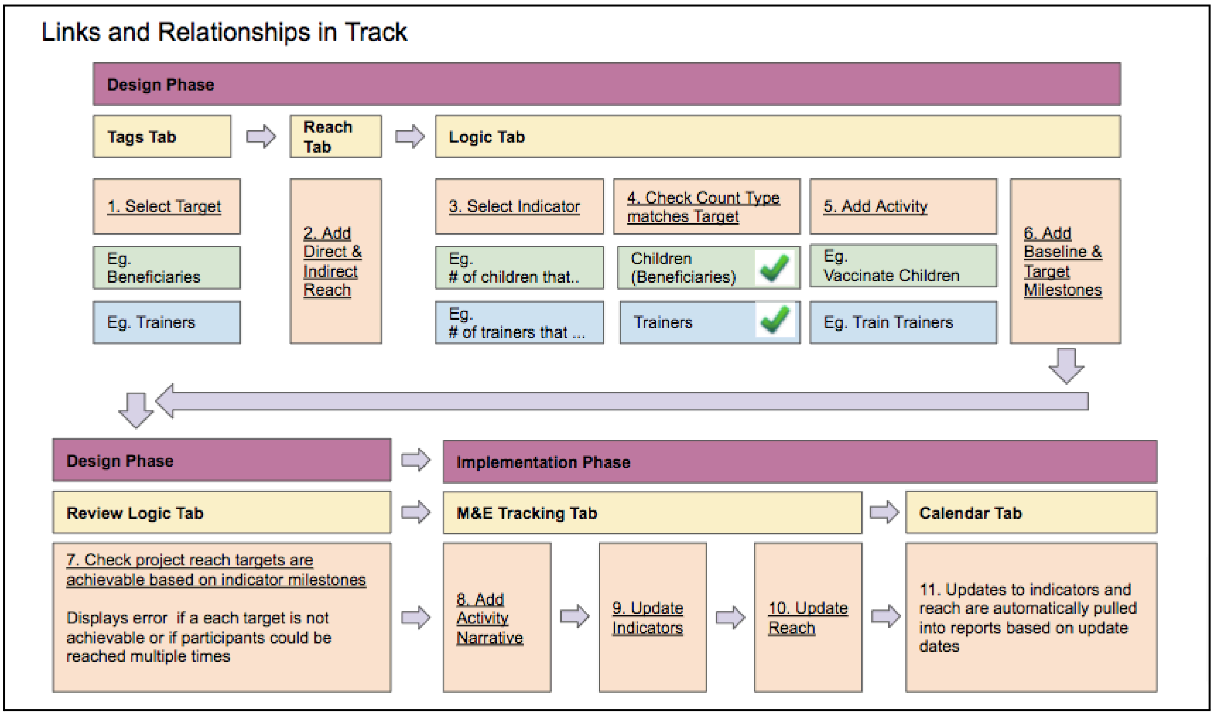
If the theme that you require is not listed, return to section 5 of the tags page 'What is my theme?' and select it. For more information on how to select a theme see user guide Section 4.2.5 'What is the theme?'

9.3 Links and relationships in Track

The following visual aid shows some of the links and relationships between the different tabs in Track.

The diagram starts in 'design phase' in the tags tab when a user chooses a target and continues through adding project reach, creating and reviewing the project logic, to updating activities, indicators and reach in 'implementation phase'.

Figure 15: Links and relationships in Track



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