



# TRACK Partner User Guide

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# 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

Tearfund Track is the new IT system that will enable users to track projects, programmes and initiatives from the inception and design phase through to implementation and reporting.

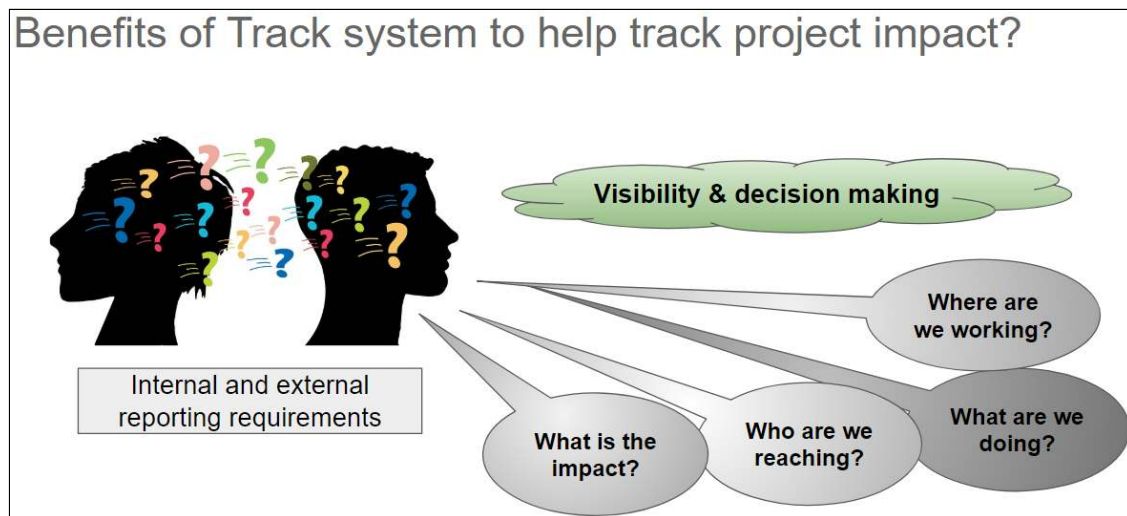
Work started on designing and scoping out Track in late 2015 when there was a corporate project to look at joining up Tearfund's IT systems. We recognised that programmatic data was collected and managed in multiple ways which was not making it easy to track our projects or programmes. We wanted to know the impact we were having across the world, to learn from our projects, to streamline reporting, and to provide a better IT solution 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, and piloting and testing the concept and prototype with partners. Track is the result of this process and is the first key component of this integration across all IT systems.

## 1.2 What are the Benefits of Track?

The key benefits of Track are that it will **improve programme management and quality** through increased confidence in the evidence that we collect to know what works, for whom, and under what conditions.

Figure 1: The Benefits of Track



Track will deliver:

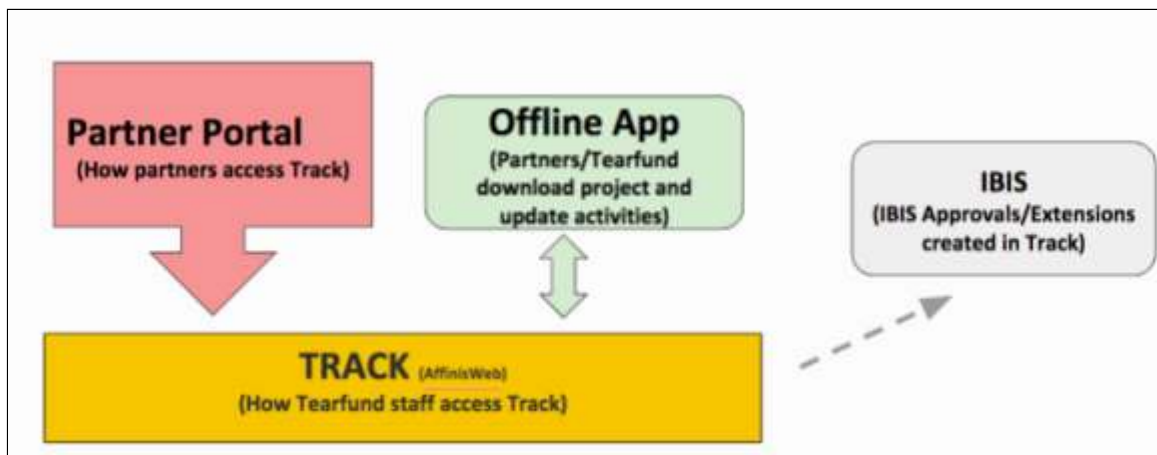
- **Visibility** of strategy, project, programme and initiative data. Dashboards will provide visibility of data so that users can see at a quick glance how well a project is doing, or look across multiple programmes and initiatives. Track is accessible to staff across all parts of Tearfund. Partners will also have their own dashboards so they can clearly see their projects and how well they are doing.
- **Consistent approach** to capturing and assessing data across all of our projects, programmes and initiatives. A lot of work has been done to look at the consistency of how we tag the data against common categorises. This gives the opportunity to filter and view similar data across all of our work. Track provides a menu of standard indicators that Tearfund is encouraging users to use so that over time we will be able to track progress across similar measures globally.
- Assurance of the **quality** of data. A number of data validation and approval points have been built into the system. This will allow for better decision-making and insights at all levels. It will enable Tearfund to maintain and grow income as reliable evidence of impact can be used for communication and engagement.
- It is first building block towards our **Global Systems Programme**. Track is the pioneering project to look at the integration of Tearfund's systems across financial, partner, grant and logistics management.

### 1.3 Tearfund Track Overview

Tearfund Track is an IT system that is externally accessible to all Tearfund staff and partners. It is designed to capture project proposals for all frontline work across Tearfund, to support the monitoring and tracking of activities and indicators and to facilitate reporting against these projects.

There are 3 different ways to access Tearfund Track (these can be thought of as 3 different doors by which to enter the same house, with the house being Tearfund Track).

Figure 2: The 3 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.
- The **Offline App** can be downloaded onto Android phones by both Tearfund Staff and Partners. The Offline App allows the Project Indicators and Activities to be downloaded so they can be updated offline and when internet connection is available the tracking details will automatically be updated to the project.

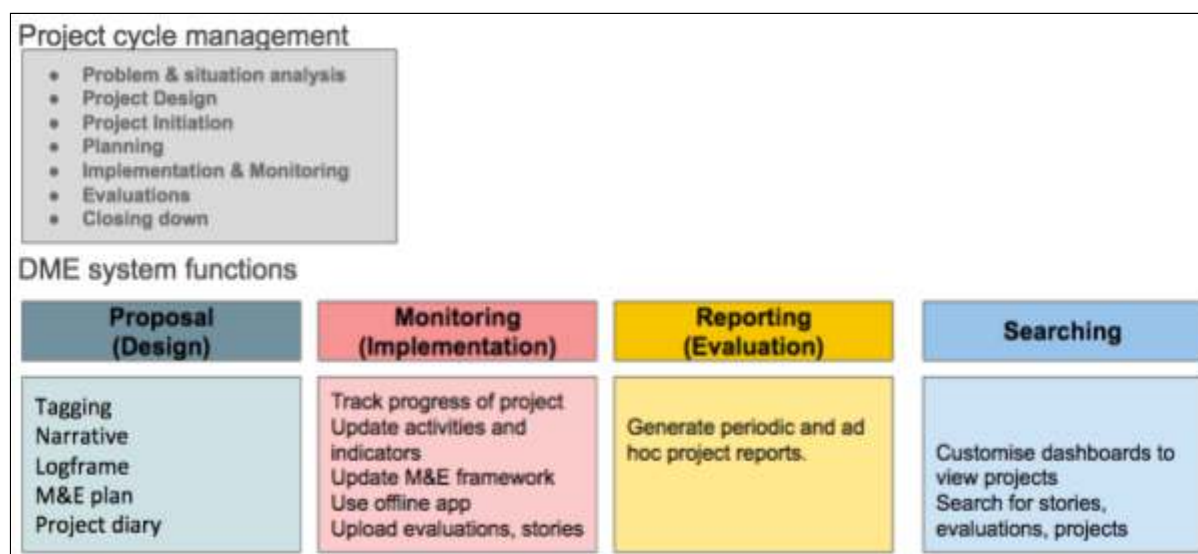
### 1.3.1 Track Functions

Track is structured around the key stages of the project or programme cycle as this is at the heart of how we design and manage projects, programmes and initiatives. It is important to say that Track is a system which will enable users to capture their thinking and planning. It will not do the thinking for you! The recommendation is that users do still spend time with staff and partners to collaborate and plan together. Track can support users to think through the logic on a project, it provides access to a set of standard indicators that are aligned with industry standards, the Sustainable Development Goals and the Light Wheel; and it serves as a tool for tracking and monitoring on-going performance of projects, programmes or initiatives.

The diagram below shows the key functions of Track:



**Figure 3: The Key Functions of Track**



### Project cycle management (PCM)

Track facilitates good project cycle management which is the process of planning and managing projects and programmes. PCM is based around a project cycle, which ensures that all aspects of projects are considered. It involves a set of planning tools which feed into the logical framework (commonly known as a log frame). The process is important for project success, sustainability and organisational learning. Track holds the tools eg. log frame to ensure Tearfund and Partners do PCM effectively to ensure successful projects. Roots 5 provides guidance on the whole project cycle - and can be found [here](#) or on the Tearfund Learn Hub.

### Proposals (Design)

1. Create project proposals using the Micah Template, Tearfund Template (for Global Advocacy & Influencing projects) or Donor Template (for Institutionally funded projects)
2. Review, edit and approve project proposals

### Monitoring (Implementation)

3. Create project diary events.
4. Amend project design and details during project implementation.
5. Update progress against activities and indicators off and 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 count for reports (e.g. beneficiary numbers, categories of groups reached through Tearfund's work).

## Searching

11. Reports, stories, research and evaluations can be searched
12. Search for information using different criteria in the system (such as theme, location, cluster, approach, beneficiary groups).

### 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 Tearfund 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 System 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 [here](#) or on the Tearfund Learn Hub.

## 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

TEARFUND

[Tearfund Log in](#)

### Log in.

Email

Password

Remember me?

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

(Please note that if you have forgotten your password, you will have to email [tracksupport@tearfund.org](mailto:tracksupport@tearfund.org) to ask for it to be reset).

## 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.

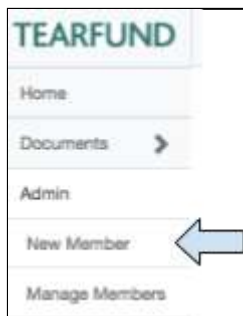
### Log in.

Email

Password

Remember me?

1. Login to the partner environment ([partner.tearfund.org](http://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 setup 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).



**Admin role:** Add new users to the system  
Reset passwords  
Delete users  
Disable account

**User:** Update project data  
Change status of project

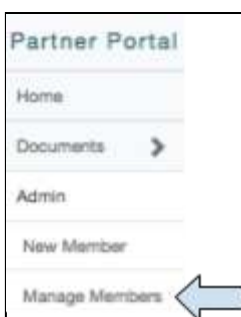
## 6. Click on **Create**



7. 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 (search via e-mail address)

3. Select if the user should be given **Admin** or **User** rights

4. Click here to **disable** the account if required.

(Please note that if a user account is disabled, the user will no longer have access to Track. A new user account would have to be set up by either the Partner Administrator or the Country Office link person).

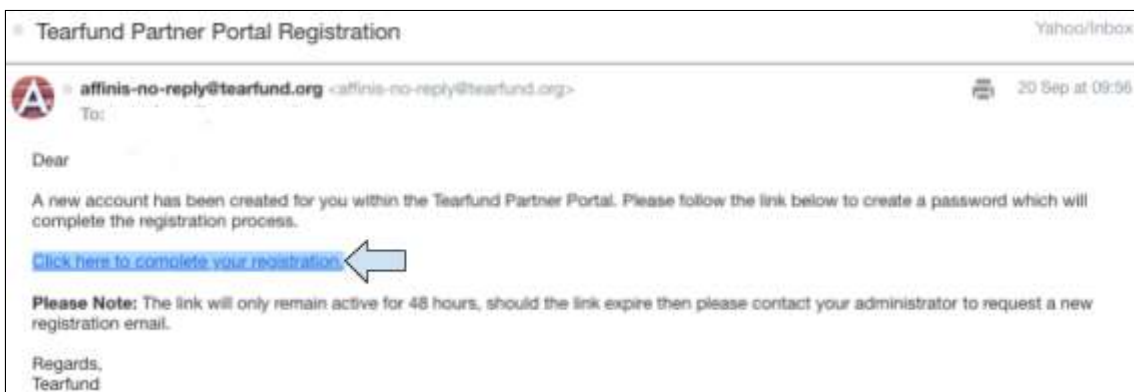
5. Click here to **reset password** if required.

(Please note that once a password is reset, a user is prompted to enter a new password the next time they try to enter Track).

If there are any issues with setting up partner accounts, please contact your country office link person.

## 2.3 How to Login as a Partner ‘User’

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.



TEARFUND

### Set your password

Email

Password

Confirm password

2. Add your email address and password

3. Click on **Update**

TEARFUND

### Password Updated.

Your password has been updated. Please [click here to log in](#)

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

TEARFUND [Tearfund Log in](#)

### Log in.

Email

Password

Remember me?

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

(Please note that if you have forgotten your password, you will have to ask your Track Partner Administrator to reset it).

## 3. System Navigation

### What will this chapter cover?

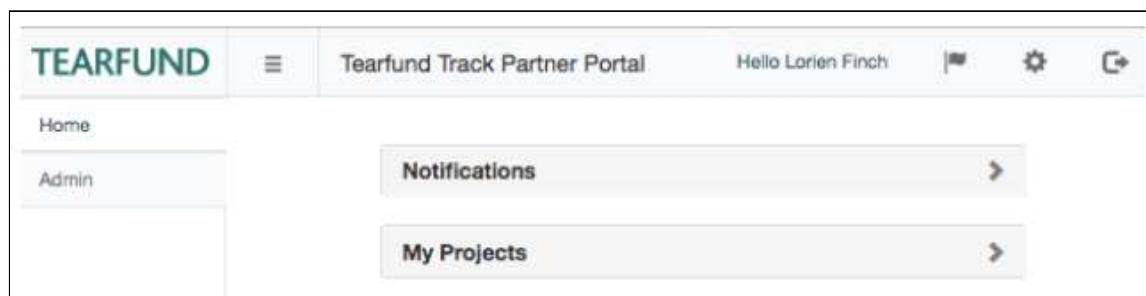
This chapter will explain how to navigate within Track and will highlight some of the key features that a user will see.

### Who will find this chapter helpful?

All users of Track

### 3.1 Home Screen

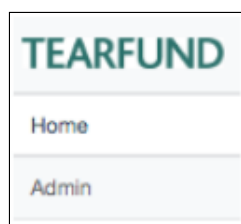
Once the system has been logged into, the user will see this **Home** screen.



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.

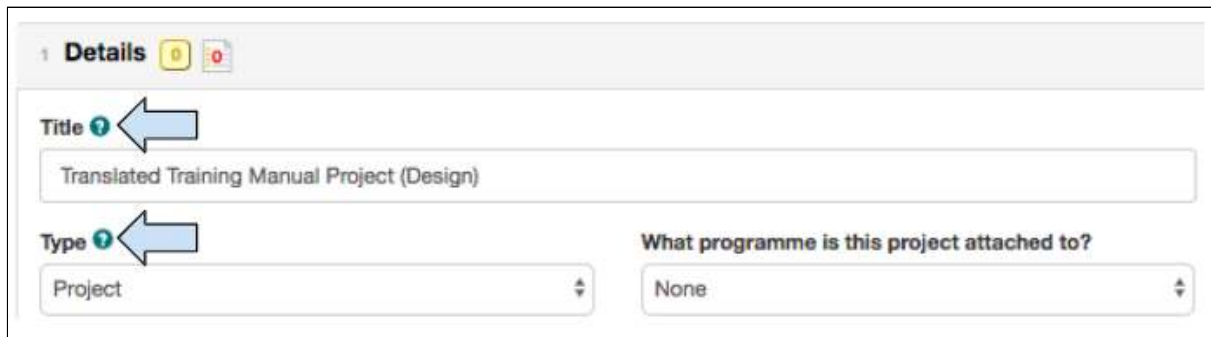


Click on the icon to expand the box and reveal the additional information.

### 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.

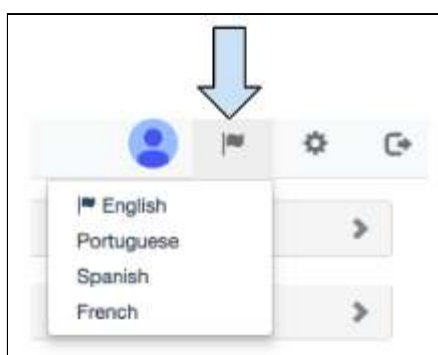


Click on the icon to delete or remove something from Track.

### 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.

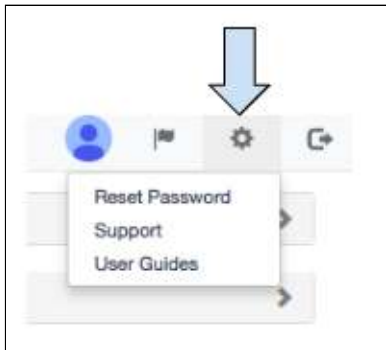


Click on the icon to **choose** between English, French, Spanish or Portugese as a system language.

### 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 **Reset a Password**, 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. (For more information on using the collaborator 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 5.1 'Amend a Project'](#)).

### 3.4.11 Add an Action



This symbol allows Partner users to collaborate with Tearfund staff 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 open a message box and add an Action. For more information on how to add an Action see [Section 4.5.1 'Add an Action'](#)).



### 3.4.12 Activities List



This symbol can be found in the Logic section of Track inside the Output row (see Logic tab in the Process Bar).



Output 1.1

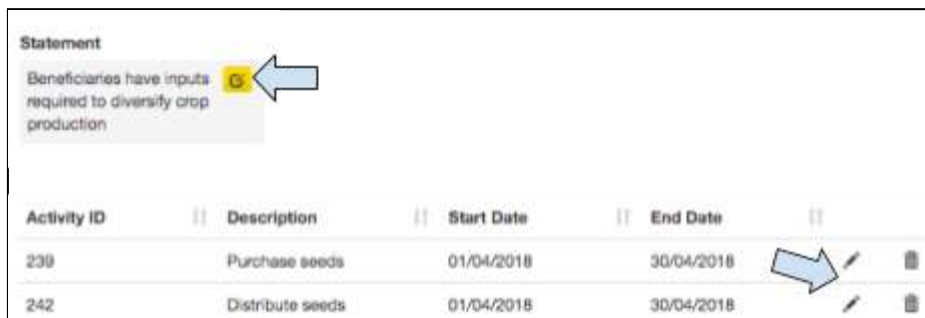
| Statement   | Indicator title                 | Risks and assumptions  |
|---|---------------------------------|--|
| Farmers have inputs and knowledge required to diversify crop production | Number of beneficiaries trained | Farmers are able to use new seeds and knowledge from training sessions |

Click on the icon to add Activities to Outputs.

### 3.4.13 Edit



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



Statement

Beneficiaries have inputs required to diversify crop production

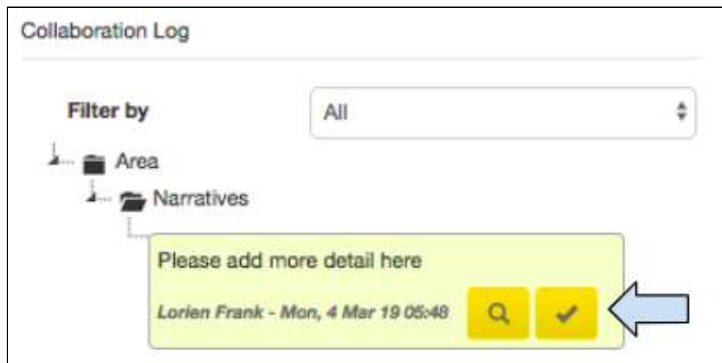
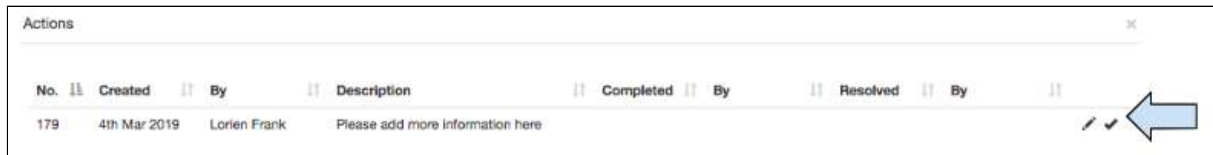
| Activity ID | Description      | Start Date | End Date   |
|-------------|------------------|------------|------------|
| 239         | Purchase seeds   | 01/04/2018 | 30/04/2018 |
| 242         | Distribute seeds | 01/04/2018 | 30/04/2018 |

Click on the icon to edit

### 3.4.14 Complete an Action



This symbol allows users to complete an action or a collaboration. It can be found inside an Action List or inside the Collaboration Log next to each Action / Collaboration message.



Click on the icon to complete an Action or a Collaboration message. (For more information on using the Resolve button see [Section 4.4.3 'Resolving Collaborations'](#) or [Section 4.5.3 'Complete / Resolve an Action'](#)).

## 4. Design: Projects

### What will this chapter cover?

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

### Who will find this chapter helpful?

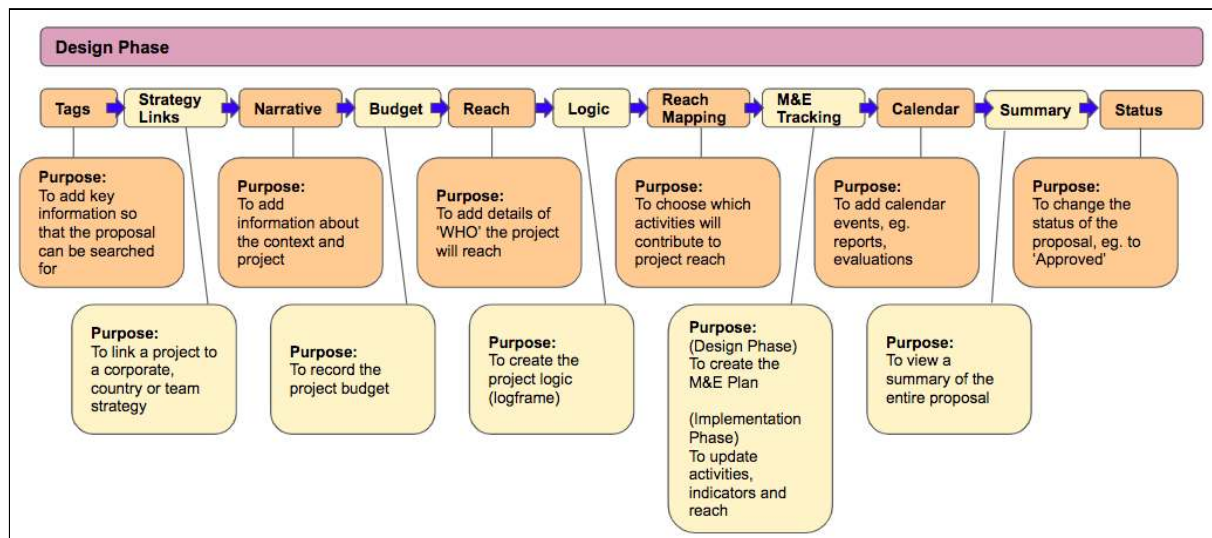
Any user that creates, makes edits to or collaborates on a proposal.



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 Micah template).

**Figure 5: The steps for creating a proposal in Track**



## 4.1 Receiving a Project Proposal from Tearfund

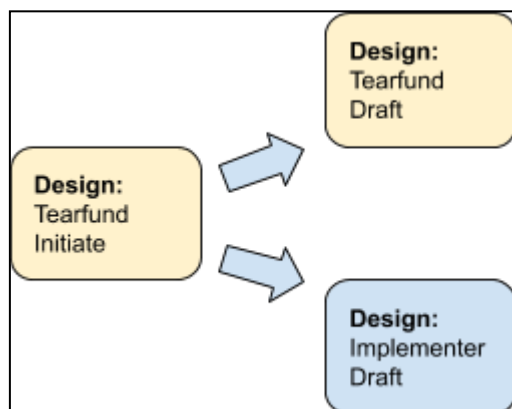
### 4.1.1 Where does a proposal come from?

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 4.13 '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**.

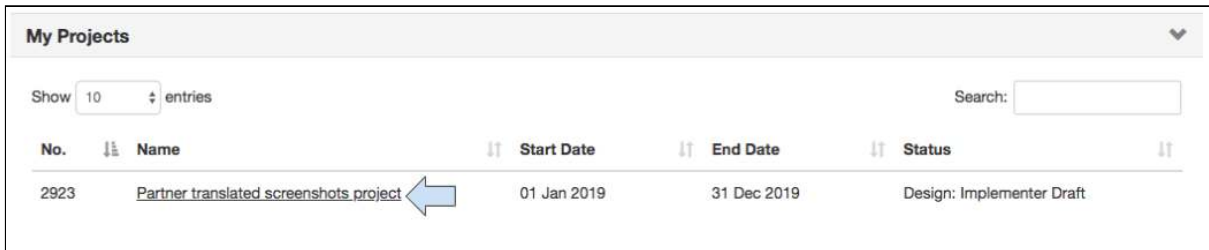


1. Click on the drop arrow next to **Notifications** to open the box.

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 it opens in the Tags page. At the top of the page is the following display box:

**Invite Tearfund**

Allow Tearfund to view and edit  Yes  No

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 are denied access to the project.
- The default value for the checkbox is NO
- 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

[Tags](#) / [Narrative](#) / [Budget](#) / [Reach](#) / [Logic](#) / [Reach mapping](#) / [M&E Tracking](#) / [Calendar](#) / [Summary](#) / [Status](#)

This 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. CCT) 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?**

Within the DME system, projects are tagged in the following ways:

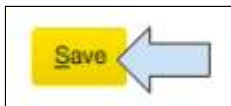
- Project title and start and end date (time)
- By type of project (project type)
- Project details (description of project objective)
- By who it is that is doing the work (implementer)
- By the location that the work is being done (geography)
- By the global approach taken by the project to address this issue (global approach)
- By the approach taken by the project to address this issue (project approach)
- By reason for response for the project (reason for response)
- By the issue that the project is seeking to address (theme)
- By the categories of people that the project is working on (target groups)
- By the Sustainable Development Goals (SDGs)
- By contribution to Tearfund outcome (Corporate outcomes)
- What country strategy objective does it relate to?
- By the source of funding (funding)
- By Quality standards (TBC)



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



The tags section is very long. Click periodically on **Save** at the bottom of the screen to ensure that information is not lost



# Instructions

## 4.2.1 Details

The screenshot shows a 'Details' form with the following fields and values:

- Title:** Partner Manual Project
- Start Date:** 01/01/2018 (format: dd/mm/yyyy)
- End Date:** 31/12/2018 (format: dd/mm/yyyy)
- Type:** Project
- What programme is this project attached to?:** None
- Project templates:** MICAH
- Owner:** Richard Yao - Country Representative

Two blue arrows point upwards to the Start Date and End Date fields, indicating they are editable.

