



Investing in rural people

USER GUIDE **2021**

Commercial Agriculture and Resilient Livelihoods Enhancement
Programme (CARLEP)

Investing in rural people



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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 realistic milestones and deadlines.

2. Pre-requisites

The prerequisites for preparation before login to the M&E Portal for the OPM administration, 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 system.

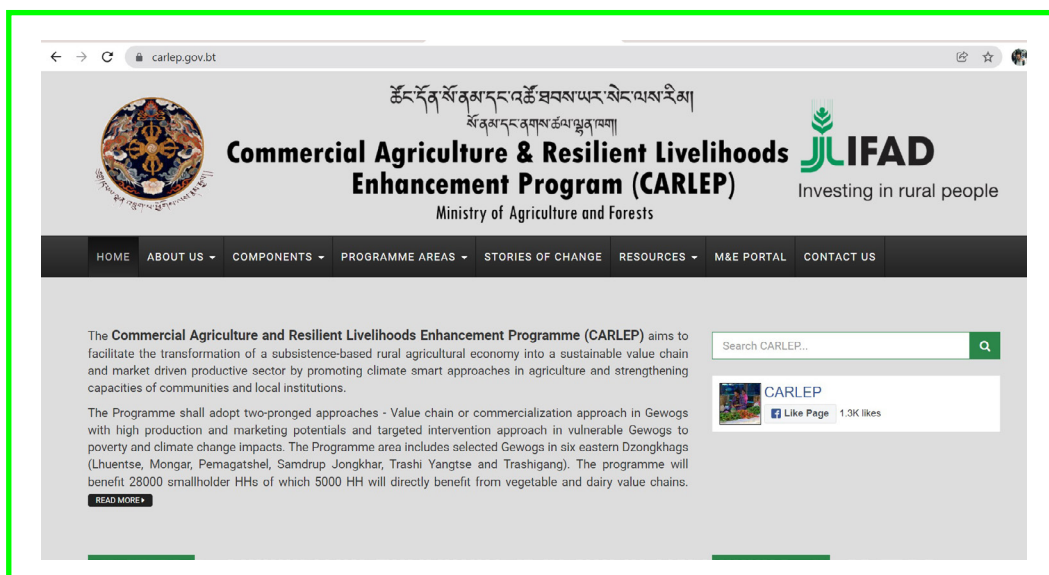
The registration details will be automatically inbox in your authenticate email address with username and password.

Note: For Registration of your Username and Password, you need to provide your authenticate email address and Phone number as when required.

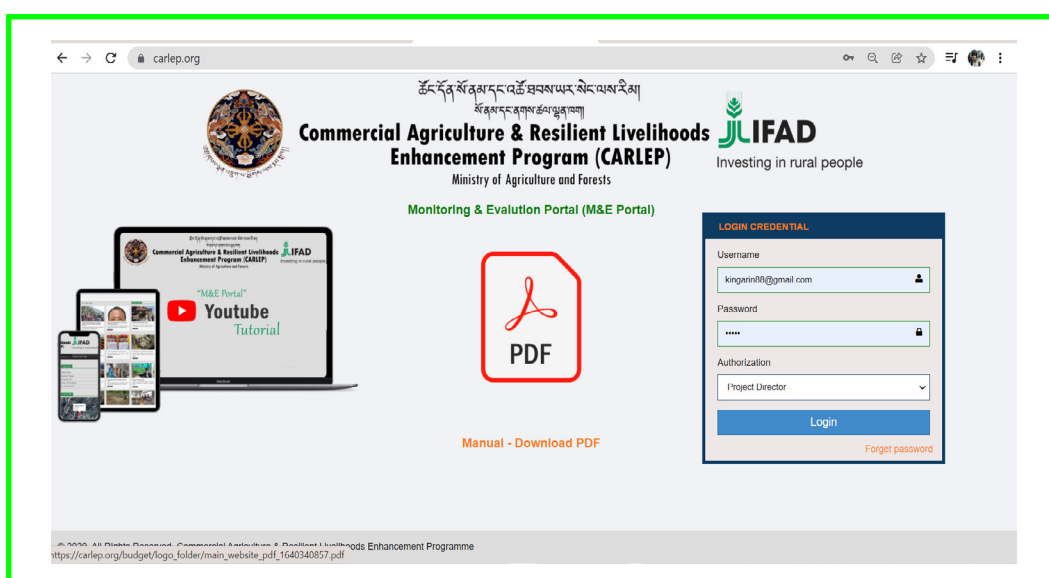


Guidelines to get into the M&E Portal by Agency Officer & Agency users (General User)

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)

OPM - Monitoring & Evaluation

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ཚོང་རྒྱལ་སྤོང་ལྷན་ཁག་གི་འཛུགས་སྐྱོང་གི་ལས་འགན་ཁུངས་
མི་རྒྱལ་དང་རྒྱལ་ཁུངས་ཚུན་ལྷན་ཁག་།

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Ministry of Agriculture and Forests

IFAD
Investing in rural people

Monitoring & Evaluation Portal (M&E Portal)

Manual - Download PDF

LOGIN CREDENTIAL

Username
kingarin88@gmail.com

Password

Authorization
Project Director
Project Director Super Admin
ICT
OPM Officer
Agency

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Step 4: Select the Authorization.

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

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ཚོང་རྒྱལ་སྤོང་ལྷན་ཁག་གི་འཛུགས་སྐྱོང་གི་ལས་འགན་ཁུངས་
མི་རྒྱལ་དང་རྒྱལ་ཁུངས་ཚུན་ལྷན་ཁག་།

