IFAD

Investing in rural people

USER GUIDE
2021

Commercial Agriculture and Resilient Livelihoods Enhancement Programme (CARLEP)

Investing in rural people

Table of Content

1.Preface

The M&E Portal is an application that are designed to increase efficiency in project delivery. It gives with an entire ERP solution which is able to provide the management with varied modules like financial reporting system, procurement plan, BRF plan, quarterly progress report, beneficiary list update, annual progress report, beneficiary counting etc. This system aims to improve the efficiency and effectiveness of the use of ICT/digital services. It is used to break the project to individual task and then set r ealistic milestones and deadlines.

2. Pre-requisites

The prerequisites for preparation before login to the M&E Portal for the OPM admin istration, Agency Administration and Agency Users.

a. All users should provide authenticate Email address to the concern authority for registration.
b. All user should get registered into the M&E portal by the concern authority and respective authority to activate his/her credentials.
c.The Agency Administration and Agency user should be aware about the 'Authorization and Agency' they are assigned in the M&E portal.

3. Registration into M&E Portal?

All the staffs working as admin in the office of CARLEP, OPM, The Project Director, ICT, Super Admin will do the registration of all the stakeholder's credential in the sys tem.

The registration details will be automatically inbox in your authenticate email address with username and password.

Note: For Registration of your Username and Password, you need to provide your authenticate email address and Phone number as when required.
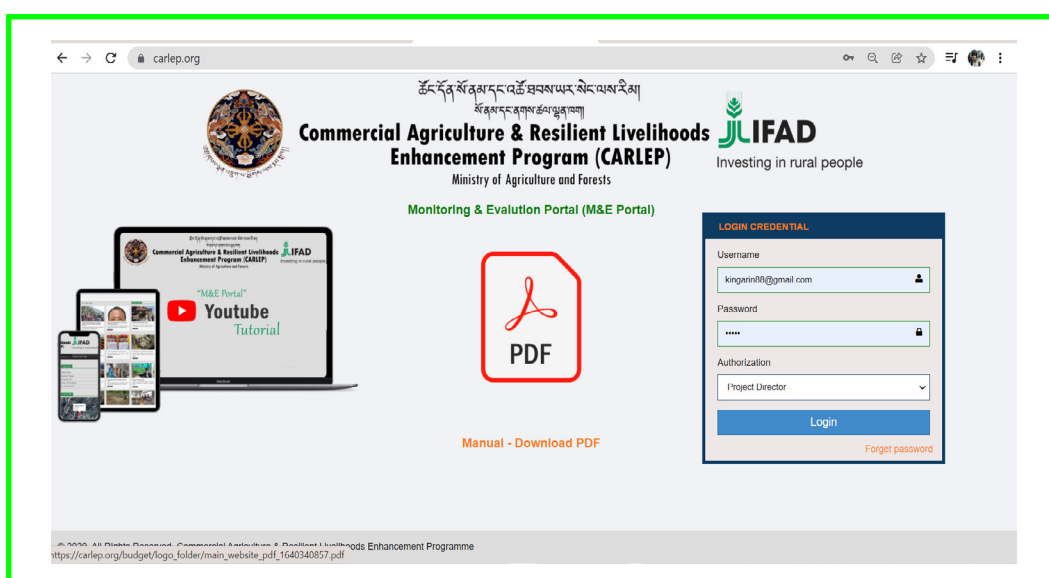
Guidelines to get into the M&E Portal by Agency Officer & Agency users (General User)

Step 1: Type the URL or Web address in address bar.
Visit website https://carlep.gov.bt.
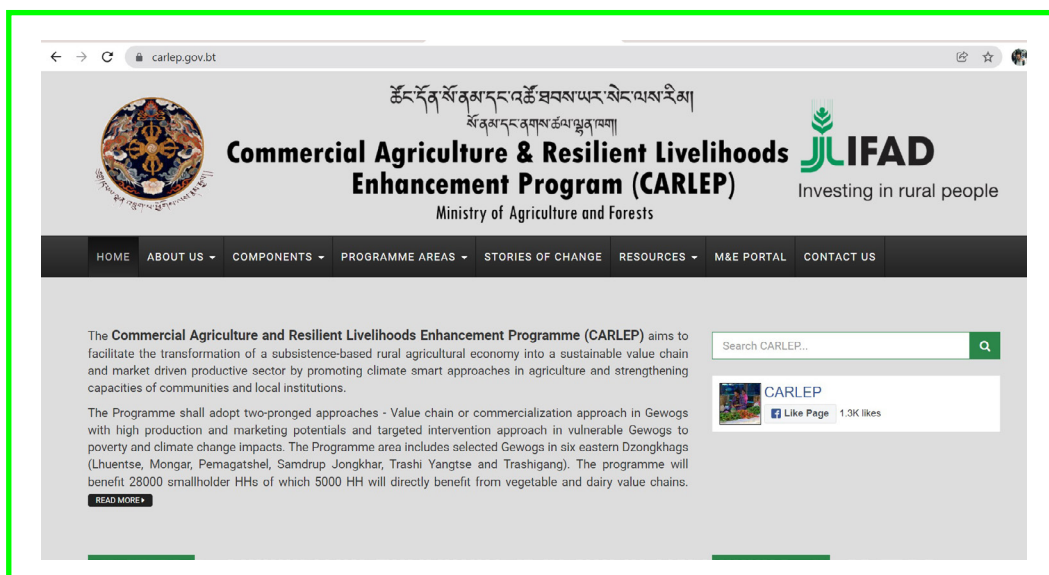
Step 2: Type the username that has been registered in M&E Portal Login credential interface   (Username – registered email address).