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

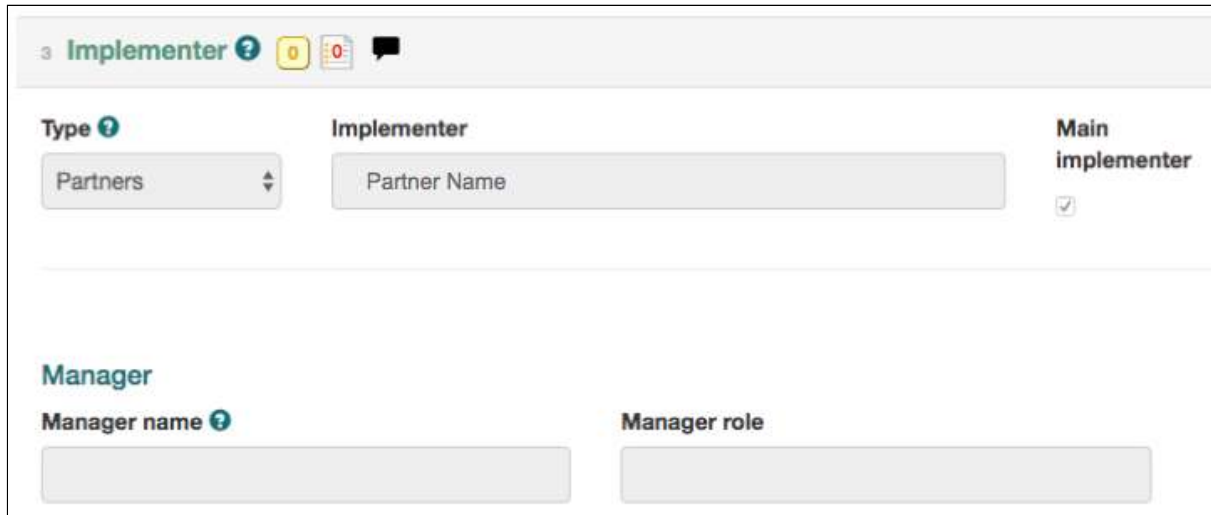
The screenshot shows a 'Summary' form with a 'Description' field. A blue arrow points to the 'Description' field, indicating where to enter the project description.

1. In the Summary 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.



The screenshot shows a form titled "Implementer" with a header bar containing a question mark icon, a yellow notification icon, a red error icon, and a speech bubble icon. The form is divided into two main sections. The top section is titled "Implementer" and contains a "Type" dropdown menu set to "Partners", a "Partner Name" text input field, and a "Main implementer" checkbox which is checked. The bottom section is titled "Manager" and contains a "Manager name" text input field and a "Manager role" text input field.




### 4.2.4 Where is the work taking place?

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




The screenshot shows a form titled "Where is the work taking place?" with a header bar containing a question mark icon, a yellow notification icon, a red error icon, and a speech bubble icon. The form contains a "Location" text input field. To the right of the input field, there is a blue arrow icon pointing to the right, followed by the text "Add a new location".

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


Where is the work taking place?   


## Location



Regional grouping

Country



Sub-national level 1 

Sub-national level 2 

Community Name

Area

GPS reference

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.

The screenshot shows a web interface titled "What is the theme?". At the top, there is a search bar with the placeholder text "Enter text to search for dimensions". Below the search bar is a grid of themes and sub-themes. The themes are listed on the left, and sub-themes are listed on the right. The themes are: Conflict & peacebuilding, Education, Environment, Food security, Health, Livelihoods, and Meeting basic needs. The sub-themes are: Healing, Non-violent action, Justice & rule of law, Peacebuilding, Leadership, Youth, Adult literacy & numeracy, Secondary, Higher / Tertiary, Vocational, Primary, Renewable energy, Waste management, Access to food and markets (Accessibility), Nutrition including feeding practices, food quality and safety (Utilisation), Stable and resilient food systems (Stability), Sustainable food production and supply (Availability), Disability, Maternal & child health, HIV, Infectious diseases, Access to financial services, Social and cultural norms, Access to inputs, services and infrastructure, and Natural resource management/sustainability. Three blue arrows point to the search bar (labeled 3), the search bar (labeled 2), and the "Food security" theme (labeled 1).

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





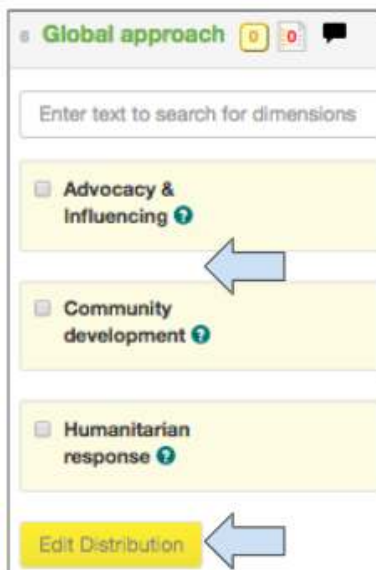
4. Click the **edit distribution** button in order to amend the proportion of budget allocated to each of the selected themes

5. 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 What is the approach?

In order to complete this section we consider the question ‘**HOW** are we going to do the work?’ or ‘Which methods or approaches will we be using to address the problem and achieve the desired outcomes?’

7 Approach

Enter text to search for dimensions

Assistance modality

Cash grants (conditional)  
In kind

Cash grants (unconditional)  
Value vouchers

Campaigning and lobbying

Influencing political debate  
Strategic relationship building

Long term centralised campaigns

Capacity building & support

Awareness raising  
Self help groups (savings groups)

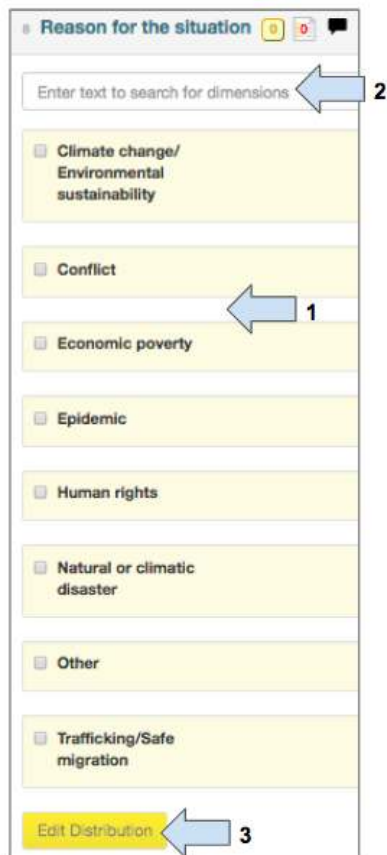
Community transformation groups  
SGBV led community dialogues

Edit Distribution

1. Select the **approach(es)** from the left hand column which best relate to the project
2. Select the specific **sub-approach(es)** under each approach which best relate to the project
3. For a **quick search** start typing in this box and the relevant words will be highlighted
4. Click the **edit distribution** button in order to amend the proportion of budget allocated to each of the selected items

## 4.2.8 What is the reason for the situation?

The tags chosen in this section are used by the Tearfund marketing team when they are discussing Tearfund’s work with supporters.



1. Select the **reason for response** from the left hand column which best relate to the project
2. For a **quick search** start typing in this box and the relevant words will be highlighted
3. Click the **edit distribution** button in order to amend the proportion of budget allocated to each of the selected items

#### 4.2.9 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 5 groups of Targets to choose from in the Tags page.

- Beneficiaries
- Churches and Faith Groups
- Individuals and Communities
- Influencers
- Organisations and Institutions

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 from the 'Group' AND the 'Sub-group' to represent exactly who will be counted as activities are implemented.



Remember, it is important to select target types from both the 'Group' AND 'Sub-group' in order to be able to add and update Reach later in Track

Any reach that relates to people, eg. refugees, facilitators, inspired individuals, can later be disaggregated by age, gender, disability.

## Instructions

1. Select the '**Group**' type that the project is targeting from the left hand column
2. Select the '**Sub-group**' types that the project is targeting (this is essential in order to be able to update reach)
3. For a **quick search** start typing in this box and the relevant words will be highlighted
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 for reach data to be entered 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 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 reach can be updated.



## 4.2.10 Contribution to Tearfund Outcome

Tearfund's outcomes describe the change we want to see as an organisation. All of our projects, programmes and strategies should help us to achieve our outcomes.

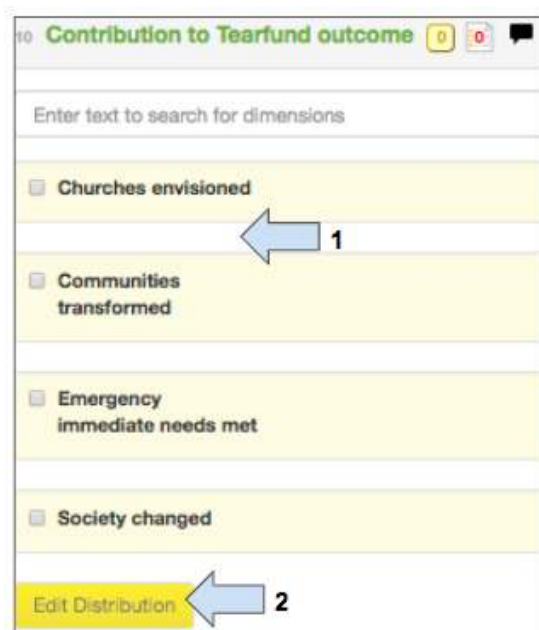
Our outcomes are:

**Churches envisioned:** The church is envisioned, empowered and equipped to play its part in transforming the poorest communities and changing society.

**Communities transformed:** The poorest communities are resilient to shocks and stresses, working for peace and unity, and contributing to better futures for themselves and others.

**Emergency needs met:** Immediate needs are met when crises and natural disasters hit and community structures and mechanisms are affected.

**Society changed:** Social, political, economic and environmental systems and policies work for the poorest communities, ensuring access to basic needs, reduced inequality and sustainable growth.



This section would have been completed by the Tearfund Project Initiator and is not editable.

## 4.2.11 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.

11 Sustainable Development Goals (SDGs)

Enter text to search for dimensions

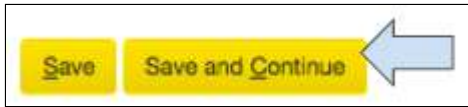
- 1: No poverty
- 2: Zero hunger
- 3: Good health and well-being
- 4: Quality education
- 5: Gender equality
- 6: Clean water and sanitation
- 7: Affordable and clean energy
- 8: Decent work and economic growth
- 9: Industry, innovation and infrastructure

↔

- 10: Reduced inequalities
- 11: Sustainable cities and communities
- 12: Responsible consumption and production
- 13: Climate action
- 14: Life below water
- 15: Life on land
- 16: Peace, justice and strong institutions
- 17: Partnerships for the goals
- None

Edit Distribution

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.

### 4.3 Narrative



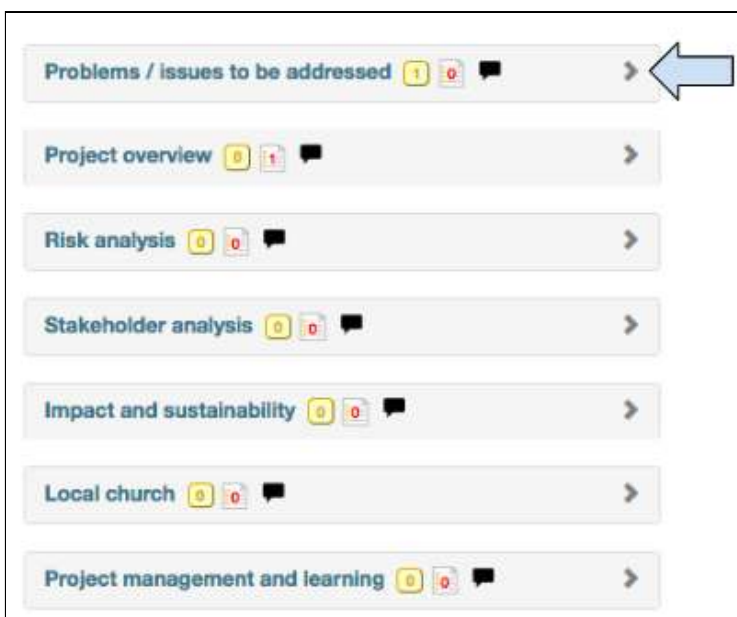
The narrative section can be completed by either an Implementing Partner user or by a Tearfund user. This page will look familiar to users who have experience completing a Micah proposal template. Further instructions on the Donor template will follow.



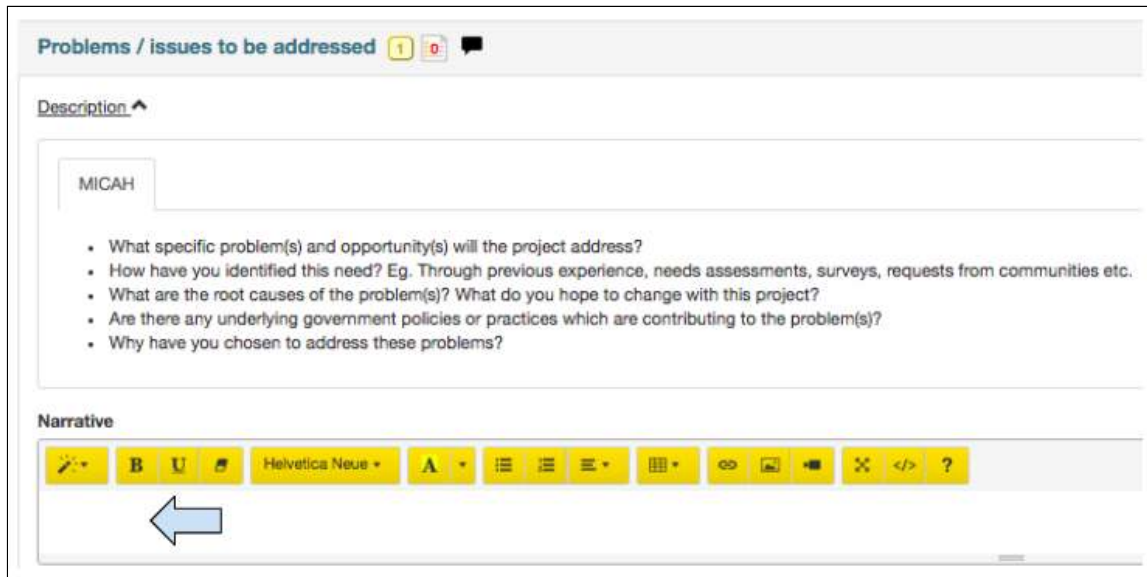
The Narrative section is very long. Click periodically on Save at the bottom of the screen to ensure that information is not lost



### Instructions



1. Click on the drop arrow next to each section to open the editable box.



2. The example above is for the **Problem to be addressed** section but all the sections can be completed in the same way. Use the bullet pointed Micah template guidelines to add **Narrative**. The yellow buttons allow for text to be edited and tables, images or video links to be inserted.



3. When the narrative screen is complete, click on **Save and Continue** to move to the next screen.

## 4.4 Collaboration

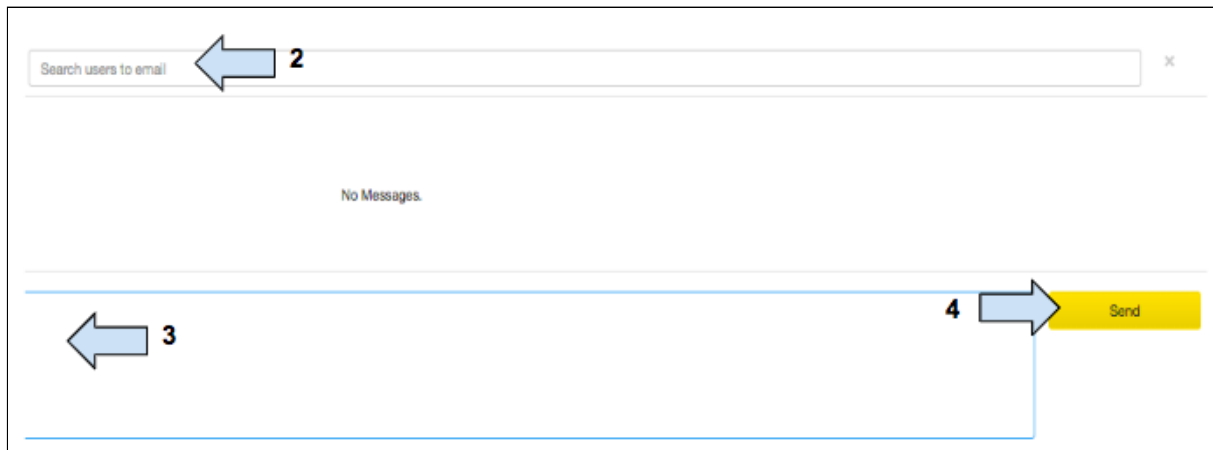


This symbol can be seen next to the title of each section in Track. It facilitates collaboration by allowing comments to be sent between Partner staff who are working within a document. It cannot be used for collaboration between Tearfund and Partner staff.

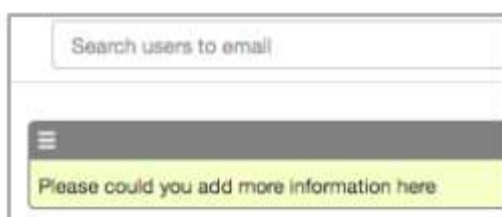
## 4.4.1 Sending a collaboration message



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



2. Start typing a name and select the relevant email address
3. Type the collaboration message
4. 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



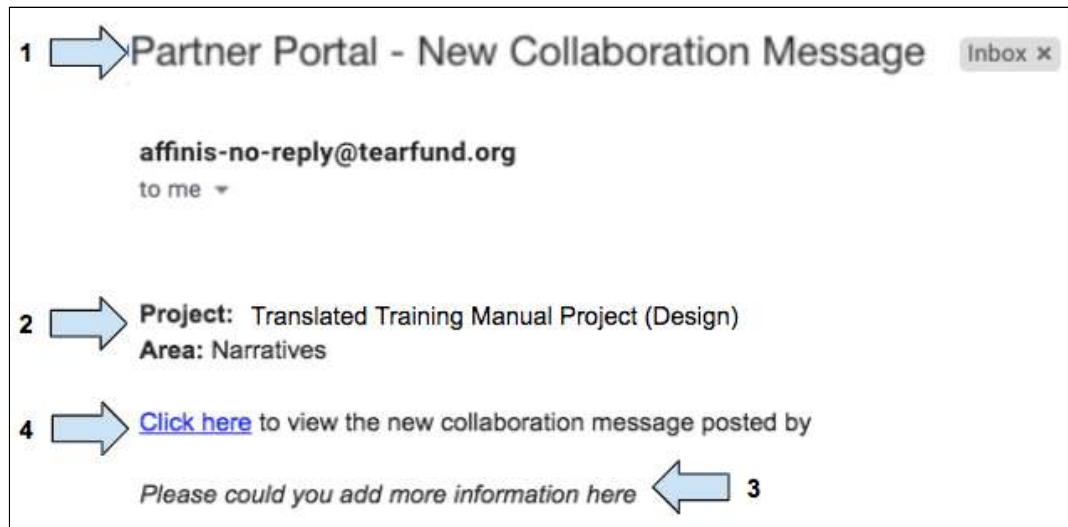
Once the message is sent, close the box and notice that the collaboration symbol has changed to a:



This is called an “unresolved collaboration”.

## 4.4.2 Receiving a Collaboration Message

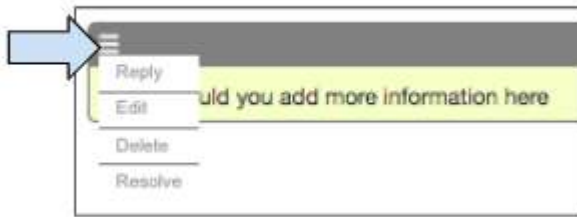
Once a user sends a collaboration message from within Track, an email is sent to the person's inbox.



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.

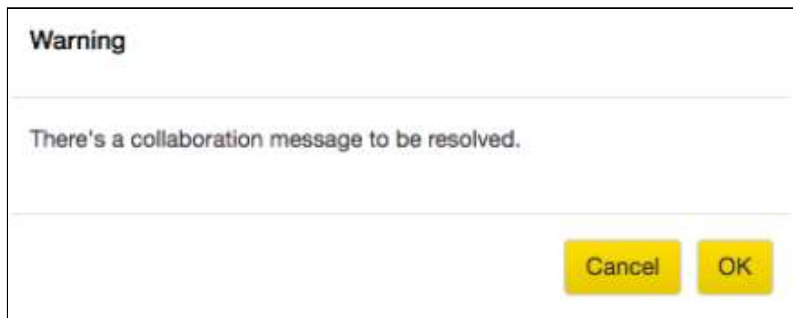


6. Click on the drop menu on the left hand side above the collaboration message to view the possible actions.

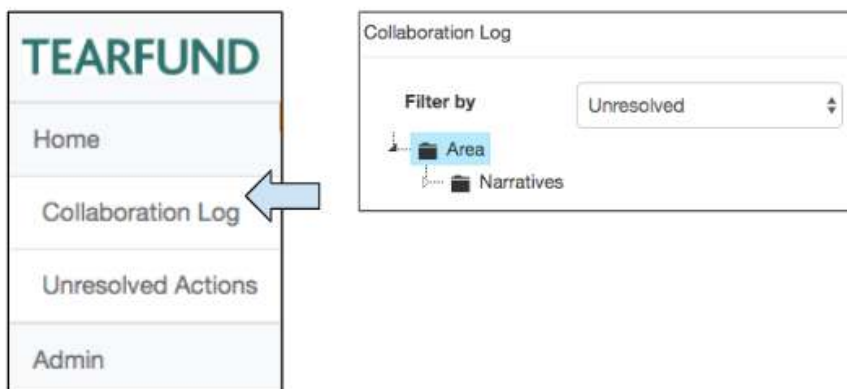
- Select **Reply** to continue the collaboration conversation if necessary
- Select **Edit** to edit the original collaboration message
- Select **Delete** to remove the collaboration message from Track
- Select **Resolve** if the action has been completed

#### 4.4.3 Resolving Collaborations

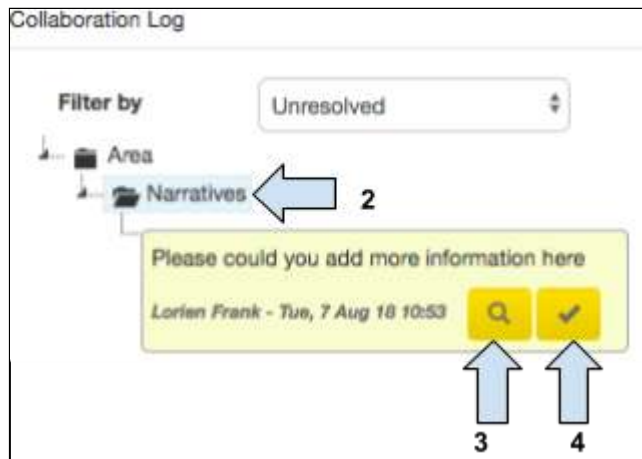
A proposal cannot be moved to Approved status whilst it has unresolved collaborations. If an attempt is made to do so, the following error message will appear:



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 Action Button

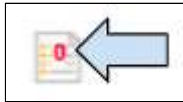


This symbol can be seen next to the title of each section in Track. It facilitates collaboration by allowing comments to be sent between Tearfund staff and Partner staff who are working within the same document.



## 4.5.1 Add an Action

Either a Tearfund user or a Partner user can add a new Action.



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



2. Type a message in the box, then click on **Add Action**



3. The message has been added to the **Action List** and is now visible as a (1) in the relevant section.

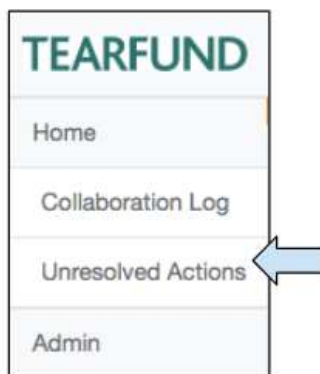
Email notifications are not sent after an Action has been created. When the proposal next changes status (ie. from Implementer Draft to Tearfund Review or vice versa), users should check the Unresolved Actions tab on the left hand navigation panel to check for Action messages.

## 4.5.2 Unresolved Actions

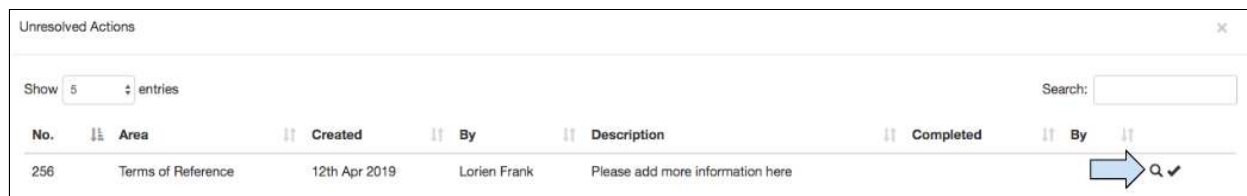
A proposal cannot be moved to Approved status whilst it has unresolved actions. If an attempt is made to do so, the following error message will appear:



A section entitled **Unresolved Actions** is located in the left hand navigation bar under Projects.



1. Click on **Unresolved Actions** to open a new window showing the Action messages



2. Click on the **Search icon** for Track to search for the task. The screen will refresh and the user will be taken to the area in which the Action message was written.