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LOGIN CREDENTIAL

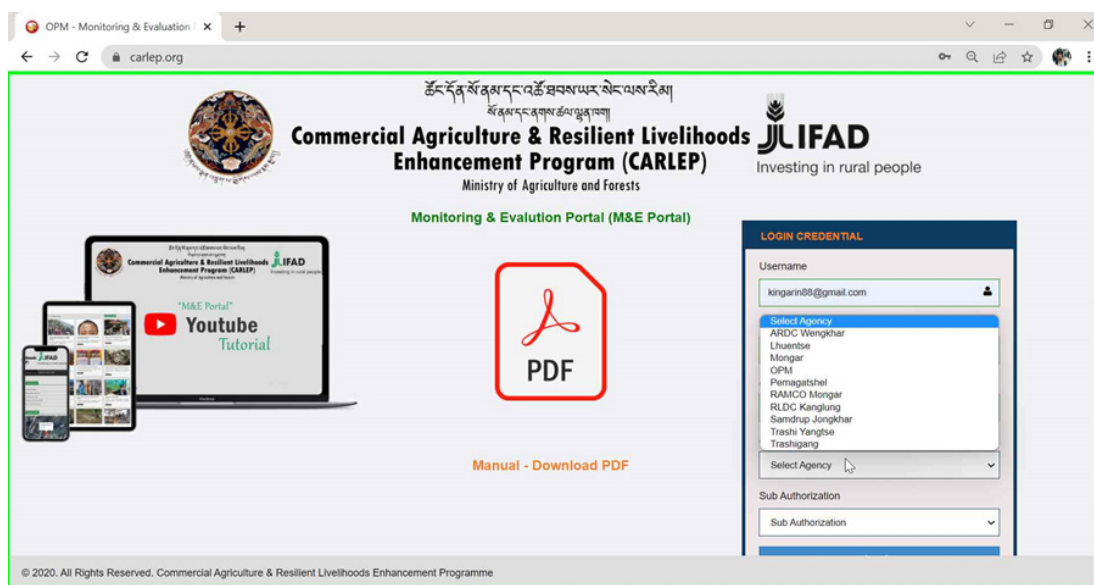
Username
kingarin88@gmail.com

Password

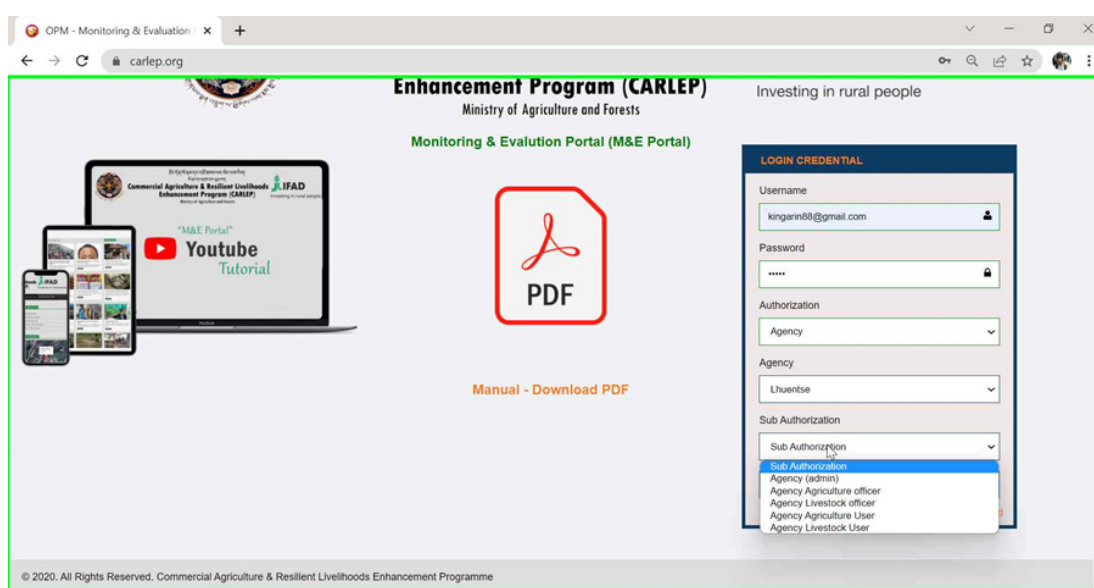
Authorization
Project Director
Project Director Super Admin
ICT
OPM Officer
Agency

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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 user 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. Else click on the user account button to change the password and update.

The screenshot shows a web browser window with the URL `carlep.org/admins/edit-profile`. The page title is "OPM - Monitoring & Evaluation Portal". The navigation bar includes "Master", "Entry", and "Report" tabs, along with "My Account" and "Logout" links. The "My Account" section contains a form with the following fields:

User Type	Name	Phone Number
Agency	Kinga Rinzin	77335514

Below the table, there are two rows of input fields:

Email Address	Password	Confirm Password
kingarin88@gmail.com	*****	

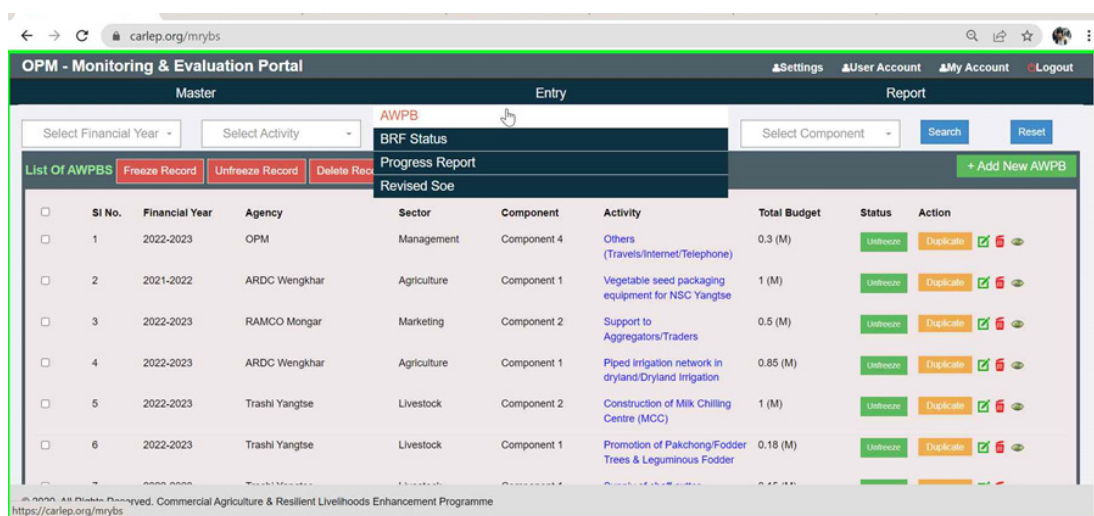
An "Update" button is located at the bottom left of the form. At the bottom of the page, a footer reads: "© 2020. All Rights Reserved. Commercial Agriculture & Resilient Livelihoods Enhancement Programme".