Step 3: Type the password (Default Login credential will be automatically generated in your registered email address)

Step 4: Select the Authorization.

For example – If you are working in Dzongkhag, please select 'Agency' as Authorization.

Step 5: Select the Agency.

Step 6 : Select the Sub Authorization and then click on the Login
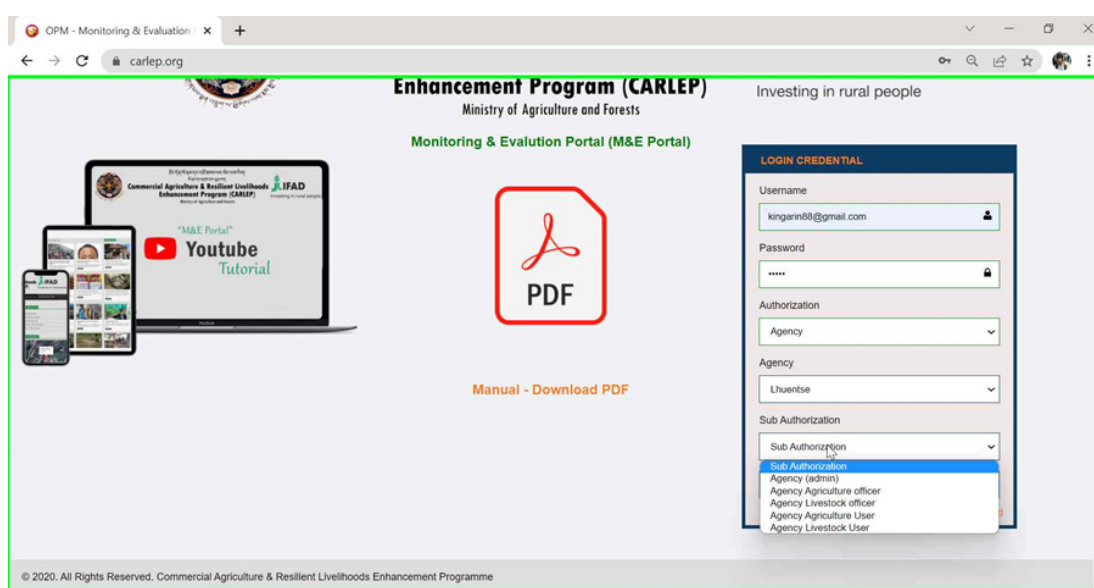
Authorization type – Agency Extension Officer select Agency Agriculture user/Agency Livestock us Authorization

Authorization type – For Agency Agriculture/Livestock officer, select Agency Agriculture Officer / Agency Livestock Officer as Authorization.

For the first time login in the M&E Portal by users, it will directly prompt to my User Account interface to change and update the information as per user desire. Elese click on the user account button to change the password and update.

Guidelines for General Agency officer for AWPB Module/Feature

How to add new AWPB PLAN?

To initiate AWPB PLAN follow the steps below;

i.   Click on Enter tab and select AWPB module.
ii.   Select Add new AWBP button.

iii.   Click on the Add NEW AWPB button in the List of AWPB window to create new AWPB form.
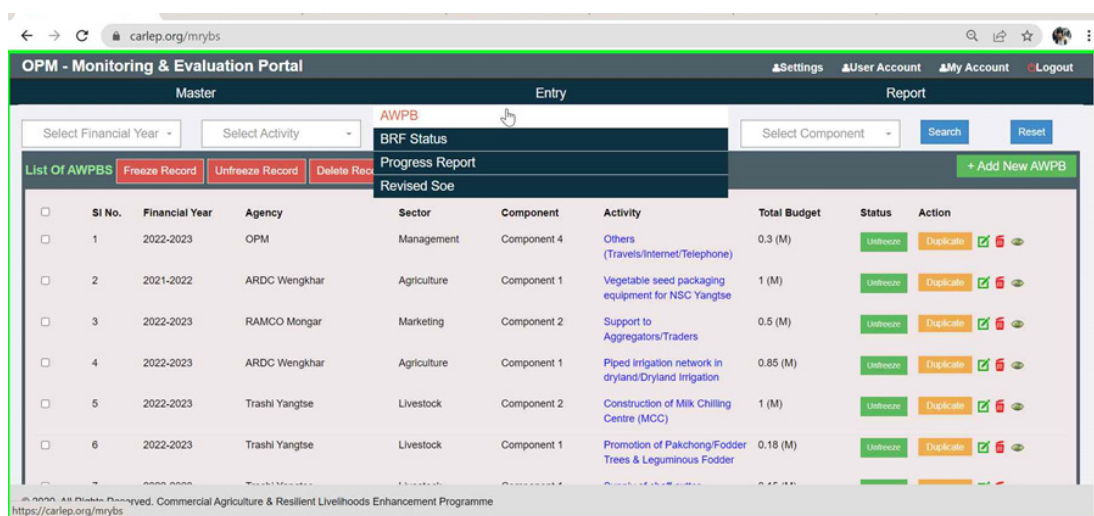
iv.   Fill up all the fields in the ADD NEW AWPB Purpose window. All the red * fields are mandatory.

Note: -
- Sub Activities (Max 500 words)

- Collaborator - In case of Collaborator, user can select more that one collaborator by simultaneously pressing the ctrl key and clicking on types of collaborators

- Source of Financing tab
By clicking on the Source of Financing tab, user can either add by clicking on Append New Row button or delete by clicking Remove Row button

- Procurment label
In this case if the user select the procurment label 'Yes' PP method and PP review lable become active vice versa.

