social development

Department:
Social Development
REPUBLIC OF SOUTH AFRICA

DEVELOPMENT OF AN ELECTRONIC MONITORING &EVALUATION SYSTEM

Oversight/Viewer User Manual

DATAWORLD
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Version 0.2

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Document Change Control

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Distribution

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Document Abbreviations

Abbreviation	Description
DSD	Department Of Social Development
GIS	Geographical Information System
HCBC	Home and Community Based-Care
HOD	Head Of Department
M&E	Monitoring and Evaluation
NPO	Non-Profit Organization
PowerBI	Interactive dashboard reporting for data visualization
SASSA	South African Social Security Agency

Primary Contact

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Definitions

Key Word	Definition
Data Capturer	A person who is responsible for inputting information from different sources into the system
Data Verifier	A person who is involved in the process of checking for accuracy and inconsistencies after data has been captured on the system
Facility	Also known as NPO, are buildings, structures or facilities funded by the government meant to facilitate the provision of social services through the development of primary and social amenities. Examples of facilities include residential facilities for older persons, persons living with disabilities, abused victims of abuse, substance abuse treatment centres, support to families and youth training facilities.
Facility/NPO Manager	Facilities managers are responsible for the security, maintenance and services provided by the NPO to ensure that they meet the needs of the organization, beneficiaries, and its employees.
Indicator	Performance indicator is a quantitative metric that provides information to monitor performance, measure achievement and determine accountability.
NPO	Non-Profit Organisation is a trust, company or other association of persons established for a public purpose, and the income and property of which are not distributable to its members or office bearers accept as reasonable compensation for services rendered.
Programme	Social programs administered by different branches or units within the department such as programme responsible for providing social protection services, care and services to older persons, services to persons with disabilities etc.
Service Point	Service point is the point of demarcation between the facility (NPO) by implementation of assistance and support programmes through which social programs are delivered to beneficiaries by social services practitioners.

Key Word	Definition
Service Point Manager	Service point managers are responsible for the security, maintenance and services provided by the service point to ensure that they meet the needs of the organization, beneficiaries, and its employees.
Service Point Manager Data Capturer	A person who is responsible for inputting information at the service point into the system
Sub-Programme	A programme is a smaller programme making up part of the larger main programme. Social Welfare is the main programme providing welfare services, care and support to older persons is a sub-programme with specific focus and activities.

Facilities

Facility Type	Definition
CNDC	Poverty alleviation projects mainly aimed at addressing issues of hunger and poverty especially in deep rural areas. DSD supports these initiatives by ensuring food security and that communities are able to generate reasonable income and ways of sustaining themselves and their families through the supported CNDCs.
CYCC	The Children's Act (38 of 2005) ensures that youth and children that are orphaned, living on the streets, in conflict with the law or are not safe at home or in their communities can be placed in alternative care. A CYCC is a facility that provides a form of alternative care for children outside of the family environment.
Child Care & Family Protection (CPO)	Social Development's Child Care and Family Protection Programme aims to safeguard and promote child well-being and build resilience of families and communities to care for and protect their children. These include placing children in foster homes, accessing shelters for families.
Community Care Center (CCC)	Community Care Centers provide psychosocial care and support services and skills development to orphans and vulnerable children, including child-headed households

Facility Type	Definition
	and youth. The goal of CCC's is to enhance the quality of services that are available to orphans and vulnerable children within their communities of origin. This approach also complements existing child-protection interventions and services such as Home Community-Based Care, drop-in centres, Isibindi, childcare forums and early childhood development.
Community Based Center	Community-based centers can meet the needs of young children and their families or caregivers by providing comprehensive, child-friendly services (e.g., education, nutrition, health, HIV care and treatment, and water and sanitation) through a central location.
Community Development Project	The aim of community development project is to eradicate poverty by improving social, environmental and economic situations of rural communities.
Day-Care Centre for Children with Disabilities	Provides a set of services to children with special needs to promote children's development, ensure comprehensive care for them during the day, meet their learning needs, provide motor and speech therapy, organize their free time, among others.
Drop-In center	Drop-in centres are facilities or community-based initiatives aimed at addressing the physical, emotional, psychological and social developmental needs of vulnerable children within their communities and closer to their homes. Drop-in centres provide basic services such as food, clothing, school support and hygiene, as well as optional services such as counselling, guidance, life skills development and educational and recreational programmes.
HCBC Organisation	HCBC is the provision of comprehensive services, including health and social services, by formal and informal caregivers in the home in order to promote, restore and maintain a person's maximum level of comfort, function and health, including care towards a dignified death. The objective of the programme is to reduce the psycho-social impact of HIV and AIDS on the infected and affected individuals and families

Facility Type	Definition
Homeless Shelter	Homeless shelters are a type of homeless service agency and facilities which provide temporary residence for homeless individuals and families.
Hospice	A healthcare facility for older persons who are terminally ill or near the end of life that emphasizes pain control and emotional support for the patient and family.
Independent living facility for persons with disabilities	Facilities that have been specifically developed to accommodate and care for persons with disabilities, these differ slightly and may be referred to as: "Self Help Centres", "Homes of Safety", "Quad Homes" or "Group Homes". These "Homes" are private residence for persons with chronic disabilities who cannot live with their families or on their own due to their disability and the assistance they require, they cater for young adults, adults and seniors.
Luncheon Club (Service Center)	Social welfare programmes responsible for serving hot midday meals to a society or group of older persons who meet regularly for an organized lunch.
Outreach Preventative	The Outreach Prevention Program provides intensive in-home counseling, case management, and is based on the evidenced based practiced of Targeted Case Management. Structured interventions which promote life skills development, parenting skills, children's academic success, family unification, and stabilization of mental health symptoms.
Partial Care Facility	Partial care facility is the care of more than six children on behalf of their parents or caregivers for a temporary period during the day and could include overnight 'care.
Partial Care Facility (Special Day-Care-Centre for Children with Disabilities)	Partial care is the care of children with disabilities or chronic illnesses on behalf of their parents or caregivers for a temporary period during the day and could include overnight 'care.
Protective Workshop	Protective workshops are safe, disability-friendly environments providing opportunities for people with

Facility Type	Definition
	disabilities to develop the skills and abilities of these persons and to provide the necessary support which will allow them to find suitable employment or other forms of income generation.
Residential facility for older persons	Facilities providing community-based care and support services. Service centres give older persons the opportunity to engage in activities and services such as exercise, recreational activities, cultural and spiritual activities, awareness campaigns, educational and skills activities, and lunches.
Residential facility for persons with disabilities	Licensed care centres or assisted living facilities day care programmes focusing on the care and development of persons with disability.
Secure Care Center	A residential facility and/or programme of intervention which ensures the appropriate physical, behavioural and emotional containment of young people while providing an environment, milieu, and programme conducive to their care, safety, and healthy development.
Social Crime Prevention	The programme provide services to all persons at risk and in conflict with the law, ensuring social protection and contributing to a safer society, in support of law enforcement and crime combating initiatives.
Substance Abuse Prevention Programme	Early intervention school and family-based programs aimed to promote abstinence from alcohol and illicit drugs and the misuse of over-the-counter drugs
Substance use Disorder (SUD) inpatient treatment center	Offers 24-hour low to high-intensity treatment for both adults and adolescents in a residential setting like a rehabilitation centre.
Substance use Disorder (SUD) outpatient treatment center	The regularly scheduled sessions take place at a nonresidential treatment center administered by an addiction professional or trained clinician providing medication treatment, group and individual abstinence, counseling, relapse prevention programming, drug and alcohol education.
Victim Empowerment Service Center	Victim empowerment service centers offers the services of both trauma debriefers, who engage with victims at

Facility Type	Definition
	the time of the incident, as well as trauma counsellors, who are available to counsel victims after the event.
Youth Development Centre	Youth development centre targets young persons between the ages 14 – 35 by providing support, services, and funding to youth organisations to implement youth services and programmes.

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1. Introduction

The electronic Monitoring and Evaluation system is designed to assist the Social Development department in monitoring its national and provincial indicators and easing the data collection process.

Following are the M&E system Objectives:

- Incorporate existing data and indicators.
- Incorporate the M&E Framework in designing a robust and access control-based system.
- Integrate with other systems to get real time data on indicators.
- Facilitate Realtime data collection through the usage of mobile devices.
- Implement a system with role-based authority and secure authentication to allow the implementation of proper security and protection of the privacy and integrity of confidential information. It will allow multi-party simultaneous access to case records while protecting the integrity of the information.
- Retain and show audit trail for each process step and action taken.

2. Summary

This document details the operations of the implemented data capturing modules into the M&E System, and the modules are listed below:

- Module 1: Access control – the module is created for the system to manage users.
- Module 2: Reports – this module is for accessing the system reports

3. Access Control

This system is web based and can be accessed through a machine connected to the internet using the credentials provided by the system. Users are sent login details after account approval from the administrator.

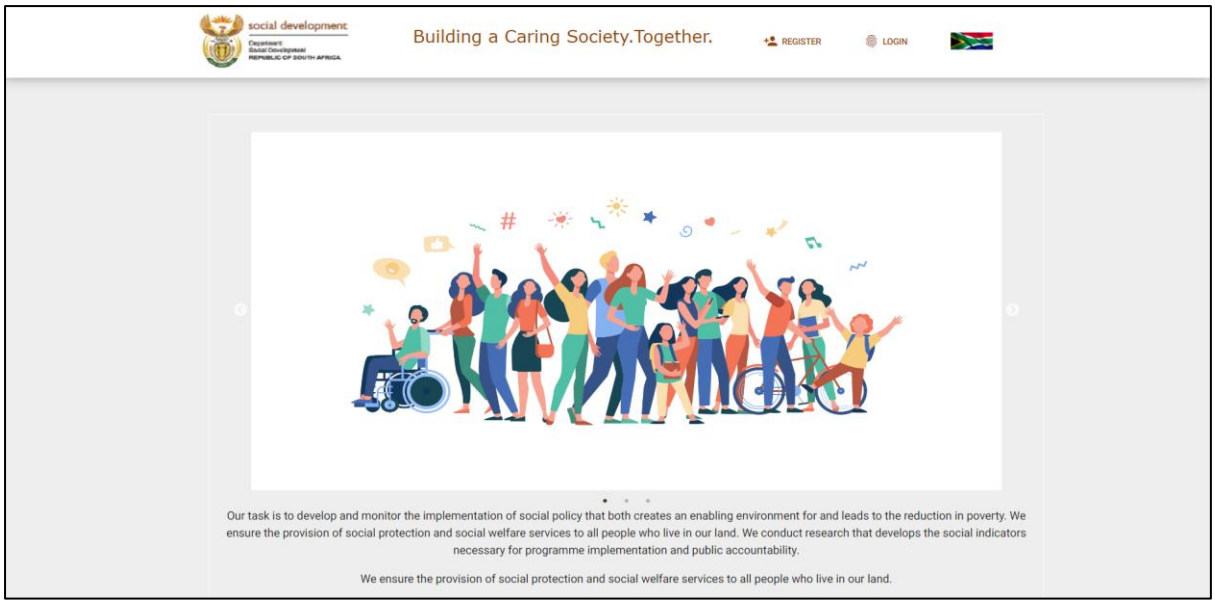
Note: The system can also be accessed offline.

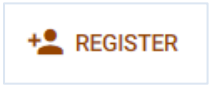
This section will detail how the user can access the system and navigate to the desired part of the system.

- Open an internet browser i.e., Internet Explorer, Firefox, or Google Chrome
- Enter the following URL into the address bar: https://testportal.dsd.gov.za/mne_app_uat/

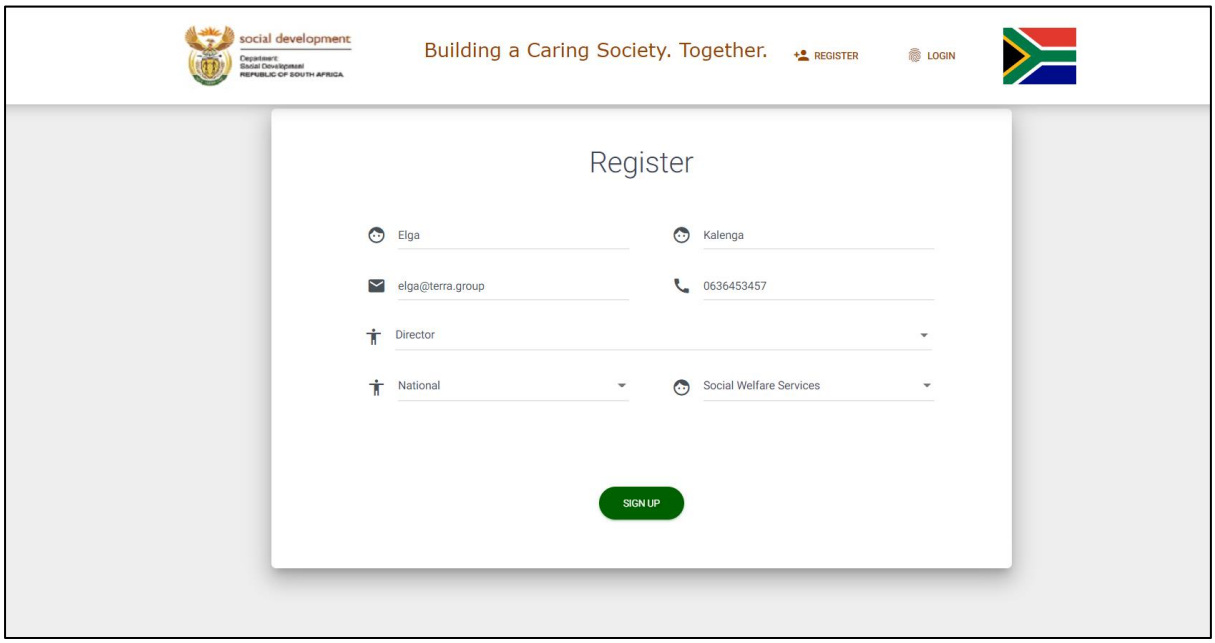
3.1. User Registration

1. After entering the URL into the address bar, the user will be directed to the M&E system landing page.



2. Click on  to register on the system.

3. Below user registration page shall be displayed



4. Capture user details.

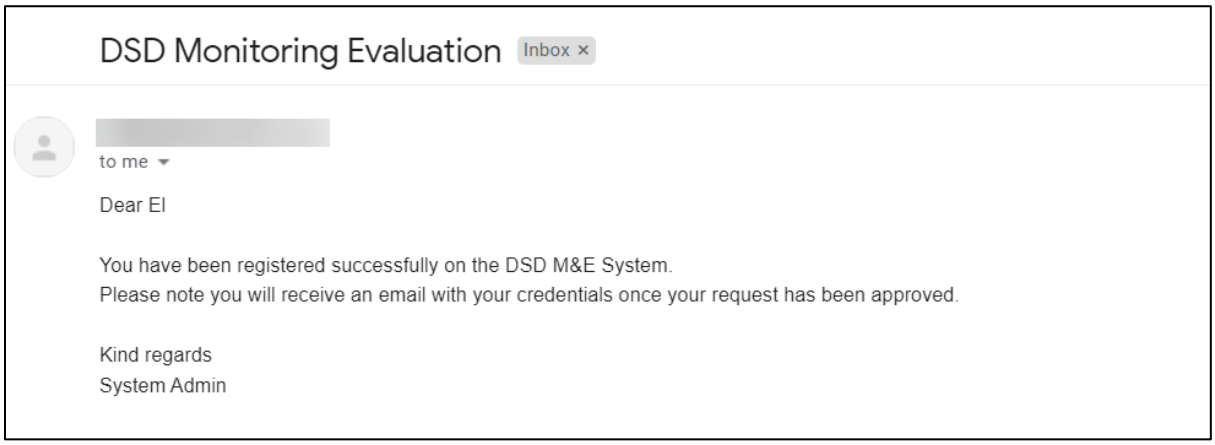
Note: When selecting location type, Provincial users will be requested to select name of province, district users will be requested to select province then district, service point users will select

province, district then service point, facility/NPO users will select province, district, service point, then facility/NPO