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 AWPB 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 than one collaborator by simultaneously pressing the ctrl key and clicking on types of collaborators

Location	Lead	Collaborator
	Dzongkhag Agriculture	UPM, Wengkhaz Genec MoAF Department CARLEP/IFAD
Procurement	PP Method	PP Review
Yes	DC	Post
Procurement Items	AWPB PP Code	
	CARLEP/LH/GSI/20213007/8980	

- 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

- Procurement label

In this case if the user select the procurement label 'Yes' PP method and PP review label 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

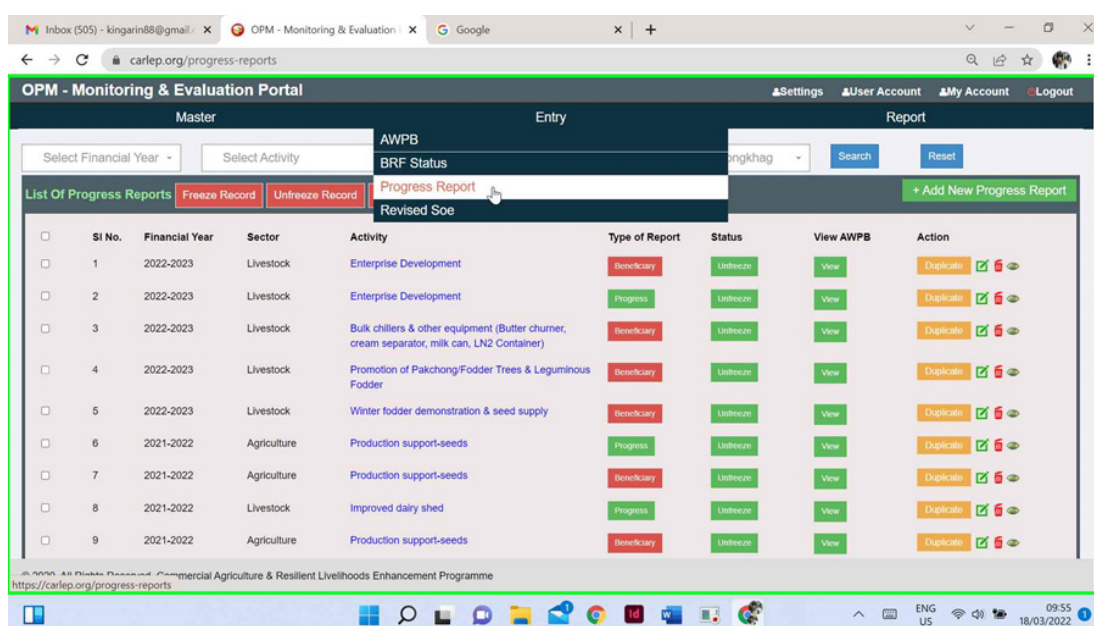
Sl.No	Module/ Features	Accessibility Status - Authorized by Admin			Accessibility Status - Unauthorized by Admin			Authorization type	Remarks
		Edit/Update	view	Delete	Edit/Update	view	Delete		
1	Progress Report	Yes	Yes	Yes	No	Yes	No	OPM Officer	System Authorization for the accessibility of the module 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.

OPM - Monitoring & Evaluation Portal

Master Entry Report

Add a New Progress Report

Progress Reports List + Add New Progress Report

Search Awpb Code (Financial Year) 2022-2023 Search Awpb Code (Sector) Livestock Search Awpb Code (Agency) Lhuentse Search Awpb Code (Activity) Enterprise Development

Awpb Code

Select Awpb Code

Select Awpb Code

2022-2023 Livestock Supply of yagat cattle/2022/01101241/1824

Select Financial Year Select Sector Select Activity Select Indicator

Sub Activity Sub Activity Details Dzongkhag

Proposed Quantity 0.000 Proposed HH 0 Proposed Male 0 Proposed Female 0 Proposed Budget (in Million) 0.000

Remark

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IV. Click on the Submit button.

Establish Semi-commercial Enterprise

Select Dzongkhag

Proposed Quantity 10 Proposed HH 120 Proposed Male 60 Proposed Female 60 Proposed Budget (in Million) 0.7

Remark

Search Email (Sector) Livestock Search Email (Agency) Lhuentse

Permission User

Select Permission User

kingarin88@gmail.com

ghurpat@moat.gov.bt

retend@moat.gov.bt

dorju@ruentse.gov.bt

agencyusertest@gmail.com

Submit

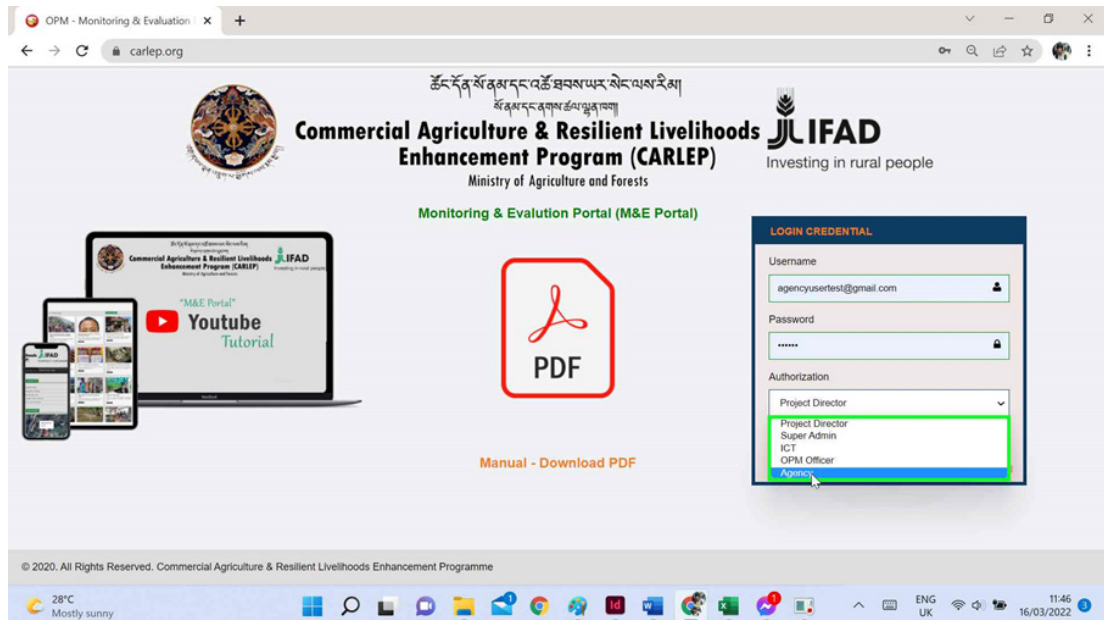
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Note:- Before submitting the progress report, the Agency users should verified that they had correctly redirected there Progress Report plan with their authenticate email address as per their proposed plan for the FY year. For instant:- Agency user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