AWPB Form/Report accessibility by Authorization Type.
as per the Admin Permission.

• Access to AWPB module by Agency Officer – Dzongkhag DAO, DLO, ARDC, RAMCO, RLDC.

• Access to AWPB module by Agency Users – Extension officer

Si.No	Module/ Features	Accessibility Status - Authorized by Admin			Accessibility Status - Unauthorized by Admin			Authorization type	Remarks
		Edit/Update	view	Delete	Edit/Update	view	Delete		
1	Progress Report	Yes	Yes	Yes	No	Yes	No	OPM Officer	System Authorization for the accessibility of the module and the feature are usually given by the Project Director.
		Yes	Yes	Yes	No	Yes	No	Agency Officer/Super Admin	
		No	Yes	No	No	Yes	No	Agency User	
2	AWPB Reports & Queries	Yes	Yes	Yes	No	Yes	No	OPM Officer	In AWPB Report there will be no option for edit/update/delete for any authorization users.
		Yes	Yes	Yes	No	Yes	No	Agency Officer/Super Admin	
		No	No	No	No	No	No	Agency User	

Guidelines for Agency officer for Progress Report Module/Feature

Note: - Progress Report should be assign by the Agency officer to their respective Agency users by the authenticate Email Address as per their FY plan proposal.

To initiate Progress Report, follow the steps below;

I.   Click on Enter Menu and select Progress Report.
II.   Select Add new Progress Report.
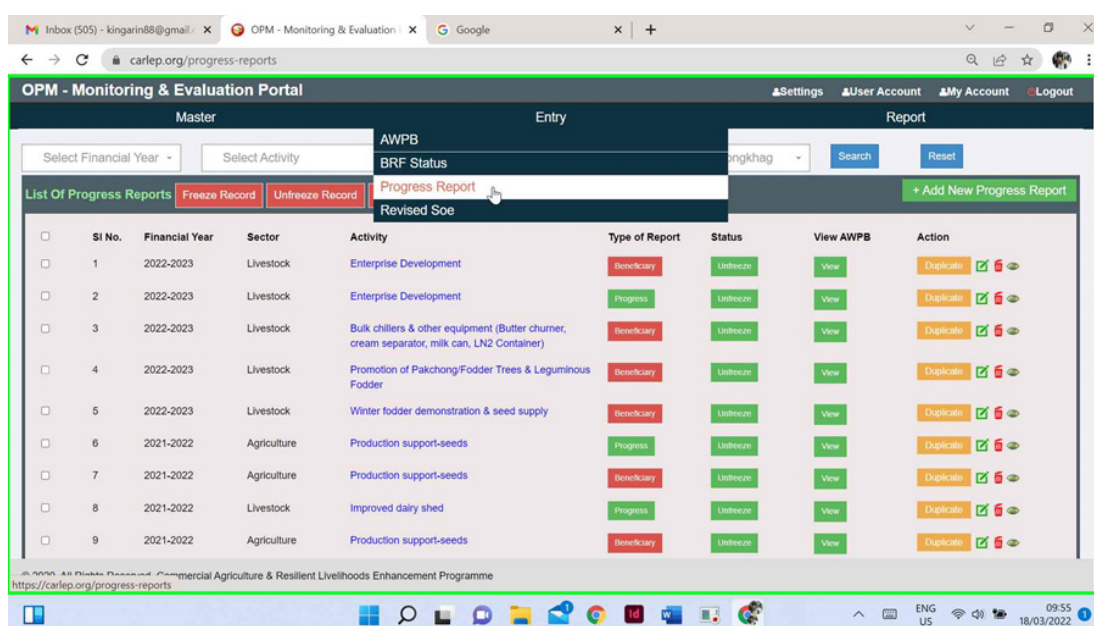
III.   Fill up all the fields in the Add a Progress Report Purpose window. All the red * fields are mandatory.

IV.   Click on the Submit button.

Note:- Before submitting the progress report, the Agency users should verified that they had correctly redirected there Progress Report plan with their authenticate email address as per their proposed plan for the FY year. For instant:- Agency user (kurtoe Geog- against Email ID – kingarin88@gmail.com)

Guidelines for Agency users (Extension Officer)

To initiate Monitoring and Evalution Portal by Agency User.