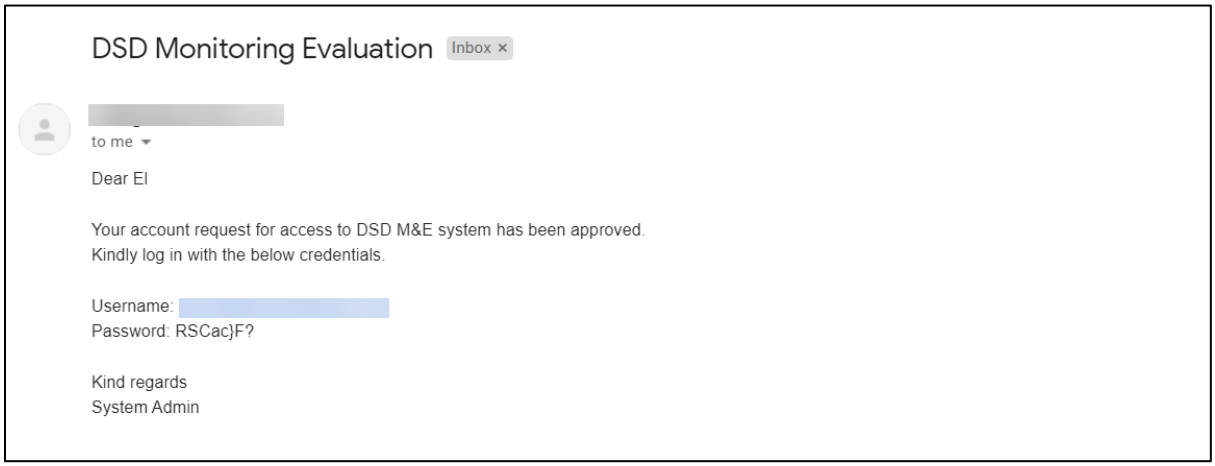
5. Click

button.
6. System will display below message to indicate that the user has been successfully created on the system

7. User will then receive below email notification, awaiting confirmation and approval from system administrator



8. Once the system administrator approves the user account, system will send below notification with credentials



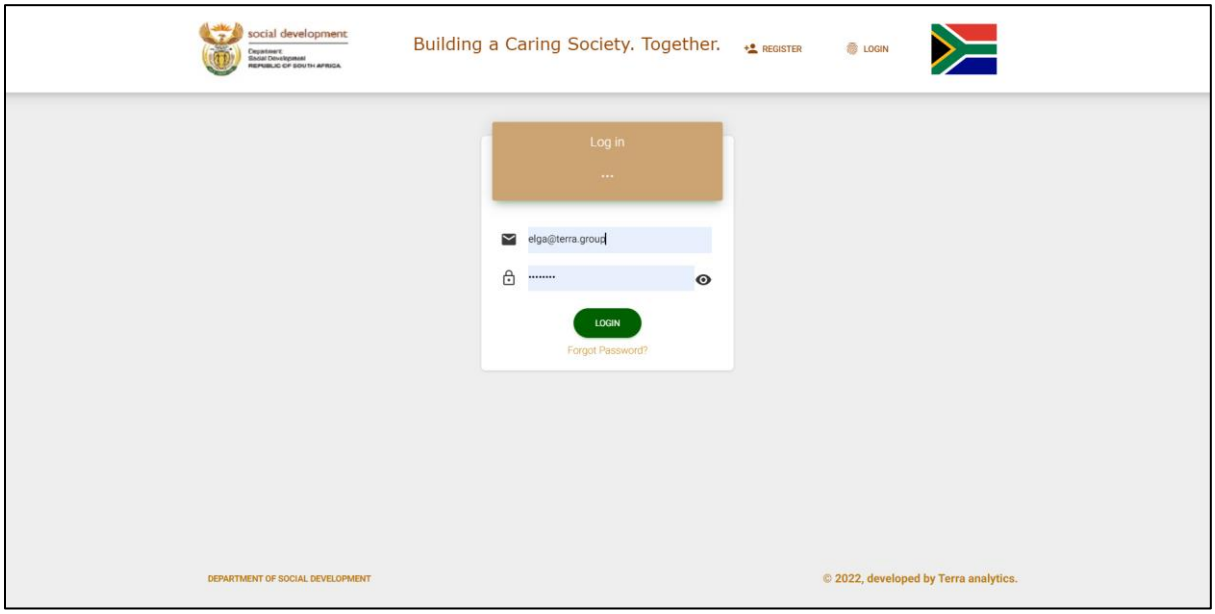
9. User will then log into the system

Notes:

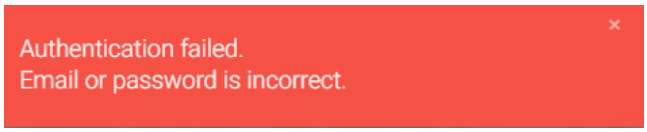
- Once logged into the system, the password can be changed (refer to Change Password in section 3.6)
- Each Province will have its own System Administrator who will be responsible for managing and approving user accounts in the Province, National Users will be managed by the System Administrator at National.

3.2. User Login

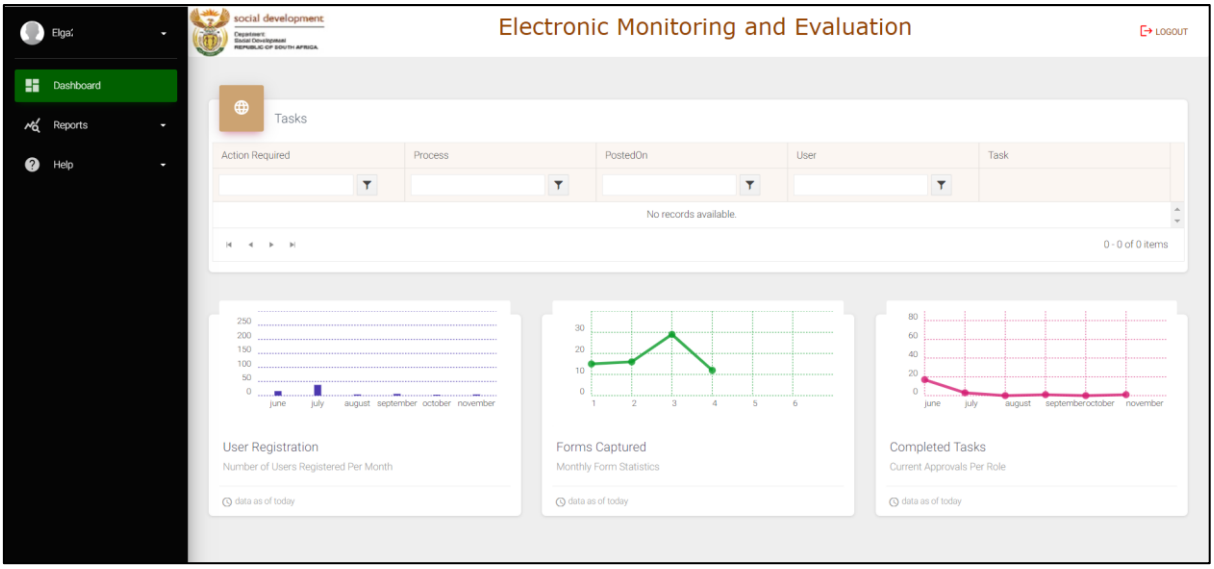
1. Access the following URL to log in to the system
   URL: https://testportal.dsd.gov.za/mne_app_uat/
2. The screen below will be displayed for the system user to enter **Username** and **Password** to access the system



3. Use the view function to view your password before clicking on login
4. Click on the **Login** button to access the system.
5. For valid login details, the oversight/viewer **home Page** screen shall be displayed.
6. For an incorrect Username and/ Password, system will display below message requesting valid details:



3.3. Home Page

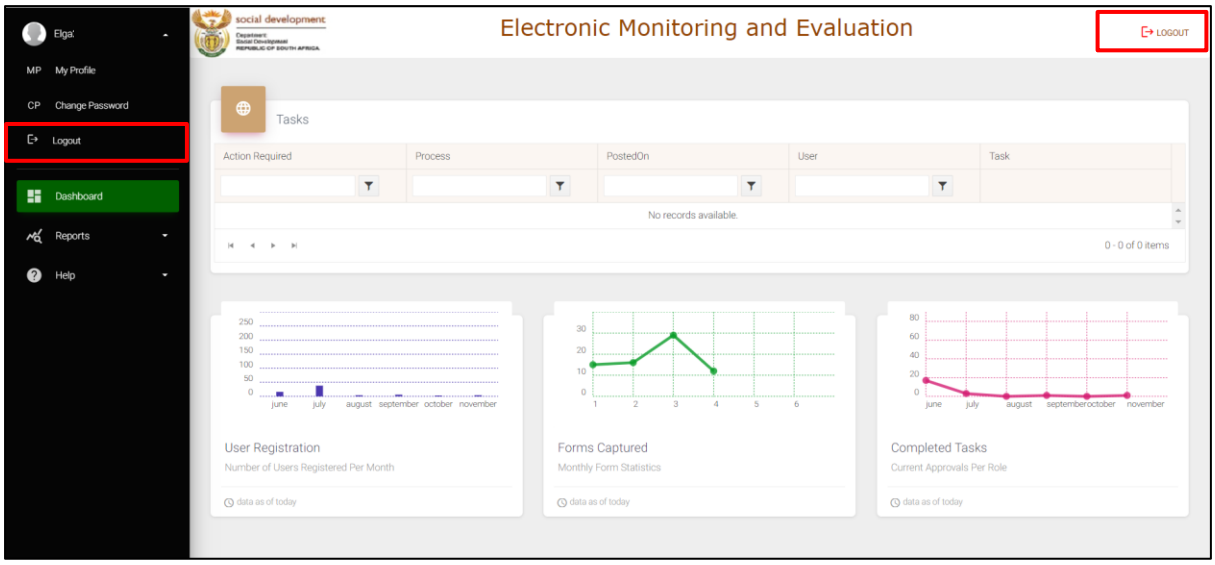


Note that as a viewer, user will be able to access below functions/menus of the M&E system.

1. **Dashboard** – The overall view of captured forms and completed tasks and verification of captured data
2. **Reports –** Reports and dashboards
3. **Help –** Manuals and Videos on how to use the system

3.4. User Logout

1. After a successful user login, user can logout from the system as shown on below screen



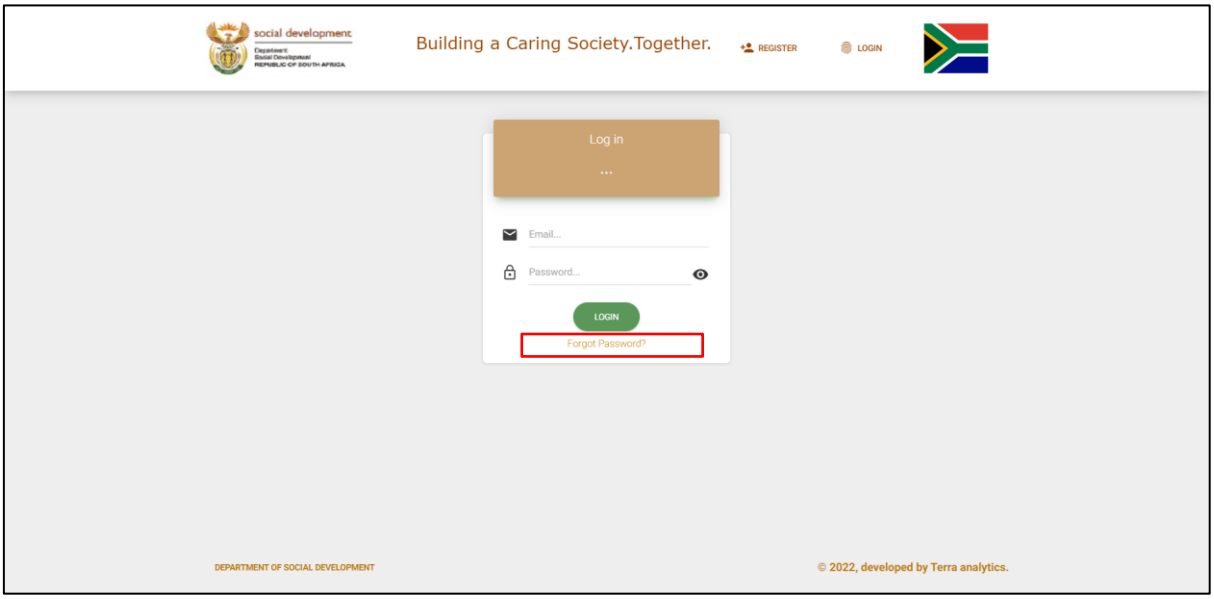
2. Click **Log out**

on home page or click on username then on

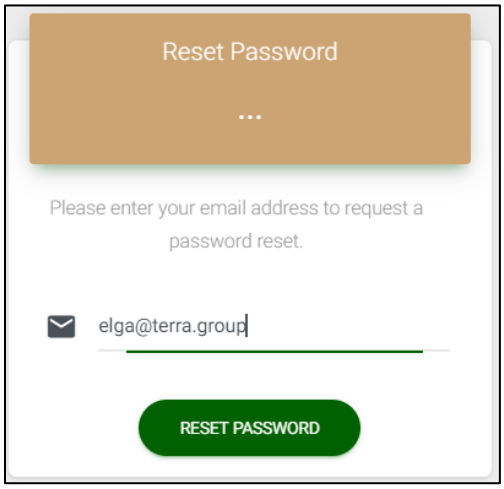
to logout of the system.

3.5. Forgot Password

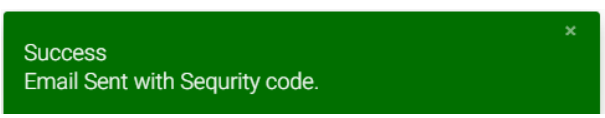
1. If you forget your password, you should be able to reset the password on the login screen by clicking the “Forgot password?” link as highlighted below.