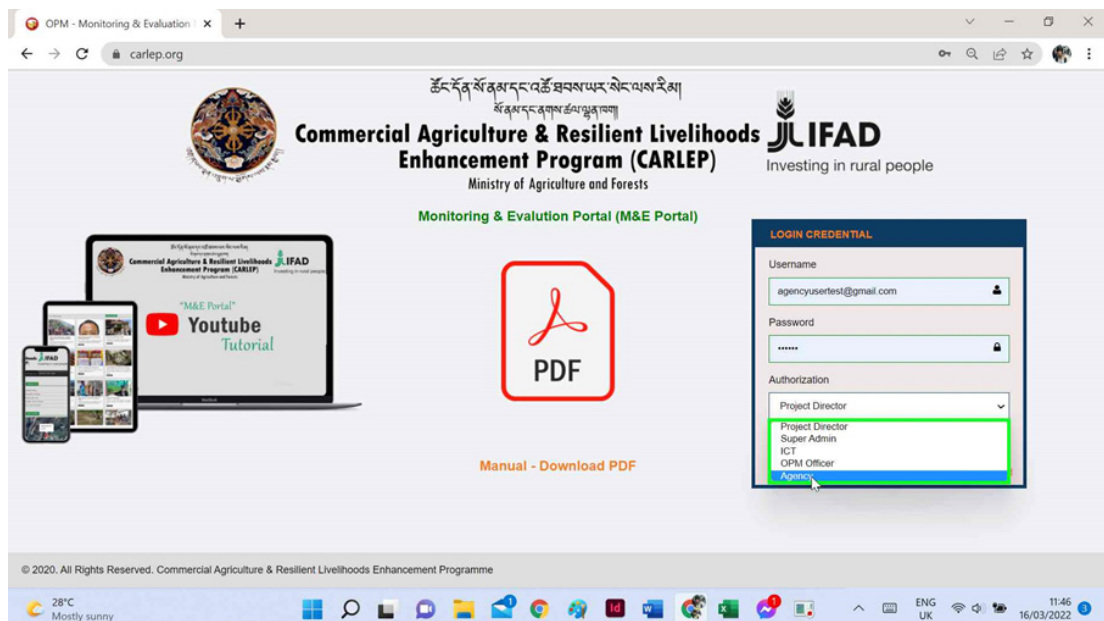
Guidelines for Agency users (Extension Officer)

To initiate Monitoring and Evaluation Portal by Agency User.

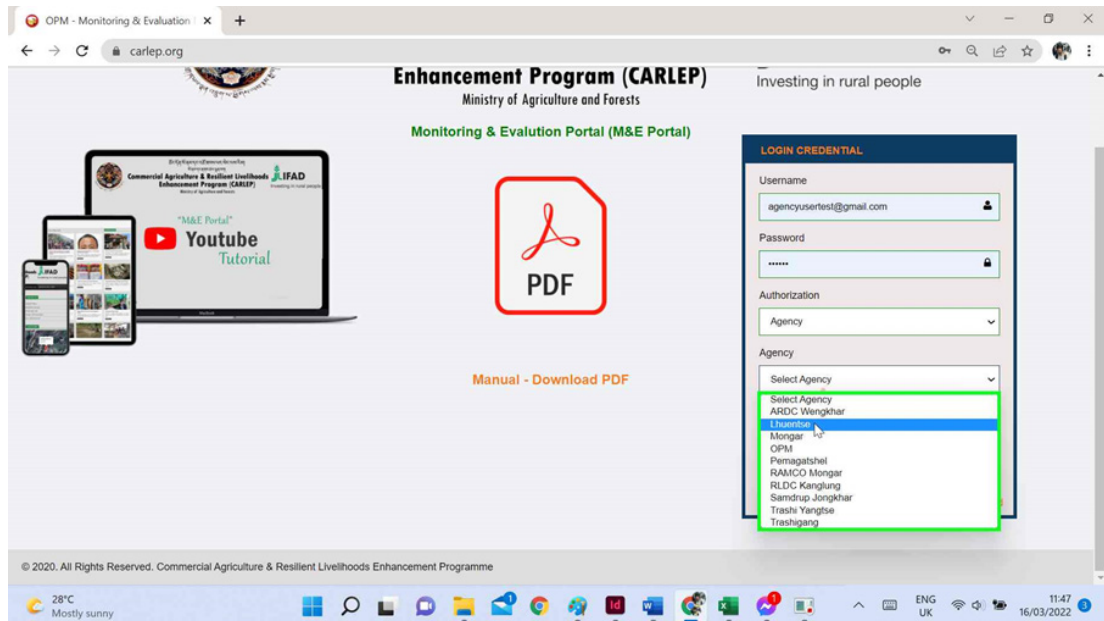
i. Enter the login credential i.e Username and Password.