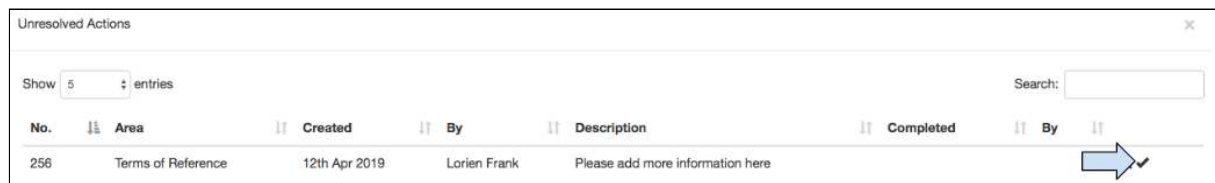
3. Locate and then complete the Action.

### 4.5.3 Complete / Resolve an Action

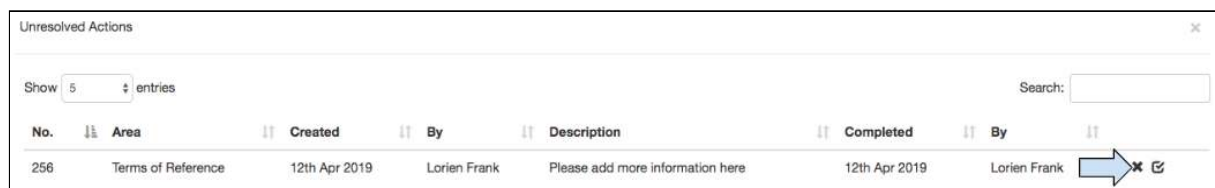
Once an action has been completed, this should be registered in Track.



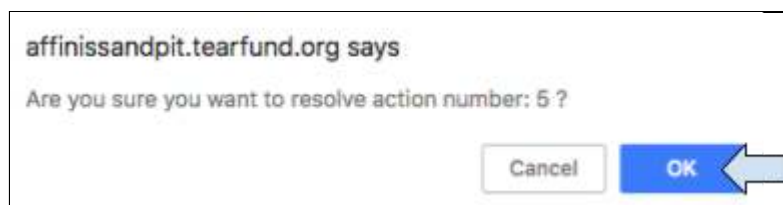
1. Find the relevant action and click on the icon to open the Action list.



2. Click on the **Tick** icon to set the task as **Complete**. This will automatically enter a user name and completion date.



3. Either click on the **'x'** icon to cancel the last action or click on the **'tick'** icon to set the task as **Resolved**.



4. A pop up box will open asking if the user is sure they want to resolve the task. Click on **OK** to resolve the task, then click on the close icon (**x**) in the top right corner to close the Task List box.

The Unresolved Actions box (which can be accessed from the left hand navigation panel) should now be empty.

## 4.6 Budget



This section is not intended to manage the budget of the project or programme. This section is intended to only record the proposed budget at the time of the setup of the proposal. Budget tracking is not available in Track. A link to the actual project budget document should be added.

A form with three input fields. The first field is labeled 'Total Budget Amount (£)' and contains '0.00'. A blue arrow labeled '1' points to this field. The second field is labeled 'Budget version date' and contains '16/02/2019'. A blue arrow labeled '2' points to this field. To the right of the date field is a yellow dropdown menu with 'dd/mm/yyyy' selected. The third field is labeled 'URL Link to Financial Summary spreadsheet' and is empty. A blue arrow labeled '3' points to this field.

1. Enter the **project budget**
2. Enter the **date**
3. Add a **URL link** to another financial spreadsheet

A screenshot of the 'Financial Summary' page. It features a narrative editor at the top and a table below. The table has columns for 'Activity Year', 'Year 1 (£)', 'Year 2 (£)', and 'Year 3 (£)'. The rows are: 'Supporting Partner', 'Second supporting partner: (state name) (if applicable / add further lines if needed)', 'Local and other income', and 'Total (£)'. Blue arrows with numbers 4 through 8 point to the following elements: 4 points to the 'Supporting Partner' text box; 5 points to the 'Year 1 (£)' column header; 6 points to the 'Second supporting partner' text box; 7 points to the 'Local and other income' text box; 8 points to the 'Total (£)' column header.

4. Edit the box by entering the name of the organisation that will provide financial support
5. Enter the annual breakdown of the budget requested
6. If the project will be financially supported by more than one partner, add these details in the additional columns.
7. Add details about local or other income sources.
8. Manually enter the total budget per year



9. When the budget screen is complete, click on **Save and Continue** to move to the next screen

## 4.7 Reach



Go to [https://learn.tearfund.org/en/misc/partner\\_area/](https://learn.tearfund.org/en/misc/partner_area/) to watch an e-learning 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, organisations 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 5 groups of Targets to choose from in the Tags page.

- Beneficiaries
- Churches and Faith Groups
- Individuals and Communities
- Influencers
- Organisations and Institutions

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



Remember to select target types from both the 'Group' AND 'Sub-groups' in the Target section of the Tags tab.

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

### 4.7.1 Beneficiaries



If **Beneficiaries** was selected in the Target section of the Tags tab, reach data will be entered into any of the following tabs:

(Note: In the Micah template, it is only possible to choose 'Beneficiaries' as a 'sub-group' target type. In the Donor template there are a number of additional 'sub-group' types from which to choose, as can be seen in the screenshot below)

1. Select the relevant tab
2. Add the number of **direct and indirect beneficiaries**

### 3. Add **narrative** 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 theater 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.  $500 \times 3 = 1500$ .

#### **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 three settings for beneficiary disaggregation in Track

- 1) Two age groups
- 2) Six age groups
- 3) Two age groups, disability considered

**Beneficiary disaggregation** ⓘ

**Beneficiary setting**

Two age groups ← 4

|                              | Direct | ↔ 5 ↔ | Indirect | %  |
|------------------------------|--------|-------|----------|----|
| Female Under 18 years old    | 0      |       | 0        | 0% |
| Male Under 18 years old      | 0      |       | 0        | 0% |
| Female 18 years old and over | 0      |       | 0        | 0% |
| Male 18 years old and over   | 0      |       | 0        | 0% |
| <b>Total</b>                 | 7 → 7  |       | 0        |    |

↓ 6

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

5. 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.

6. The % column will automatically update

7. 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 2 otherwise it will not be possible to change screen.



**Beneficiaries by location**

| Location | Direct                         | Indirect                       |
|----------|--------------------------------|--------------------------------|
| Liberia  | <input type="text" value="0"/> | <input type="text" value="0"/> |

**Beneficiaries by theme**

| Theme         | Direct                         | Indirect                       |
|---------------|--------------------------------|--------------------------------|
| Food security | <input type="text" value="0"/> | <input type="text" value="0"/> |
| WASH          | <input type="text" value="0"/> | <input type="text" value="0"/> |

8. 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 2 otherwise it will not be possible to change screen.

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

10. Click on **Save** before moving to add data to the next Reach tab or click on **Save and Continue** to move to the next Track tab which is Logic.

#### 4.7.2 Churches and Faith Groups

|   |         |   |   |
|---|---------|---|---|
| <input checked="" type="checkbox"/> Churches & Faith Groups ⓘ | 100.0 % | <input checked="" type="checkbox"/> Christian societies | <input checked="" type="checkbox"/> Denominations         |
|   |         | <input checked="" type="checkbox"/> Local churches      | <input checked="" type="checkbox"/> Theological educators |

If **Churches and Faith Groups** was selected in the Target section of the Tags tab, reach data will be entered into any of the following tabs.

(The same information is displayed on each tab)

1. Select the relevant tab
2. Add the **number of targets** in each 'subgroup' that the project will reach
3. Add **narrative** if required
4. Click on Next to add data to the next Reach tab

5. Click on **Save and Continue** to move to the next Track tab

#### 4.7.3 Individuals and Communities

If **Individuals and Communities** was selected in the Target section of the Tags tab, reach data will be entered into any of the following tabs.

(The same information is displayed on each tab).

1. Select the relevant tab
2. Add the **number of targets** in each 'subgroup' that the project will reach.

3. Add **narrative** if required



4. Click on **Save** before moving to add data to the next Reach tab or click on **Save and Continue** to move to the next Track tab

#### 4.7.4 Influencers



If **Influencers** was selected in the Target section of the Tags screen, reach data will be entered into any of the following tabs.

(The same information is displayed on each tab except the 'Delegates' tab which will be shown in more detail below)

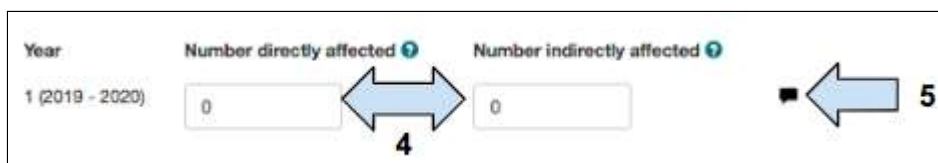


1. Select the relevant tab

2. Add the **number of targets** in each 'subgroup' that the project will reach.

3. Add **narrative** if required

If **'Delegates'** was chosen as a 'subgroup' target type the following additional information should be added to the reach tab.



4. Add the number of **direct and indirect beneficiaries**

5. Add **narrative** if required



### Beneficiary Disaggregation

There are three settings for beneficiary disaggregation in Track

- 1) Two age groups
- 2) Six age groups
- 3) Two age groups, disability considered

**Beneficiary disaggregation** ⓘ

**Beneficiary setting**

Two age groups ← 6

|                              | Direct | ↔ 7 ↔ | Indirect | %  |
|------------------------------|--------|-------|----------|----|
| Female Under 18 years old    | 0      |       | 0        | 0% |
| Male Under 18 years old      | 0      |       | 0        | 0% |
| Female 18 years old and over | 0      |       | 0        | 0% |
| Male 18 years old and over   | 0      |       | 0        | 0% |
| <b>Total</b>                 | 0      | → 9   | 0        |    |

↓ 8

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

7. 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.

8. The % column will automatically update

9. 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 2 otherwise it will not be possible to change screen.

| Beneficiaries by location ? |                                |                                |
|-----------------------------|--------------------------------|--------------------------------|
| Location                    | Direct                         | Indirect                       |
| Liberia                     | <input type="text" value="0"/> | <input type="text" value="0"/> |
|                             | ↔ 10 ↔                         |                                |
| <b>Total</b>                | <input type="text" value="0"/> | <input type="text" value="0"/> |

| Beneficiaries by theme ? |                                |                                |
|--------------------------|--------------------------------|--------------------------------|
| Theme                    | Direct                         | Indirect                       |
| Food security            | <input type="text" value="0"/> | <input type="text" value="0"/> |
| WASH                     | <input type="text" value="0"/> | <input type="text" value="0"/> |
|                          | ↔ 11 ↔                         |                                |
| <b>Total</b>             | <input type="text" value="0"/> | <input type="text" value="0"/> |

10. 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 2 otherwise it will not be possible to change screen.

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

|                                     |  |   |
|-------------------------------------|--|---|
| <input type="button" value="Save"/> | <input type="button" value="Save and Continue"/> | ← |
|-------------------------------------|--|---|

12. Click on **Save** before moving to add data to the next Reach tab or click on **Save and Continue** to move to the next Track tab

#### 4.7.5 Organisations and Institutions

|   |       |  |   |
|---|-------|--|---|
| <input checked="" type="checkbox"/> <b>Organisations &amp; Institutions</b> ? | 100 % | <input checked="" type="checkbox"/> Civil society groups | <input checked="" type="checkbox"/> Development actor     |
|   |       | <input checked="" type="checkbox"/> Networks             | <input checked="" type="checkbox"/> Partners              |
|   |       | <input checked="" type="checkbox"/> Public sphere        | <input checked="" type="checkbox"/> Resource organisation |

If **Organisations and Institutions** was selected in the Target section of the Tagging tab, reach data will be entered into any of the following tabs.

(The same information is displayed on each tab)

1. Select the relevant tab
2. Add the **number of targets** in each 'subgroup' that the project will reach.
3. Add **narrative** if required

4. Click on **Save** before moving to add data to the next Reach tab or click on **Save and Continue** to move to the next Track tab

## 4.8 Project Logic

### Project Logic Terminology

The following table provides some definitions of terms which can be found in the project 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 by 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.

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 has historically used a great number of indicators and so it has been difficult to measure specific things at a corporate level.

In order to ensure a consistent approach to capturing and assessing data across all of Tearfund's projects, programmes and initiatives, a menu of standard indicators has been designed. Users are encouraged to select from this common set of indicators so that over time Tearfund will be able to track progress across similar measures globally. This has been done by a number of other International NGOs and is seen as best practice.

A set of 8 output, 8 outcome and 3 impact indicators have been provided for each theme. It is now a mandatory requirement for users to choose at least three of these indicators for their projects.

- 1 output indicator (# of people directly reached by that theme)
- 1 output indicator (user choice)
- 1 outcome indicator

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 4.8.4 'Custom Indicators'](#).

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

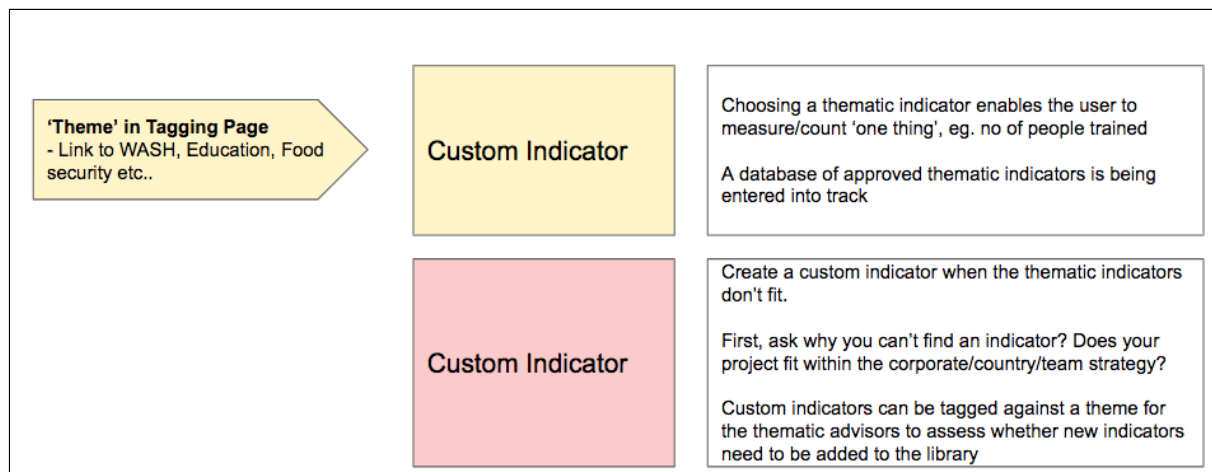
### Which Indicator to Choose?

- Thematic indicator: enables the user to measure/count one thing, eg. no of people trained
- Custom indicator: for when a thematic indicator does not fit

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?**



## Count Types

When selecting and writing our indicators, it is important to think about who/what is being counted. In order for Track to automatically update how many people you have reached, it is important that you set at least one indicator per each target group that you selected in the tagging screen.

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

- Target: beneficiaries
- Indicator: number of people trained
- Count type: beneficiaries

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: beneficiaries
- Indicator: number of communities with improved access to water
- Count type: communities

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 will of course 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'.

Please note that a custom count type which does not match a target type in the Tags page, will only update the indicator. It will not update the reach total.

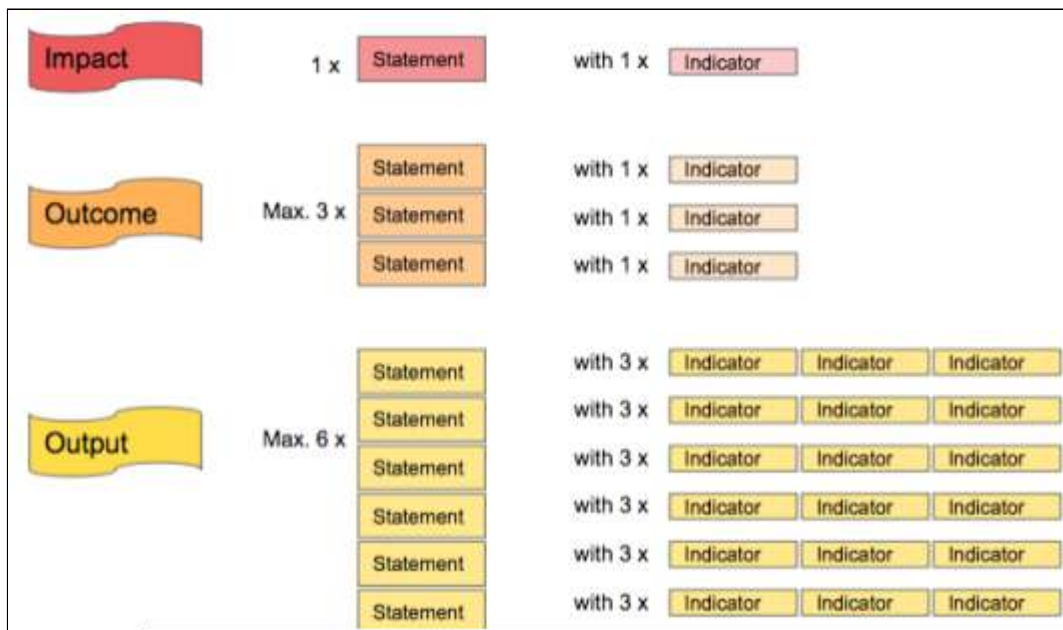
## Tearfund Recommendations

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

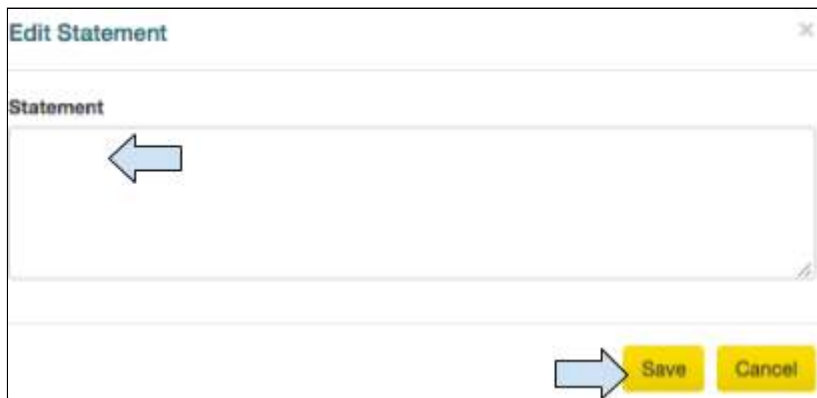
### 4.8.1 Add an Impact row



Go to [https://learn.tearfund.org/en/misc/partner\\_area/](https://learn.tearfund.org/en/misc/partner_area/) to watch an e-learning video which provides more information on 'Defining your Project Impact'.



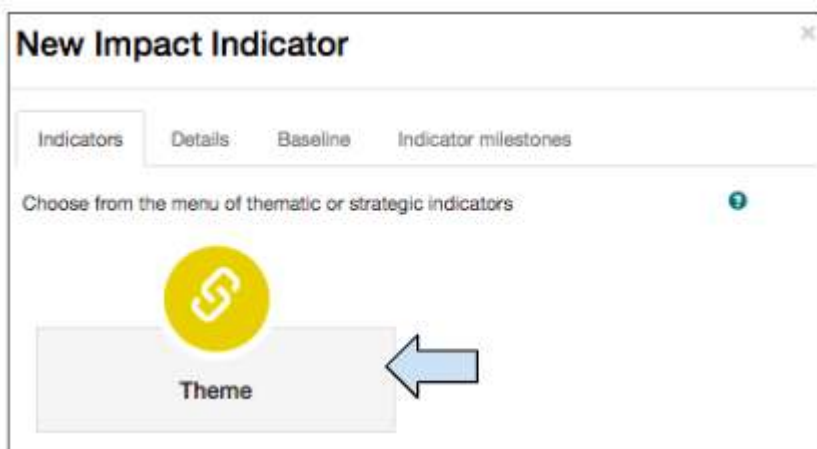
1. Click in the box to open the **Impact statement** box.



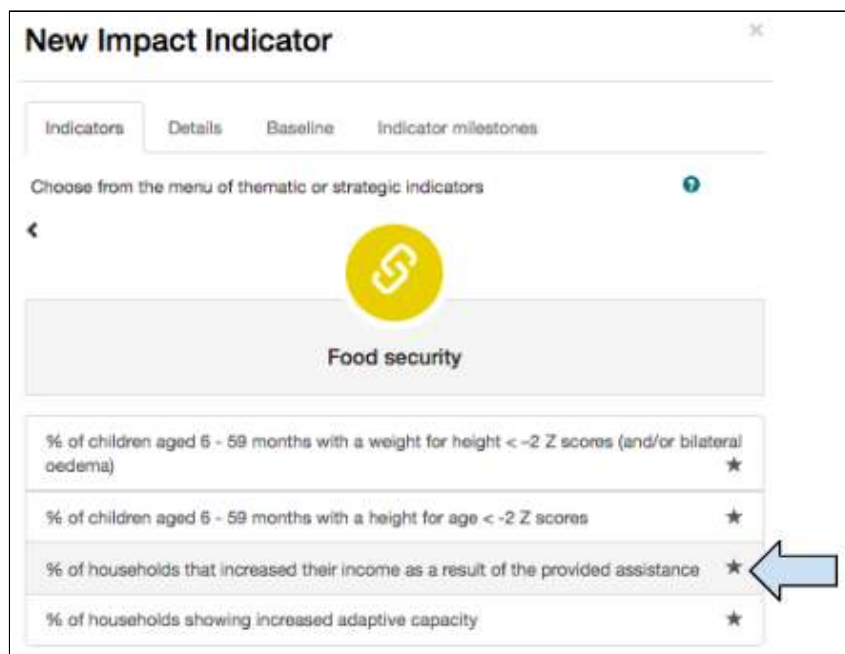
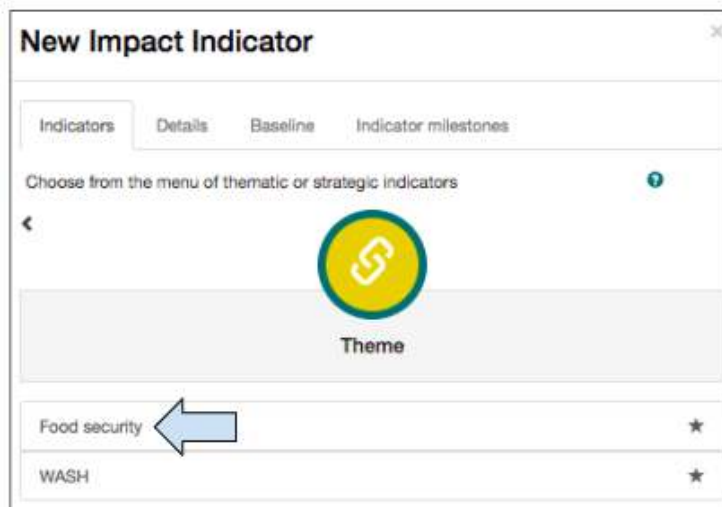
2. Type the **Impact statement** in the box and click on **Save**



3. Click on the '+' symbol to add an indicator



4. Click on **Theme** to open the thematic indicator database



5. 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 Tagging page and select it).

**New Impact Indicator**

Indicators Details Baseline Indicator milestones

Choose from the menu of thematic or strategic indicators

**% of households that increased their income as a result of the provided assistance**

From:

- Tagged Theme on project

Use indicator Back

6. Click on **use indicator**

**New Impact Indicator**

Indicators Details Baseline Indicator milestones

**Indicator title:** % of households that increased their income as a result of the provided assistance  
**Type:** Quantitative  
**Counted as percent?:** Yes

**Description**

← 7

**Means of verification**

← 8

**Theme**

Food security

9 → Next

7. Add a **description** of the indicator.

(In time, each indicator in the database will be matched with a description and this field will be automatically populated)

8. 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**

**New Impact Indicator**

Indicators Details **Baseline** Indicator milestones

Indicator title: % of households that increased their income as a result of the provided assistance  
Type: Quantitative  
Counted as percent?: Yes

Baseline date  ← 10

Baseline value  ← 11

At what percentage below the target should the status turn red?  
 % ← 12

13 → **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).

- When a project is on target the indicator status will be Green.
- When a project is off target (ie. activities are delayed or insufficient targets have been reached, according to the milestones), the indicator status will change to Amber.
- 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**

**New Impact Indicator**

Indicators Details Baseline **Indicator milestones**

**Indicator title:** % of households that increased their income as a result of the provided assistance  
**Type:** Quantitative  
**Counted as percent?:** Yes

| Baseline date | Baseline value |
|---------------|----------------|
| 01/01/2019    | 0              |

| Date                          | Value     |
|-------------------------------|-----------|
| <b>+ New target milestone</b> | <b>14</b> |

Save

14. Click on **New Target Milestone** to add milestones

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

16. Add additional milestones if required

(The milestone values will not be seen in this page but will be displayed later in the M&E Tracking tab).



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 the total number to be reached. For example in a project aiming to reach 400 beneficiaries the milestones could look like this:

|                          |            |     |
|--------------------------|------------|-----|
| Baseline value           | 01.01.2018 | 0   |
| 3 months milestone value | 31.03.2018 | 100 |
| 6 months milestone       | 30.06.2018 | 200 |
| Final milestone value    | 31.12.2018 | 400 |

17. Click on **Save** to return to the Project Logic tab and view the completed 'Impact Statement' row of the Project Logic

#### 4.8.2 Add an Outcome row



Go to [https://learn.tearfund.org/en/misc/partner\\_area/](https://learn.tearfund.org/en/misc/partner_area/) to watch an e-learning video which provides more information on 'Defining your Project Outcomes'.



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.
6. Additional Outcome Statements can be added if required by clicking on the '+ **New Outcome**' button

### 4.8.3 Add an Output row



Go to [https://learn.tearfund.org/en/misc/partner\\_area/](https://learn.tearfund.org/en/misc/partner_area/) to watch an e-learning video which provides more information on 'Defining your Project Outputs'.

| Statement  | Indicator title  | Means of verification | Risks and assumptions  |
|--|--|-----------------------|--|
| Farmers have increased their agricultural production | % of farmers reporting an increase in their agricultural production as a result of the provided assistance | Household Survey      | Farmers are able to use new seeds and knowledge from training sessions |

+ New Output

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.
2. Additional Output Statements can be added if required by clicking on the '**+ New Output**' button

### 4.8.4 Custom Indicators

In order to ensure a consistent approach to capturing and assessing data across all of Tearfund's projects, programmes and initiatives, a database of thematic indicators has been designed. Users are encouraged to select indicators from this database so that, over time, Tearfund will be able to track progress across similar measures globally.