i. Enter the login credential i.e Username and Paswword.
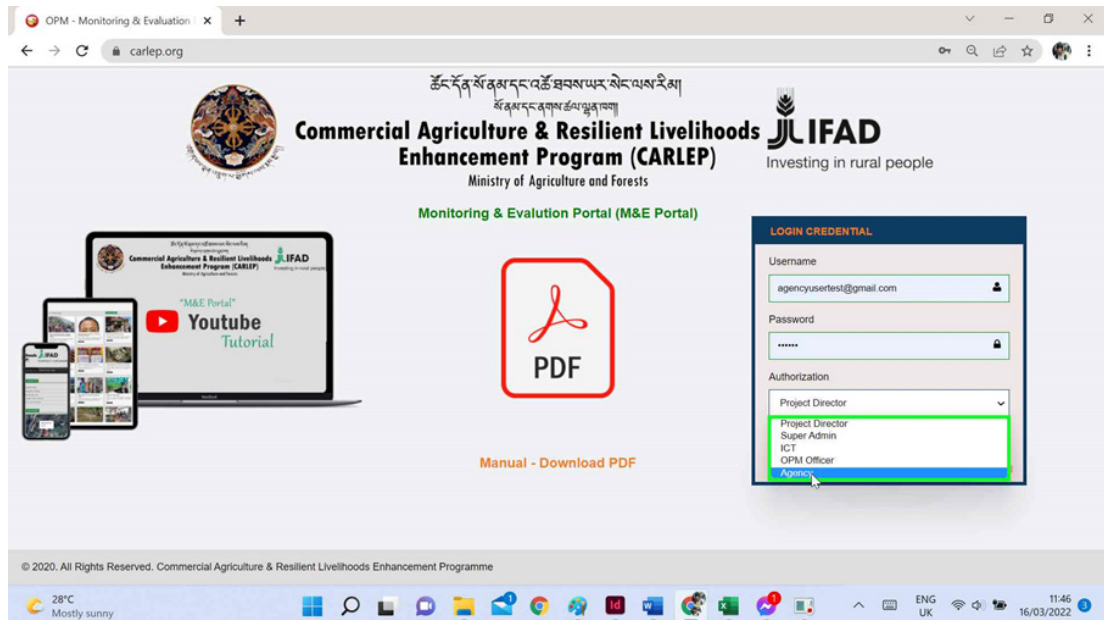
ii. Select the Authorization as Agency.
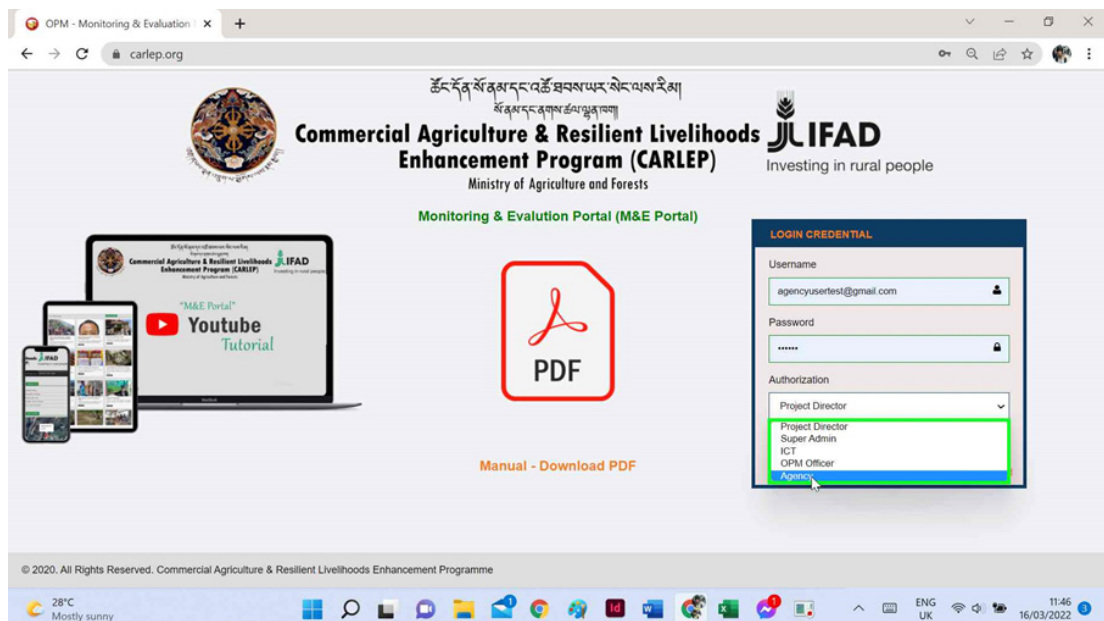
iii. Select you own Agency Name (For example - Lhuentse)
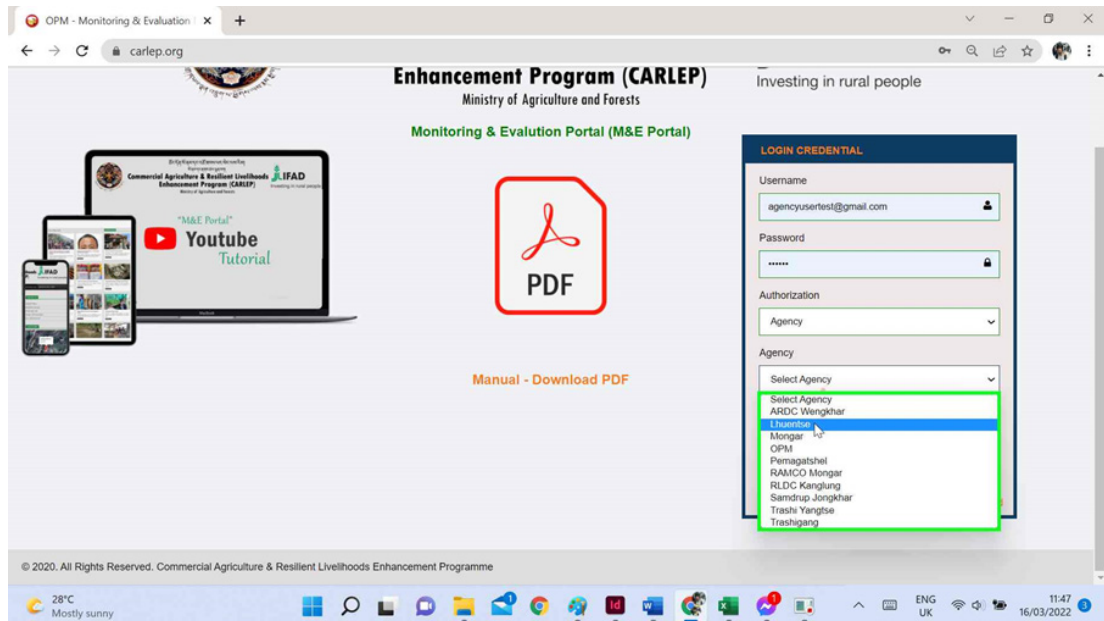
iv. Select the authorization type as either Agency agriculture user/ Agency livestock user.