2. Once user clicks on the “**Forgot password?**” link shown above, system will request the registered email address of the user

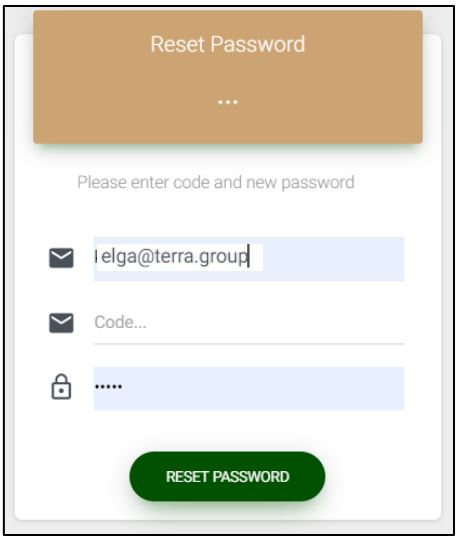


3. Enter registered email address and click “**Reset Password**” button
4. System will display below notification



5. User shall receive below email with the security code

6. Enter the above system generated code on the screen below and click the **'Reset Password'** button

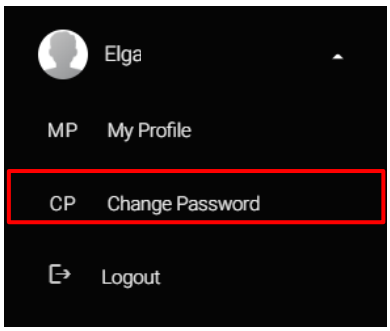


7. System will display below notification
8. User shall be able to log into the system with new password

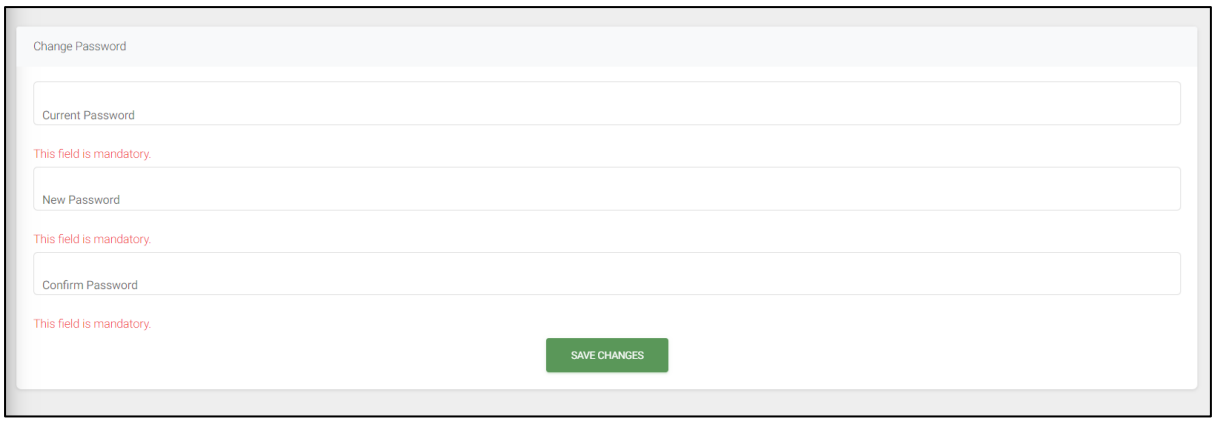
3.6. Change Password

Once logged into the system user can change their password

1. Access Username as shown below and click on Change password

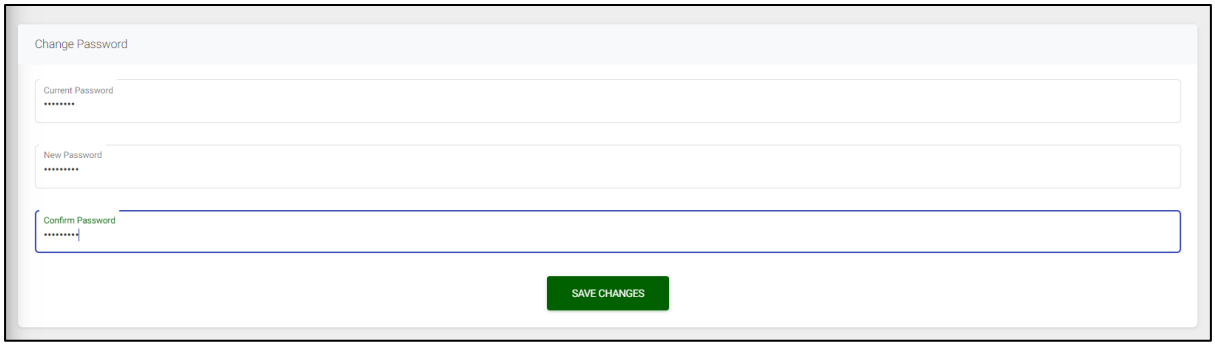


2. System will display below change password screen



3. Enter the **Current Password**.
4. Enter **New Password**.
5. **Confirm Password**.
6. Click the

button to save the changes



7. System will display below notification

8. Password shall be changed, and user will log in using the new password

4. Reports

4.1. SQL Reports

4.1.1. Available Reports

1. NPO/Facility Register

The report keeps record of all registered NPOs/Facilities on the system.

2. Electronic Template Report

The report keeps track of all modifications made to electronic/form templates on the system.

3. User Summary Report National

The report keeps record of all registered National users on the system.

4. User Summary Report Provincial

The report keeps record of all registered Provincial users on the system.

5. Tree Maintenance Report

The report keeps track of all modifications made to trees/hierarchies on the system.

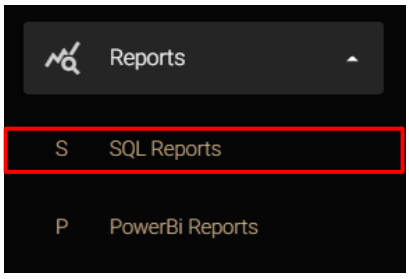
6. Indicator Report

The report displays information on indicators filtered at National or Provincial level

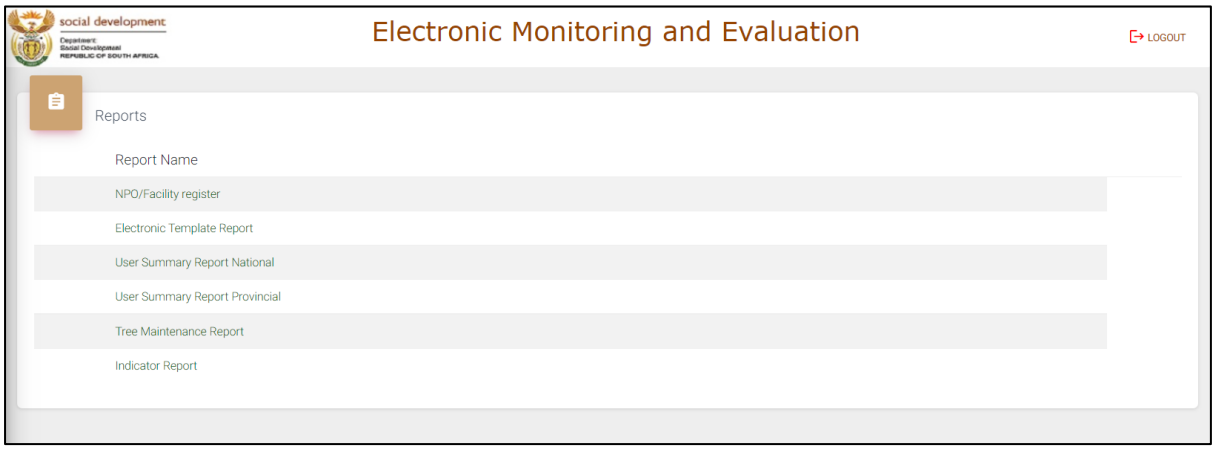
4.1.2. Accessing Reports

To access the SQL reports,

1. Click on '**SQL Reports**' under the '**Reports'** menu as on below screen



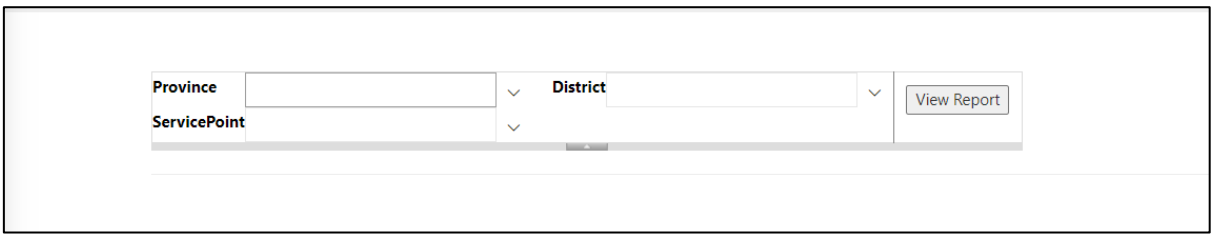
2. A list of available reports will display



4.1.3. Generating and Viewing reports

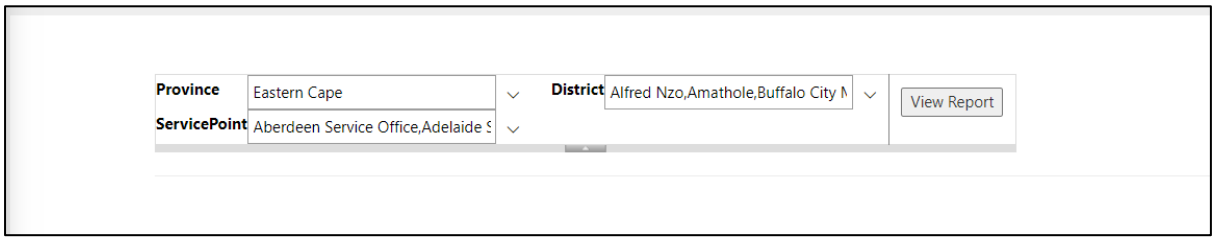
❑ NPO/Facility Register

1. To view and generate the report, click on the report name, below screen will display

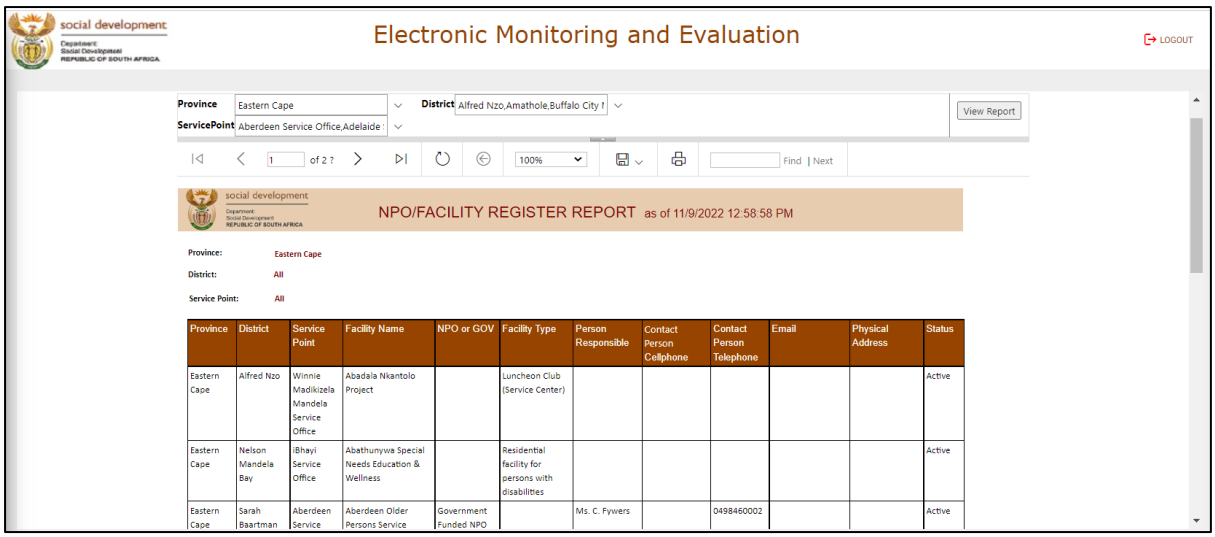


2. Select the filters Province(s), District(s) as well as Service Point(s).

Note: All or multiple Provinces, Districts and Service Points may be selected, the system will also filter the Districts and Service Points based on the selected province(s)



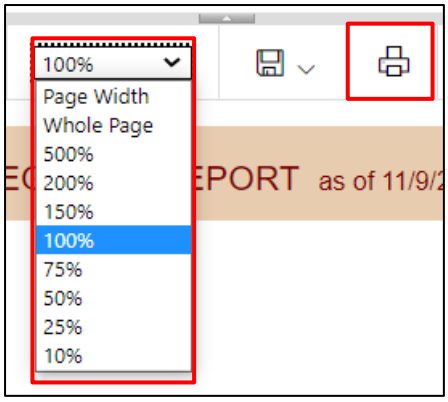
3. The user can then generate the filtered data into a report, where the data is summarized in a cross-table, by clicking on **View Report** button.



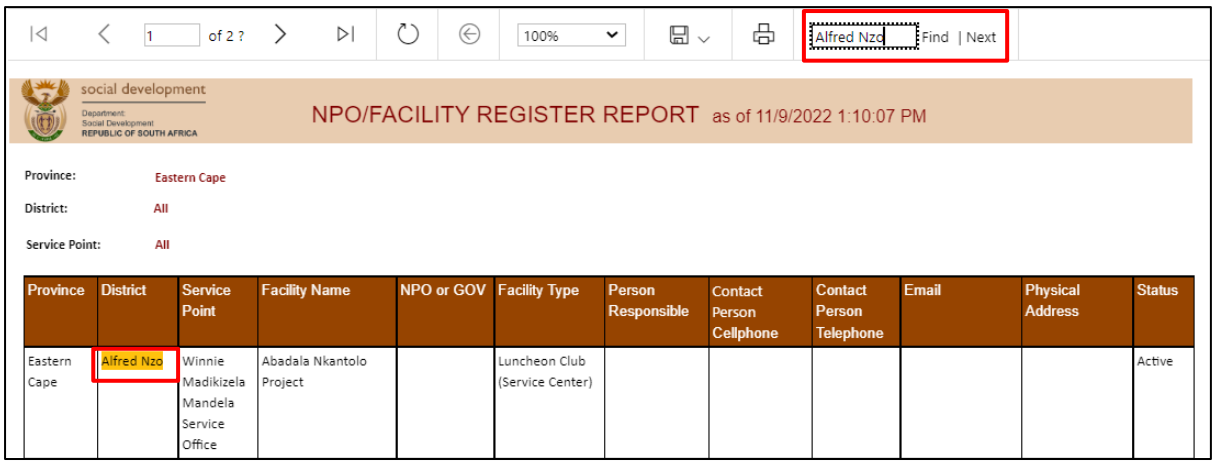
This user has the ability to:

Scroll to next page(s), using page navigation function as highlighted below

Zoom to multiple page widths and print as highlighted below.