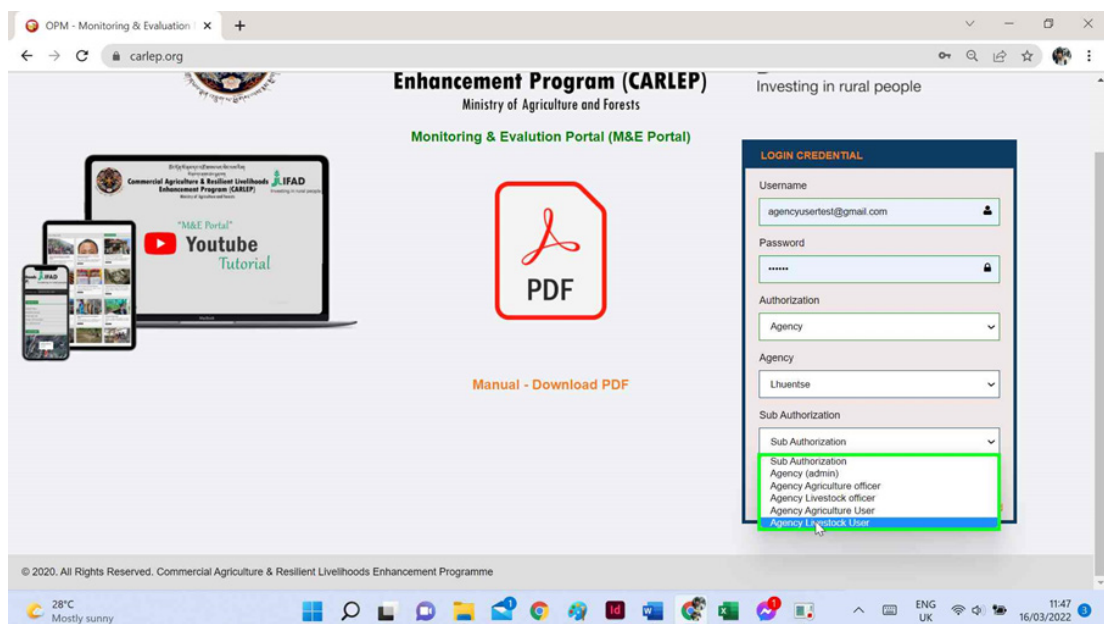
ii. Select the Authorization as Agency.



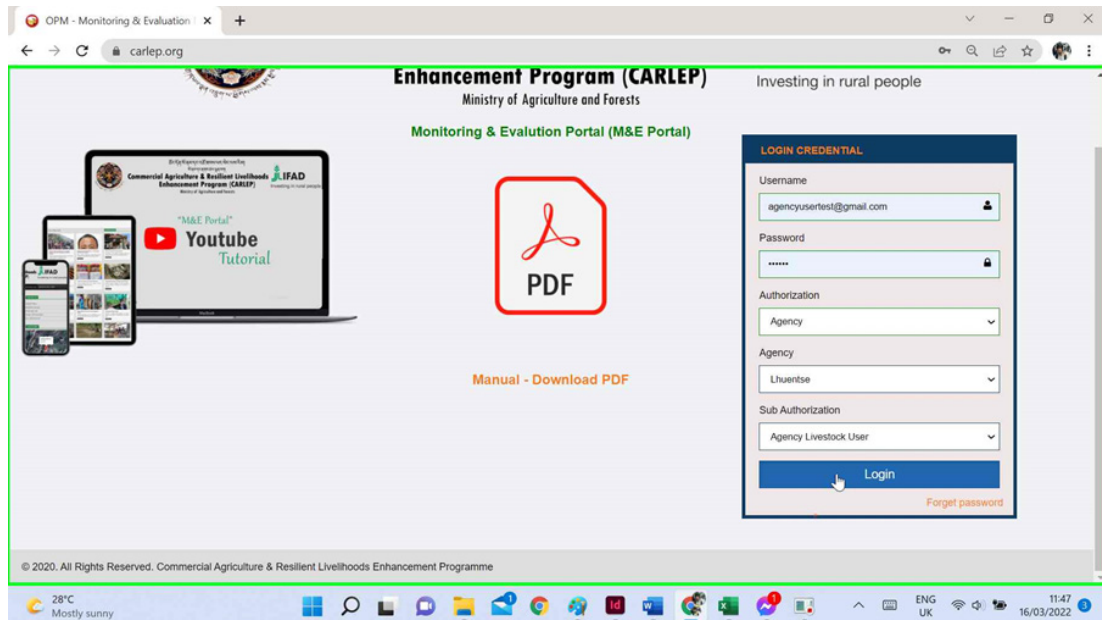
iii. Select you own Agency Name (For example - Lhuentse)



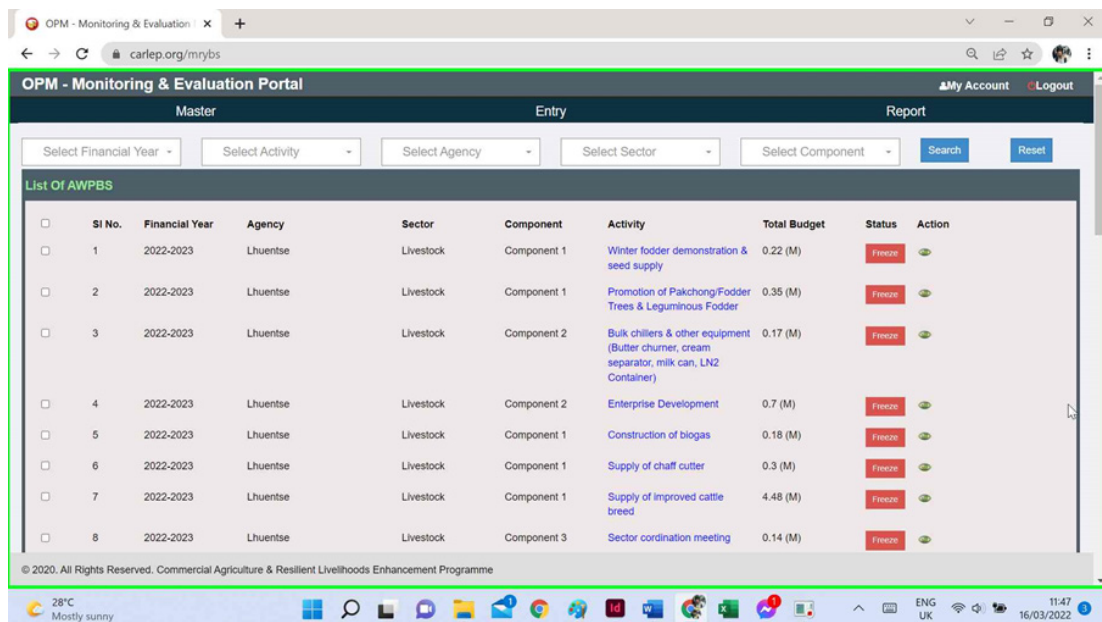
iv. Select the authorization type as either Agency agriculture user/ Agency livestock user.



v. Click on the login button.