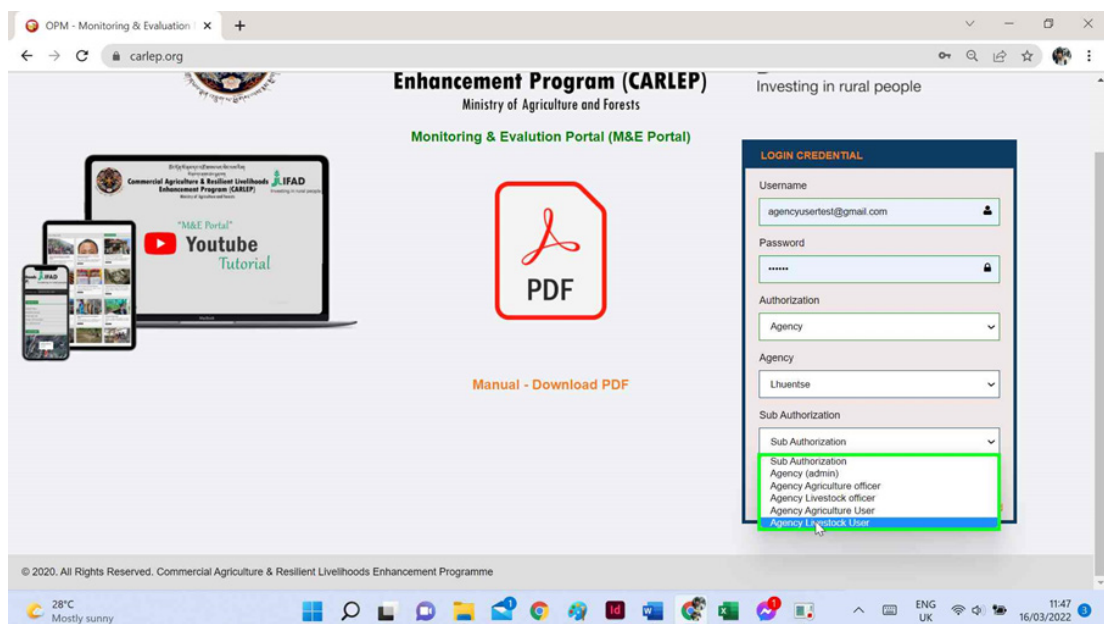
v. Click on the login button.
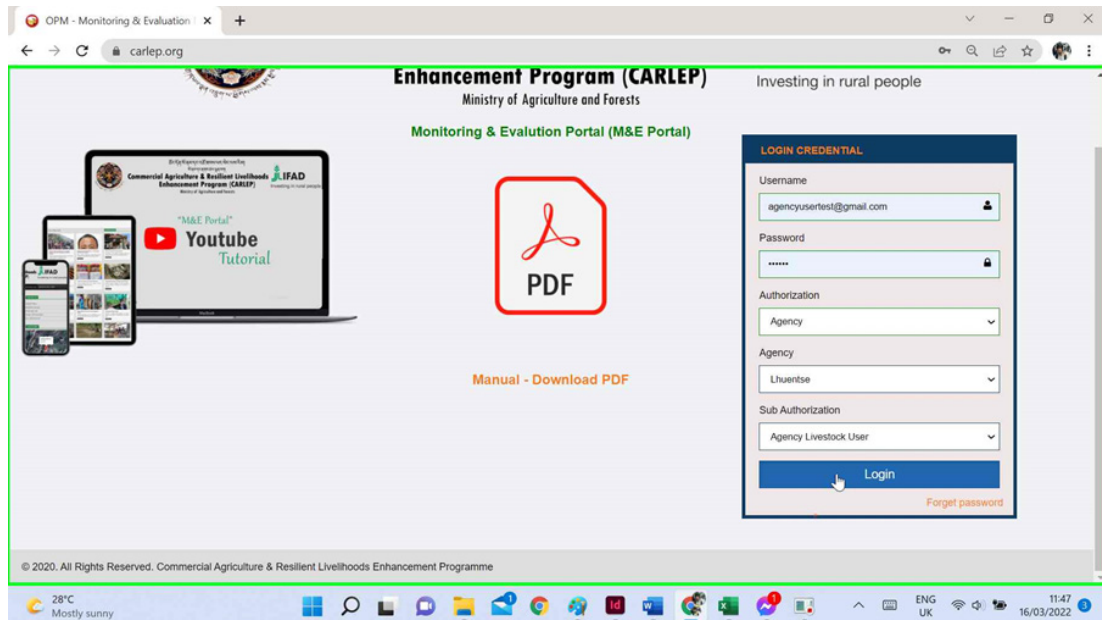
-The Agency user redirect to the respective agency AWPB list window as default where they can view the list of the porposed plan for the agency as per the required Fiscal year.
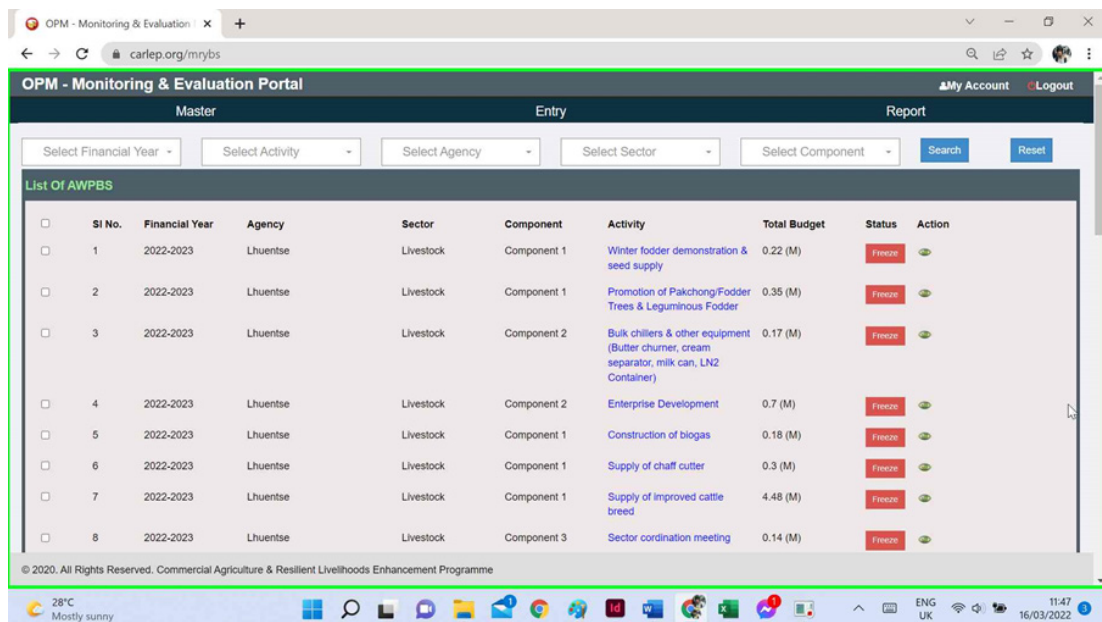
Forgot Password:-