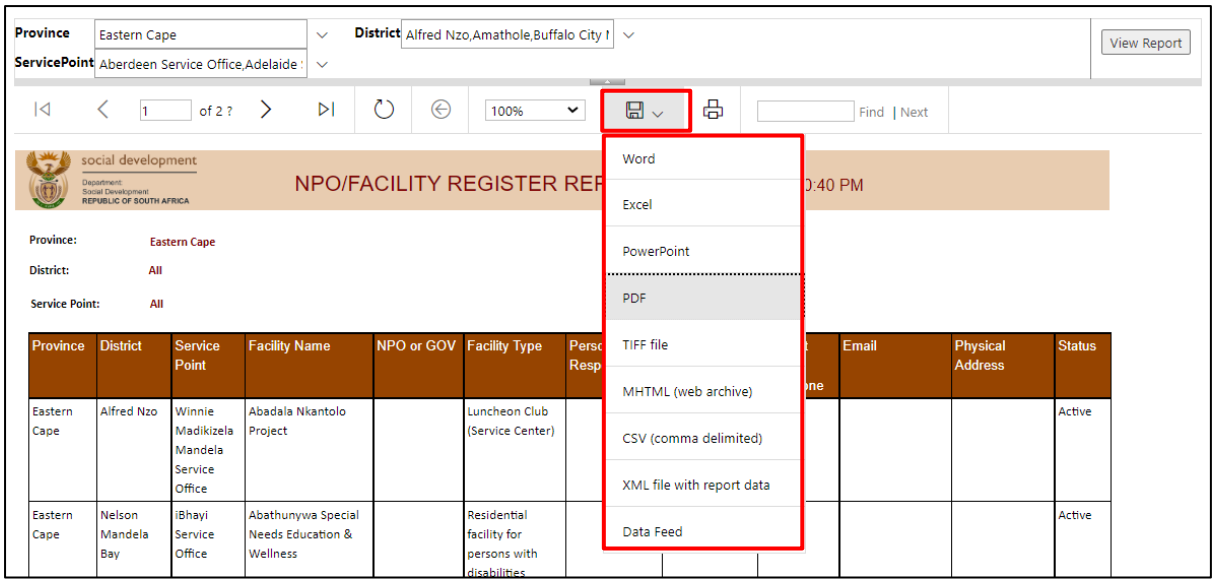


Use the search function as show below

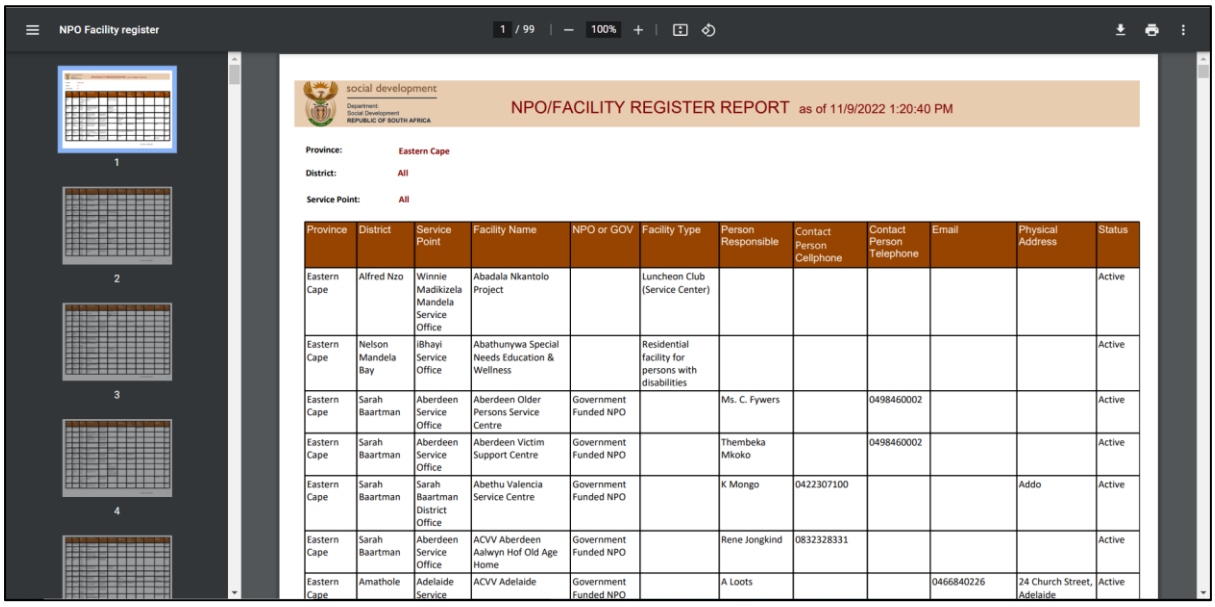


4.1.4. Exporting reports

To extract a report, click on the '**Save'** icon dropdown and select a format to extract the report in. Reports can be exported into pdf, word, excel as well as other formats listed below.

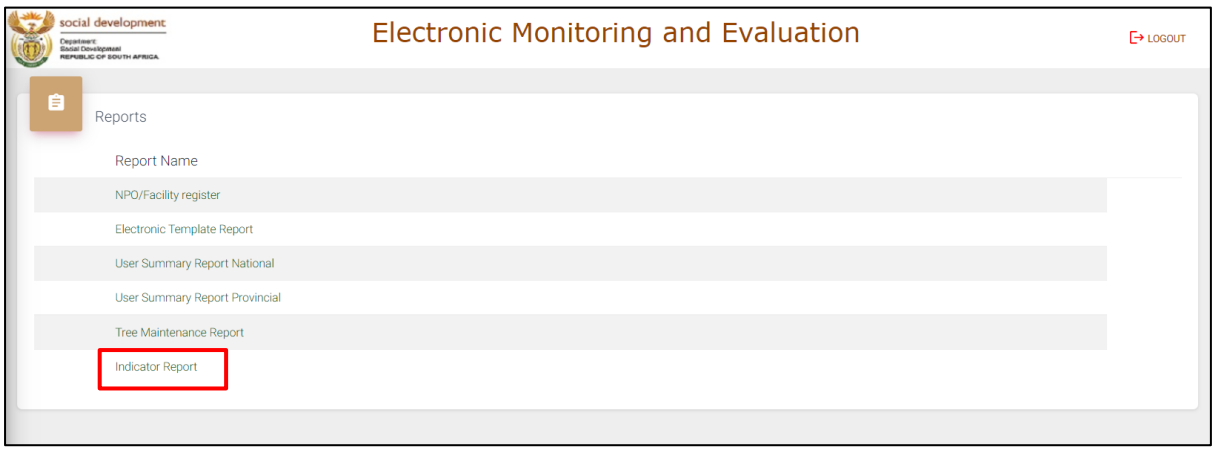


Below is example of an exported report into PDF format

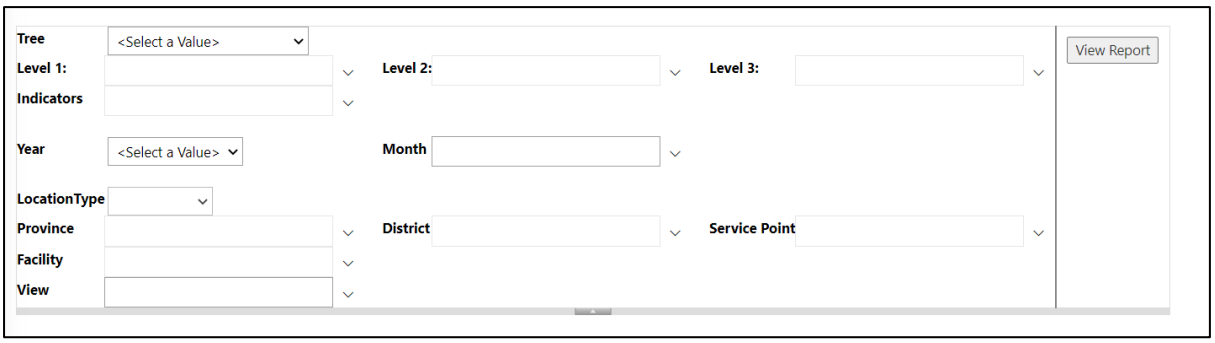


❑ Indicator Report

To view the Indicator Report, click on the report link below.



Screen below will display

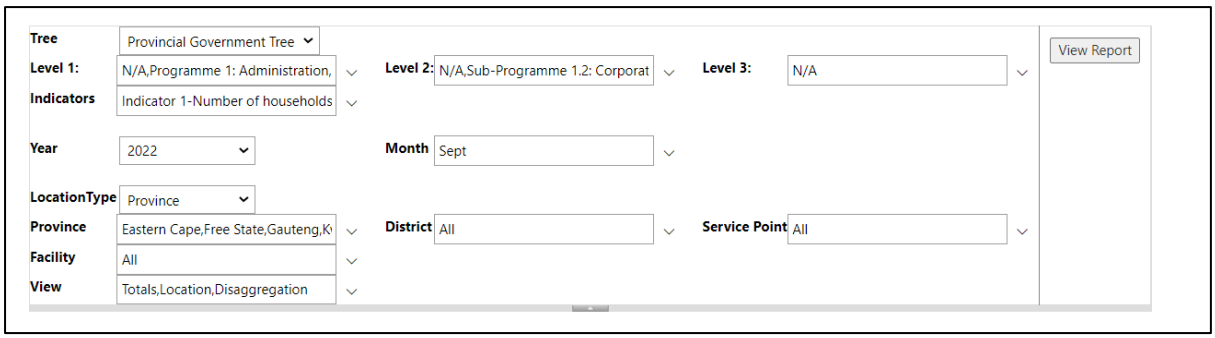


Note: The user is able to view data at National or Provincial level

At national level the user will select the branch from the level 1 dropdown, select the chief directorate from the level 2 dropdown and select the directorate from level 3 dropdown.

Should the user select provincial level, the user will select the programme from the Level 1 dropdown and select the subprogramme from the level 2 dropdown. The level 3 dropdown will not be applicable. Note: multiple branches, chief directorates and directorates may be selected (for the National Tree selection) and multiples programmes, sub-programmes may be selected (for the Provincial Tree selection)

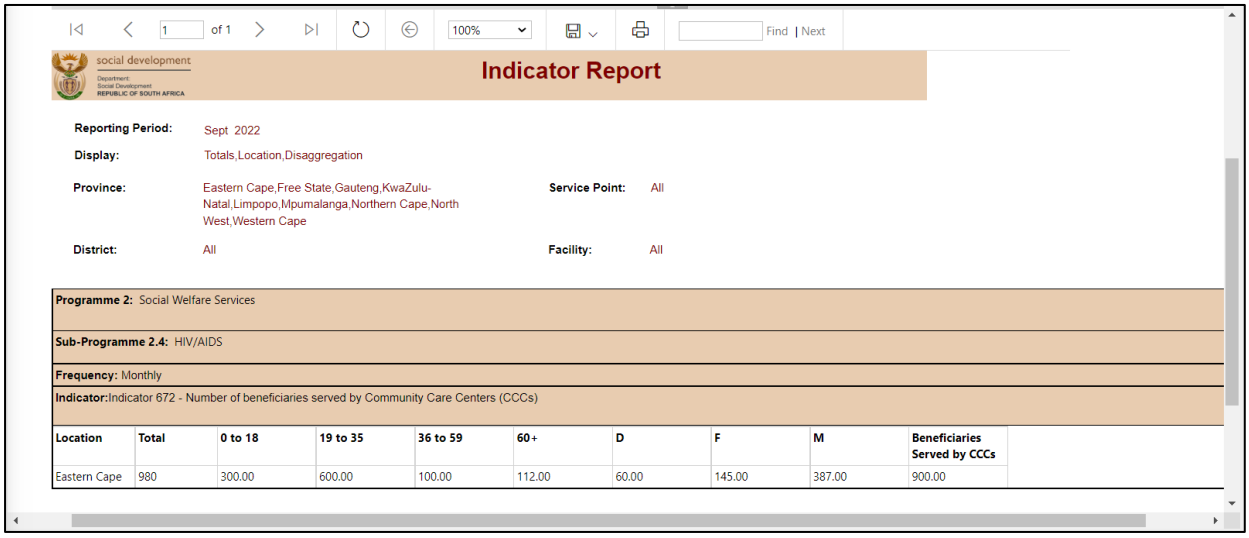
The below screen displays selections at Provincial level, programme(s), sub-programme(s), indicator(s), year, month, location type. Note that since the location type is at provincial level, all districts, service points and facilities will be selected by default. The user must then select the view type. The data can be displayed by total value, by location, by disaggregation or all. The user must generate the filtered data by clicking on view report.
Note: multiple provinces, districts and service points may be selected at the same time.



Note that there are 4 types of indicators which are **whole numbe**r, **percentage**, **ratio**, and **rand value**.

1. Whole Number Indicator

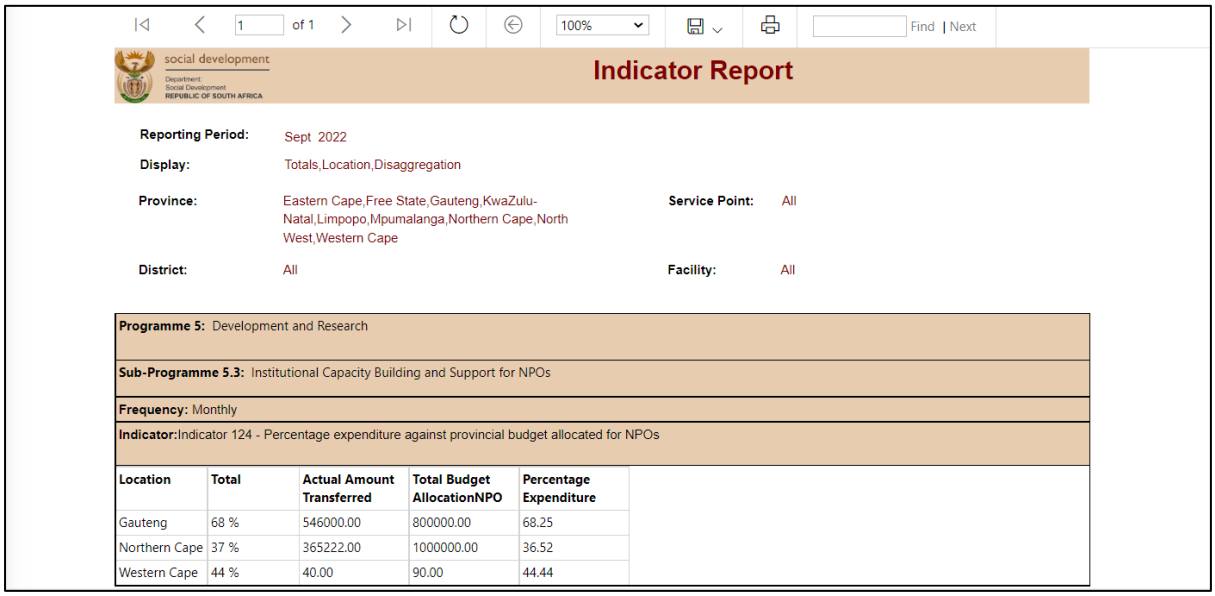
Whole number indicators report will appear in the following format.



