User's Guide

Results-Based Program Monitoring & Evaluation Suite

Developed by Gilbert E. Lumantao

Welcome

This user guide walks you through the day-to-day use of the Results-Based Program Monitoring & Evaluation Suite. The suite is organized around the five steps a typical results-based program follows: design the change, frame the results, plan the measurement, collect the data, and report what was achieved.

1. Sign in

- Click **Sign in** at the top right.
- Use email + password, or continue with Google.
- New accounts start with the standard *user* role. An administrator can promote you from the User Management page.

2. Navigate

Use the left sidebar to move between modules. The suggested sequence is:

- Home — orientation and quick links.
- Theory of Change — articulate the change pathway.
- Results Framework — turn the pathway into goal, outcomes, outputs, and indicators.
- M&E Plan — operationalize each indicator.
- Reporting & Visualization — enter indicator data and read the dashboard.
- Kobo Toolbox — guidance on mobile data collection.
- Sample Program — see all four planning modules applied to one program.
- References — open the source materials cited in the practitioner tips.

3. Report and visualize indicator performance

Add and edit indicators

- Open **Reporting & Visualization**.
- Click **Add indicator** to create a new row.

- Edit the name, level (Output / Outcome / Impact), unit, baseline, and target.
- Remove an indicator with the trash icon at the end of the row.

Record values per reporting period

- Each indicator has a **Reporting periods** section.
- Click **Add period** to add a new period (for example Q1, Midline, Year 1).
- Enter the period label and the achieved value. The dashboard updates immediately.

Read the dashboard

- **KPI tiles** show how many indicators you track, average achievement, and how many are on track (≥75%).
- **Achievement vs target** bar chart compares the latest reported value to target for every indicator.
- **Indicators by results level** pie shows the balance across the results chain.
- **Indicator trend** line chart compares the actual values against baseline and target for the indicator you select.

Export and reset

- Use **Export CSV** to download all indicators and their period values.
- Use **Reset to sample data** to discard your entries and restore the seeded example.

4. Submit feedback

- Open the **Feedback** page.
- Choose a category (bug, idea, question, other).
- Optionally note which page the feedback refers to.
- Write the message and submit. Administrators will see it and may respond.

5. Manage users (admin only)

- Open the **User Management** page.
- Review the list of registered users.
- Grant or revoke the *admin* role using the action buttons next to each user.

6. Tips for success

- Build the indicator list first in the M&E Plan, then mirror the same names in Reporting & Visualization so the dashboard tells a coherent story.

- Export to CSV at the end of every reporting cycle to keep an off-browser backup.
- Use the References page to cite authoritative sources in donor reports.

Credits

Developed by Gilbert E. Lumantao.