i. To reset password please click on the forgot password link in the login interface.
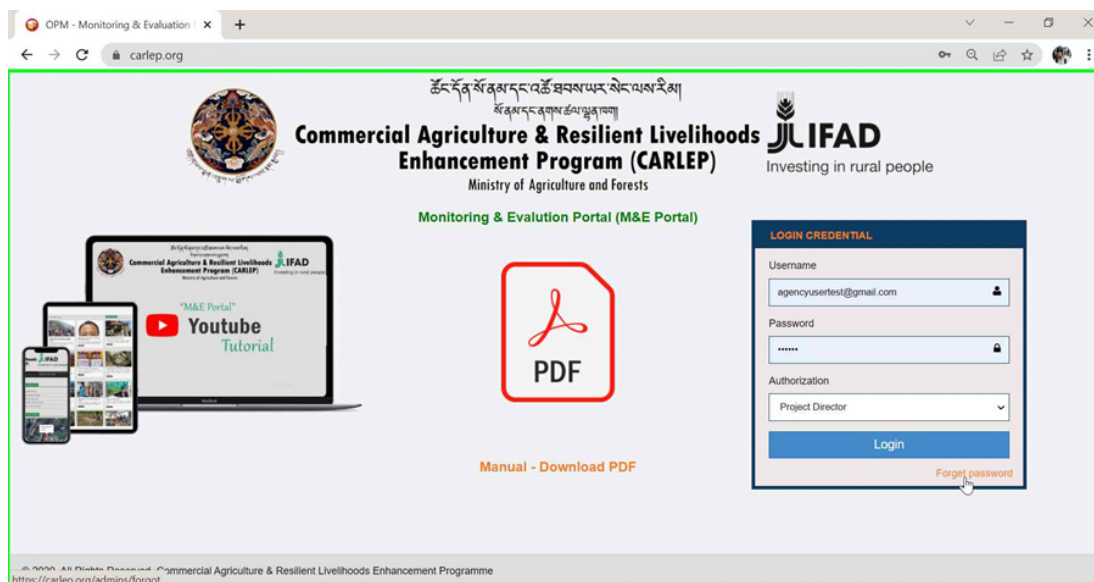
ii. Enter the registered email address to reset your password and then click on submit button.
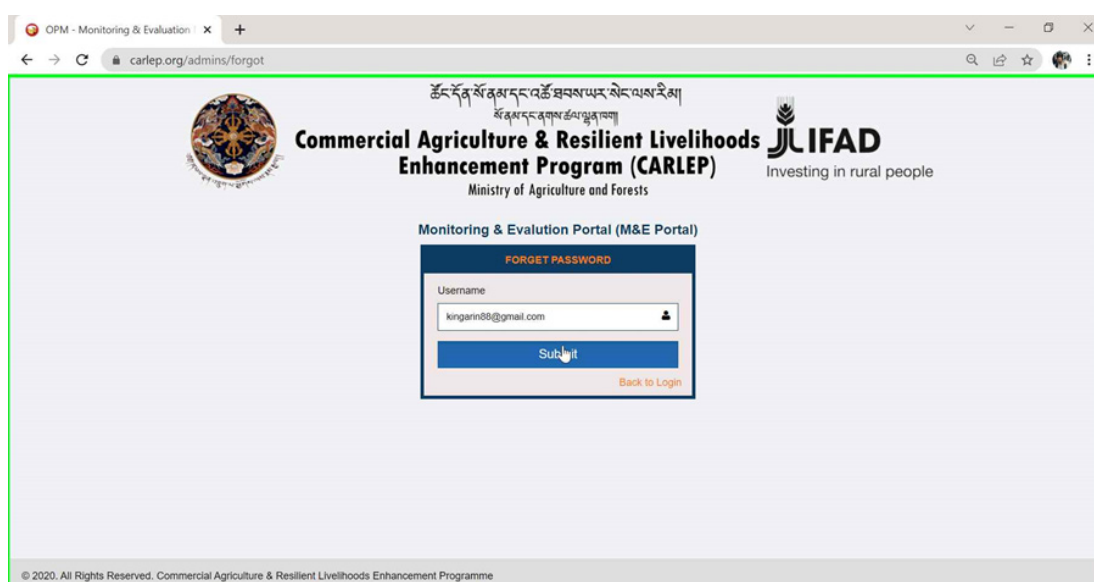
Note:- The system will automitically generate the new passwrod to your email box.