Note: User may use report functionality (export, print and navigate to next pages) as demonstrated in section 5.1.3 above

2. Percentage Indicator

Percentage indicators report will appear in the following format.



social development
Department: Social Development
REPUBLIC OF SOUTH AFRICA

Indicator Report

Reporting Period: Sept 2022

Display: Totals,Location,Disaggregation

Province: Eastern Cape,Free State,Gauteng,KwaZulu-Natal,Limpopo,Mpumalanga,Northern Cape,North West,Western Cape

Service Point: All

District: All

Facility: All

Programme 5: Development and Research

Sub-Programme 5.3: Institutional Capacity Building and Support for NPOs

Frequency: Monthly

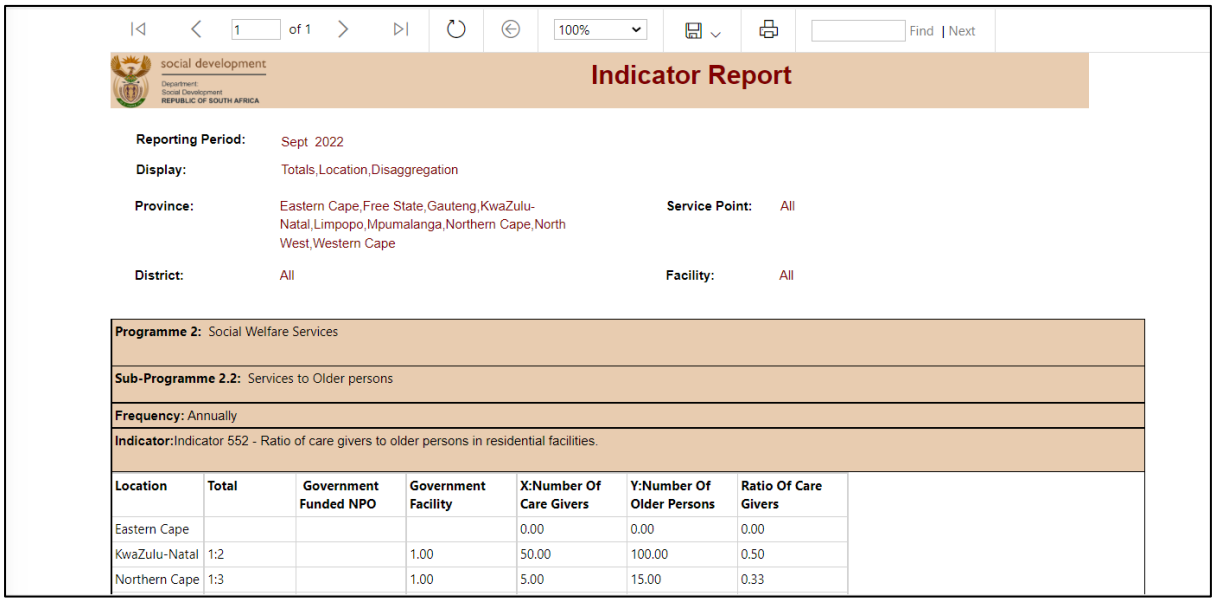
Indicator: Indicator 124 - Percentage expenditure against provincial budget allocated for NPOs

Location	Total	Actual Amount Transferred	Total Budget AllocationNPO	Percentage Expenditure
Gauteng	68 %	546000.00	800000.00	68.25
Northern Cape	37 %	365222.00	1000000.00	36.52
Western Cape	44 %	40.00	90.00	44.44

Note: User may use report functionality (export, print and navigate to next pages) as demonstrated in section 5.1.3 above

3. Ratio Indicator

Ratio indicators report will appear in the following format.



social development
Department: Social Development
REPUBLIC OF SOUTH AFRICA

Indicator Report

Reporting Period: Sept 2022

Display: Totals,Location,Disaggregation

Province: Eastern Cape,Free State,Gauteng,KwaZulu-Natal,Limpopo,Mpumalanga,Northern Cape,North West,Western Cape

Service Point: All

District: All

Facility: All

Programme 2: Social Welfare Services

Sub-Programme 2.2: Services to Older persons

Frequency: Annually

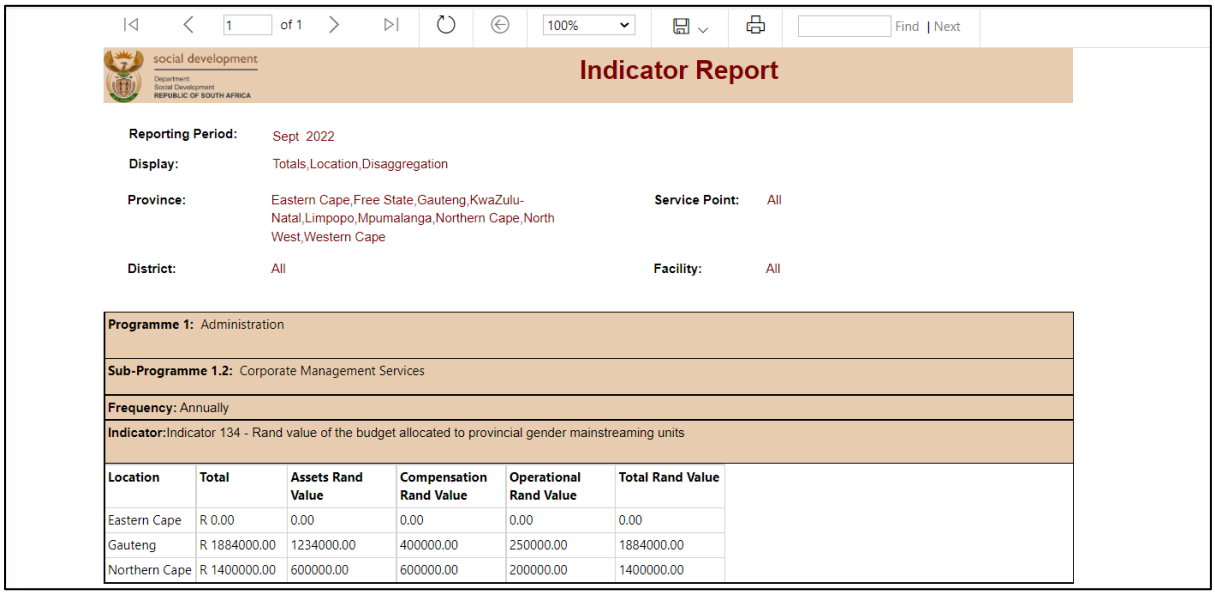
Indicator: Indicator 552 - Ratio of care givers to older persons in residential facilities.

Location	Total	Government Funded NPO	Government Facility	X:Number Of Care Givers	Y:Number Of Older Persons	Ratio Of Care Givers
Eastern Cape				0.00	0.00	0.00
KwaZulu-Natal	1:2		1.00	50.00	100.00	0.50
Northern Cape	1:3		1.00	5.00	15.00	0.33

Note: User may use report functionality (export, print and navigate to next pages) as demonstrated in section 5.1.3 above

4. Rand Value Indicator

Rand Value indicators report will appear in the following format.



social development
Department:
Social Development
REPUBLIC OF SOUTH AFRICA

Indicator Report

Reporting Period: Sept 2022

Display: Totals,Location,Disaggregation

Province: Eastern Cape,Free State,Gauteng,KwaZulu-Natal,Limpopo,Mpumalanga,Northern Cape,North West,Western Cape

Service Point: All

District: All

Facility: All

Programme 1: Administration

Sub-Programme 1.2: Corporate Management Services

Frequency: Annually

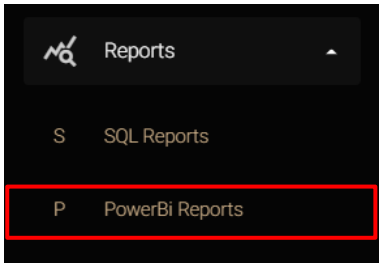
Indicator: Indicator 134 - Rand value of the budget allocated to provincial gender mainstreaming units

Location	Total	Assets Rand Value	Compensation Rand Value	Operational Rand Value	Total Rand Value
Eastern Cape	R 0.00	0.00	0.00	0.00	0.00
Gauteng	R 1884000.00	1234000.00	400000.00	250000.00	1884000.00
Northern Cape	R 1400000.00	600000.00	600000.00	200000.00	1400000.00

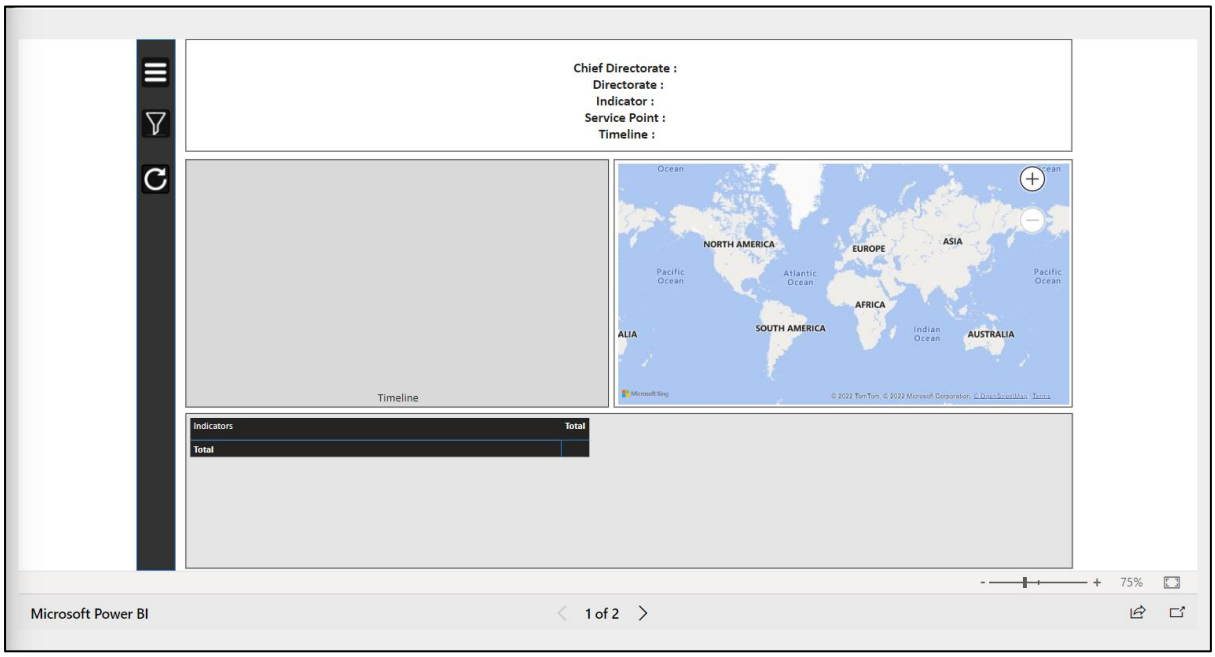
Note: User may use report functionality (export, print and navigate to next pages) as demonstrated in section 5.1.3 above

4.2. PowerBI Reports

1. Under '**Reports'** menu, click '**Power BI Reports'** link



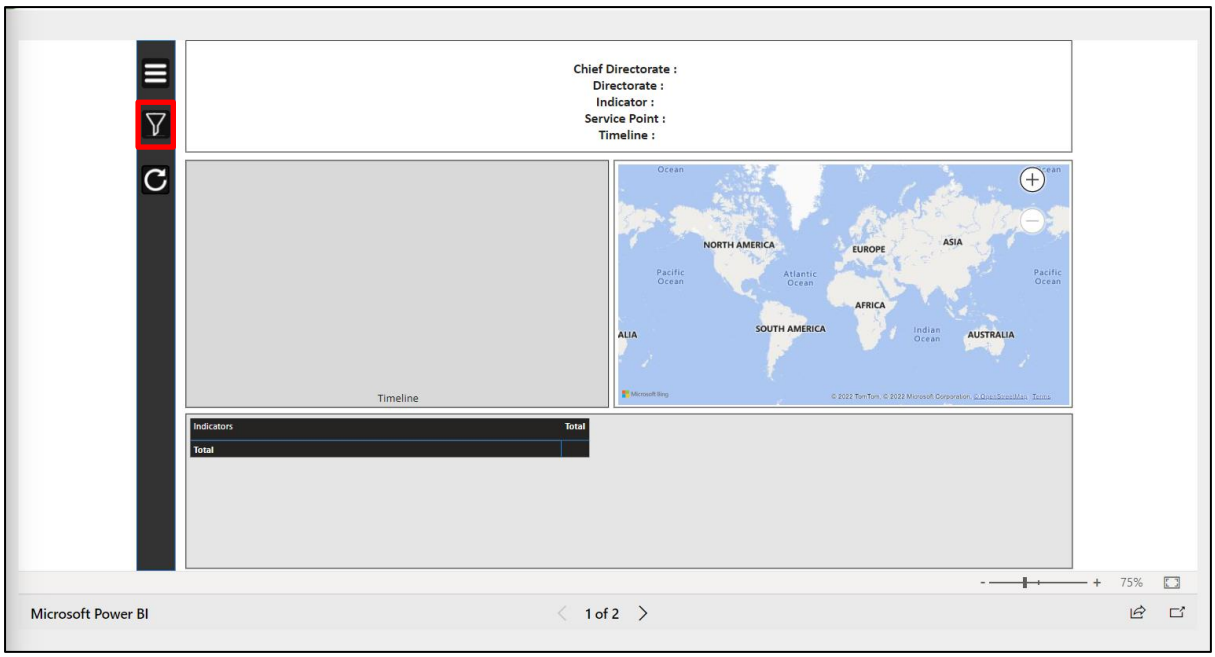
2. Screen below will display



4.2.1. Indicator Page

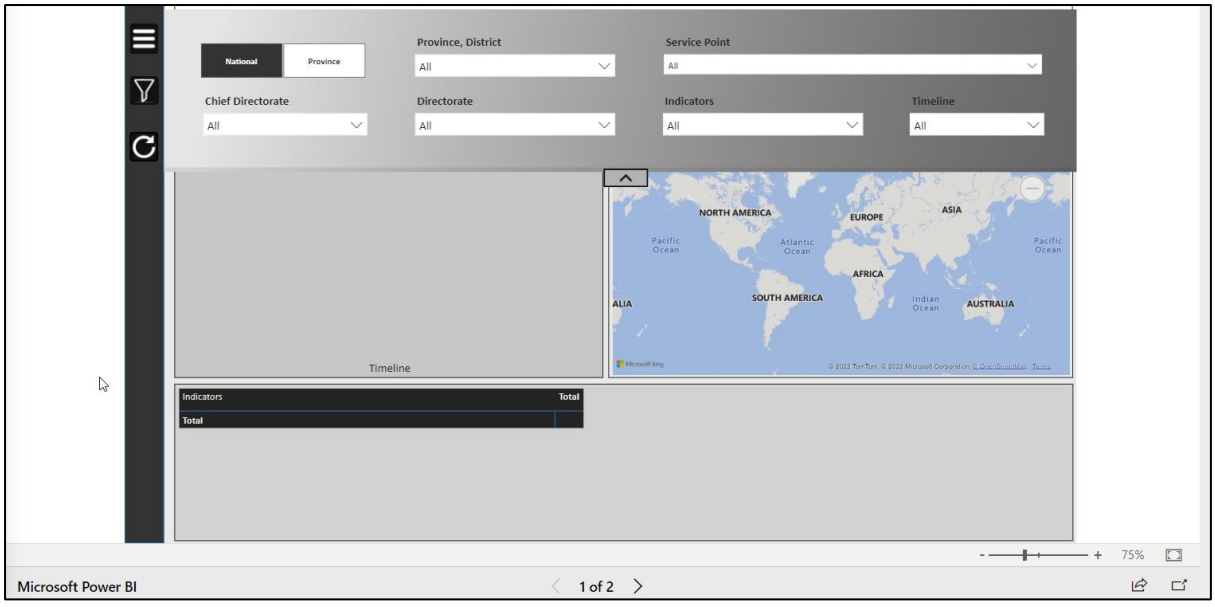
4.2.1.1. Viewing Indicator Information (Single Indicator)