Of course 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

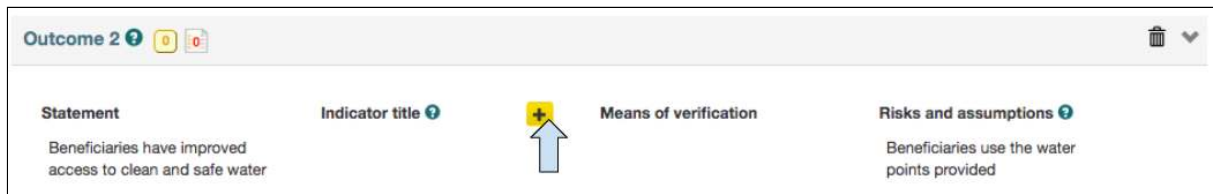
**Relevant:** appropriate to the changes and evaluation

**Economic:** can be obtained at a reasonable cost

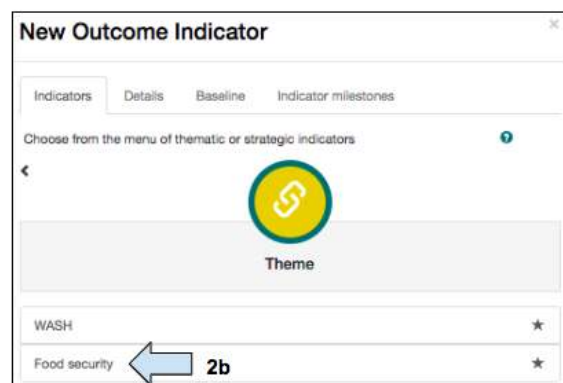
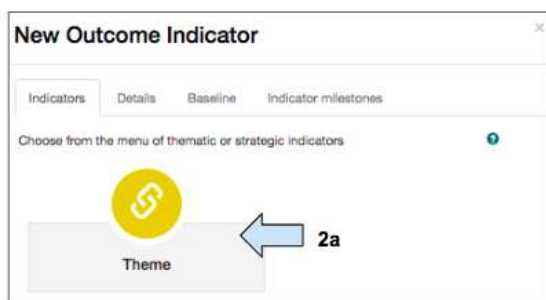
**Adequate:** the ability to provide sufficient information

**Monitorable:** easily monitored, and amenable to independent validation.

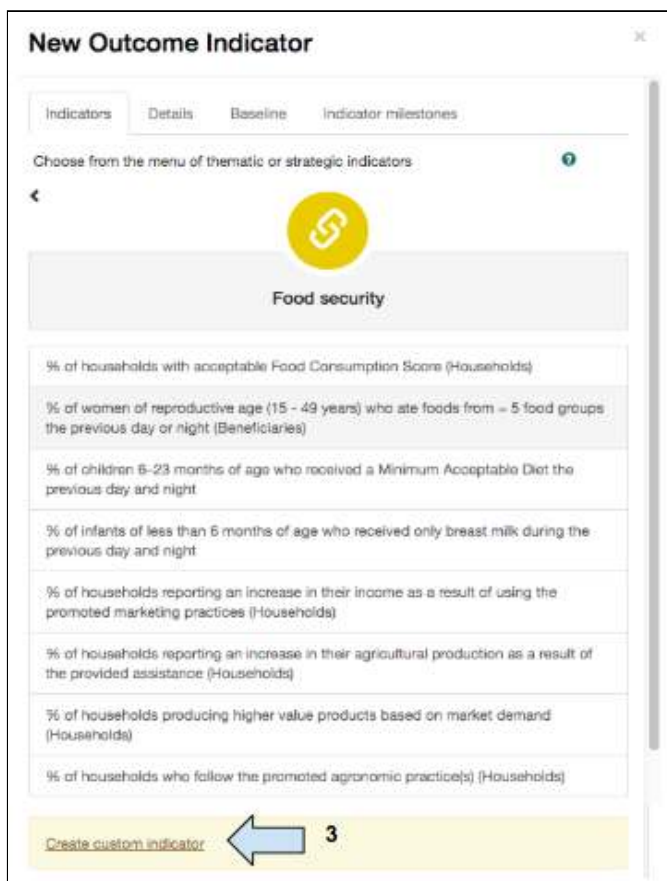
# Instructions



1. Click on the '+' symbol to add an indicator



2. Click on **Theme** to open the indicator database, then select the relevant Theme



3. Click on 'Create Custom Indicator'

The screenshot shows a 'New Outcome Indicator' form with the following fields and callouts:

- Indicator title:** A text input field with callout 4 pointing to it.
- Type:** Radio buttons for 'Quantitative' (selected) and 'Qualitative'. Callout 5 points to the 'Qualitative' option.
- Counted as percent?:** Radio buttons for 'Yes' and 'No' (selected). Callout 6 points to the 'No' option.
- Description:** A text input field with callout 7 pointing to it.
- Means of verification:** A text input field with callout 8 pointing to it.
- Theme:** A text input field with callout 9 pointing to it.
- Count type:** A dropdown menu with 'Select a count type' and callout 10 pointing to it.
- Custom count type:** A text input field with callout 10 pointing to it.
- Next:** A blue button with callout 11 pointing to it.

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

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

6. Select whether the indicator will be counted as a **percentage (%)**

7. Add a **description** of the indicator

8. Add the **means of verification**

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

10. Select a **standard count type** or create 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.

A custom count type which does not match a target type in the Tags page, can only be used to update the indicator. It cannot be used to update reach.



If a custom indicator has been entered that relates to 'beneficiaries' and it is counted as a percentage (%), then the user must leave the 'Count Type' section blank. This is because the beneficiary settings are disaggregated and the data cannot be used for a percentage (%) indicator.

11. Click on **Next** when the indicator is complete

**New Outcome Indicator**

Indicators Details **Baseline** Indicator milestones

**Indicator title:** % of beneficiaries using an improved drinking water source less than 30 minutes or 1km away  
**Type:** Quantitative  
**Counted as percent?:** Yes

**Baseline date**  ← **12**

**Baseline value**  ← **13**

**At what percentage below the target should the status turn red?**  
 % ← **14**

**15** → **Next**

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

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

14. 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)

Once the project is in Implementation status and activities are carried out and updated against an indicator, Track will automatically inform the user if the the indicator is 'On Track' (G: green), 'Delayed' (A: amber) or 'Late' (R: red).

In Step 12, the user is given the option to choose at which percentage below target the Red status is shown.

15. Click on **Next**

**New Outcome Indicator**

Indicators Details Baseline **Indicator milestones**

**Indicator title:** % of beneficiaries using an improved drinking water source less than 30 minutes or 1km away  
**Type:** Quantitative  
**Counted as percent?:** Yes

| Baseline date | Baseline value |
|---------------|----------------|
| 01/01/2019    | 0              |
| Date          | Value          |

+ New target milestone **16**

Save

16. Click on **New Target Milestone** to add milestones

Date Value

dd/mm/yyyy 17

+ New target milestone 18

19 Save

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

18. Add additional milestones if required

(The milestone values will not be seen in this page but will be displayed later in the M&E Tracking tab).



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 the total number to be reached. For example in a project aiming to reach 400 beneficiaries the milestones could look like this:

|                          |            |     |
|--------------------------|------------|-----|
| Baseline value           | 01.01.2018 | 0   |
| 3 months milestone value | 31.03.2018 | 100 |
| 6 months milestone       | 30.06.2018 | 200 |
| Final milestone value    | 31.12.2018 | 400 |

19. Click on **Save** to return to the Project Logic tab and view the completed row of the Project Logic

#### 4.8.5 Edit a cell in Project Logic

| Statement  | Indicator title  | Means of verification | Risks and assumptions  |
|--|--|-----------------------|--|
| Farmers have increased their agricultural production | % of farmers reporting an increase in their agricultural production as a result of the provided assistance | Household Survey      | Farmers are able to use new seeds and knowledge from training sessions |

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.

## 4.8.6 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.

The following screenshot is provided as an example of 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).





**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

### 4.8.7 Add Activities to an Output



Go to [https://learn.tearfund.org/en/misc/partner\\_area/](https://learn.tearfund.org/en/misc/partner_area/) to watch an e-learning 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.

| Statement   | Indicator title  | Means of verification                         | Risks and assumptions  |
|---|--|---|--|
| Farmers have inputs and knowledge required to diversify crop production | Number of beneficiaries trained<br>Number of beneficiaries that have received new seed types | Training attendance lists<br>Household survey | Farmers are able to use new seeds and knowledge from training sessions |

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**

**Create activity**

Details Indicators Tags

**Output statement** Farmers have inputs and knowledge required to diversify crop production

**Activity description** Conduct training of farmers in sustainable agricultural practices

**Start Date** 01/03/2019      **End Date** 31/03/2019

Which indicators should the activity link to?

Select an indicator

+ Add indicator link

Next

7. Decide if the activity should be linked to an indicator (see [Example](#) in the box on page 87 below).

(For example, if your output indicator is 'the number of beneficiaries trained' and your activity is to 'train beneficiaries' it is important to link them so that when you are in project implementation, updating activities will automatically update your output indicators).

Which indicators should the activity link to?

✓ Select an indicator

Number of beneficiaries trained

Number of beneficiaries that have received new seed types

None

8. If yes, **select the indicator** to which it should be linked.

Which indicators should the activity link to?

Number of beneficiaries trained

+ Add indicator link

Next

9. It is possible to link the activity to another indicator. To do this, click on **Add indicator link**

10. Click on **Next**

**Create activity**

Details Indicators Tags

**Output statement** Farmers have inputs and knowledge required to diversify crop production

**Activity description** Conduct training of farmers in sustainable agricultural practices

**Start Date** 01/03/2019      **End Date** 31/03/2019

What does this activity contribute to?

**Approach**

Capacity building & support

Awareness raising

Assistance modality

In kind

**Theme**

Food security

Save

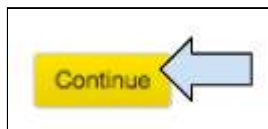
11. Select the **Approach and Theme** that the activity contributes to (The tags available here are driven by what was selected in the Tagging screen. If only one theme was selected, the theme section won't appear in the Create activity box since there isn't anything for the user to choose between. The activity is automatically tagged against the one theme selected).

12. Click on **Save** to return to the Activity box

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

14. Click on **Create activity** to add more activities to the output

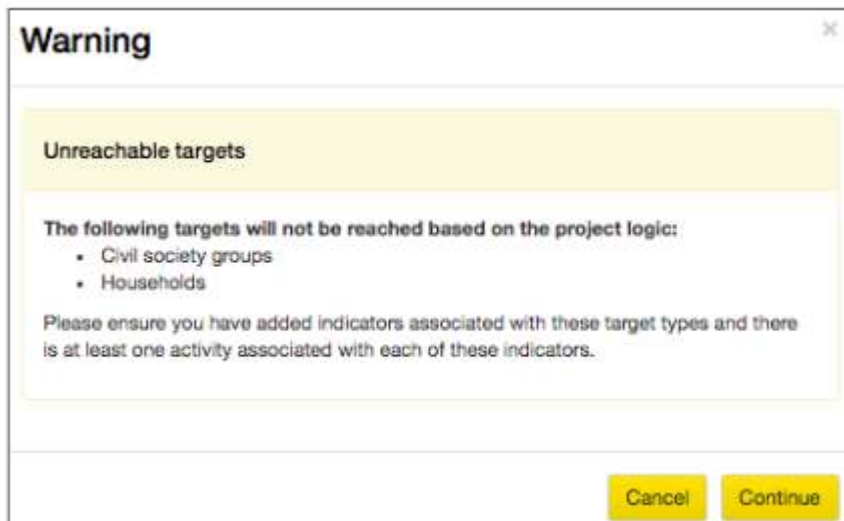
15. Click on **Close** when all activities have been added



16. Once all the Project Logic information has been entered, click on **Continue** to save and move to the next tab

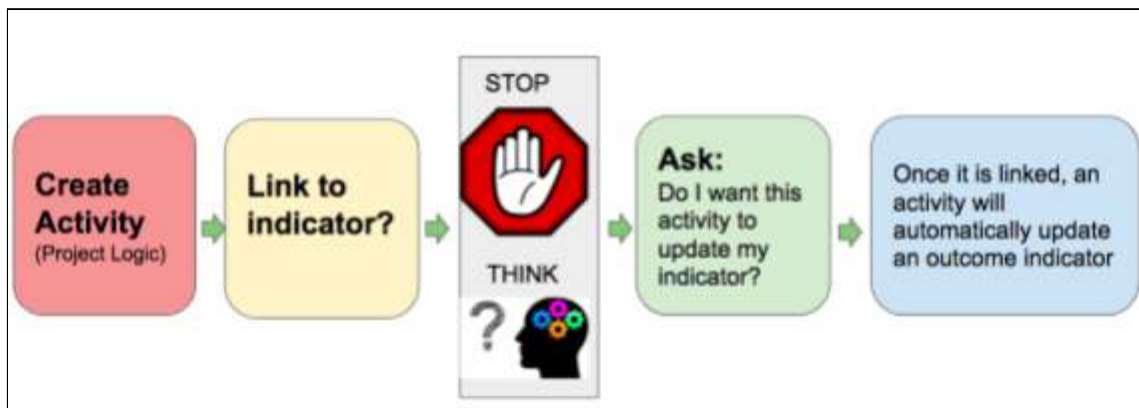
17. It is possible that an automated warning message will appear at this point.

In the example below, the user is being advised that their project logic is incomplete, ie. that two project targets (local churches and households) will not be reached by current activities. In this case the user should go back to check their logic and add outputs/activities as necessary.



The Add Activity section of the Project Logic tab is the second place where users need to carefully think through in order to avoid double counting

Figure 10: Steps to avoid double counting #2



It is possible to create a double count at this stage if the user selects several activities to update the same output indicator. The example below will demonstrate how a double count could be created and will provide advice on how to avoid it.

## Example

### How a double count could be created by accident

Let's say that we have 400 beneficiaries and we have created the following Project Logic:

- Output Statement: Beneficiaries have inputs required to diversify crop production
  - Output Indicator: Number of beneficiaries that have received new seed types
    - Activity 1: Purchase Seeds
    - Activity 2: Distribute Seeds

**Q:** Should we link both activities to the indicator? What will happen if we do?

**A:** If we link the purchase of seeds for 400 farmers to the indicator - the indicator will be updated to 400 farmers reached. If we also link the distribution of seeds to 400 farmers - the indicator will also be updated to 400 farmers reached. This would result in a target of 400 farmers but an indicator update of 800 farmers reached, ie. a double count.

### How to avoid a double count at the 'link to an indicator' stage

In order to avoid creating a double count, the user should choose only one of the activities to update the indicator. In our example, it would make sense to choose the distribution of seeds to update the indicator.

### In summary

- By linking activities to output indicators, the indicator is automatically updated when the activities are updated
- It is possible to link an activity to more than one indicator
- Do not automatically link an activity to an indicator - stop first to consider if it will create a double count and then choose just one of the activities
- If an activity is not linked to an output indicator, it means that any updates recorded against the activity will remain at activity level and not be aggregated up against an output indicator

## 4.9 Reach Mapping



Go to [https://learn.tearfund.org/en/misc/partner\\_area/](https://learn.tearfund.org/en/misc/partner_area/) to watch an e-learning video which provides more information on 'Reach Mapping'.

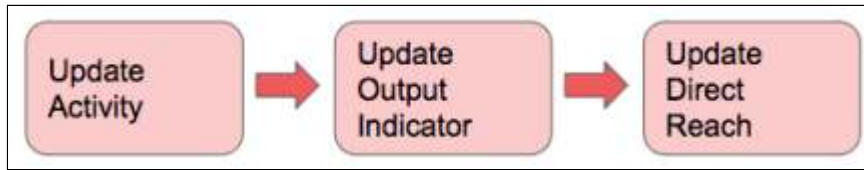


In this section users will learn how to select the activities which can be used to contribute to direct project reach.

The process of updating direct project reach is automated in Track and takes place as follows:

- i) An activity is updated
- ii) The activity update creates an output indicator update
- iii) The activity / output indicator update can be used to update direct project reach

**Figure 11: The process of updating direct project reach**



In order for an activity to automatically update an output indicator and project reach, two things must be in place:

- 1) The activity must be linked to the output indicator (see [Section 4.8.7 'Add Activities to an Output'](#)).
- 2) The output indicator Count Type and the Target Type must be the same (project targets were chosen in [Section 4.2.9 'Targets'](#) in the Tags page)

For example in Figure 12 below, the first activity to train farmer beneficiaries can be used to update direct reach count because the output indicator count type (beneficiaries) matches the target type (beneficiaries).

However an activity to construct wells cannot be used to update direct reach count as the output indicator count type (wells) does not match the target type (beneficiaries).

**Figure 12: Output indicator Count Types must match Target types**

| Target type          | Output Indicator Count Type | Activity         | Update direct reach? |
|----------------------|-----------------------------|------------------|----------------------|
| Beneficiaries        | Beneficiaries               | Train farmers    | Beneficiaries        |
| Civil Society Groups | Civil Society Groups        | Develop Capacity | Civil Society Groups |
| Beneficiaries        | Wells                       | Construct Wells  | Beneficiaries        |

Although, in this scenario, it is not possible to update direct reach count with a well construction activity update, the data would still be recorded against the output indicator.



## Instructions

What each user will see in the Reach Mapping page will depend on the type of project and the type of activities created. It is therefore not possible to write generic instructions for this section. The instructions and screenshots below relate to the project that has been created for the purposes of this Training Manual. Hopefully this example will provide enough context for the user to be able to understand and use their own Reach Mapping page.

To provide some context, these are the 4 activities which were created in the Project Logic for the 'Training Manual Project':

| Activity ID | Description   | Start Date | End Date   |
|-------------|---|------------|------------|
| 908         | Purchase seeds  | 01/02/2019 | 28/02/2019 |
| 909         | Distribute Seeds  | 01/03/2019 | 31/03/2019 |
| 910         | Conduct training of farmers in sustainable agricultural practices | 01/03/2019 | 31/03/2019 |
| 911         | Build Wells   | 01/10/2019 | 30/11/2019 |

Activity 908 'Purchase seeds' was not linked to the output indicator  
Activities 909, 910 and 911 were all linked to an output indicator.

This is the subsequent view of the Reach Mapping page (see explanation below).

Select the activities that will contribute towards direct project reach ?

**1.1 Output statement:** Farmers have inputs and knowledge required to diversify crop production  
b) Indicator: Number of beneficiaries that have received new seed types  
CountType: Beneficiaries Final target milestone: 400  
Distribute Seeds  ←

a) Indicator: Number of beneficiaries trained  
CountType: Beneficiaries Final target milestone: 400  
Conduct training of farmers in sustainable agricultural practices  ←

**2.1 Output statement:** Beneficiaries have sufficient safe water points available  
a) Indicator: Number of wells constructed  
CountType: Wells Final target milestone: 40  
Build Wells

### **Under Output Statement 1.1:**

Activity 908 'Purchase seeds' cannot be seen because it was not linked to an output indicator. This means it has been automatically removed by Track as it cannot be used to update direct project reach.

Activity 909 'Distribute seeds' is shown with a box which could be ticked allowing updated activity data to contribute to direct project reach

Activity 910 'Train farmers' is shown with a box which could be ticked allowing updated activity data to contribute to direct project reach

**Warning!**

If you cannot see an activity in the Reach Mapping page it has probably not been linked to an indicator.

(To link an activity to an indicator see Section 4.8.7 'Add activities to an output').

Alternatively:

- Go back to the Logic tab.
- Click on the List Icon in the output row to open the list of activities.
- Click on the pencil 'Edit' icon to open the Edit Activity box
- Click on the second tab called 'Indicators'
- Link to an indicator in the drop menu next to 'Do you want to link this activity to an indicator?'

**Under Output Statement 2.1:**

Activity 911 'Build Wells' is shown but the section is greyed out as it cannot be used to update direct project reach.

(As we remember from the explanation above, a well construction activity cannot be used to update direct project reach because the output indicator count type and target type are different)

So now that we understand what we are seeing in the Reach Mapping page, we are ready to select the activities that will contribute to direct project reach.

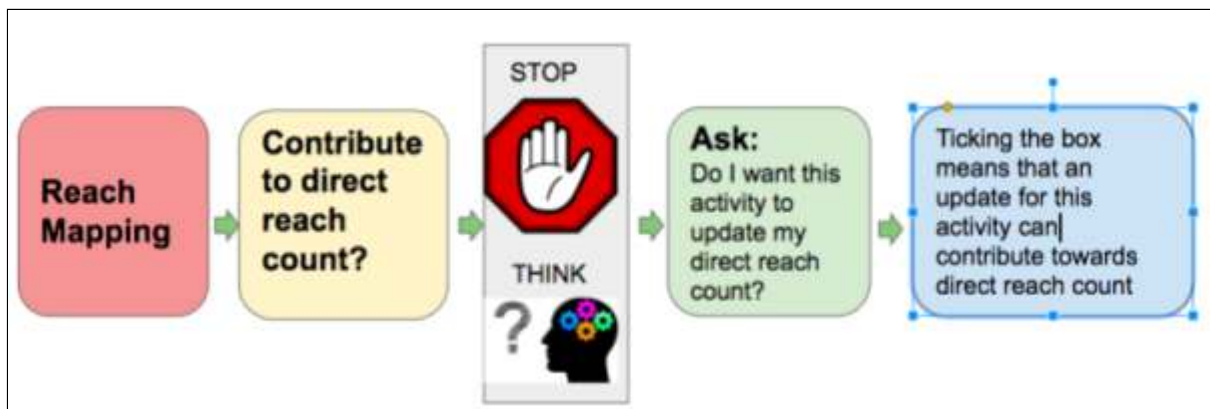
**Q:** Which of the two available activities in our example scenario should we select?

- Distribute Seeds?
- Train Farmers?
- Both of them?
- Some of both of them?



The Reach Mapping section is the third place where users needs to be careful to avoid double counting

**Figure 13: Steps to avoid double counting #3**



It is possible to create a double count at this stage if the user selects several activities to 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

#### How a double count could be created by accident

We have 400 beneficiaries and 2 activities that we could use to contribute to direct project reach.

- Activity 1: Distribute seeds
- Activity 2: Train farmers

**Q:** Should we use both activities to update direct project reach? What will happen if we do?

**A:** If we select 'Distribute Seeds' - an activity update will result in direct project reach being updated to 400 (farmers receiving seeds). If we also select 'Train farmers' - an activity update will result in direct project reach being updated to 400 (farmers trained). This would result in a target of 400 beneficiaries but a direct reach count of 800 beneficiaries reached, ie. a double count.

#### How to avoid a double count at the 'reach mapping' stage

There are 2 options to avoid creating a double count.

- 1) The user chooses only one of the activities to update direct project reach. In our example, it could be either activity but perhaps the user could select the last activity to take place.
- 2) The user creates an additional activity in the Project Logic whose purpose is solely to update direct project reach.

In this case, in our Training Manual Project scenario, there would have been 5 activities

- Purchase seeds
- Distribute seeds
- Train farmers
- **Update direct project reach**
- Build wells

Note. The new activity 'update direct project reach' would have to be linked to an output indicator in order for it to be used to contribute to direct project reach

Please note, the user still has the option to choose all of the activities to contribute to direct project reach. In this case, all available activities should be ticked in the reach mapping page. However the user must pay careful attention whilst updating activities during the Implementation Phase in order to avoid creating a double count.



If, after careful consideration, the user decides that several activities should be able to contribute to direct project reach, then all relevant activities should be ticked.

There is a final step during the updating of activities in Implementation status where the user can, again, try to avoid a double count.

#### 4.9.1 Select activities that will contribute to Direct Project Reach

Finally, returning now specifically to the Reach Mapping page of the Training Manual Project.

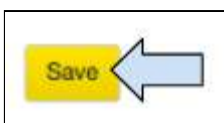
Select the activities that will contribute towards direct project reach ?

**1.1 Output statement:** Farmers have inputs and knowledge required to diversify crop production  
b) **Indicator:** Number of beneficiaries that have received new seed types  
**CountType:** Beneficiaries **Final target milestone:** 400  
Distribute Seeds

a) **Indicator:** Number of beneficiaries trained  
**CountType:** Beneficiaries **Final target milestone:** 400  
Conduct training of farmers in sustainable agricultural practices

**2.1 Output statement:** Beneficiaries have sufficient safe water points available  
a) **Indicator:** Number of wells constructed  
**CountType:** Wells **Final target milestone:** 40  
Build Wells

1. Click to select the 'Train farmers' **activity** which will be used to contribute to direct project reach



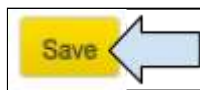
2. Click on **Save** at the bottom left of the screen to save the activities which were selected to update Reach.

#### 4.9.2 Validate Logic

The 'Validate Logic' function has been developed to assist users in the Reach Mapping tab. It provides a visual guide to whether the project logic has been correctly entered into Track, showing:

- 1) Are selected Tags reachable?  
(Will indicators and activities enable the user to update reach for the selected targets?)
- 2) Do indicator milestones match up with reach targets?  
(Does the sum of indicators counting the same target type match the reach target?)

## Instructions

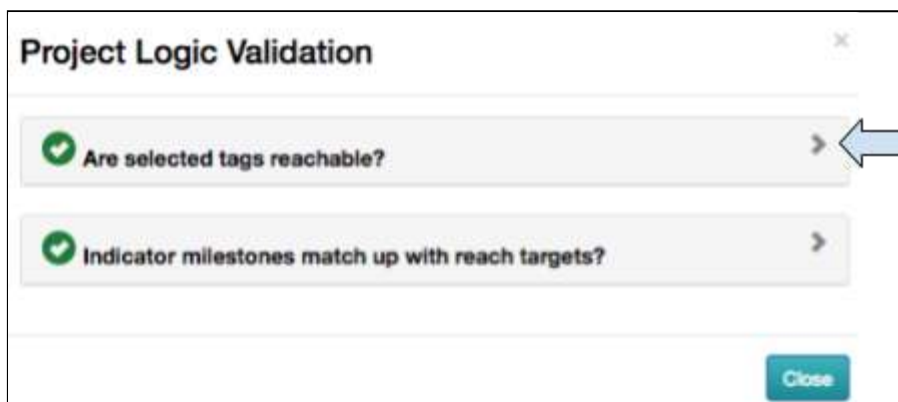


1. Click on **Save** at the bottom left of the screen to save the activities which were selected to update Reach.



2. Click on the **Validate Logic** button at the bottom right of the screen to open the Project Logic Validation box.

### 1) Are Selected Tags Reachable?



3. Click on the first tab '**Are selected tags reachable?**'

### **Example 1: Everything is ticked**

| Are selected tags reachable? |                    |                                |                        |
|------------------------------|--------------------|--------------------------------|------------------------|
| Target                       | Indicator selected | Activities linked to indicator | Reach mapping selected |
| Beneficiaries                | ✓                  | ✓                              | ✓                      |

Here we can see a visual map which shows us the following:

- i) indicators have been selected that have 'Beneficiaries' as a target type (Project Logic tab)
- ii) activities have been entered and linked to the indicator (Project Logic tab)
- iii) activities have been selected that will update project reach (Reach Mapping tab)

**Example 2: Something is not ticked**

| ✖ Are selected tags reachable? |                    |                                |                        |
|--------------------------------|--------------------|--------------------------------|------------------------|
| Target                         | Indicator selected | Activities linked to indicator | Reach mapping selected |
| Beneficiaries                  | ✔                  | ✔                              | ✖                      |

Here we can see a visual map which shows us that no activities have been selected that will update project reach (Reach Mapping tab).