How to add Progress Report data -Agency users (Extension Officer)

.   To initiate the Progress Report data-
   i. Click on the Entry menu/tab and then click on the Progress Report button.
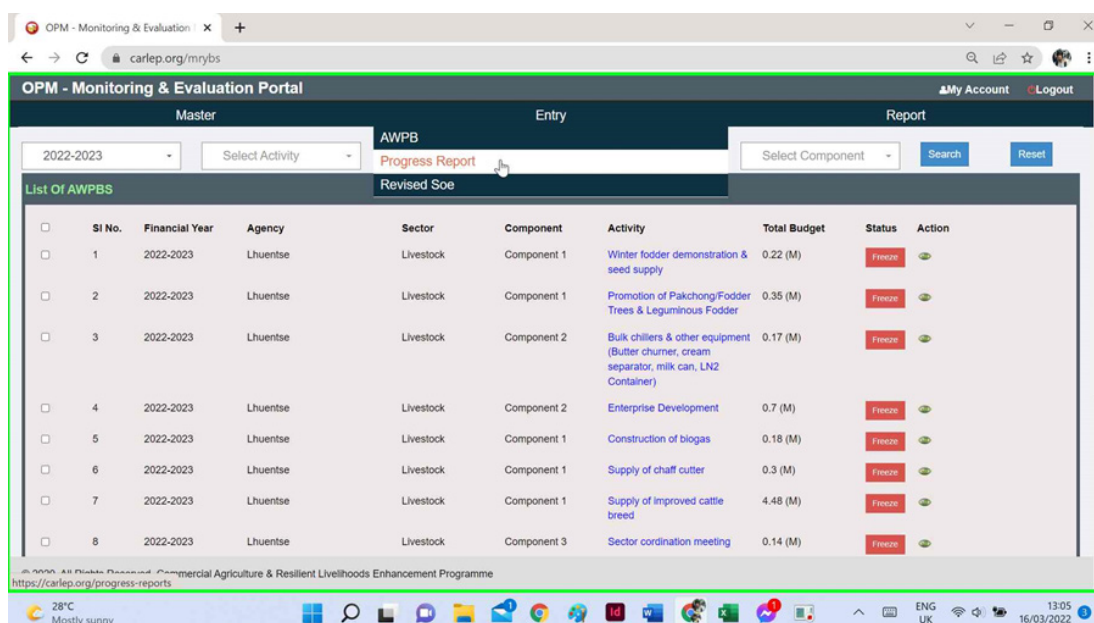
ii. A list of progress report that agency user had proposed for the particular fiscal year will be listed.
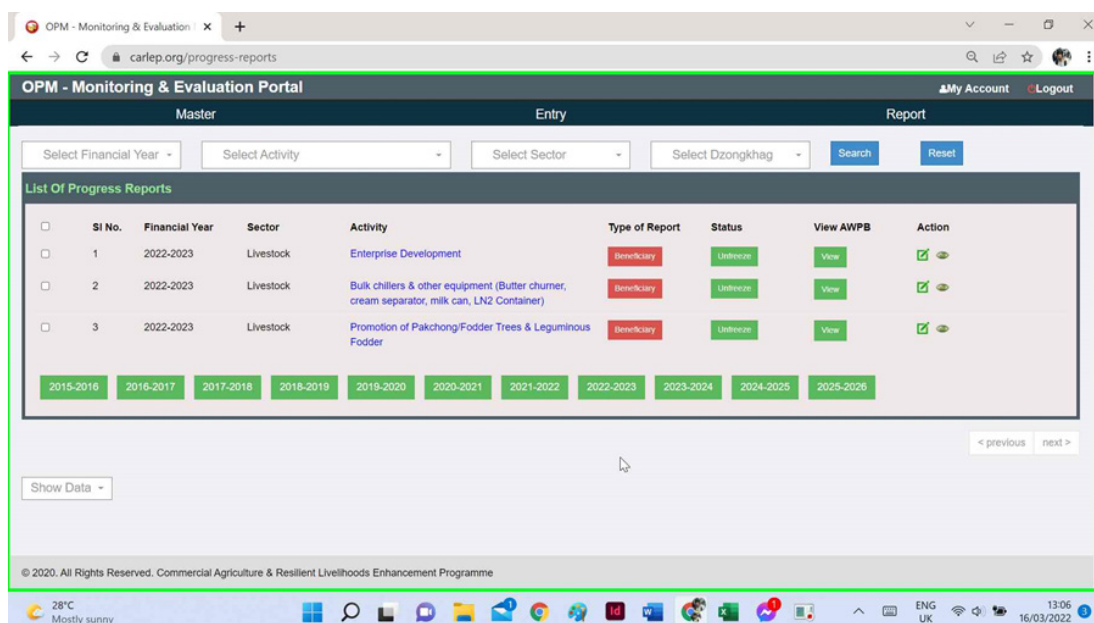
Note: If the agency user has not updated the progress report list, "the type of report" indicates in red