1. Click on the below highlighted button to **Open the Filter Pane.**

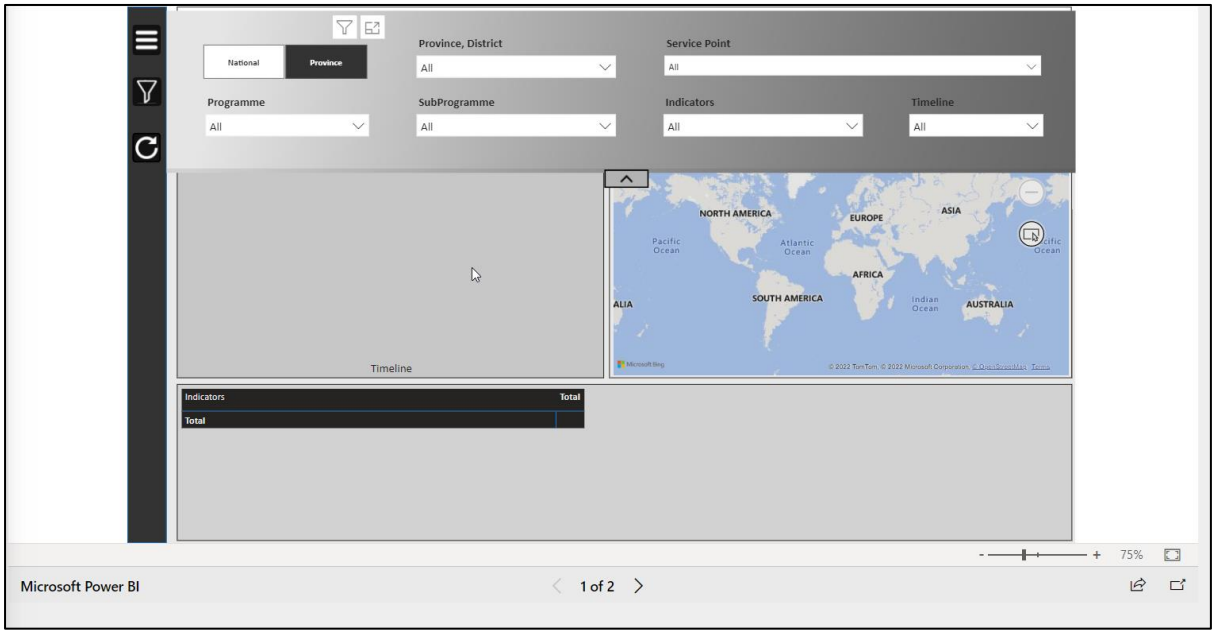


2. Once the highlighted button is clicked the user can select '**Province'** or **'National'** and all dropdowns to filter information to view at Provincial or National level.

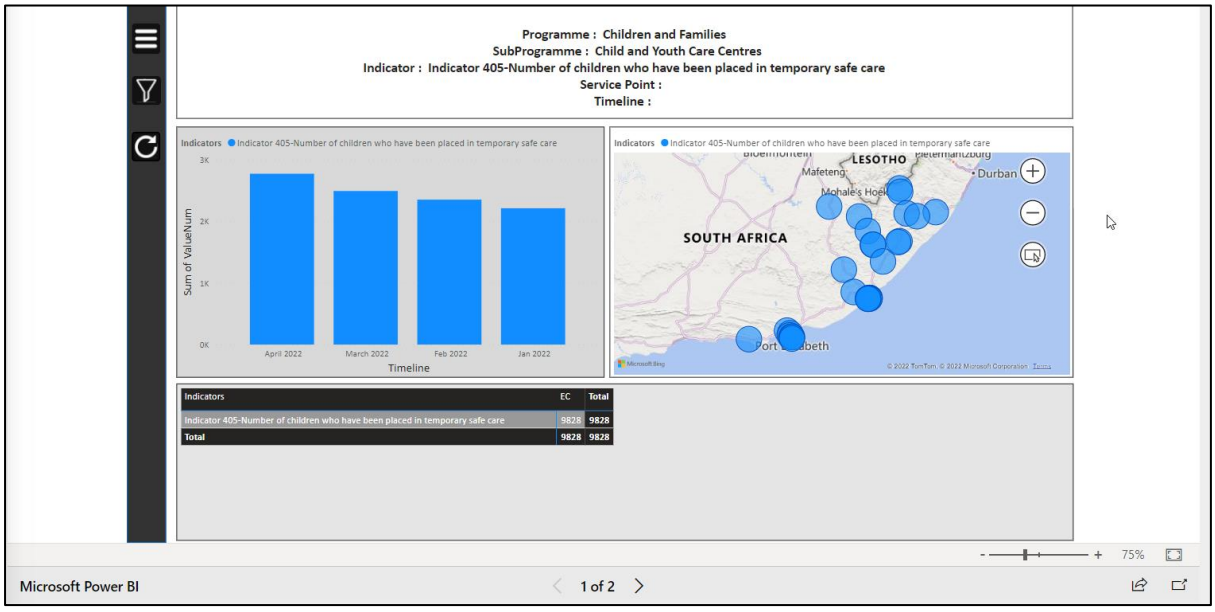
National level dropdown options



Province level dropdown options

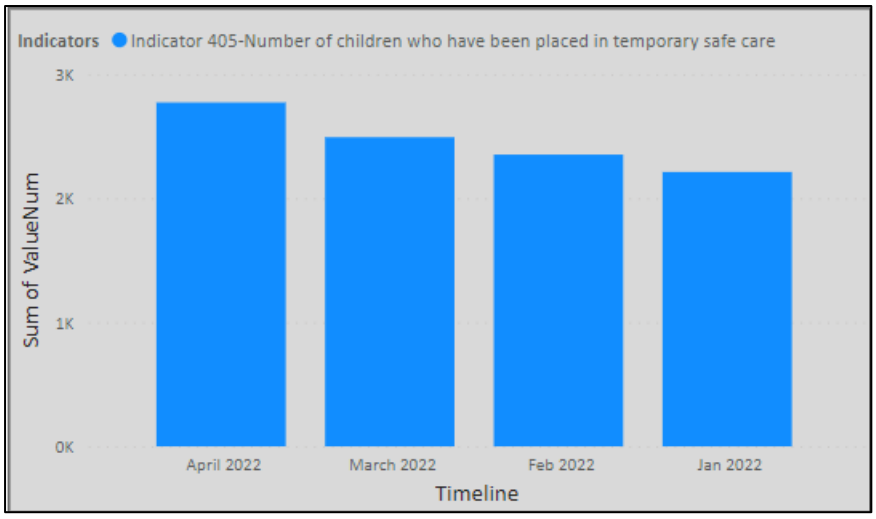


3. On the above screen, use the dropdowns to select the desired parameters.
4. Once the user selects all parameters, the dashboard will show information depending on the selected indicators, as on screen below

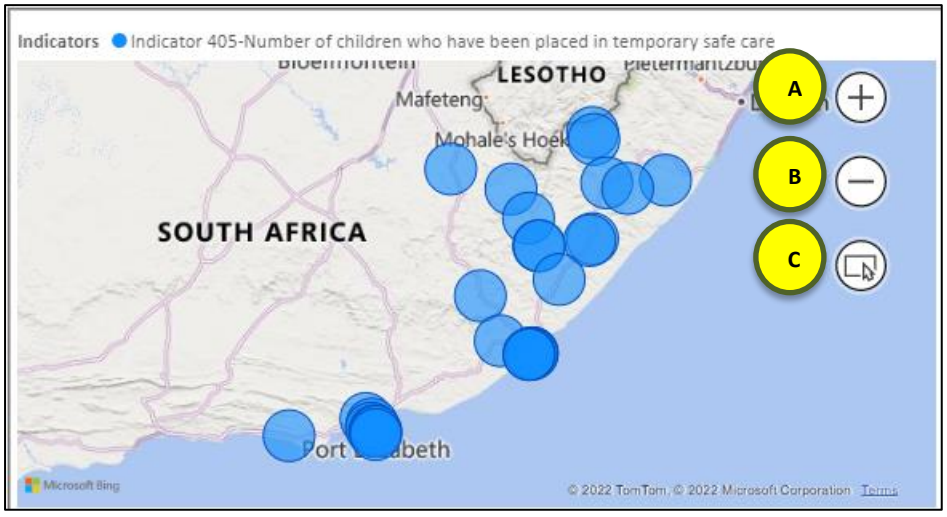


❖ Indicator Timeline

The indicator chart below shows information timelines in a bar graph per month for the selected indicator/s.



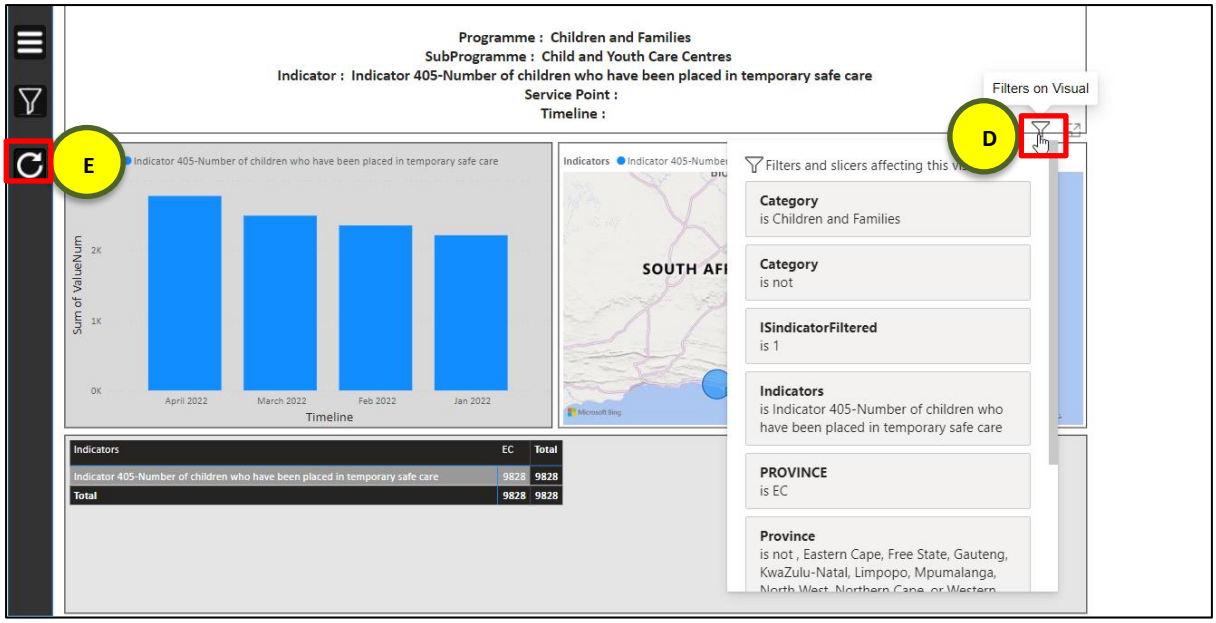
❖ Map Tools



A – Zoom in button

B – Zoom out button

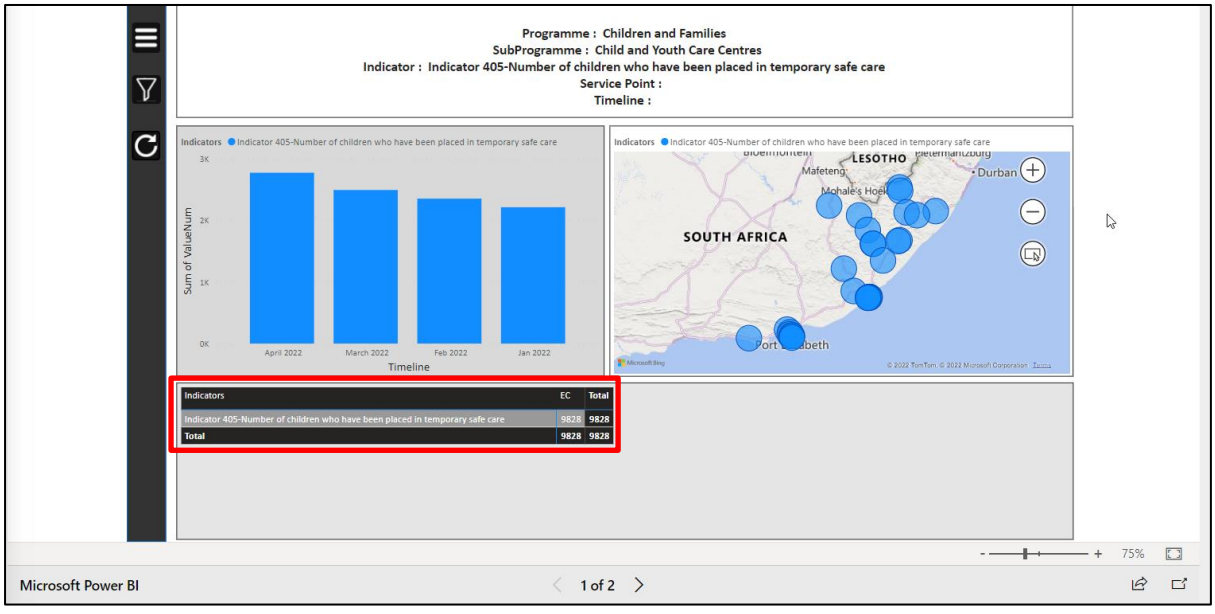
C – Use this to select a specific area on the map



D – This function displays information depending on the selected parameters

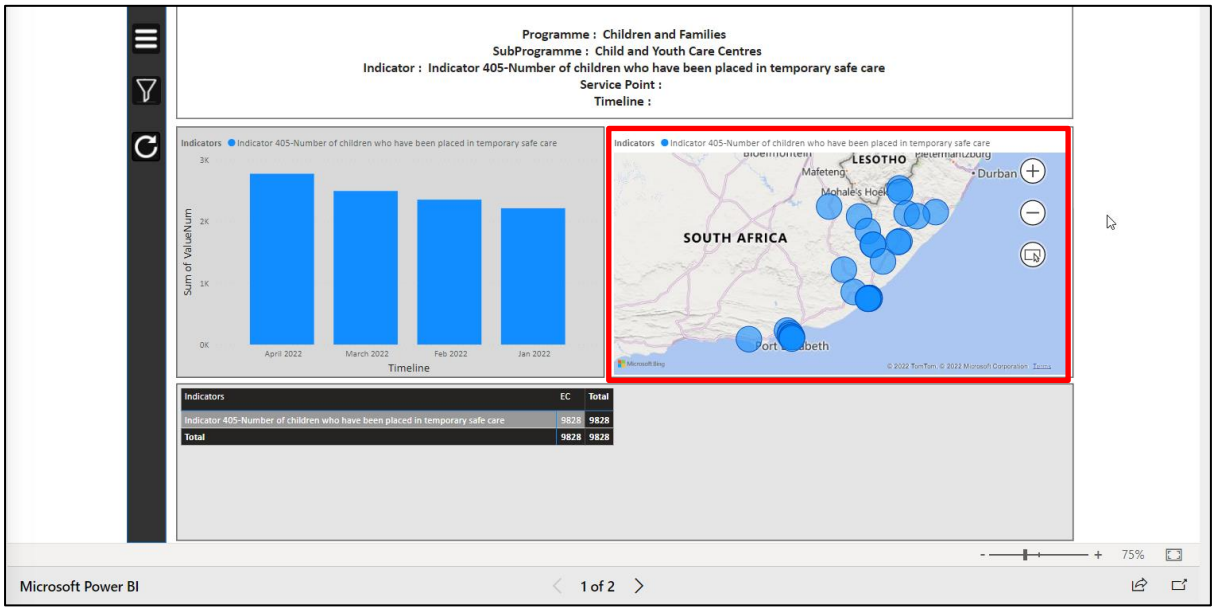
E – Use this to clear selections

Tabular values for the indicator and the selected Province with a Total.