2) Indicator Milestones match up with Reach Targets?

**Project Logic Validation** ×

✔ Are selected tags reachable? >

✔ Indicator milestones match up with reach targets? >

Close

4. Click on the second tab 'Indicator milestones match up with reach targets?'

**Example 1: Everything is ticked**

| ✔ Indicator milestones match up with reach targets? |                     |  |
|---|---------------------|--|
| Target  | Direct reach target | Mapped indicator final target milestones ? |
| Beneficiaries                                       | 400                 | 400  |

Here we can see a visual map which shows us the following:

- i) 400 direct beneficiaries were selected (Reach tab)
- ii) The sum of the target milestones for the indicators targeting 'beneficiaries' is 400 (Project Logic tab)

## Example 2: Something is not ticked

| ✖ Indicator milestones match up with reach targets? <span style="float: right;">▼</span> |                     |  |
|--|---------------------|--|
| Target   | Direct reach target | Mapped indicator final target milestones <span style="color: blue;">?</span> |
| Beneficiaries  | 400                 | 200  |

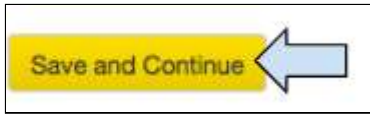
Here we can see a visual map which shows us the following:

- i) 400 direct beneficiaries were selected (Reach tab)
- ii) The sum of the target milestones for the indicators targeting 'beneficiaries' is 200 (Project Logic tab)

5. If something is not ticked in one of these sections, the user should go back to the relevant tab and correct or add the missing information.

Here is a reminder of which part of the Validate Logic function relates to which section of Track.

| <b>Are Selected Tags reachable?</b>                     |  |
|---|--|
| Target  | The target which was selected in the Target section in the <b>Tags tab</b>   |
| Indicator selected                                      | The indicator selected in the <b>Project Logic tab</b> should have a count type which matches the target type              |
| Activities linked to indicator                          | When adding an activity in the <b>Project Logic tab</b> , it should be linked to the relevant indicator                    |
| Reach Mapping selected                                  | Is the activity selected in the <b>Reach Mapping tab</b> ?   |
| <b>Indicator Milestones match up with Reach Targets</b> |  |
| Target  | The target which was selected in the Target section in the <b>Tags tab</b>   |
| Direct reach target                                     | The number of direct beneficiaries that were entered in the <b>Reach tab</b>   |
| Mapped indicator final target milestones                | The sum of the target indicator milestones counting the same target type that were entered in the <b>Project Logic tab</b> |



6. Once the Validate Logic box is correct, click on **Save and Continue** to move to the next tab.

## 4.10 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 Reach and Logic pages. The user can also create an M&E Plan.

| Tags <span>0</span> <span>0</span>              |   |  |  |
|---|---|--|--|
| <b>Global approach</b><br>Community development | <b>Approach</b><br>Capacity building & support<br>Assistance modality<br>Awareness raising<br>In kind | <b>Reason for the situation</b><br>Economic poverty<br><br><b>Theme</b><br>Food security<br>WASH | <b>Location</b><br>• Liberia<br><br><b>Implementer</b><br>Association of Evangelicals of Liberia |
| <b>Target</b><br>Beneficiaries                  | <b>Contribution to Tearfund outcome</b><br>Communities transformed                                    | <b>Sustainable Development Goals (SDGs)</b><br>2: Zero hunger<br>6: Clean water and sanitation   |  |

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

| Reach <span>0</span> <span>0</span> |                          |        |                            |        |
|-------------------------------------|--------------------------|--------|----------------------------|--------|
| 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.

| 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 Implementation phase, the indicator tracking table would be used to manually update Outcome and Impact indicators.

| 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  |

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 Implementation phase, this table would be used to update activities which would automatically update the Output indicators.



Any evaluations or stories that are available for a project can be accessed via a link in these sections (the user must first add the links).

| 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       |                             |                           |                               |  |                               |
| Output  | Beneficiaries have sufficient safe water points available | Number of wells constructed  | Community Survey       |                             |                           |                               |  |                               |

[+Add Plan Item](#)

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





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.

|   |
|---|
| <p><b><u>Objectives / Results chain:</u></b><br/>The impact, outcome and output statements entered into the Project Logic screen</p> <p><b><u>Data Source and Method:</u></b><br/>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.)</p> <p><b><u>Data collection frequency:</u></b><br/>How often will the data be collected?</p> <p><b><u>Who is verifying and analysing?</u></b><br/>Describe how the data will be verified and which people are involved in the verification and sign-off.<br/>Describe how the data will be analysed and which people are involved in the analysis.</p> <p><b><u>Information sharing:</u></b><br/>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.</p> <p><b><u>Information sharing frequency:</u></b><br/>Describe how often the information will be shared with the key audiences e.g. MONTHLY community meetings, QUARTERLY reporting</p> |
|---|


# Instructions


## 4.10.1 Creating the 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   |
|---------|--|--|------------------------|-----------------------------|---------------------------|-------------------------------|--|---|
| 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


**Edit M&E plan item**

**Objectives/Results Chain**  
Farmers in Gbarpolu County have improved food security 

**Data Source and Method**  
Household Survey 

**Who is collecting the data?**  


**Data collection frequency**  
Repeated  
None 

**Who is verifying & analysing?**  


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

Who will the information be shared with?

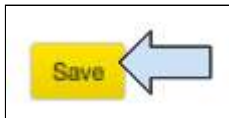
Information sharing frequency ⓘ

Repeated

None

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

| 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.

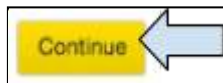
| Cost of data collection | Notes | Cost to share the information | Notes |
|-------------------------|-------|-------------------------------|-------|
| £                       |       | £                             |       |

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](#)).

## 4.11 Calendar



The calendar can be used as a project diary to keep track of reporting requirements. The user should enter types and due dates for all reports that will be submitted.

## 4.11.1 Add a Calendar Item

Calendar 0 0

Show 10 entries Filter:

| Type                       | Start Date | End/Due Date | Location | Owner | Status | Document |
|----------------------------|------------|--------------|----------|-------|--------|----------|
| No data available in table |            |              |          |       |        |          |

Showing 0 to 0 of 0 entries

Previous Next

+ Add event

1. Click on **Add event**

**Add event**

Start Date: [ ] dd/mm/yyyy 2

End Date: [ ] dd/mm/yyyy

Type: Other type Select a type 3

Location: Select a location 6

Owner Type: Tearfund 4

Owner: Select a user 7

Status: Select status 5

Document: [ ] Open 8

Notes: [ ] 9

10 Save

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

3. Click on the drop arrow and select the **event type**. Alternatively, click on the '**Other type**' link and add a new event.

4. Click on the drop arrow and select the **organisation that owns the event**, ie. Tearfund or partner

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

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

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

8. Enter the URL of the document that the calendar event relates to then click on 'Open' to access the document

9. Add **user notes** if required

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

#### 4.11.2 Update the Status of a Calendar Item



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

There is a RAG status associated with events 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

Calendar 0 0

Show 10 entries Filter: 1

| Type            | Start Date | End/Due Date | Location | Owner                                  | Status      | Document |
|-----------------|------------|--------------|----------|--|-------------|----------|
| Baseline survey | 01/01/2019 | 31/01/2019   | Liberia  | Association of Evangelicals of Liberia | Complete    | 2        |
| Field visit     | 01/02/2019 | 28/02/2019   | Liberia  |  | In progress |          |
| Mid term review | 30/06/2019 | 31/07/2019   | Liberia  | Association of Evangelicals of Liberia | Not started |          |
| Final report    | 01/12/2019 | 31/12/2019   | Liberia  | Association of Evangelicals of Liberia | Not started |          |
| Evaluation      | 01/12/2019 | 31/12/2019   |          |  | Not started |          |

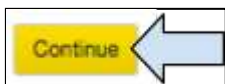
Showing 1 to 5 of 5 entries

Previous 1 Next

+ Add event

1. Type in the **filter** box to quick search for an event

2. Use the **edit** button to update the event status



3. Click on **Continue** to change screen

## 4.12 Summary



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

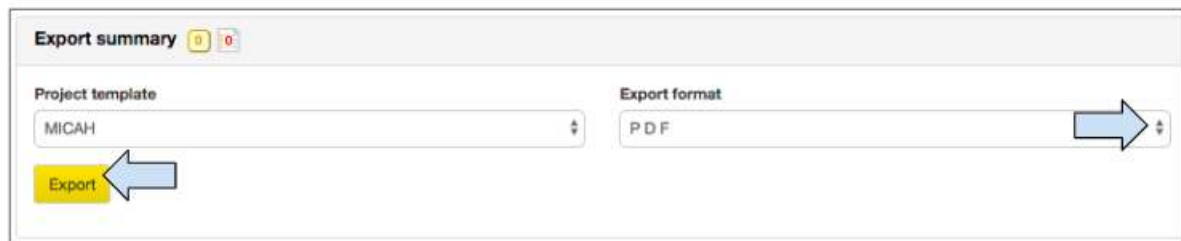
- Sections A-L of the summary page correspond to the information entered into Track.
- Sections M-Q correspond to information that can be added from other sources. If a user wants to add information to these sections they need to first export the proposal and then add the information manually.

1. 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.

### 4.12.1 Export Summary

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

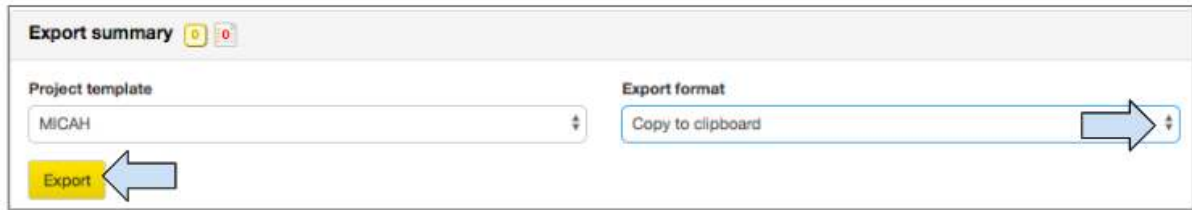
#### 4.12.1.1 Export to PDF



1. Click on the drop arrow next to Export format and select **PDF**
2. Click on **export** to create the pdf file
3. The file will be saved to the users' computer and should then be saved into the correct corporate folder.



#### 4.12.1.2 Copy to Clipboard

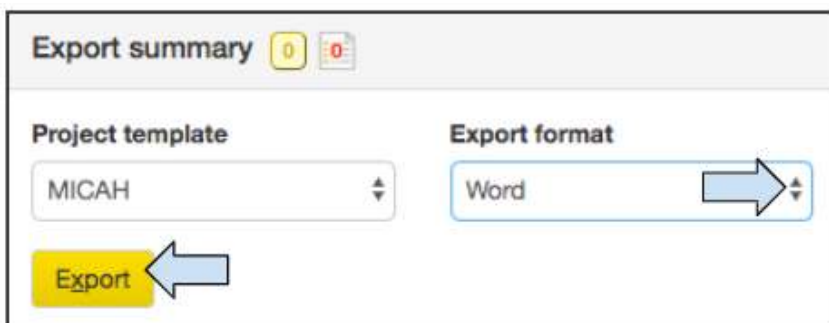


1. Click on the drop arrow next to Export format and select **Copy to Clipboard**
2. Click on **export**



3. A pop up message will appear telling the user that the proposal has been copied to the clipboard and is ready to be pasted. Click on **OK**.
4. Open a new Word document or Google Doc and paste the summary into the new document. The information can now be edited.

#### 4.12.1.3 Export to Word



1. Click on the drop arrow next to Export format and select **Word**
2. Click on **export** to create the pdf file
3. The exported file will be saved to the user's computer and should then be saved into the correct corporate folder.

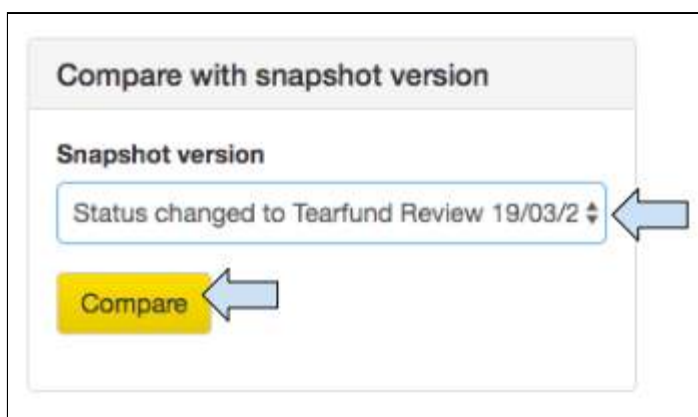
#### 4.12.1.4 Export Snapshot Version



1. Click on the drop arrow next to **Export format** and select the format in which you would like to export the document.
2. Click on the drop arrow next to **Snapshot version** and select the version of the document that you would like to export.
3. Click on **Export**.
4. The exported file will be saved to the user's computer and should then be saved into the correct corporate folder.

#### 4.12.2 Compare 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 you would like to compare with the current version.
2. Click on **Compare**.

Comparing Current version with Status changed to Aprovação Pendente da Tearfund 19/03/2019. Sections with differences are shown in red, use the links within these sections to show the previous version. [Clear](#)

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

Section has differences [Show previous version](#)

**Section C**

**Problems / issues to be addressed**

|   |  |
|---|--|
| <ul style="list-style-type: none"><li>• What specific problem(s) and opportunity(s) will the project address?</li><li>• How have you identified this need? Eg. Through previous experience, needs assessments, surveys, requests from communities etc.</li><li>• What are the root causes of the problem(s)? What do you hope to change with this project?</li><li>• Are there any underlying government policies or practices which are contributing to the problem(s)?</li><li>• Why have you chosen to address these problems?</li></ul> | The project will address the following problems: |
|---|--|

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



5. Click on **Continue** to move to the next tab.

## 4.13 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.

### Design Phase

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

- Changes in status of a Micah proposal (ie. with an implementing partner) involve moving the project between the Partner and Tearfund environments

(Please note, once a partner has received a proposal, 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?'](#))

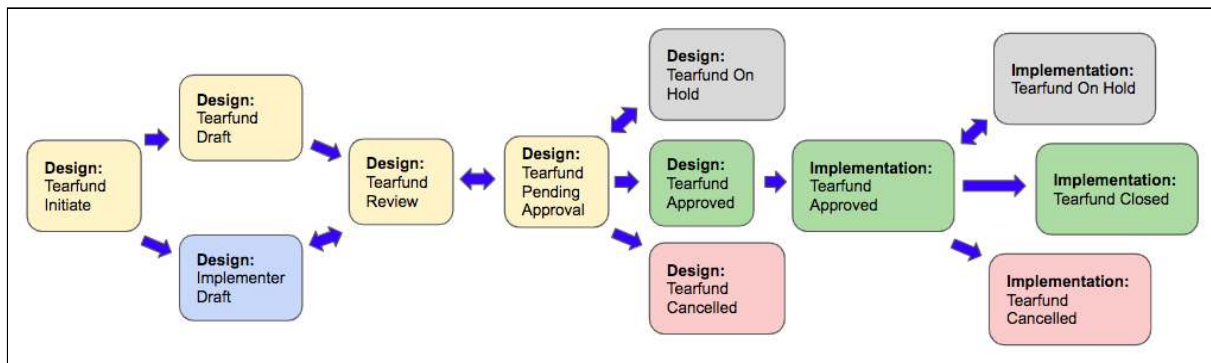
- Changes in status of a Tearfund proposal (ie. with Tearfund as implementer) involve sending a project back and forth within the Tearfund environment

### Implementation Phase

Once a project has passed through Approved status, it can be moved into the Implementation phase. Once the project is in Implementation it can no longer be rolled back to a Design phase.

The following diagram shows the different phases and statuses that a proposal will move through between the start and the end of a project.

**Figure 14: Project Phases and Statuses**



A project can change statuses by moving forwards or backwards.

An example of when the status can be rolled backwards is:

- At 'Design: Tearfund Review' status - if the reviewer feels that more information is required they might send the project back to 'Design: Implementer Draft' status

#### 4.13.1 Status History

The Status History button can be found at the bottom of the Status page.



1. Click on **Status History** and a new box opens with a list of the project statuses and dates.



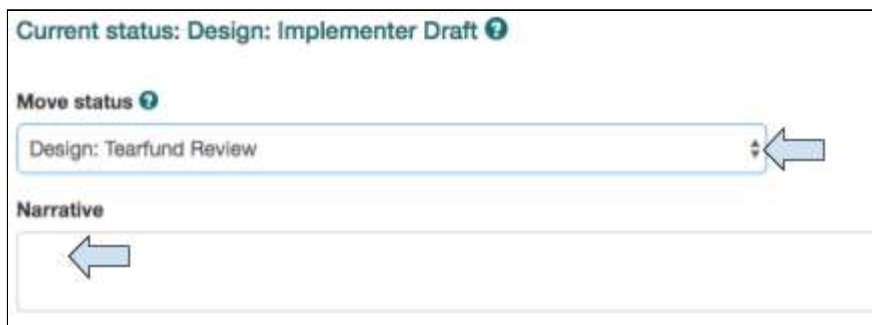
| Date                   | Status                    | Narrative | Snapshot             |
|------------------------|---------------------------|-----------|----------------------|
| Mon, 10 Sep 2018 10:33 | Design: Tearfund Initiate |           |                      |
| Mon, 10 Sep 2018 10:36 | Design: Implementer Draft |           | <a href="#">View</a> |
| Wed, 10 Oct 2018 10:54 | Design: Tearfund Review   |           | <a href="#">View</a> |

2. Click on **View** to see a PDF snapshot of the project summary page as it was during that status.

### 4.13.2 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.



Current status: Design: Implementer Draft ?

Move status ?

Design: Tearfund Review

Narrative

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

2. Add **narrative** if required



Update & Send

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.

See [Figure 14: 'Project Phases and Statures'](#) for a reminder of which statuses must be moved through before reaching Design: Tearfund Pending Approval.

## 5. Implementation: Projects

### What will this chapter cover?

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

### Who will find this chapter helpful?

Any user that updates activities, indicators and reach in a proposal.

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 4.13.2 'Move Status'](#))



Please note that once a project has been moved to Implementation Phase it cannot be rolled back to Design phase and can therefore no longer be amended.

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

### 5.1 Amend a Project

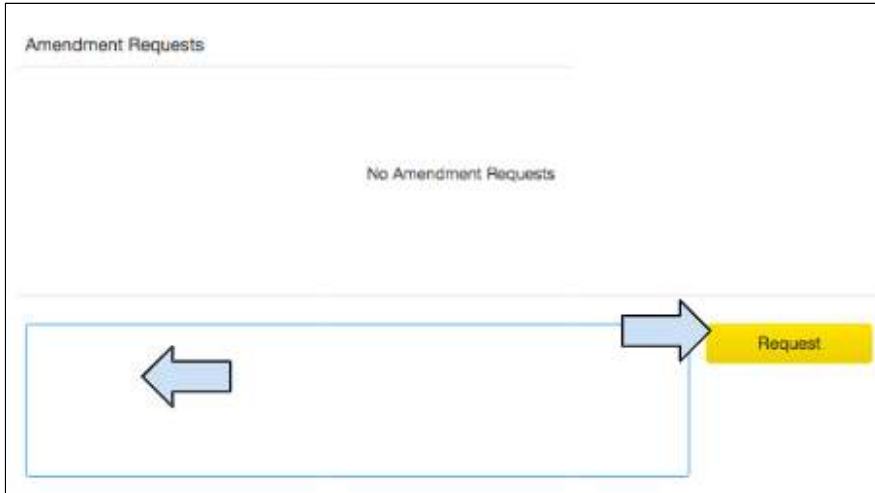
Once a project is in the implementation phase, it may be necessary to make amendments to it. Most sections within Track are read-only in the implementation phase and therefore uneditable. Changes to a project can only take place through an amendment request which is sent to the project approver.

#### 5.1.1 Making an Amendment Request

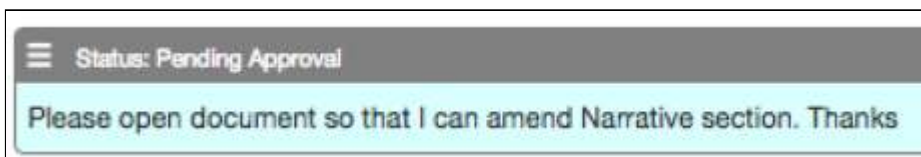
Requesting an amendment is done by clicking on the following diamond symbol which can be found in the Narrative, Budget, Reach, Logic and Reach Mapping tabs of a project in Track.




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.

### 5.1.2 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.

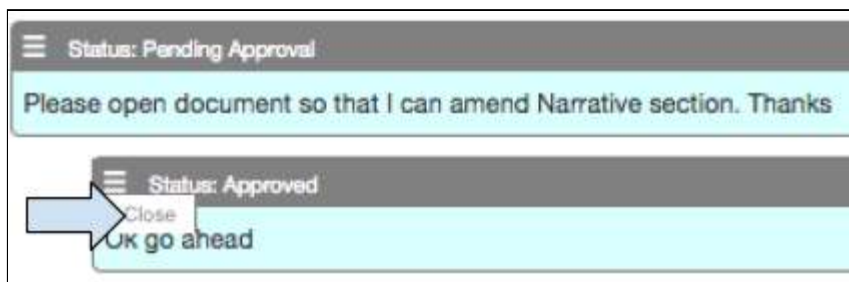
Once an Amendment Request has been approved, (this may take some time depending on how quickly the project approver actions the amendment request), the user who made the request will receive an email with a link to the project in Track.



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



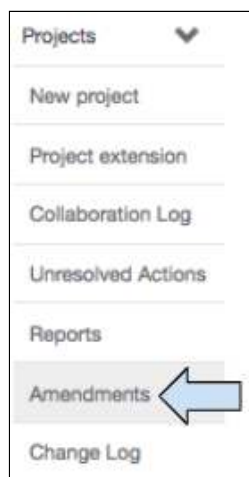
4. In the left hand menu, select **Close** in order to close the request and to return the status to "read only".



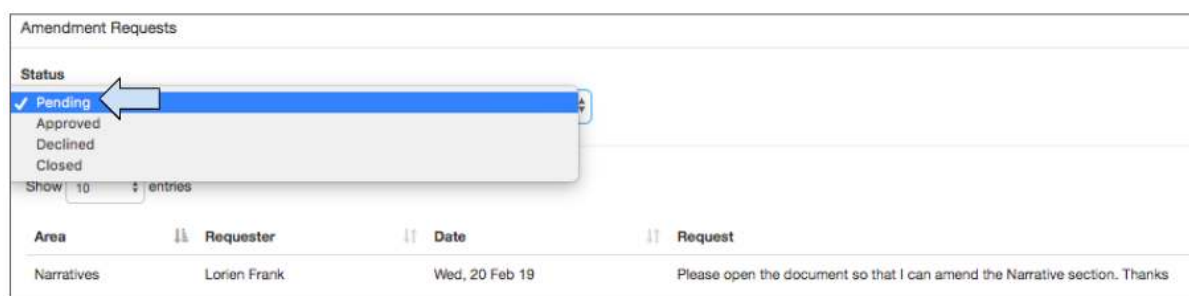
5. Type the closing message into the box then click on **Close**.



### 5.1.3 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.

## 5.2 Update Activities, Indicators and Reach Count



Go to [https://learn.tearfund.org/en/misc/partner\\_area/](https://learn.tearfund.org/en/misc/partner_area/) to watch an e-learning video which provides more information on 'How to update Activities and Output Indicators'.

When a project is in implementation phase it will automatically open in the M&E Tracking tab. This tab is where the user will update Activities, Indicators and Reach.

**M&E Tracking**

Title: Translated Training Manual Project (Implementation)  
 Initiator: [Loren Frank](#) Owner: [Bernard Mtonga](#)  
 Start Date: 01-January-2019 End Date: 31-December-2019 Project No: **2638**  
 Available in offline app  Implementation: Tearfund Approved

[Tags](#) / [Strategy Links](#) / [Narrative](#) / [Budget](#) / [Reach](#) / [Logic](#) / [Reach mapping](#) / **M&E Tracking** / [Calendar](#) / [Summary](#) / [Status](#)

**Tags**   >

**Reach**    >
←

**Reach by dimension**   v

**Indicator tracking**    >
←

**Activities**    >
←

**Evaluations**    >

**Stories** >

**M&E Plan**    >

Continue



As a reminder..

- Activities are updated manually in the Activities Table
- Output Indicators are updated automatically as a result of the activity updates
- Outcome and Impact Indicators are updated manually in the Indicator Tracking Table
- Direct Reach is updated automatically as a result of the activity (output indicator) updates
- Indirect Reach is updated manually in the Reach Table

## 5.2.1 Activity Updates

This section will explain how to update activities that are not linked to an indicator. (Remember that some activities were linked to indicators in section [4.8.7 'Add Activities to an Output'](#)).