color as show below.
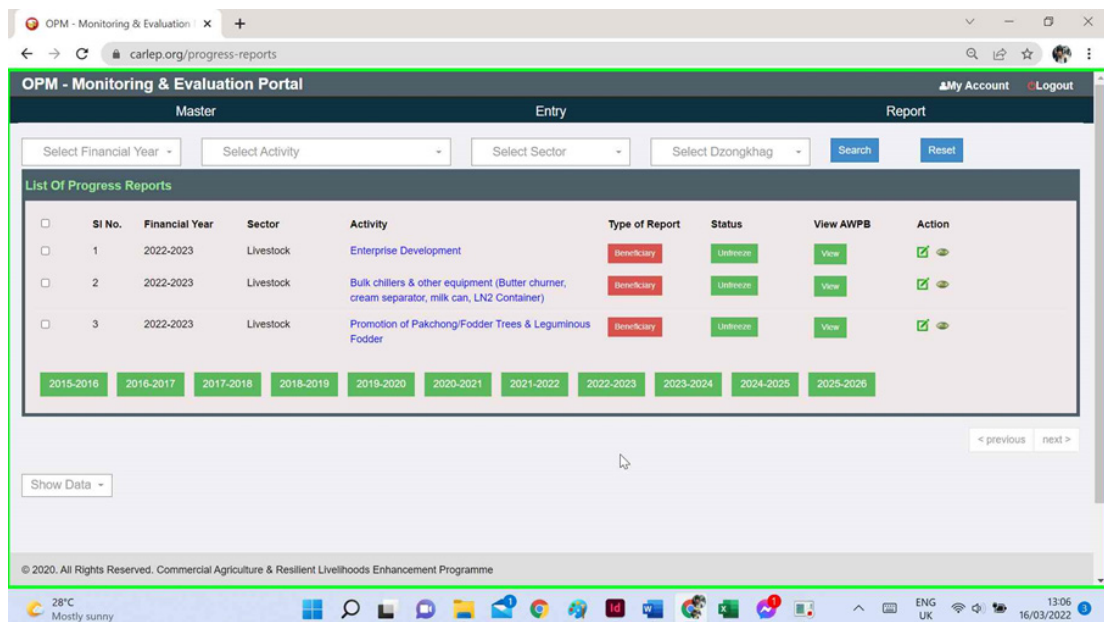
iii. Click on the Edit button to add Progress report and click on the View button to view the progress report details.

Edit Mode screen 1 ..... continued from screen 2

Edit Mode screen 2

View Mode Screen.

Adding beneficiary list in Progress Report.

As per the convienet and user friendly for the end-user (Agency user) there are two ways to update the beneficiary list in the progress report.

Manual Updation of Beneficiary list in Progress Report Quaterly.

i. Click on the add beneficary as per your quaterly report..

Note: Fill up all the fields in the "Add new progress report" window.

 - User can either add row by clicking on Append New Row button or delete by selecting or clicking on checked box of the row that to be delete & then click on Remove Row button as shown

CSV Updation of Beneficiary list in Progress Report quaterly.

A CSV is a comma-separated values file, which allows data to be saved in a tabular format. In this case a pre-format excel file is made in .csv extension. Below is the format pricise format.

Name	Gender	Village	Geog	House No	specific Support type	Quantity	No. of Scheme	Remarks
UGYEN RINZIN	M	THUENPEY	6	CHHA-4-58	Supply of Seeds	2	1	Received
PELDEN	F	DUNGKAR	6	CHHA-4-58	Supply of Seeds	3	2	Received
SANGAY KEEBA	F	DUNGKAR	6	CHHA-4-100	Supply of Seeds	2	1	Received
GYELTSHEN	M	DUNGKAR	6	CHHA-4-103	Supply of Seeds	3	2	Received
RINCHEN	F	DUNGKAR	6	CHHA-4-104	Supply of Seeds	2	1	Received
YANGZOM	F	DUNGKAR	6	CHHA-4-105	Supply of Seeds	3	2	Received
MELAM TSHERING	M	DUNGKAR	6	CHHA-4-107	Supply of Seeds	2	1	Received
NMINJUR DEMA	F	DUNGKAR	6	CHHA-4-109	Supply of Seeds	3	2	Received

Note:- The file name should be saved in .csv extension
           For example.   Beneficiarylist.csv not as Beneficiarylist.xlsx

In the above Pre-define .csv by the end-user or the client, we may notice that under Geog column, the name of geog is assinged as numerical value not as a text.
For instant : Geog - 6 . In this case 6 indicate kurtoe geog under Lhuentse Dzonkhag. This is due to the techinical netique. For other registered Geogs in M&E Portal, system had automiclly generated mumerical value againist the geog. Therefore all the end-user/client must enter the numerical value against the repective geog as shown below while pre-defining the .csv benificiay list as following.

     Click on the link to Find the Geog-ID (numerical value) by agency wise

How to add and upload .csv file in the Progress Report.

i. Click on the add CSV quaterely.

ii. Click on the upload file and select the pre-define .csv file from the computer that had been stored and select then submit button.

After the .csv file get upload the beneficiary list will be listed as per you quaterly selection.