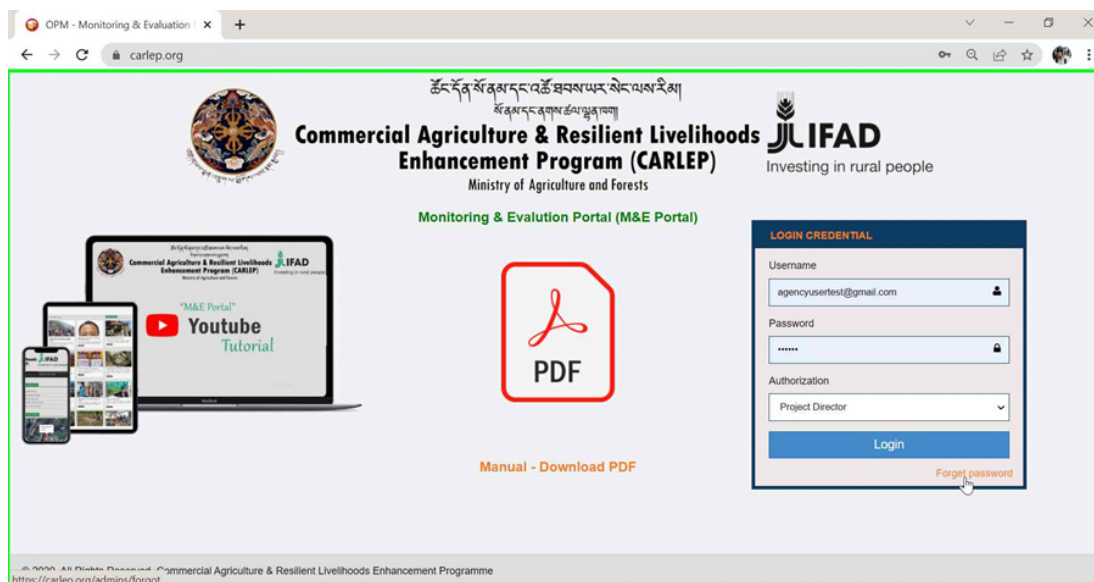


-The Agency user redirect to the respective agency AWPB list window as default where they can view the list of the proposed plan for the agency as per the required Fiscal year.

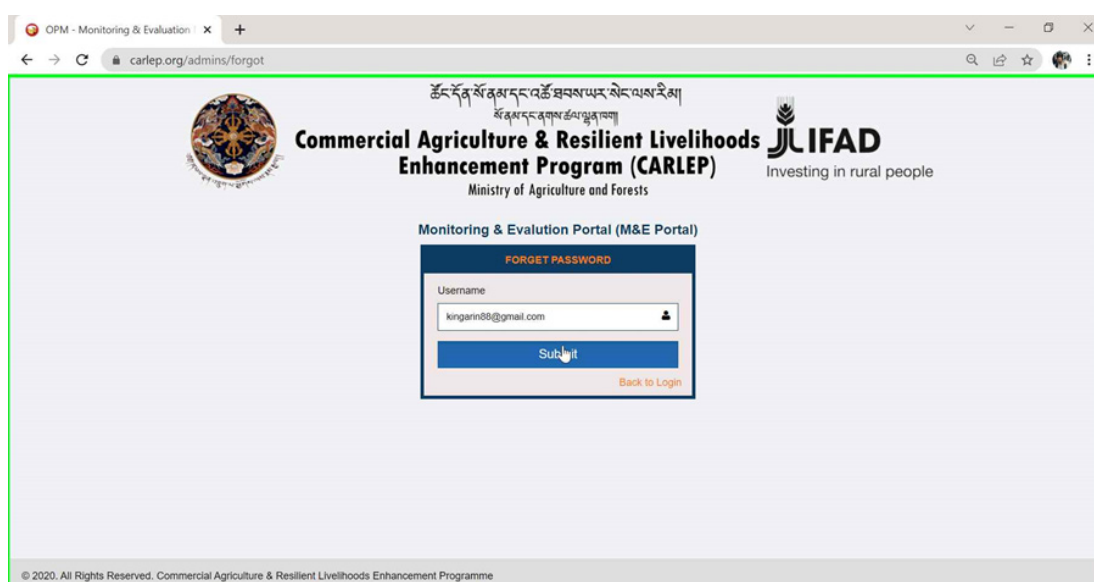


Forgot Password:-

- 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.

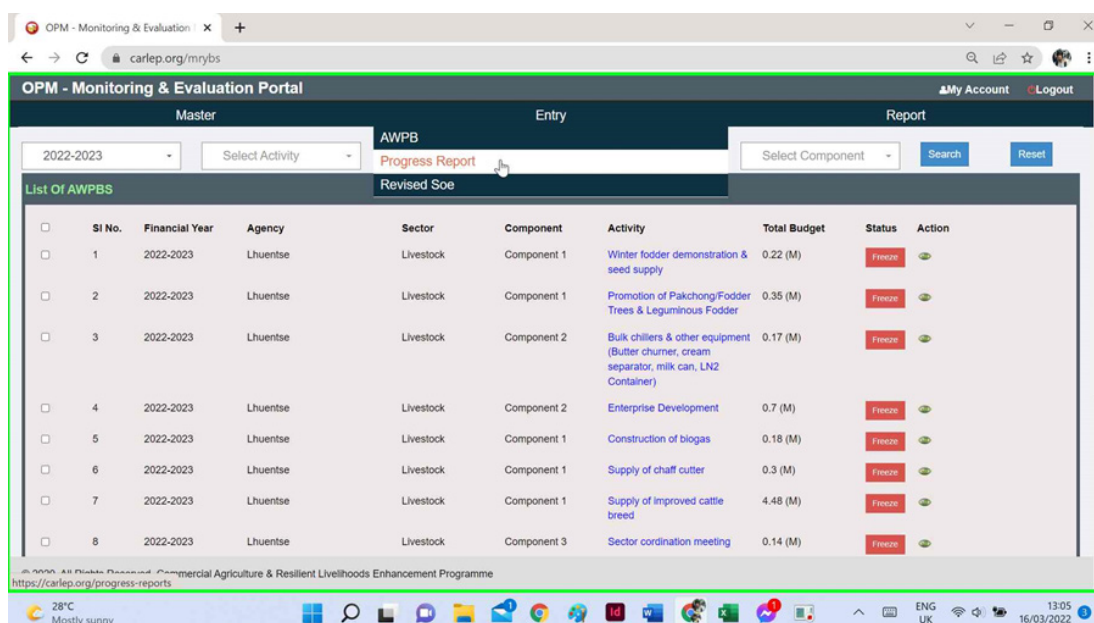


Note:- The system will automatically generate the new password to your email box.