**Activities** 0 0

Show  entries Search:

| Activity ID | Description   | Start Date | End Date   | Status |   |
|-------------|---|------------|------------|--------|---|
| 1.1.1       | Purchase Seeds  | 01/02/2019 | 28/02/2019 | Draft  | Activity updates ▾                        |
| 1.1.2       | Distribute seeds  | 01/03/2019 | 31/03/2019 | Draft  | All<br>New update ←<br>Activity updates ▾ |
| 1.1.3       | Conduct training of farmers in sustainable agricultural practices | 01/03/2019 | 31/03/2019 | Draft  | Activity updates ▾                        |
| 2.1.1       | Build Wells   | 01/10/2019 | 30/11/2019 | Draft  | Activity updates ▾                        |

1. In the Activities Table, click on **New Update** which is located in the Activity Updates drop menu on the right hand side of the activity

**New update** ×

Date  ← 2 Location  ← 3

Narrative  ← 4

Activity Status  ← 5

6  →

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

3. Select the **location** of the activity update

4. Add details regarding the activity update to the **narrative** section

5. Change the **activity status**

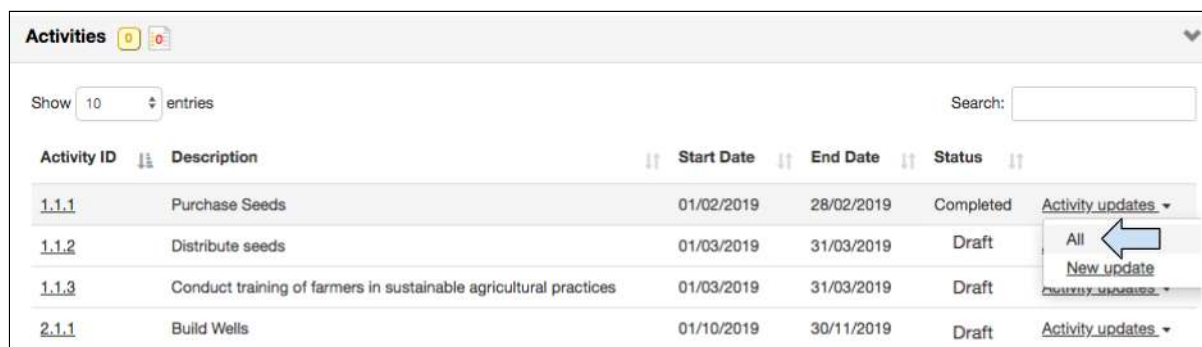
6. Click on **Save** to return to the Activities box and view the updated activity status

**Activities** 0 0

Show  entries Search:

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

## 5.2.2 Edit / Delete an Activity Update



| Activity ID | Description   | Start Date | End Date   | Status    | Activity updates  |
|-------------|---|------------|------------|-----------|---|
| 1.1.1       | Purchase Seeds  | 01/02/2019 | 28/02/2019 | Completed | Activity updates ▾<br>All ←<br>New update<br>Activity updates ▾ |
| 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     |   |
| 2.1.1       | Build Wells   | 01/10/2019 | 30/11/2019 | Draft     | Activity updates ▾  |

1. Click on '**All**' which is located in the Activity Update drop menu next to an activity



| ID  | Date       | Narrative                              | Location | Icons |
|-----|------------|--|----------|-------|
| 159 | 01/03/2019 | Purchased seeds from 2 local suppliers | Liberia  | ✎ 🗑️  |

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**

## 5.2.3 Output Indicator Updates

Output indicators are updated automatically via activity updates in the Activities Table. Only those activities which were linked to an indicator (see [Section 4.8.7 'Add Activities to an Output'](#)) can be used to update output indicators.

This section will explain how to update output indicators via activity updates.

**Activities** 0 0

Show  entries Search:

| Activity ID | Description   | Start Date | End Date   | Status    |   |
|-------------|---|------------|------------|-----------|---|
| 1.1.1       | Purchase Seeds  | 01/02/2019 | 28/02/2019 | Completed | Activity updates ▾                        |
| 1.1.2       | Distribute seeds  | 01/03/2019 | 31/03/2019 | Draft     | Activity updates ▾                        |
| 1.1.3       | Conduct training of farmers in sustainable agricultural practices | 01/03/2019 | 31/03/2019 | Draft     | All<br>New update ←<br>Activity updates ▾ |
| 2.1.1       | Build Wells   | 01/10/2019 | 30/11/2019 | Draft     | Activity updates ▾                        |

1. In the Activities Table, click on **New Update** which is located in the Activity Updates drop menu on the right hand side of the activity

**New update**

Date  2 Location  3

Narrative  4

**Number of beneficiaries that have received new seed types (Beneficiaries)** 5

**Number directly affected** 6

|                              |                                |
|------------------------------|--------------------------------|
| Female Under 18 years old    | <input type="text" value="0"/> |
| Male Under 18 years old      | <input type="text" value="0"/> |
| Female 18 years old and over | <input type="text" value="0"/> |
| Male 18 years old and over   | <input type="text" value="0"/> |
| <b>Total</b>                 | <input type="text" value="0"/> |

Activity Status  7

8

2. Add the **date** of the activity update
3. Select the **location** of the activity update
4. Add details regarding the activity update to the **narrative** section
5. Notice that the **output indicator** is shown here for reference

6. Enter the total number of beneficiaries affected by the activity in question.  
(Information entered into the 'Number directly affected' column will be used to update the output indicator).

7. Change the **activity status**

8. Click on **Save** to close the New Update Box

**Activities** 0 0

Show  entries Filter:

| Activity ID           | Description      | Start Date | End Date   | Status      |                                    |
|-----------------------|------------------|------------|------------|-------------|------------------------------------|
| <a href="#">1.1.1</a> | Purchase Seeds   | 01/02/2019 | 28/02/2019 | Completed   | <a href="#">Activity updates</a> ▼ |
| <a href="#">1.1.2</a> | Distribute seeds | 01/03/2019 | 31/03/2019 | In Progress | <a href="#">Activity updates</a> ▼ |

**Indicator tracking** 0 0

Show  entries Search:

| 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    |               | <a href="#">Actuals</a> ▼       |
| 1.a   | % of farmers reporting an increase in their agricultural production as a result of the provided assistance | Outcome | 0        | 100    |               | <a href="#">Actuals</a> ▼       |
| 1.1.a | Number of beneficiaries trained  | Output  | 0        | 400    |               | <a href="#">Actuals</a> ▼       |
| 1.1.b | Number of beneficiaries that have received new seed types  | Output  | 0        | 400    | 200           | Green <a href="#">Actuals</a> ▼ |

9. Check in the Activities Table and in the Indicator Tracking Table that the activity update has been correctly recorded. For example:

- In the Activities Table, the status of Activity 1.1.2 has changed to 'In progress'
- In the Indicator Tracking Table, indicator 1.1b has a new 'Last Actual' value of 200. (This is the update made to the Number Directly Affected column in Step 6 above)
- In the Indicator Tracking table, indicator 1.1b also has a 'Green' box in the RAG column. This means that the indicator is 'on track'.



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

When an indicator is created with a baseline and milestone target dates, Track applies a RAG status to it. Once the project is in Implementation phase and activities are updated against an indicator, Track will automatically inform the user if the activities are:

- **Green** for On Track
- **Amber** for Delayed
- **Red** for Late

## 5.2.4 Custom Indicator Updates

This section is only relevant for users who want to update a custom indicator with a custom count type.

In order to update a custom indicator with a standard count type, please follow the instructions in [Section 5.2.3 'Output Indicator Updates'](#).

(For information on how to create a custom indicator see [Section 4.8.4 'Custom Indicators'](#))



### **Reminder**

Custom indicators require the manual input of a 'Count Type'. This can be either a standard or a custom count type.

If a standard count type was selected AND if it matches a Target type (selected in the Tags page), the activity can be used to update both the indicator AND reach.

If a custom count type is selected which does NOT match a Target type (selected in the Tags page), the activity can be used to update an indicator but canNOT be used to update reach.

The example below relates to updating a custom indicator with a custom count type.

**Activities** 0 0

Show  entries Search:

| Activity ID           | Description   | Start Date | End Date   | Status      | Activity updates                 |
|-----------------------|---|------------|------------|-------------|----------------------------------|
| <a href="#">1.1.1</a> | Purchase Seeds  | 01/02/2019 | 28/02/2019 | Completed   | <a href="#">Activity updates</a> |
| <a href="#">1.1.2</a> | Distribute seeds  | 01/03/2019 | 31/03/2019 | In Progress | <a href="#">Activity updates</a> |
| <a href="#">1.1.3</a> | Conduct training of farmers in sustainable agricultural practices | 01/03/2019 | 31/03/2019 | Draft       | <a href="#">Activity updates</a> |
| <a href="#">2.1.1</a> | Build Wells   | 01/10/2019 | 30/11/2019 | Draft       | <a href="#">Activity updates</a> |

Showing 1 to 4 of 4 entries

1. In the Activities Table, click on **New Update** which is located in the Activity Updates drop menu on the right hand side of the activity

### New update

**Date**  ← 2

**Location**  ← 3

**Narrative**  ← 4

**Number of wells constructed (Wells)**  ← 5

**Activity Status**  ← 6

7

2. Add the **date** of the activity update
3. Select the **location** of the activity update
4. Add details regarding the activity update to the **narrative** section
5. Add the activity update **data**
6. Change the **activity status**
7. Click on **Save** to close the New Update Box



**Activities** 0 0

Show  entries Search:

| Activity ID           | Description   | Start Date | End Date   | Status      |                                    |
|-----------------------|---|------------|------------|-------------|------------------------------------|
| <a href="#">1.1.1</a> | Purchase Seeds  | 01/02/2019 | 28/02/2019 | Completed   | <a href="#">Activity updates</a> ▼ |
| <a href="#">1.1.2</a> | Distribute seeds  | 01/03/2019 | 31/03/2019 | In Progress | <a href="#">Activity updates</a> ▼ |
| <a href="#">1.1.3</a> | Conduct training of farmers in sustainable agricultural practices | 01/03/2019 | 31/03/2019 | Draft       | <a href="#">Activity updates</a> ▼ |
| <a href="#">2.1.1</a> | Build Wells   | 01/10/2019 | 30/11/2019 | In Progress | <a href="#">Activity updates</a> ▼ |

**Indicator tracking** 0 0

Show  entries Search:

| 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    |               | <a href="#">Actuals</a> ▼   |
| 1.a   | % of farmers reporting an increase in their agricultural production as a result of the provided assistance | Outcome | 0        | 100    |               | <a href="#">Actuals</a> ▼   |
| 1.1.a | Number of beneficiaries trained  | Output  | 0        | 400    |               | <a href="#">Actuals</a> ▼   |
| 1.1.b | Number of beneficiaries that have received new seed types  | Output  | 0        | 400    | 200           | <span style="background-color: green; color: white; padding: 2px;">Green</span> <a href="#">Actuals</a> ▼ |
| 2.a   | % of beneficiaries using an improved drinking water source less than 30 minutes or 1km away                | Outcome | 0        | 100    |               | <a href="#">Actuals</a> ▼   |
| 2.1.a | Number of wells constructed  | Output  | 0        | 40     | 5             | <span style="background-color: red; color: white; padding: 2px;">Red</span> <a href="#">Actuals</a> ▼     |

8. Check in the Activities Table and in the Indicator Tracking Table that the activity update has been correctly recorded. For example:

- In the Activities Table, the status of Activity 2.1.1 has changed to 'In progress'
- In the Indicator Tracking Table, indicator 2.1a has a new 'Current Total' value of 5. (This is the update made to the Number Directly Affected column in Step 6 above)
- In the Indicator Tracking table, indicator 2.1a also has a 'Red' box in the RAG column. This means that the indicator is 'late'.



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)

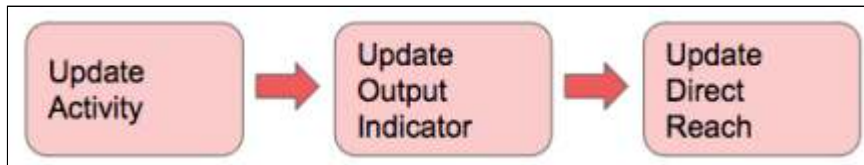
Once the project is in Implementation status and activities are carried out and updated against an indicator, Track will automatically inform the user if the the indicator is 'On Track' (G: green), 'Delayed' (A: amber) or 'Late' (R: red).

## 5.2.5 Direct Reach Count Updates

Direct Reach Count is updated automatically via activity updates in the Activities Table. A reminder of the process of updating direct project reach is as follows:

- i) An activity is updated
- ii) The activity update automatically creates an output indicator update
- iii) The activity / output indicator update can be used to automatically update direct project reach

**Figure 15: The process of updating direct project reach**



Because of this link between Activities, Output Indicators and Direct Reach, only activities which have been linked to an output indicator (see [Section 4.8.7 'Add activities to an output'](#)) AND which were selected in the Reach Mapping tab (see [Section 4.9 'Reach Mapping'](#)) can be used to update direct project reach.

This section will explain how to update direct project reach via activity updates.

| Activity ID | Description   | Start Date | End Date   | Status      |                     |
|-------------|---|------------|------------|-------------|---------------------|
| 1.1.1       | Purchase Seeds  | 01/02/2019 | 28/02/2019 | Completed   | Activity updates ▾  |
| 1.1.2       | Distribute seeds  | 01/03/2019 | 31/03/2019 | In Progress | Activity updates ▾  |
| 1.1.3       | Conduct training of farmers in sustainable agricultural practices | 01/03/2019 | 31/03/2019 | Draft       | Activity updates ▾  |
| 2.1.1       | Build Wells   | 01/10/2019 | 30/11/2019 | In Progress | All<br>New update ← |

1. In the Activities Table, click on **New Update** which is located in the Activity Updates drop menu on the right hand side of the activity

**New update**

Date  ← 2 dd/mm/yyyy ▾ Location  Select a location → 3

Narrative  ← 4

Number of beneficiaries trained (Beneficiaries) ↑ 5

|                              | Number directly affected ? 6 | Number new to project ? 7 |
|------------------------------|------------------------------|---------------------------|
| Female Under 18 years old    | <input type="text"/> 0       | <input type="text"/> 0    |
| Male Under 18 years old      | <input type="text"/> 0       | <input type="text"/> 0    |
| Female 18 years old and over | <input type="text"/> 0       | <input type="text"/> 0    |
| Male 18 years old and over   | <input type="text"/> 0       | <input type="text"/> 0    |
| Total                        | <input type="text"/> 0       | <input type="text"/> 0    |

Activity Status  Draft ← 8

9 → Save

2. Add the **date** of the activity update
3. Select the **location** of the activity update
4. Add details regarding the activity update to the **narrative** section
5. Notice that the **output indicator** is shown here for reference
6. Enter the total number of beneficiaries affected by the activity in question.  
(Information entered into the '**Number directly affected**' column will be used to update the output indicator ONLY).
7. Of the total number of affected beneficiaries, which of these are new to the project (and should be added to Reach Count)  
(Information entered into the '**Number new to project**' column will be used to update the Direct Reach Count).





The '**number new to project**' column will only be visible in the activity update box if the activity was selected in the Reach Mapping tab.

Updating Direct Reach at this stage is optional and the user must carefully consider this in order to avoid a double count. See the scenarios included below for more details.



8. Change the **activity status**

9. Click on **Save** to close the New Update Box

**Activities**  

Show  entries Search:

| Activity ID | Description   | Start Date | End Date   | Status      |                                    |
|-------------|---|------------|------------|-------------|------------------------------------|
| 1.1.1       | Purchase Seeds  | 01/02/2019 | 28/02/2019 | Completed   | <a href="#">Activity updates</a> ▼ |
| 1.1.2       | Distribute seeds  | 01/03/2019 | 31/03/2019 | In Progress | <a href="#">Activity updates</a> ▼ |
| 1.1.3       | Conduct training of farmers in sustainable agricultural practices | 01/03/2019 | 31/03/2019 | In Progress | <a href="#">Activity updates</a> ▼ |

**Indicator tracking**  

Show  entries Search:

| 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    |               |        | <a href="#">Actuals</a> ▼ |
| 1.a   | % of farmers reporting an increase in their agricultural production as a result of the provided assistance | Outcome | 0        | 100    |               |        | <a href="#">Actuals</a> ▼ |
| 1.1.a | Number of beneficiaries trained  | Output  | 0        | 400    | 200           | Green  | <a href="#">Actuals</a> ▼ |
| 1.1.b | Number of beneficiaries that have received new seed types  | Output  | 0        | 400    | 200           | Green  | <a href="#">Actuals</a> ▼ |

**Reach**  

**Beneficiaries**

| Beneficiaries                | Number directly affected |        |
|------------------------------|--------------------------|--------|
|                              | Target                   | Actual |
| Female Under 18 years old    | 100                      | 50     |
| Male Under 18 years old      | 100                      | 50     |
| Female 18 years old and over | 100                      | 50     |
| Male 18 years old and over   | 100                      | 50     |

10. Check in the Activities Table and in the Indicator Tracking Table that the activity update has been correctly recorded. For example:

- In the Activities Table, the status of Activity 1.1.2 has changed to 'In progress'
- In the Indicator Tracking Table, indicator 1.1b has a new 'Last Actual' value of 200. (This is the update made to the Number Directly Affected column in Step 6 above).
- In the Indicator Tracking table, indicator 1.1b also has a 'Green' box in the RAG column. This means that the indicator is 'on track'.
- In the Reach Table, the Number Directly Affected 'Actual' column has been updated (This is the update made to the Number New to Project column in Step 7 above).



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

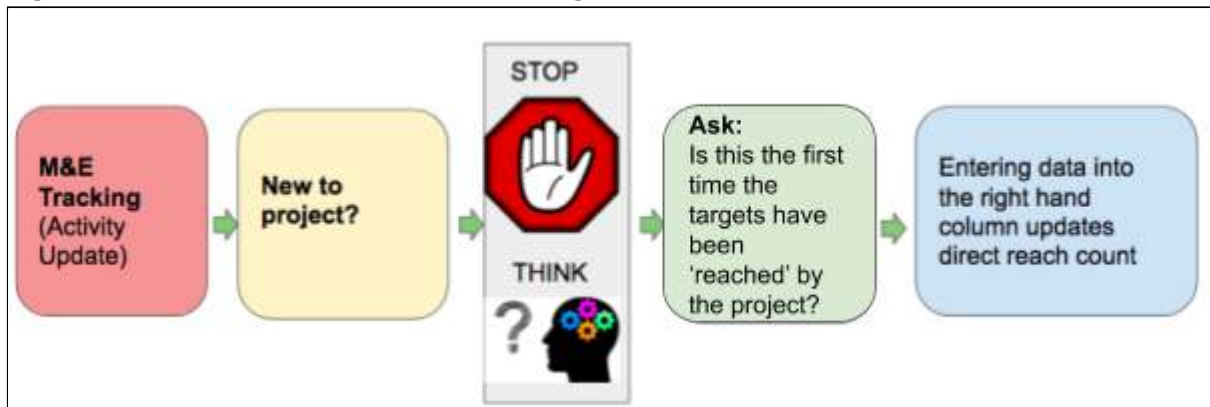
RAG = R (red), A (amber), G (green)

Once the project is in Implementation status and activities are carried out and updated against an indicator, Track will automatically inform the user if the the indicator is 'On Track' (G: green), 'Delayed' (A: amber) or 'Late' (R: red).



The 'Update Direct Project Reach' section is the fourth place where users needs to be careful to avoid double counting

**Figure 16: Steps to avoid double counting #4**



It is possible to create a double count at this stage if the user selects several activity updates to 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

Here are two scenarios of how a double count could be created by accident and ideas of how to avoid it.

### Scenario 1

- Let's say we have 400 beneficiaries and we have chosen Activity 1: 'Distribute seeds' to contribute to direct project reach.
- Let's say we carry out a distribution of seeds to 100 beneficiaries in April. We would want to update the activity, the output indicator and project reach. We would therefore enter 100 beneficiaries (disaggregated) into the left hand column (number directly affected) and into the right hand column (number new to project) of the Edit Activity box.
- Now let's say that we want to carry out a second distribution in May to an additional 100 beneficiaries. A project partner informs us that 20 beneficiaries from the previous distribution have lost their seeds due to unforeseen circumstances and asks us to include them again in this second distribution. We now have a planned distribution to 120 beneficiaries, 20 of which were already counted in April.

Q: How do we record this data in Track without creating a double count?

A: By using the concept of 'first time reached' the user can try to avoid creating a double count.

### Summary

In the Activity Update box the user would add the 120 beneficiaries (disaggregated) to the left hand column (number directly affected). The user would then only add 100 beneficiaries to the right hand column (number new to project) in order to update project reach.

### Scenario 2

- Let's say we have 400 beneficiaries and we have chosen 2 activities to contribute to direct project reach, 1) Training and 2) Provision of a loan (this scenario is similar to the example provided in Section 4.9 Reach Mapping')
- Let's say the training was conducted for 200 people. We would want to update the activity, the output indicator and project reach. We would therefore enter 200 beneficiaries (disaggregated) into the left hand column (number directly affected) and into the right hand column (number new to project) of the Edit Activity box.
- Let's say that we now wanted to train an additional 100 beneficiaries AND provide them with a loan.

Q: Which activity update would we choose to contribute to project reach? Choosing both would result in a double count

A: By using the concept of 'first time reached' the user can try to avoid creating a double count.

### Summary

If 100 beneficiaries were trained AND provided with a loan, we would add data to the left hand column (number directly affected) in both activity updates. However we would only add data to the right hand column (number new to project) for one of the activity updates to contribute towards direct project reach.

## 5.2.6 Impact & Outcome Indicator Updates



Go to [https://learn.tearfund.org/en/misc/partner\\_area/](https://learn.tearfund.org/en/misc/partner_area/) to watch an e-learning video which provides more information on 'How to update Outcome/Impact Indicators'.

Outcome and Impact Indicators are updated manually via the Indicator Tracking table. Neither outcome nor impact indicators can contribute to direct project reach.

This section will explain how to update an Outcome Indicator, however the process for updating an Impact Indicator is the same.

In the project storyline used throughout this User Guide, the following activities were added in [Section 4.8.7 'Add activities to an output'](#):

- Distribute seeds
- Train farmers

Let's say that farmers have now been trained and provided with new seed types. An assessment has been carried out to find that farmers have indeed diversified their crops and have more food available in time for the hunger season. Now we are ready to update the Food Security outcome indicator.

## Instructions

| 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    | 200           | Green   |
| 1.1.b | Number of beneficiaries that have received new seed types  | Output  | 0        | 400    | 200           | Green   |

1. In the Indicator Tracking Table, click on **New Update** which is located in the 'Actuals' drop menu on the right hand side of the indicator

**New Total - % of farmers reporting an increase in their agricultural production as a result of the provided assistance** ✕

**Date**  
 ←

**Value** ⓘ  
 ←

→ **Save**

2. Add the **date** of the outcome indicator update
3. Add the **New Total value** to update the outcome indicator
4. Click on **Save** to close the New Total box

**Indicator tracking** ⓘ ⓘ

Show  entries Search:

| 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    |               |        | <a href="#">Actuals</a> |
| 1.a   | % of farmers reporting an increase in their agricultural production as a result of the provided assistance | Outcome | 0        | 100    | 50 ←          | Red    | <a href="#">Actuals</a> |
| 1.1.a | Number of beneficiaries trained  | Output  | 0        | 400    | 200           | Green  | <a href="#">Actuals</a> |
| 1.1.b | Number of beneficiaries that have received new seed types  | Output  | 0        | 400    | 200           | Green  | <a href="#">Actuals</a> |

5. Check in the Indicator Tracking Table that the indicator update has been correctly recorded.

Notice that in the Indicator Tracking table, there is a red box next outcome indicator 1.a This means that the indicator is 'late'.



## 5.2.7 Indirect Reach Count Updates



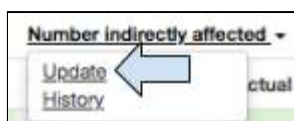
Go to [https://learn.tearfund.org/en/misc/partner\\_area/](https://learn.tearfund.org/en/misc/partner_area/) to watch an e-learning video which provides more information on 'How to update Indirect Beneficiary Reach'.

Unlike the updating of direct reach count which takes place through an activity (output indicator) update, the updating of Indirect Reach Count takes place manually.

This section will explain how to update Indirect Project Reach.

| Beneficiaries                | Number directly affected |        | Number indirectly affected |        |
|------------------------------|--------------------------|--------|----------------------------|--------|
|                              | Target                   | Actual | Target                     | Actual |
| Female Under 18 years old    | 100                      | 50     | 300                        | 0      |
| Male Under 18 years old      | 100                      | 50     | 300                        | 0      |
| Female 18 years old and over | 100                      | 50     | 300                        | 0      |
| Male 18 years old and over   | 100                      | 50     | 300                        | 0      |

1. In the Reach Table click on the **Number Indirectly Affected** link



2. Click on **Update**

**Indirect Beneficiaries**

Number indirectly affected

Female Under 18 years old: 0

Male Under 18 years old: 0

Female 18 years old and over: 0

Male 18 years old and over: 0

Total: 0

Save

3. Add details of the **number of indirectly affected** beneficiaries (disaggregated)

4. Click on **Save**

| Beneficiaries                | Number directly affected |        | Number indirectly affected ▾ |        |
|------------------------------|--------------------------|--------|------------------------------|--------|
|                              | Target                   | Actual | Target                       | Actual |
| Female Under 18 years old    | 100                      | 50     | 300                          | 150    |
| Male Under 18 years old      | 100                      | 50     | 300                          | 150    |
| Female 18 years old and over | 100                      | 50     | 300                          | 150    |
| Male 18 years old and over   | 100                      | 50     | 300                          | 150    |

5. Check in the Reach Table that the update has been correctly recorded.

Please note, each time the indirect beneficiary actual is updated, the new value is added to the previous actual value.

## 6. Offline App

### What will this chapter cover?

This chapter explains how to use the Track Offline App in order to update activities whilst in the field.

### Who will find this chapter helpful?

Any user that would like to view the project logframe and/or update activities from the field.

One of the core business requirements of Track is to allow Tearfund and partners offline access to the system. Tearfund has created an offline app which allows users to update activities and output indicators from anywhere in the field. Information is then synchronised back to Track as soon as an internet connection is reached. The app also allows users a view of the project logic and create activity narratives

This section will explain how to use the Offline-app.

### 6.1 Access the Offline App

In order to be able to access the Tearfund Offline-App, users must have an android phone or tablet. Guidelines on how to download the app onto your device can be found in the Appendix.