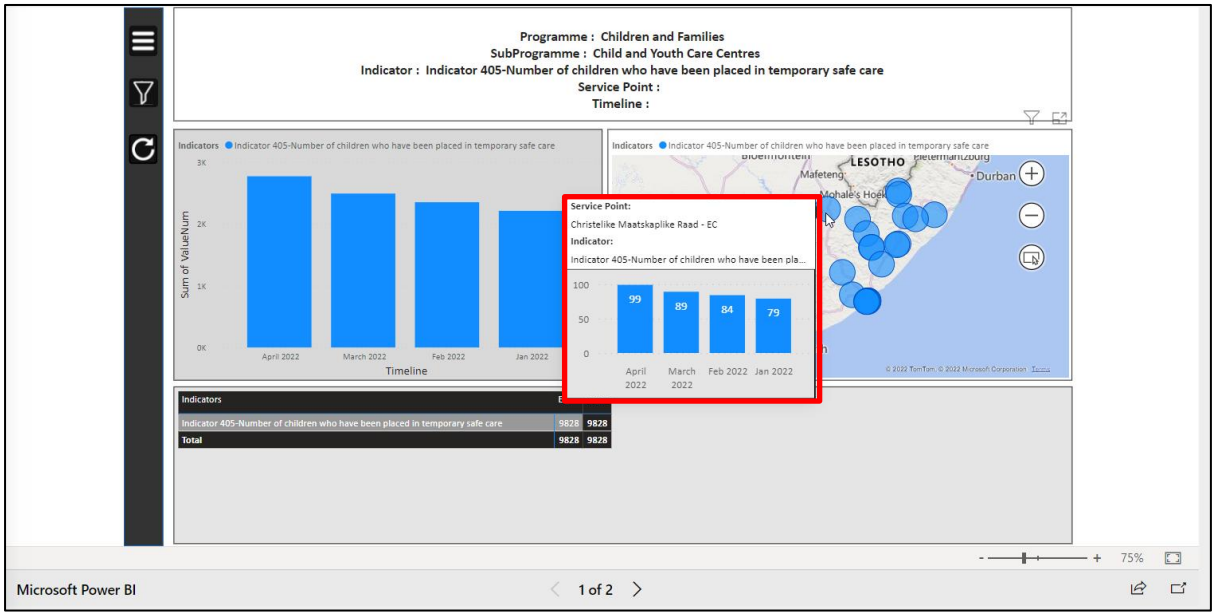


❖ Map view

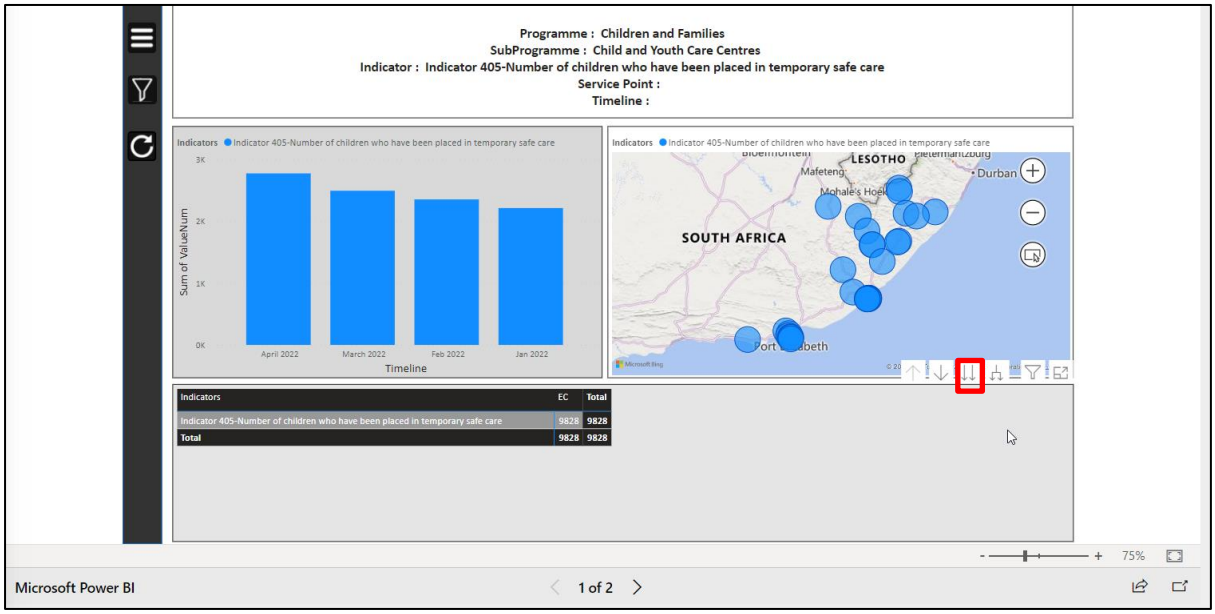
The blue dots are the different service points in the selected province(s).



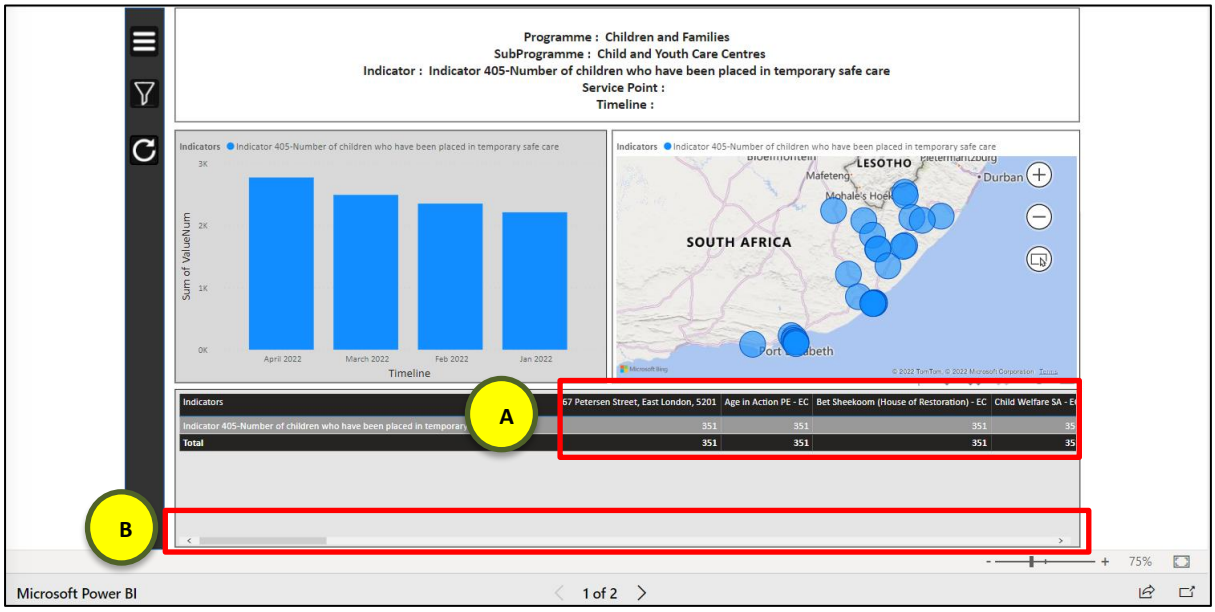
When hovering over a dot the values and information for the selected service point is displayed.



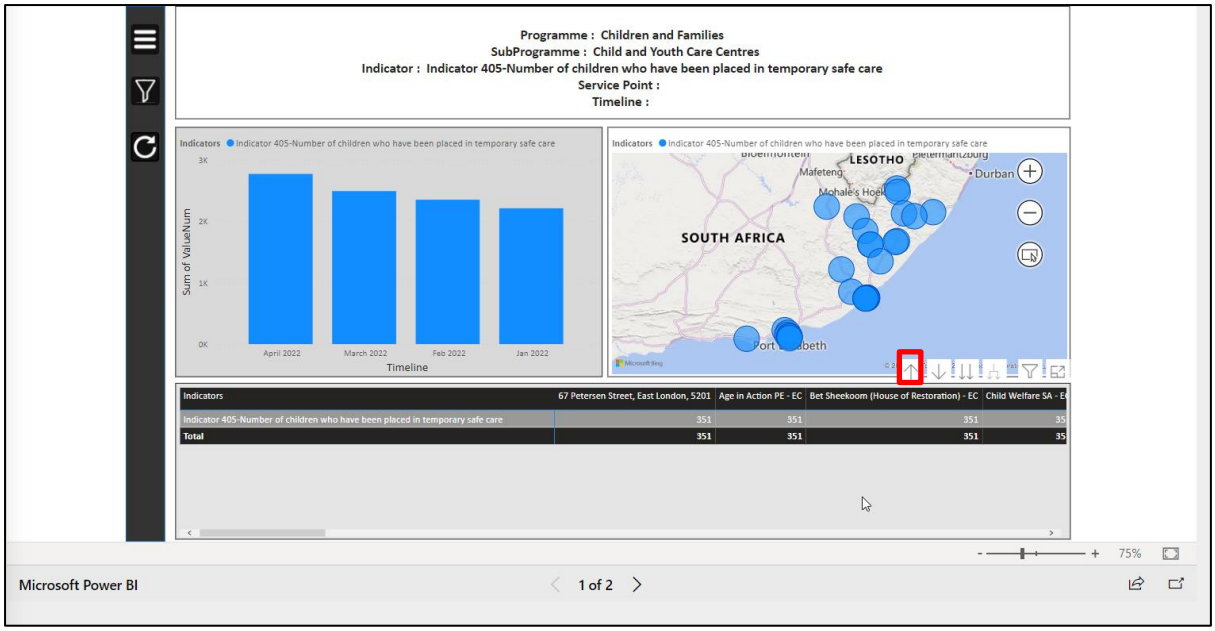
Go to next level hierarchy (drilling down to Service Points) by clicking on the highlighted button.



Once opening the next level hierarchy, it will be displayed as per below image. This shows a total value of each Service Point for the selected province and indicator/s 'A'. There is a scroll bar available to view all the Service Points for the selected province and indicator/s 'B'.

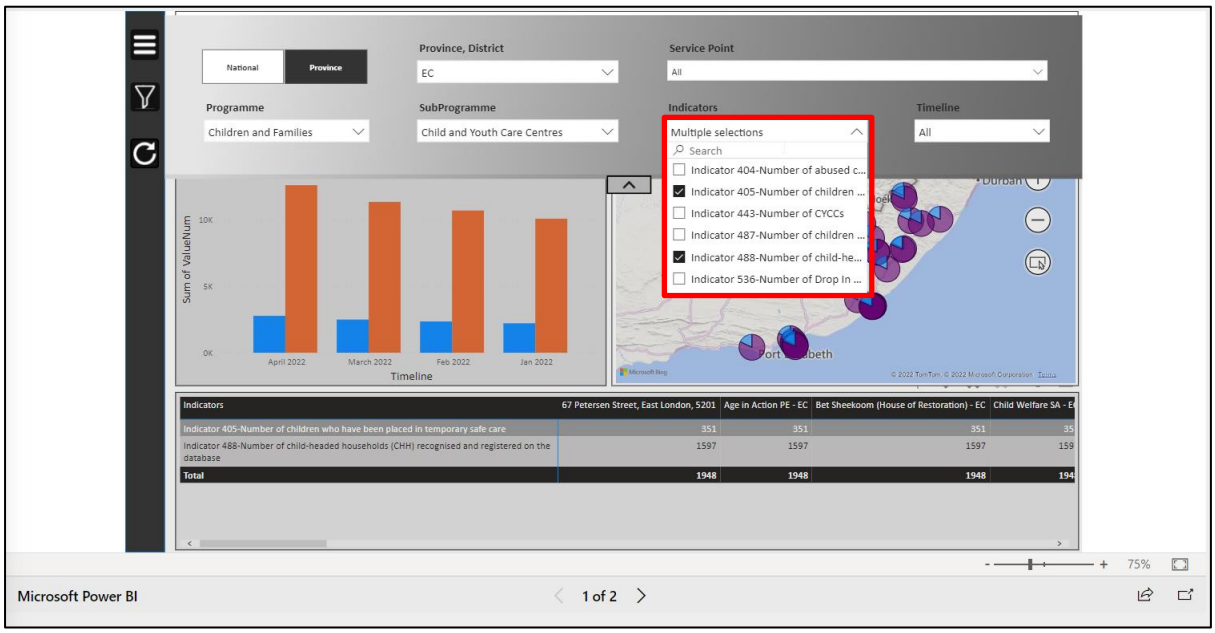


To collapse the hierarchy to display only the total for the selected Province and indicator/s, the user should click on the highlighted button. This is the 'Drill Up' button.