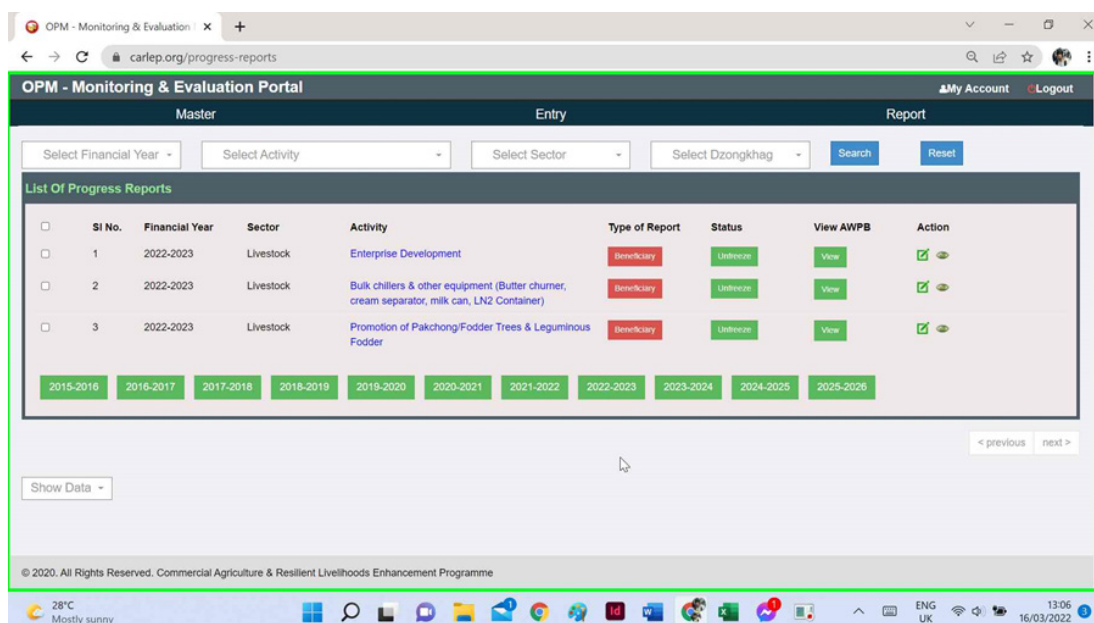
How to add Progress Report data -Agency users (Extension Officer)

To initiate the Progress Report data-

i. Click on the Entry menu/tab and then click on the Progress Report button.

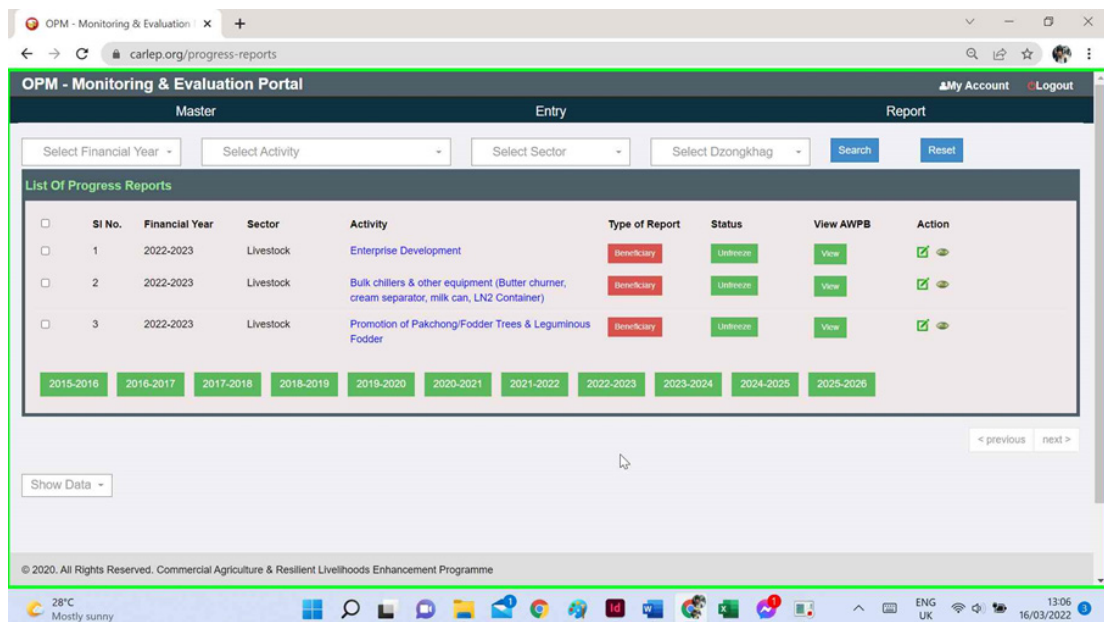


ii. A list of progress report that agency user had proposed for the particular fiscal year will be listed.



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

The screenshot displays the 'Add a New Progress Report' form in the OPM - Monitoring & Evaluation Portal. The form includes fields for Financial Year, Sector, Activity, Sub Activity, Sub Activity Details, Indicator, Dzongkhag, Proposed Quantity, Proposed HH, Proposed Male, Proposed Female, and Proposed Budget (in Million). There is also a Remark field. At the bottom, there are summary fields for Total Head Quantity, Total Head HH, Total Head Male, Total Head Female, Total No. of Scheme, and Total Expenses (in Million). The form is titled 'Add a New Progress Report' and has a 'Progress Reports List' button in the top right corner.

Edit Mode screen 2

Remark

Total Used Quantity - 0.000 Total Used HH - 0 Total Used Male - 0 Total Used Female - 0 Total No. of Scheme - 0 Total Expenses (In Million) - 0.000

Edit Color - No

ADD BENEFICIARY FIRST QUARTER ADD CSV FIRST QUARTER

ADD BENEFICIARY SECOND QUARTER ADD CSV SECOND QUARTER

ADD BENEFICIARY THIRD QUARTER ADD CSV THIRD QUARTER

ADD BENEFICIARY FOURTH QUARTER ADD CSV FOURTH QUARTER

Submit

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View Mode Screen.