## 6.1.1 Login



**TEARFUND**

**LOGIN WITH GOOGLE**

If you're a Tearfund staff member, please login with your organisation Google account.

or

Username

Password

**LOGIN AS PARTNER**

1. Partner staff users should login by entering their Track username and password then click on '**Login as Partner**'.

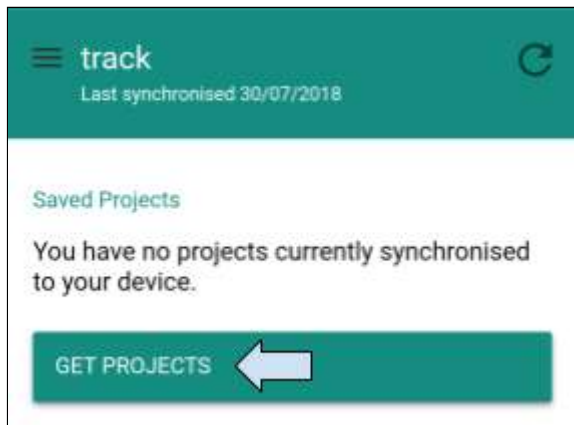


If a partner user is logging into AffinisWeb via the offline app for the first time, the password created needs to contain at least 1 lowercase, 1 uppercase and 1 symbol character (for example ! ? %).



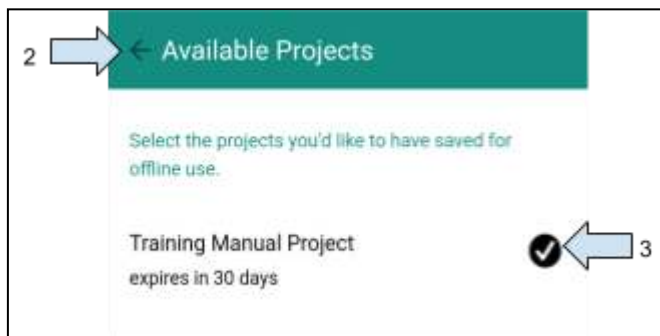
Every login to the offline app lasts 30 days if the user does not logout. After 30 days, the user will be automatically logged out of the session and any data that has not been synchronised back to Track will be lost.

## 6.2 Download Project



1. This is the Home Screen. Click on **Get Projects**

(Please note that it is only possible to access projects that are in Implementation phase)

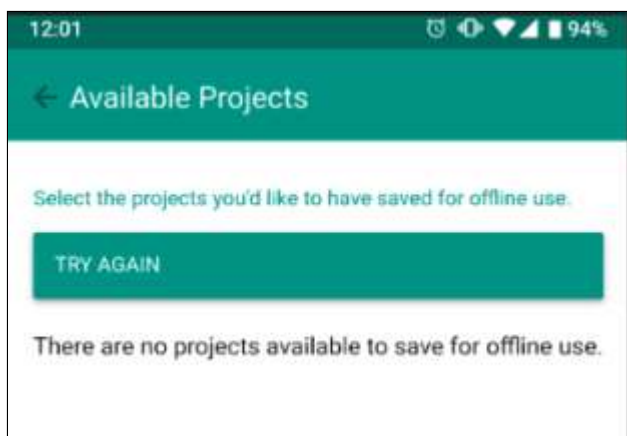


2. Select the required project by ticking in the box

3. Click on the **back arrow** next to 'Available Projects' to return to the previous screen and view the project.



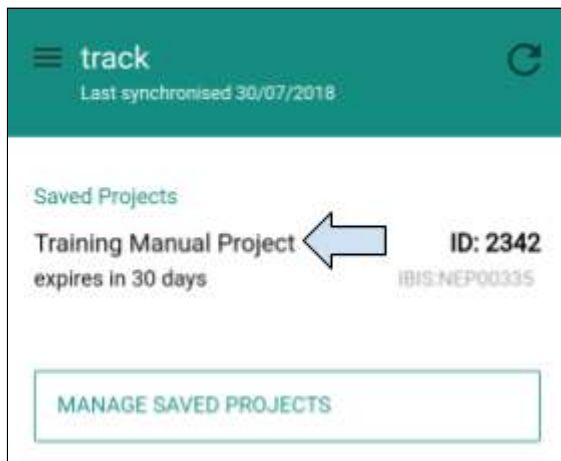
WARNING!



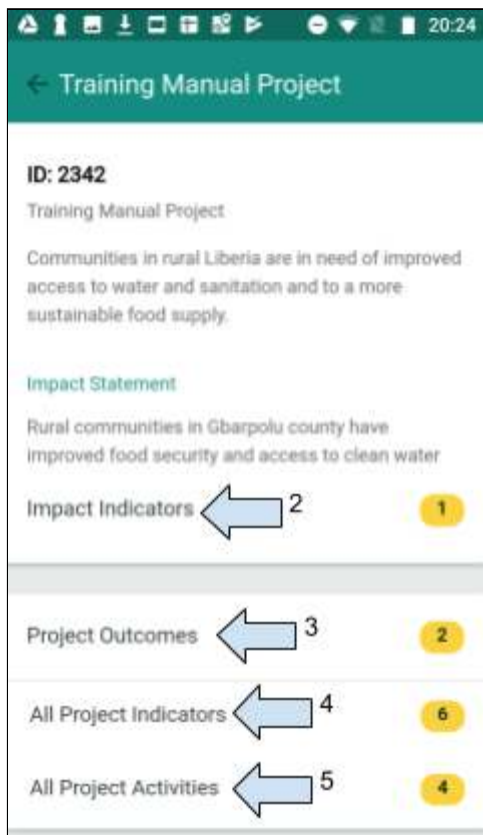
4. If the user sees this screen, it means that the project is not available to be saved onto the device.

(Please ask the Project Initiator, Project Owner or a Project Editor to open the project in Track and to tick the 'Available in Offline App' button in the yellow project box).

### 6.2.1 View Project

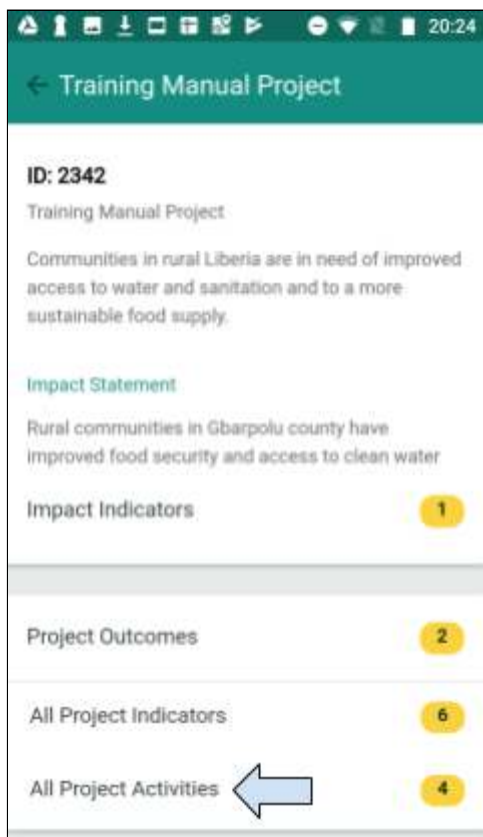


1. Click **anywhere** on the Project Title to open the project

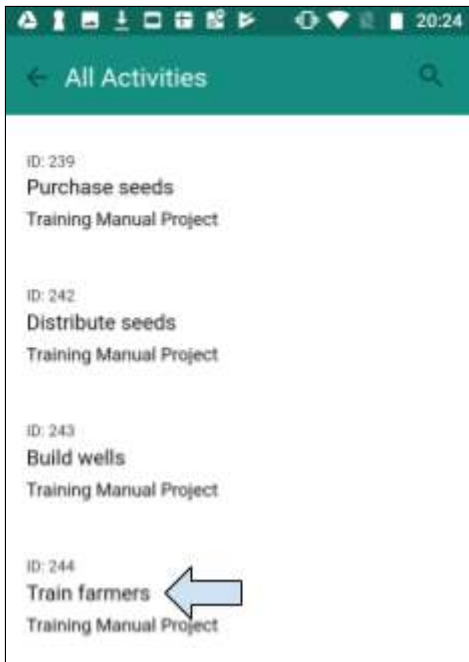


2. Click to view the **Impact Indicators**
3. Click to view the **Project Outcomes**
4. Click to view all the **Project Indicators**
5. Click to **update Project Activities**

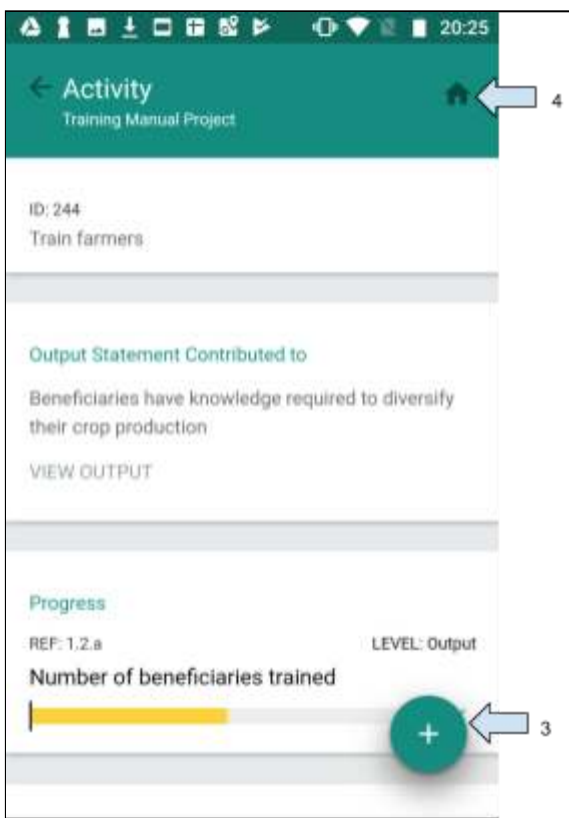
## 6.2.2 Update Project Activities



1. Click on '**All Project Activities**'



2. **Select an activity** to be updated



3. Click on the '+' sign to update an activity

4. Click on the **house icon** if for any reason the user wants to return to the Home Screen



**New Update**  
Activity 1

Number of beneficiaries trained

**Female, Under 18 years old**

|                   |                |
|-------------------|----------------|
| Directly affected | New to project |
| 0                 | 0              |

**Female, 18 years old and over**

|                   |                |
|-------------------|----------------|
| Directly affected | New to project |
| 5                 | 6              |

**Male, Under 18 years old**

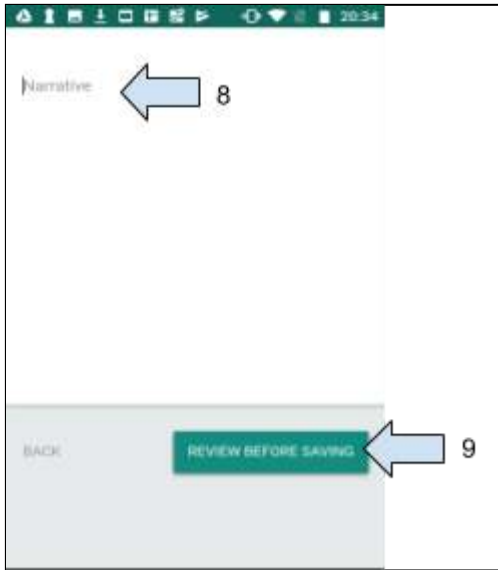
|                   |                |
|-------------------|----------------|
| Directly affected | New to project |
| 0                 | 0              |

**Male, 18 years old and over**

|                   |                |
|-------------------|----------------|
| Directly affected | New to project |
| 0                 | 0              |

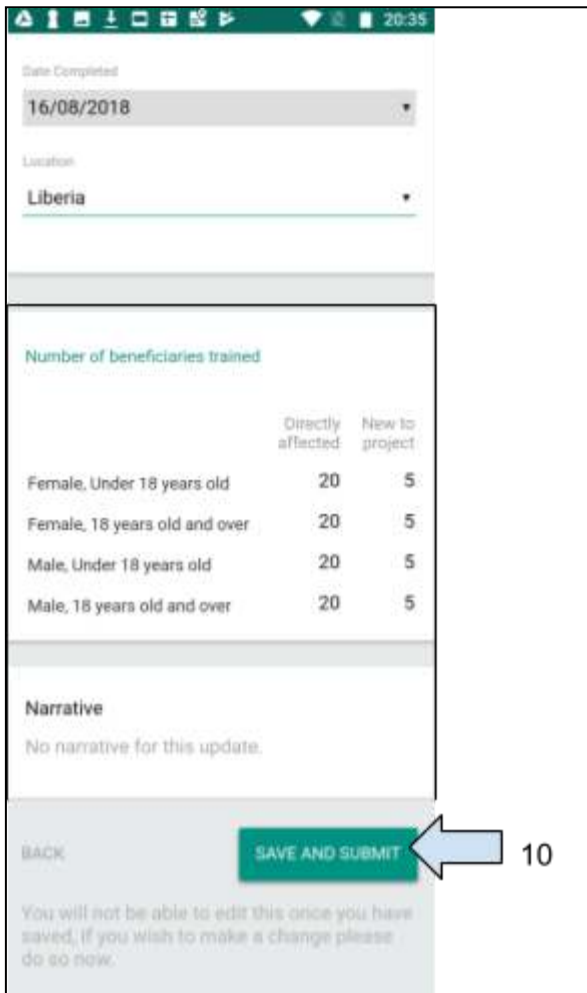
**CONTINUE TO NARRATIVE**

5. Enter the number of beneficiaries affected by the activity in question. (Information entered into the **'Directly affected'** column will be used to update the output indicator).
6. Enter the number of affected beneficiaries which should contribute to Reach Count. (Information entered into the **'New to project'** column will be used to update the Direct Reach Count).
7. Click on **Continue to Narrative**

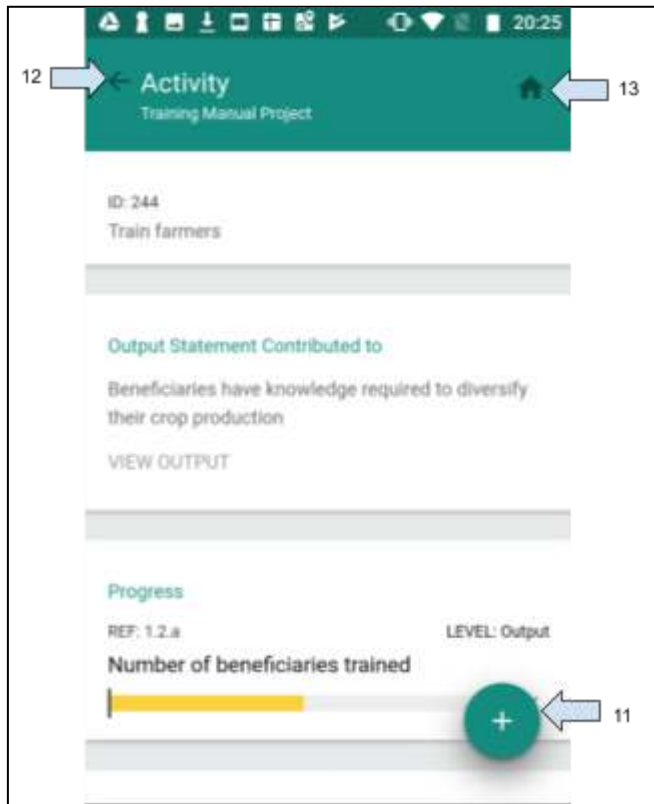


8. Add **narrative** if required

9. Click on **Review before Saving** to view the entire activity update page. (Click on **Back** to return to the New Activity Update screen).



10. Click on **Save and Submit** if all the information is correct. The user will be taken back to the Activity screen.

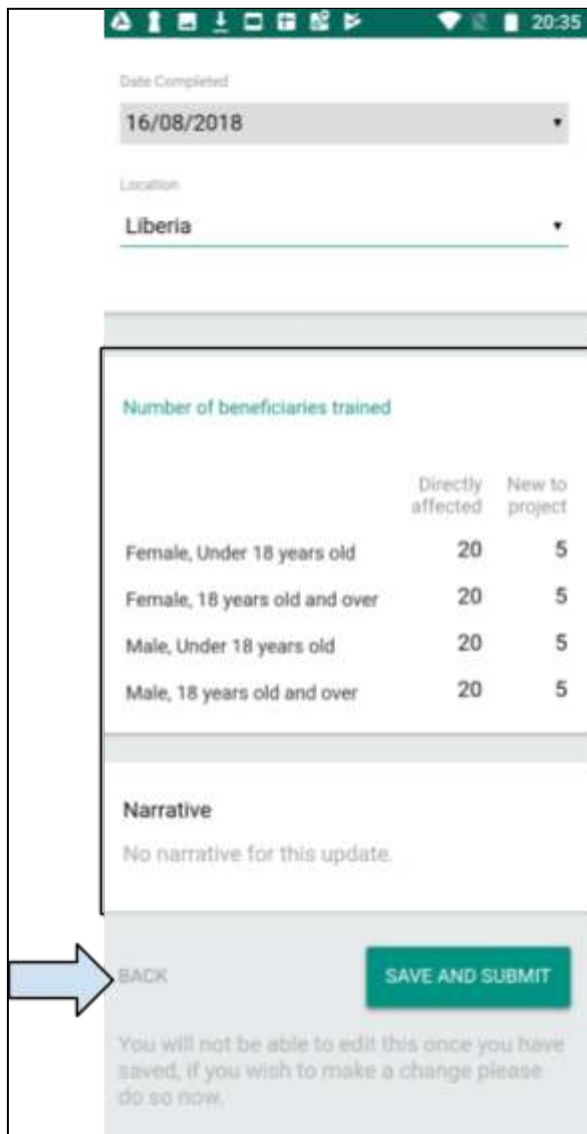


11. Click on the '+' sign to add a new update to the same activity if required

12. Click on the **Back Arrow** to return to Step 1 and update a different activity

13. Click on **Home** to return to the Home screen if no additional activities are to be updated

## 6.2.3 Edit Activity



Date Completed  
16/08/2018

Location  
Liberia

**Number of beneficiaries trained**

|                               | Directly affected | New to project |
|-------------------------------|-------------------|----------------|
| Female, Under 18 years old    | 20                | 5              |
| Female, 18 years old and over | 20                | 5              |
| Male, Under 18 years old      | 20                | 5              |
| Male, 18 years old and over   | 20                | 5              |

**Narrative**  
No narrative for this update.

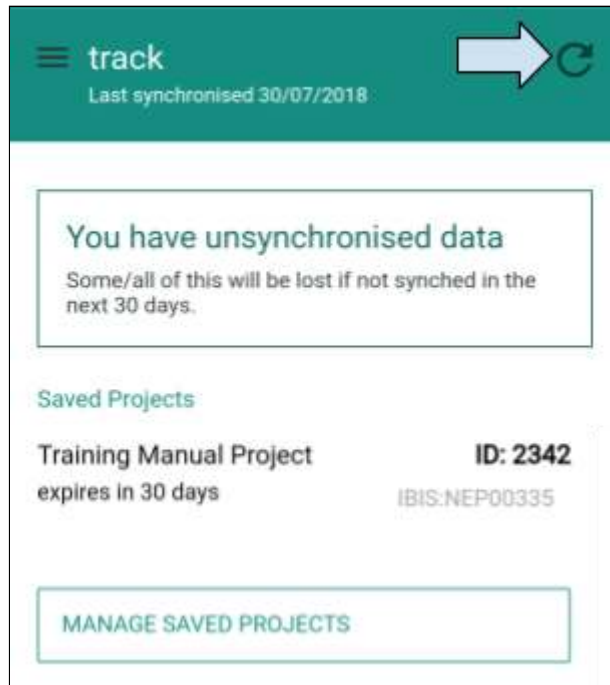
**BACK** **SAVE AND SUBMIT**

You will not be able to edit this once you have saved, if you wish to make a change please do so now.

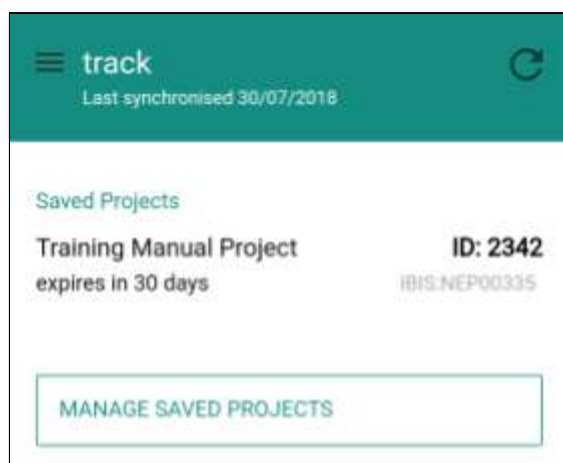
1. Edit an activity at any time (before saving) by clicking on the **back arrow** to return to the previous screen.

## 6.2.4 Synchronise Data

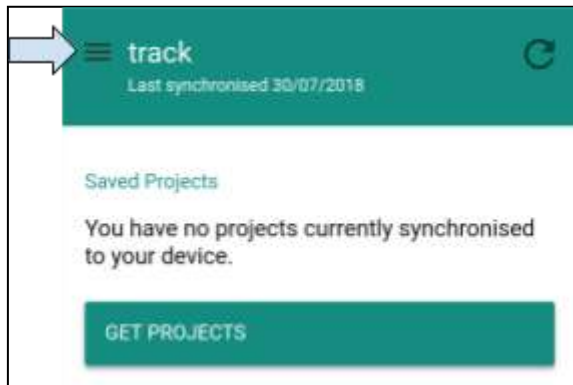
Once a user returns to a location that has Wifi internet access, the activity updates need to be synchronised back to Track.



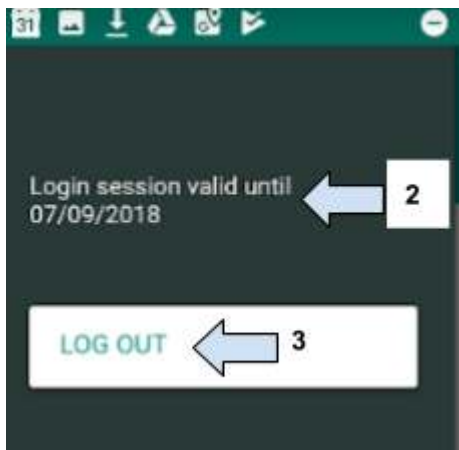
1. From the home screen click on the synchronise arrow. Any activity updates will be synchronised with Track. Once the synchronisation has taken place, the screen will return to the view below.



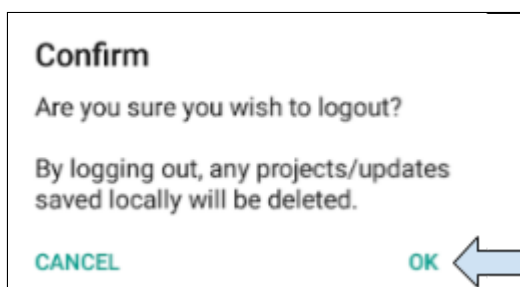
## 6.3 Logout



1. In the Home screen, click on the **menu icon** to logout



2. This indicates how long the session is still valid for. (Remember that every login to the offline app lasts 30 days if the user does not logout).
3. Click on **Logout**



4. Click on **OK** to be logged out of the Offline App



Please note that a user in the field should not Logout until a wireless internet connection has been reached and the updated data has been synchronised with Track. Data may be lost if a user logs out before the data has been synchronised with Track.

After logging in to the offline app, data will be held for a maximum of 30 days.



After 30 days, the user will be automatically logged out of the session and any data that has not been synchronised back to Track will be lost.

## 6.4 Check Activity Update has been registered in Track


Activity updates will be registered in Track on the M&E Tracking page of a proposal that is in Implementation status.

The screenshot displays the 'M&E Tracking' interface for a project titled 'Translated Training Manual Project (Implementation)'. The interface includes a navigation breadcrumb: 'Tags / Strategy Links / Narrative / Budget / Reach / Logic / Reach mapping / M&E Tracking / Calendar / Summary / Status'. Below this, there are several expandable sections: 'Tags', 'Reach', 'Reach by dimension', 'Indicator tracking', and 'Activities'. The 'Activities' section is currently selected, indicated by a blue arrow pointing left towards its label. In the top right corner, project details are shown: Initiator: Lorien Frank, Owner: Bernard Mtonga, Start Date: 01-January-2019, End Date: 31-December-2019, and Project No: 2638. There are also checkboxes for 'Available in offline app' and 'Implementation: Tearfund Approved'.

1. Click to open the **Activities** box

**Activities**  

Show  entries Search:

| Activity ID           | Description   | Start Date | End Date   | Status      |   |
|-----------------------|---|------------|------------|-------------|---|
| <a href="#">1.1.1</a> | Purchase Seeds  | 01/02/2019 | 28/02/2019 | Completed   | <a href="#">Activity updates</a> ▾  |
| <a href="#">1.1.2</a> | Distribute seeds  | 01/03/2019 | 31/03/2019 | In Progress | <a href="#">Activity updates</a> ▾  |
| <a href="#">1.1.3</a> | Conduct training of farmers in sustainable agricultural practices | 01/03/2019 | 31/03/2019 | In Progress | <a href="#">Activity updates</a> ▾  |
| <a href="#">2.1.1</a> | Build Wells   | 01/10/2019 | 30/11/2019 | In Progress | <a href="#">All</a> <br><a href="#">New update</a> |

2. Click on **All** in the Activity Updates link next to the relevant activity



**Activity updates** ✕

Show  entries Search:

| ID  | Date       | Narrative   | Location |   |
|-----|------------|---|----------|---|
| 162 | 01/03/2019 | Trained 200 farmers  | Liberia  |   |



Showing 1 to 1 of 1 entries Previous **1** Next




3. Check in the Activity Updates table that the activity updates have been correctly recorded.



**M&E Tracking**  




**Title:** Translated Training Manual Project (Implementation)  
**Initiator:** Lorien Frank **Owner:** Bernard Mtonga  
**Start Date:** 01-January-2019 **End Date:** 31-December-2019  
**Project No:** 2638  
Available in offline app  Implementation: Tearfund Approved



[Tags](#) / [Strategy Links](#) / [Narrative](#) / [Budget](#) / [Reach](#) / [Logic](#) / [Reach mapping](#) / **[M&E Tracking](#)** / [Calendar](#) / [Summary](#) / [Status](#)

**Tags**   ➤

**Reach**    ➤

**Reach by dimension**   ▾

**Indicator tracking**    ➤

**Activities**   ➤

4. Click to open the **Indicator Tracking** box



| ID    | Indicator title  | Level   | Baseline | Target | Current total | R.A.G. | Actuals |
|-------|--|---------|----------|--------|---------------|--------|---------|
| 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    | 50            | Red    | Actuals |
| 1.1.a | Number of beneficiaries trained  | Output  | 0        | 400    | 200           | Green  | Actuals |

5. Check in the output indicator has been correctly updated.

Notice that in the Indicator Tracking table, there is a green box next to output indicator 1.1.a. This means that the indicator is 'on track'.



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

When an indicator is created with a baseline and milestone target dates, Track applies a RAG status to it. Once the project is in Implementation phase and activities are updated against an indicator, Track will automatically inform the user if the activities are:

Green for On Track

Amber for Delayed

Red for Late

### M&E Tracking

**Title:** Translated Training Manual Project (Implementation)  
**Initiator:** Lorian Frank **Owner:** Bernard Mtonga  
**Start Date:** 01-January-2019 **End Date:** 31-December-2019  
**Project No:** 2638  
Available in offline app  Implementation: Tearfund Approved

[Tags](#) / [Strategy Links](#) / [Narrative](#) / [Budget](#) / [Reach](#) / [Logic](#) / [Reach mapping](#) / **[M&E Tracking](#)** / [Calendar](#) / [Summary](#) / [Status](#)

**Tags** >



**Reach** >

**Reach by dimension** v


**Indicator tracking** >

**Activities** >

6. Click to open the **Reach** box

Reach   

**Beneficiaries**

| Beneficiaries                | Number directly affected |        | Number indirectly affected  |        |
|------------------------------|--------------------------|--------|--|--------|
|                              | Target                   | Actual | Target   | Actual |
| Female Under 18 years old    | 100                      | 50     | 300  | 150    |
| Male Under 18 years old      | 100                      | 50     | 300  | 150    |
| Female 18 years old and over | 100                      | 50     | 300  | 150    |
| Male 18 years old and over   | 100                      | 50     | 300  | 150    |

7. Check that the Reach table has been correctly updated.

## 7. 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

Reports are **CREATED** by Tearfund or Partner staff in the Calendar section during the Design phase.

Reports are only available to be **WRITTEN** once a project is in Implementation phase



#### Reminder 2

##### Calendar Status

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

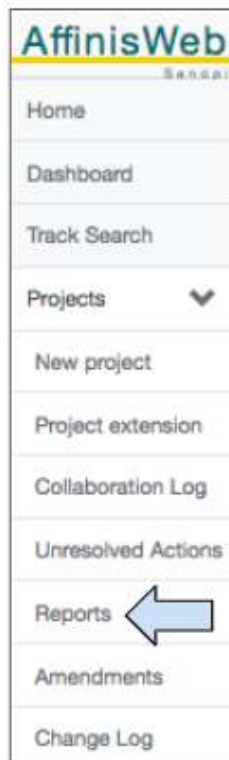
- Not Started
- In Progress
- Completed

##### RAG Status

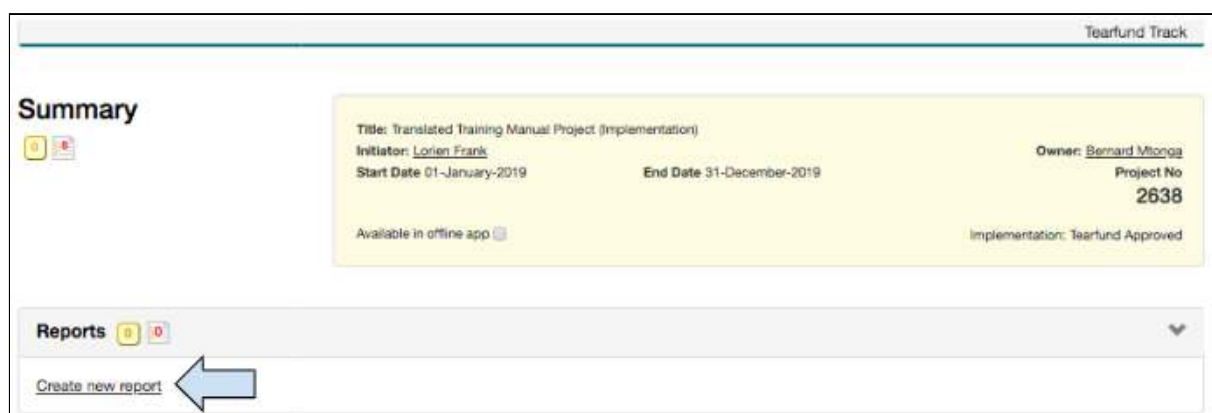
There is also a RAG status associated with Reports in the Project Calendar:

- [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

## 7.1 Create a Project Report



1. From within the desired project, click on **Reports** in the left hand navigation panel.



2. Click on '**Create New Report**'

3. Click on the drop menu next to **Report type** and select the report to be created
4. Add the **start** date of the period to be covered by the report.
5. Add the **end** date of the period to be covered by the report.



Please note that for a final report the dates entered in Step 5 must correspond to the project start and end dates. This is in order for the report to be populated with the full range of data that has been entered as Actuals into Track.

6. Click on **Create**

A report template will open which is made up of various sub sections. Users will recognise the format as it is taken directly from the Micah report template. Some of the sections will be automatically completed with information taken from the proposal. Some of the sections will have to be manually completed.

## 7.2 'Edit' Tab



The reporting template has many similarities with the proposal template.

A) **Collaboration**: It is possible for Partner staff to communicate with each other by using the 'Collaboration' button and with Tearfund staff by using the 'Action' button.

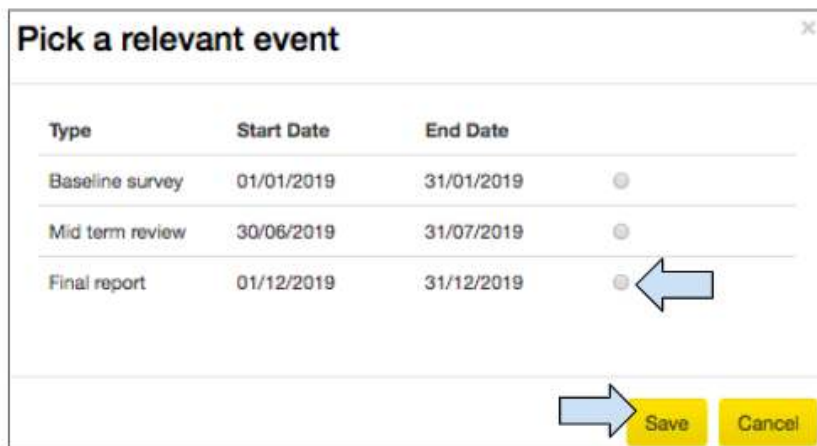
B) **Process Bar**: The report template also has a Process Bar for easy navigation through the report.

C) **Yellow Box**: The report has a yellow box with key details about the report, eg. start / end date, status, the project number and a report number.

## Instructions



1. Click to **link** the report to an event in the Track calendar



2. Click on the relevant **event**

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

(For information on how to access a report at a later date See [Section 7.5 'How to access a report at a later date'](#)).





4. Click on the **Basic Information** section to view key information about the report.

| Basic information <span>0</span> <span>0</span>   |  |            |
|---|--|------------|
| Title   | Translated Training Manual Project (Implementation)            |            |
| The Supporting Partner project reference number   | 2638   |            |
| Name of the implementing partner receiving funding  |  |            |
| Implementing Partner contact details:   |  |            |
| Name  |  |            |
| Role (Job title)  |  |            |
| Address   |  |            |
| Telephone (landline and mobile)   |  |            |
| Fax   |  |            |
| Email   |  |            |
| Website   |  |            |
| The name and role of the person approving the report for the Implementing Partner. This person must be duly authorised. |  |            |
| Project and report dates  | Start Date   | End Date   |
|   | 01/01/2019   | 31/12/2019 |
| The date of submission of the report  | 15 March 2019  |            |
| Implementer   | Partner SIFT (Supplement for Institutional Funding Tool) grade |            |
| Association of Evangelicals of Liberia  | None   |            |


This section will have been automatically populated with information taken from the proposal and should therefore be correct.




5. Click on the **Project Achievement** section.

**Project Achievement**  

**Translated Training Manual Project (Implementation)**

| What was Scheduled  | Indicators  | Explanatory Narrative   |
|---|---|---|
| <b>Impact</b> Farmers in Gbarpolu County have improved food security                      | <b>% of beneficiaries that improved their food security as a result of the provided assistance</b>                |   |
|   | <b>Period end</b> <b>Target</b> <b>Actual</b> <b>Change in period</b>   |   |
|   | 30/06/2019      n/a      0      0   |   |
|   | 31/12/2019      100      0      0   |   |
| <b>Outcome 1</b> Farmers have increased their agricultural production                     | <b>% of farmers reporting an increase in their agricultural production as a result of the provided assistance</b> |   |
|   | <b>Period end</b> <b>Target</b> <b>Actual</b> <b>Change in period</b>   |   |
|   | 31/12/2019      100      50      50   |   |
|   |   |   |
| <b>Output 1.1</b> Farmers have inputs and knowledge required to diversify crop production | <b>Number of beneficiaries trained</b>  |  |
|   | <b>Period end</b> <b>Target</b> <b>Actual</b> <b>Change in period</b>   |   |
|   | 30/06/2019      n/a      200      200   |   |
|   | <b>Number of beneficiaries that have received new seed types</b>  |   |
|   | <b>Period end</b> <b>Target</b> <b>Actual</b> <b>Change in period</b>   |   |
|   | 30/06/2019      n/a      200      200   |   |

| What was Scheduled  | Indicators  | Explanatory Narrative   |
|---|---|---|
| <b>Activity 1.1.1</b> Purchase Seeds  |   |   |
| <b>Activity 1.1.2</b> Distribute seeds  | <b>Number of beneficiaries that have received new seed types</b>      |   |
|   | <b>Period end</b> <b>Target</b> <b>Actual</b> <b>Change in period</b> |   |
|   | 30/06/2019      n/a      200      200                                 |   |
| <b>Activity 1.1.3</b> Conduct training of farmers in sustainable agricultural practices | <b>Number of beneficiaries trained</b>                                |  |
|   | <b>Period end</b> <b>Target</b> <b>Actual</b> <b>Change in period</b> |   |
|   | 30/06/2019      n/a      200      200                                 |   |

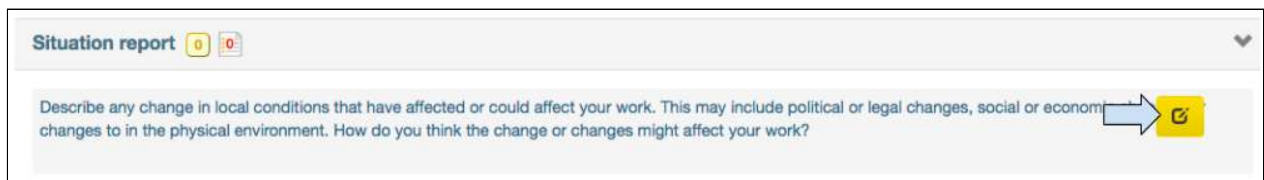
This section will have been automatically populated with information taken from the M&E Tracking page in the proposal.

6. Check that the **Actuals column** has updated with the correct data reflecting achievement against the indicator during the reporting period.
7. Hover over the Explanatory Narrative box and a pencil icon will appear. Click on the **pencil icon** in each sub-section to add explanatory narrative about what the project has achieved against each indicator during the reporting period.

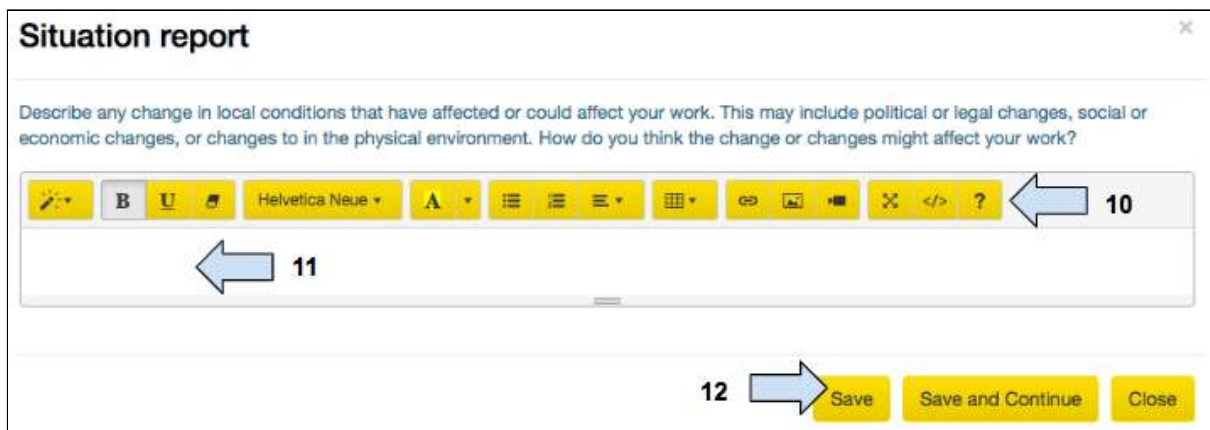




8. Click on the **Situation Report** section



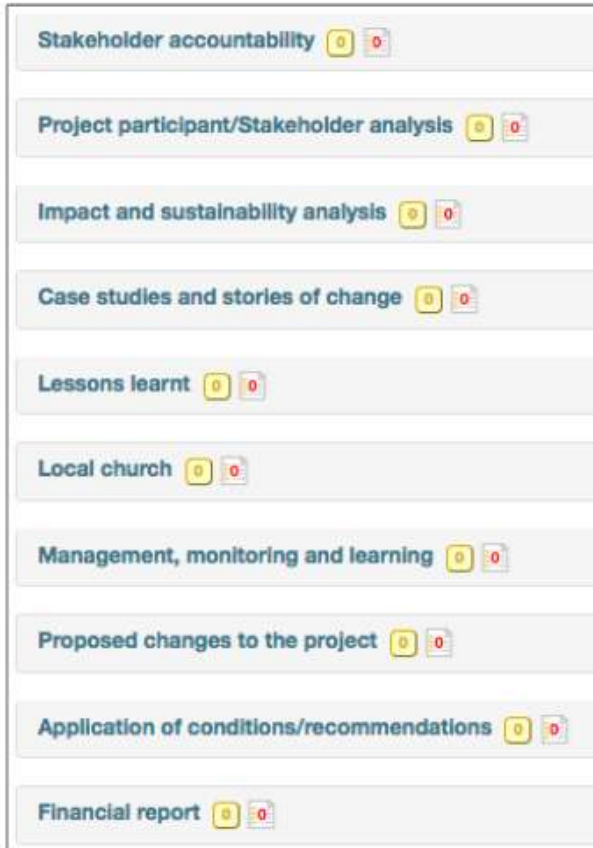
9. Hover over and click on the **pencil icon** to add narrative to this section.



10. Type in the **box** to add narrative to this section

11. Use the **editing bar** to edit the narrative, add tables, video links etc..

12. Click on **Save**



13. Complete all other sections of this Edit tab in the same way



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

## 7.3 'Summary' Tab



### 7.3.1 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.

## 7.3.2 Export to PDF. Copy to Clipboard

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

### 7.3.2.1 Export to PDF



1. Click on the drop arrow next to Export format and select **PDF**
2. Click on **export** to create the pdf file
3. The file will be saved to the users' computer and should then be saved into the correct corporate folder.

### 7.3.2.2 Copy to Clipboard

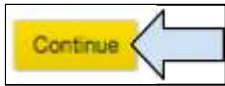


1. Click on the drop arrow next to Export format and select **Copy to Clipboard**
2. Click on **export**



3. A pop up message will appear telling the user that the report has been copied to the clipboard and is ready to be pasted. Click on **OK**.

4. Open a new Word document or Google Doc and paste the summary into the new document. The information can now be edited.



5. Click on **Continue** to move to the next tab.

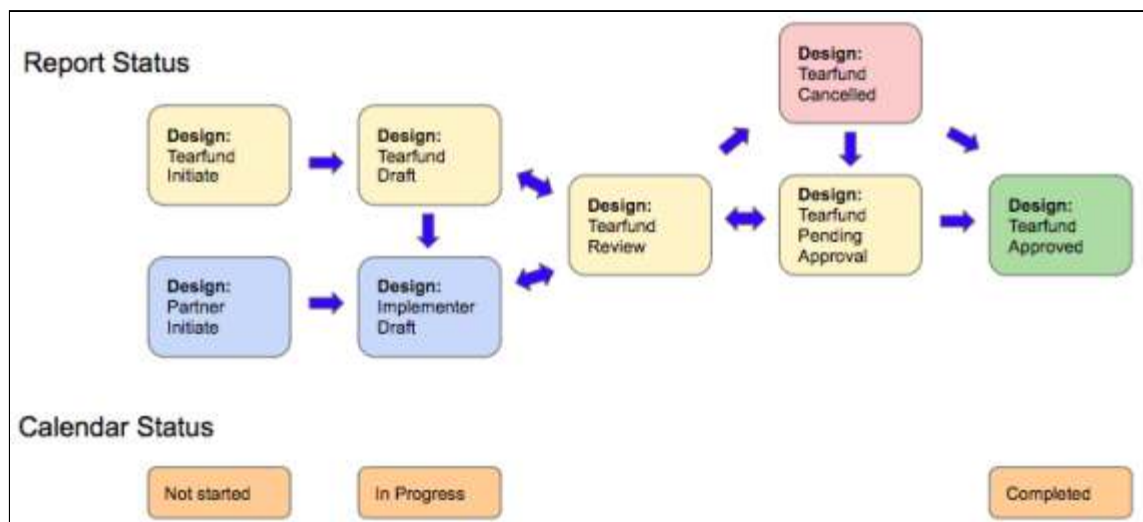
## 7.4 'Status' Tab



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.

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 18: '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 from 'Initiate' to 'Draft' and then 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

## Instructions

1. Click on the drop menu and select the next relevant **status**

2. Add text to the **narrative** section if required

| Date                   | Status                    | Narrative | Snapshot |
|------------------------|---------------------------|-----------|----------|
| Mon, 25 Feb 2019 09:01 | Report: Tearfund Initiate |           |          |

Showing 1 to 1 of 1 entries

Previous 1 Next

3. Click on **status history** to view a record of all status changes



4. Click on **Update and Send** to move the report to the next status.

Each time a partner user wants to send the report to a Tearfund staff member, the status must be changed. (There are currently no notification emails sent but work in progress is that the initiator and approver would get a notification email once the report status has changed).

See [Figure 18: 'Report Status'](#) for a reminder of which statuses must be moved through before reaching Tearfund Approved status.

## 7.5 How to access the report at a later date

Once a report has been saved in Track there are two ways to access it at a later date.

### 7.5.1 Access via the Calendar Tab

From the Home screen, find the relevant project using either Track Search or find it in the Recently Accessed drop menu.



**Calendar**

Title: Translated Training Manual Project (Implementation)  
 Initiator: [Lorien Frank](#)      Owner: [Bernard Mtonga](#)  
 Start Date: 01-January-2019      End Date: 31-December-2019      Project No: **2638**  
 Available in offline app       Implementation: Tearfund Approved








↓

Tags / Strategy Links / Narrative / Budget / Reach / Logic / Reach mapping / M&E Tracking / **Calendar** / Summary / Status

1. Click on the Project Number to open the project, then click on the **Calendar** tab.

**Calendar**  

Show  entries Filter:

| Type            | Start Date | End/Due Date | Location | Owner                                  | Status      | Document   |
|-----------------|------------|--------------|----------|--|-------------|--|
| Baseline survey | 01/01/2019 | 31/01/2019   | Liberia  | Association of Evangelicals of Liberia | Complete    |   |
| Field visit     | 01/02/2019 | 28/02/2019   | Liberia  |  | In progress |                        |
| Mid term review | 30/06/2019 | 31/07/2019   | Liberia  | Association of Evangelicals of Liberia | Not started |                        |
| Final report    | 01/12/2019 | 31/12/2019   | Liberia  | Association of Evangelicals of Liberia | Not started | <a href="#">Link</a>   |

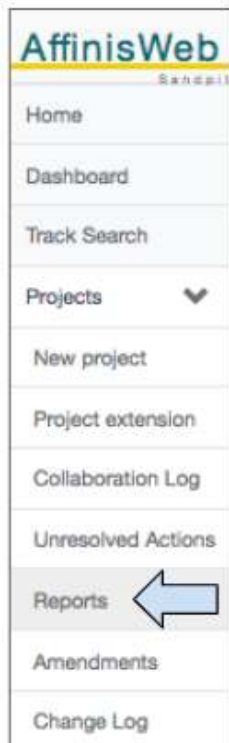
Showing 1 to 5 of 5 entries Previous **1** Next

[+ Add event](#)



2. Click on the **Link** in the report row to open the report


## 7.5.2 Access via the Left Hand Navigation Bar

From the Home screen, find the relevant project using either Track Search or find it in the Recently Accessed drop menu.



1. Click on the Project Number to open the project, then click on **Reports** in the left hand navigation panel.

**Reports**  

| Report No   | Report type                    | Start Date      | End Date         |
|---|--------------------------------|-----------------|------------------|
| <u>2070</u>  | Project End Report (narrative) | 01 January 2019 | 31 December 2019 |

[Create new report](#)

A 'Summary' screen will open listing all reports available against the project

2. Click on the **Link** to open the report.



## 8. Appendix

### 8.1 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](#).

#### 8.1.1 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.

#### 8.1.2 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.

### 8.1.3 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)

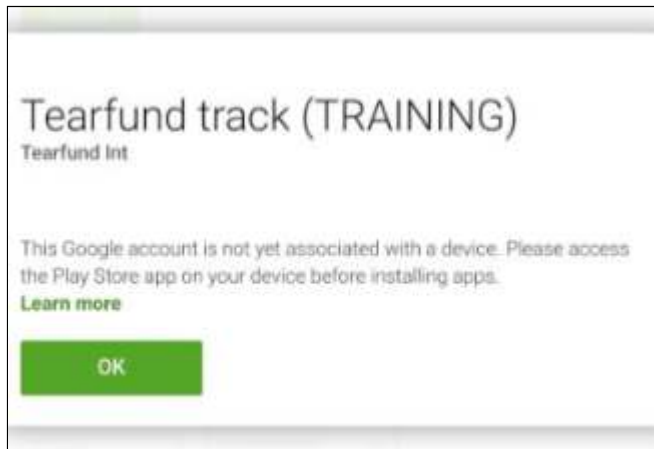
## 8.2 How to download the Offline App onto your android phone or android tablet



Users need to have Google Play Store installed on their device before downloading the Offline App.

Please note that the Offline App is not yet supported by Apple or Apple products

If Google Play Store is not yet installed, the following warning message will appear. If this happens, go back and install Google Play Store.



1. From your android phone/tablet go to Google play store
2. Type in Tearfund and click search
3. Select Tearfund TRACK and click install
4. Click open and it takes you to Tearfund TRACK Offline app login screen
5. The app is saved on your android phone/tablet
6. The download will complete when there is internet access

## 8.3. Troubleshooting

### 8.3.1 I cannot see an activity in my Reach Mapping page



#### **Warning!**

If you cannot see an activity in the Reach Mapping page it has probably not been linked to an indicator.

(To link an activity to an indicator see Section 4.1.10.7 'Add activities to an output').

Alternatively:

- Go back to the Logic tab.
- Click on the List Icon in the output row to open the list of activities.
- Click on the pencil 'Edit' icon to open the Edit Activity box
- Click on the second tab called 'Indicators'
- Link to an indicator in the drop menu next to 'Do you want to link this activity to an indicator?'

### 8.3.2 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?'](#)

## 8.4 Guidelines on How to use Downward Trend Indicators in Track

### 8.4.1 What is a Downward Trend Indicator?

Downward trend indicators are phrased in such a way that the expected result is a decrease 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.

### 8.4.2 Downward Trend Indicators in Track

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

| 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   |

### 8.4.3 Design Phase: How to create an Impact Row using a Downward Trend Indicator

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 4.8.1 Add an Impact Row](#) (steps 1-9).

Starting from Step 10 of [Section 4.8.1](#), please follow these revised instructions:

**New Impact Indicator**

Indicators Details **Baseline** Indicator milestones

Indicator title: the number of neonatal deaths per 1,000 live births  
Type: Quantitative  
Counted as percent?: No

Baseline date: 01/01/2019  
Baseline value: 500

At what percentage below the target should the status turn red?  
15 %

Next

1. Add the **baseline date** and **value**



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

2. Change the value of the % below target at which the RAG status should turn red (optional)
3. Click on **Next**

### New Impact Indicator ×

Indicators   Details   Baseline   **Indicator milestones**

**Indicator title:** the number of neonatal deaths per 1,000 live births  
**Type:** Quantitative  
**Counted as percent?:** No

| Baseline date | Baseline value |
|---------------|----------------|
| 2019-01-01    | 500            |

| Date  | Value |
|---|-------|
| <div style="display: flex; justify-content: space-between; align-items: center;"> <span style="background-color: #009688; color: white; padding: 5px 10px; border-radius: 3px;">+ New target milestone</span> <span style="font-size: 2em;">←</span> </div> |       |

Save

4. Click on **New Target Milestone**

### New Impact Indicator ×

Indicators   Details   Baseline   **Indicator milestones**

**Indicator title:** the number of neonatal deaths per 1,000 live births  
**Type:** Quantitative  
**Counted as percent?:** No

| Baseline date | Baseline value |
|---------------|----------------|
| 2019-01-01    | 500            |

| Date   | Value  |
|--|--|
| <input style="width: 100%; border: 1px solid #ccc;" type="text" value="31/12/2019"/> <span style="font-size: 2em; margin-left: 10px;">←</span> | <input style="width: 100%; border: 1px solid #ccc;" type="text" value="100"/> <span style="font-size: 2em; margin-left: 10px;">←</span> <span style="float: right; font-size: 1.2em;">🗑</span> |

+ New target milestone

Save

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!

#### 8.4.4 RAG Status for a Downward Trend Indicator

The RAG status for a downward trend indicator works in exactly the same way as for an upward 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).

- When a project is on target the indicator status will be Green.
- When a project is off target (ie. activities are delayed or insufficient targets have been reached, according to the milestones), the indicator status will change to Amber.
- The Red indicator status serves as a warning to the user that the indicator is considerably off target. Track has set this as a default value of 15% below target, but the user is free to amend this as required.



## 8.4.5 Implementation Phase: How to Update a Downward Trend Indicator

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 a reminder of how to update an impact indicator please see User Guide [Section 5.2.6 Impact & Outcome Indicator Updates](#) (steps 1-6).



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

## 8.5 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 the Project Logic, selecting activities to update direct project reach in the Reach Mapping tab and finally to updating Activities, Indicators and Reach in 'Implementation Phase'.

## Links and Relationships in Track