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Steps Recorder - Recording Now

Pause Record Stop Record Add Comment

My Account Logout

Master Entry Report

View Progress Report

Financial Year 2022-2023 Sector Livestock Activity Bulk chillers & other equipment (Butter churner, cream separator, milk can, LN2 Container)

Sub Activity Purchase of dairy equipment Sub Activity Details Indicator No. of set Dzongkhag Lhuentse

Proposed Quantity 2,000 Proposed HH 38 Proposed Male 17 Proposed Female 21 Proposed Budget (In Million) 0.170

Remark

Total Used Quantity 0.000 Total Used HH 0 Total Used Male 0 Total Used Female 0 Total No. of Scheme 0 Total Expenses (In Million) 0.000

BENEFICIARY FIRST QUARTER

Name	Gender	Village	Geog	House Number	Specify Support Type	Quantity	No. of Scheme	Remark

BENEFICIARY SECOND QUARTER

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Adding beneficiary list in Progress Report.

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

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carlep.org/progress-reports/edit/18

Remark

Total Used Quantity: 0.000

Total Used HH: 0

Total Used Male: 0

Total Used Female: 0

Total No. of Scheme: 0

Total Expenses (In Million): 0.000

Edit Color: No

ADD BENEFICIARY FIRST QUARTER

ADD CSV FIRST QUARTER

ADD BENEFICIARY SECOND QUARTER

ADD CSV SECOND QUARTER

ADD BENEFICIARY THIRD QUARTER

ADD CSV THIRD QUARTER

ADD BENEFICIARY FOURTH QUARTER

ADD CSV FOURTH QUARTER

Submit

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Manual Updation of Beneficiary list in Progress Report Quaterly.

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

OPM - Monitoring & Evaluation

carlep.org/progress-reports/edit/20

Actual Quantity: 100.000

Actual HH: 1

Actual Male: 1

Actual Female: 1

Actual No. of Scheme: 20

Actual Expenses (In Million): 0

Notice: If you delete any record from the list then press the submit button in order to update the record.

Name	Gender	Village	Geog	House Number	Specify Support Type	Quantity	No. of Scheme	Remark
Kinga Rinzin	Male	Dumpey	Kurtoed	Ja-10-35	Supply of seedlings	100	20	Received
Sonam Yeshi	Female	Dumkhar	Select Geog					

Append New Row | Remove Row

View Progress Report

ADD BENEFICIARY FIRST QUARTER

ADD CSV FIRST QUARTER

ADD BENEFICIARY SECOND QUARTER

ADD CSV SECOND QUARTER

ADD BENEFICIARY THIRD QUARTER

ADD CSV THIRD QUARTER

Submit

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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

Actual Quantity: 400,000 Actual HH: 2 Actual Male: 1 Actual Female: 1 Actual No. of Scheme: 30 Actual Expenses (In Million): 0

Notice: If you delete any record from the list then press the submit button in order to update the record.

Name	Gender	Village	Geog	House Number	Specify Support Type	Quantity	No. of Scheme	Remark	
kinga Rinzin	Male	Dumpey	Kurtoed	Ja-10-35	Supply of seedlings	100	20	Received	<input type="checkbox"/>
Sonam Yeshi	Female	Dumkhar	Kurtoed	Ja-40-36	Supply of Seedlings	300	10	Received	<input type="checkbox"/>
	Select Gen		Select Gr						<input checked="" type="checkbox"/>

Append New Row | Remove Row

Submit View Progress Report

CSV Updation of Beneficiary list in Progress Report quarterly.

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 precise 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 assigned 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 technical netique. For other registered Geogs in M&E Portal, system had automatically generated numerical value against 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 beneficiary 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 quaterly.

The screenshot shows the 'carlep.org/progress-reports/edit/20' page. At the top, there are two green buttons: 'ADD BENEFICIARY FIRST QUARTER' and 'ADD CSV FIRST QUARTER'. Below these are input fields for 'Actual Quantity' (400,000), 'Actual HH' (2), 'Actual Male' (1), 'Actual Female' (1), 'Actual No. of Scheme' (30), and 'Actual Expenses (In Million)' (0). A red notice states: 'Notice: If you delete any record from the list then press the submit button in order to update the record.' Below the notice is a table with columns: Name, Gender, Village, Geog, House Number, Specify Support Type, Quantity, No. of Scheme, and Remark. The table contains two rows: 'kinga Rinzin' (Male, Dumpey, Kurtoed, Ja-10-35, Supply of seedlings, 100, 20, Received) and 'Sonam Yeshi' (Female, Dumkhar, Kurtoed, Ja-40-36, Supply of Seedlings, 300, 10, Received). Below the table are buttons for 'Submit', 'Append New Row', 'Remove Row', and 'View Progress Report'. At the bottom, there are four more green buttons: 'ADD BENEFICIARY SECOND QUARTER', 'ADD CSV SECOND QUARTER', 'ADD BENEFICIARY THIRD QUARTER', and 'ADD CSV THIRD QUARTER'. The footer mentions '© 2020. All Rights Reserved. Commercial Agriculture & Resilient Livelihoods Enhancement Programme' and the URL 'https://carlep.org/first-quarters/add/20'.

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.

The screenshot shows the 'carlep.org/first-quarters/add/20' page. At the top, there are three tabs: 'Master', 'Entry', and 'Report'. Below the tabs is a section titled 'Add First Quarter' with a 'Progress Reports List' button. Inside the 'Add First Quarter' section, there is a 'Choose File' button and a text input field containing 'kurtoe beneficiary list.csv'. Below the input field is a 'Submit' button. The footer mentions '© 2020. All Rights Reserved. Commercial Agriculture & Resilient Livelihoods Enhancement Programme'.

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

The screenshot shows the 'carlep.org/progress-reports/edit/20' page after the CSV file has been uploaded. A green banner at the top states 'The first quarter has been saved.' Below the banner is a table with columns: Name, Gender, Village, Geog, House Number, Specify Support Type, Quantity, No. of Scheme, and Remark. The table contains 13 rows of beneficiary data, all with 'Received' status. Below the table are buttons for 'Submit', 'Append New Row', 'Remove Row', and 'View Progress Report'. At the bottom, there are two green buttons: 'ADD BENEFICIARY SECOND QUARTER' and 'ADD CSV SECOND QUARTER'. The footer mentions '© 2020. All Rights Reserved. Commercial Agriculture & Resilient Livelihoods Enhancement Programme'.