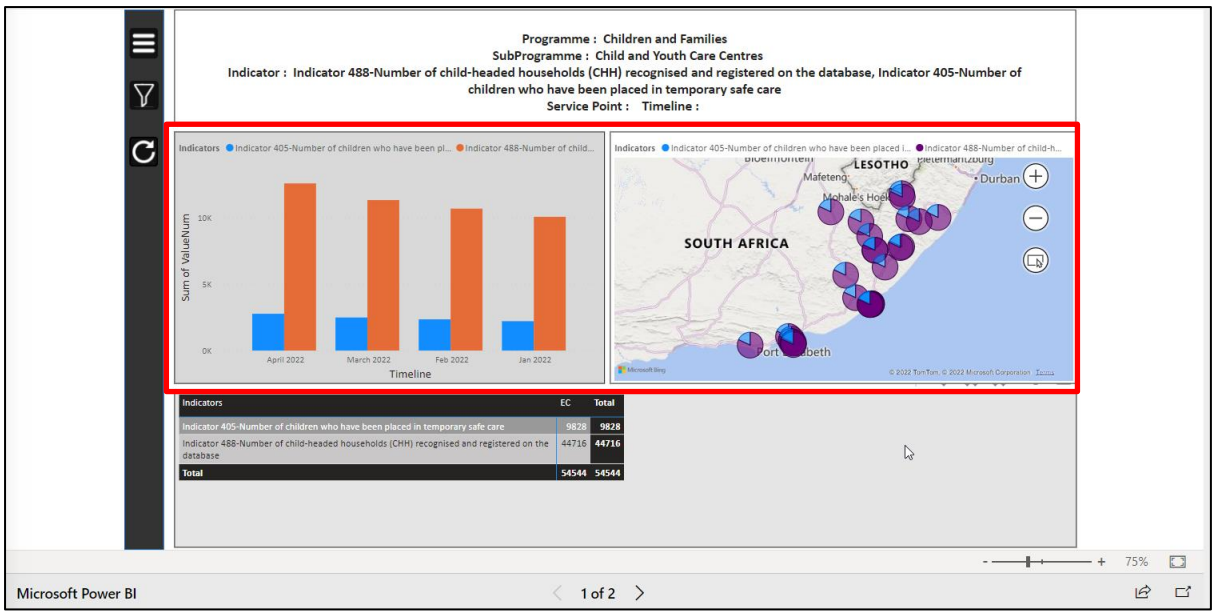


4.2.1.2. Viewing Indicator Information (Multiple Indicators)

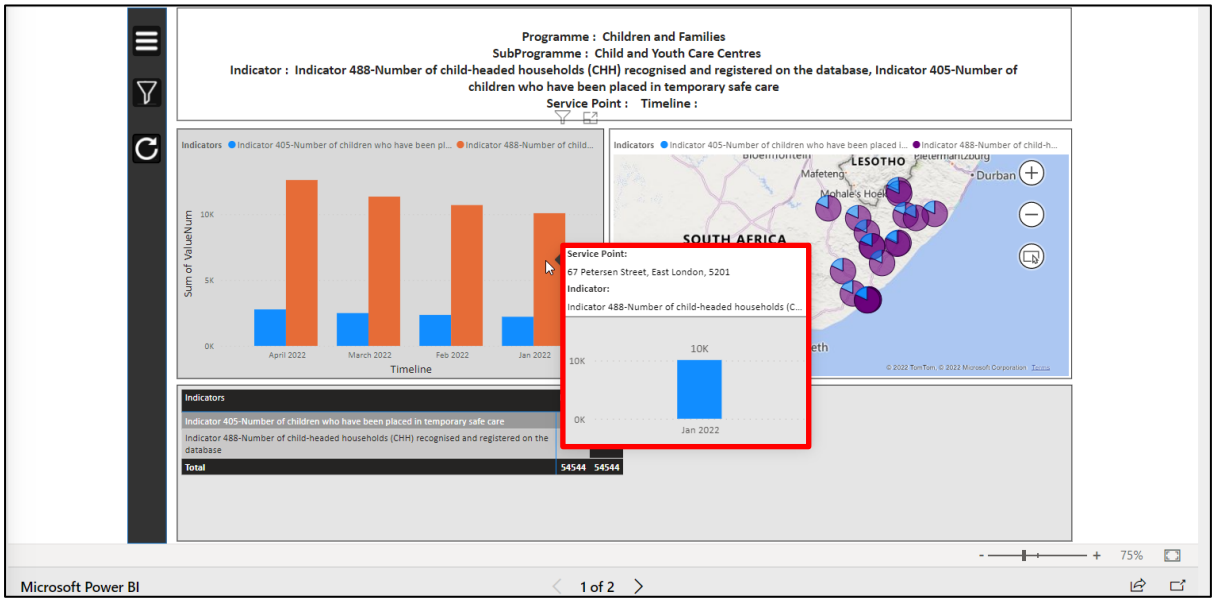
1. The user can select multiple indicators by clicking in the box next to each indicator.



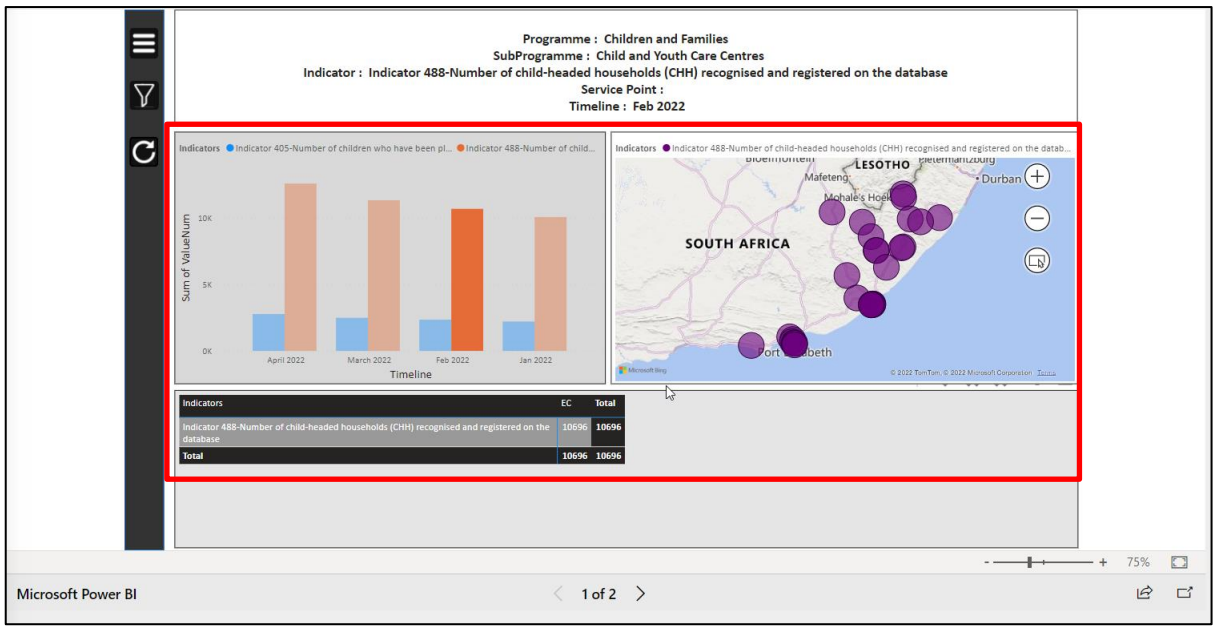
2. Once the indicators have been selected the graph and map will populate the data, as per image. Each indicator displays in a different colour. The selected indicators are also listed in the display.



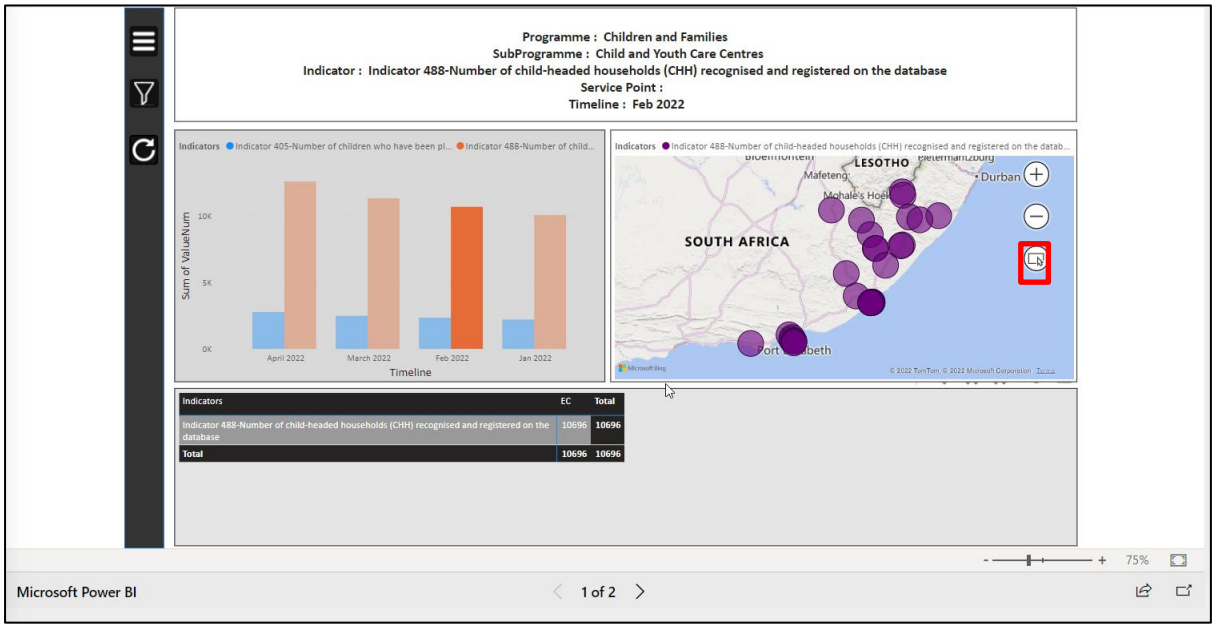
3. The user can hover on the different indicator colours and the data will display for each month displaying the totals for each indicator.



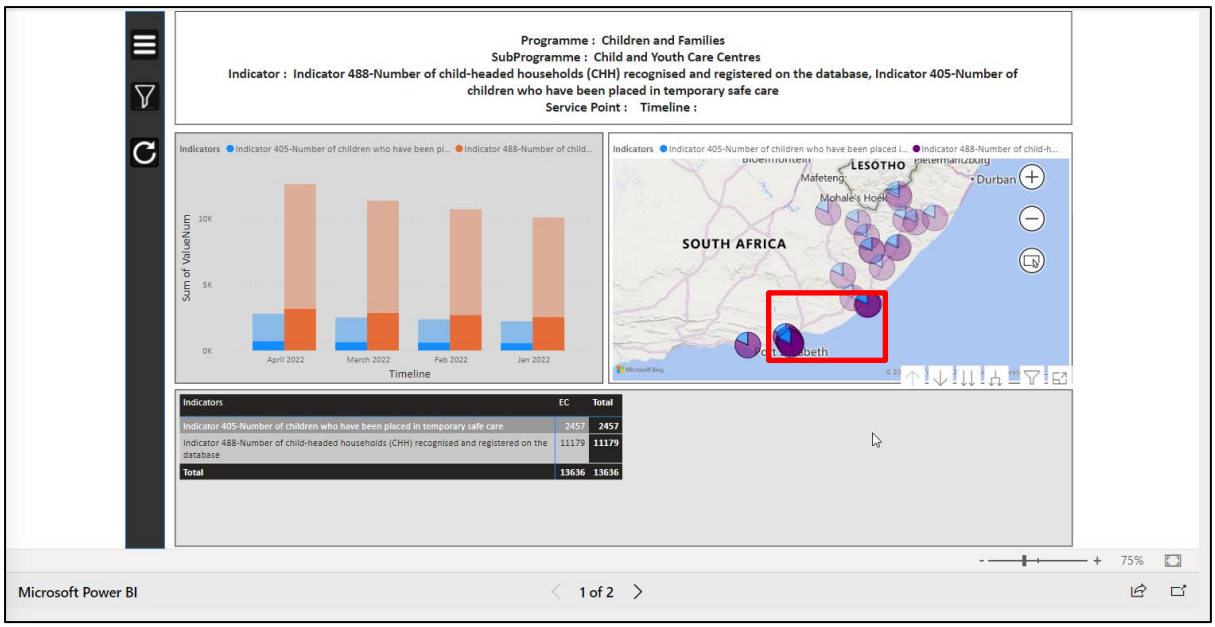
4. The user can click on any of the months and the data will display according to the month selected.



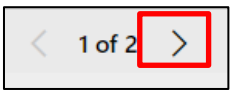
5. The user can view a few of the service points at a time by selecting the highlighted tool on the map. This tool is called ‘Rectangle Select’.



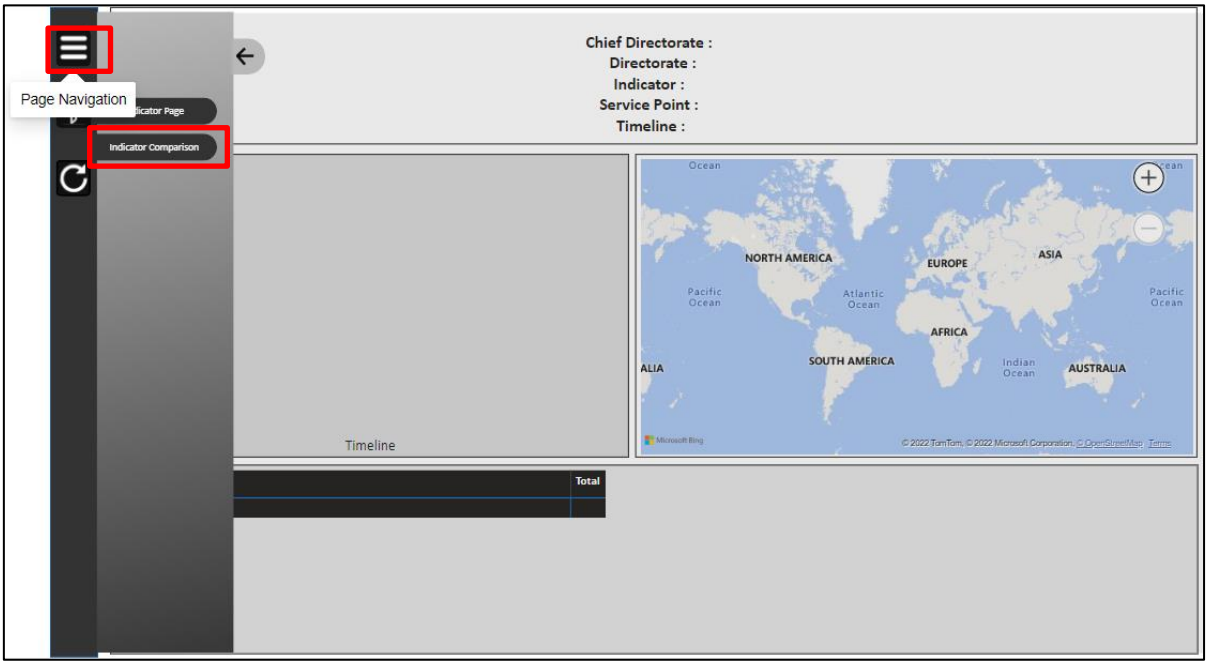
6. The data will display as per below. The selected ‘Service Points’ is highlighted; the darker shade is the selected ‘Service Point’.



4.2.2. Indicator Comparison

1. Go to next page 

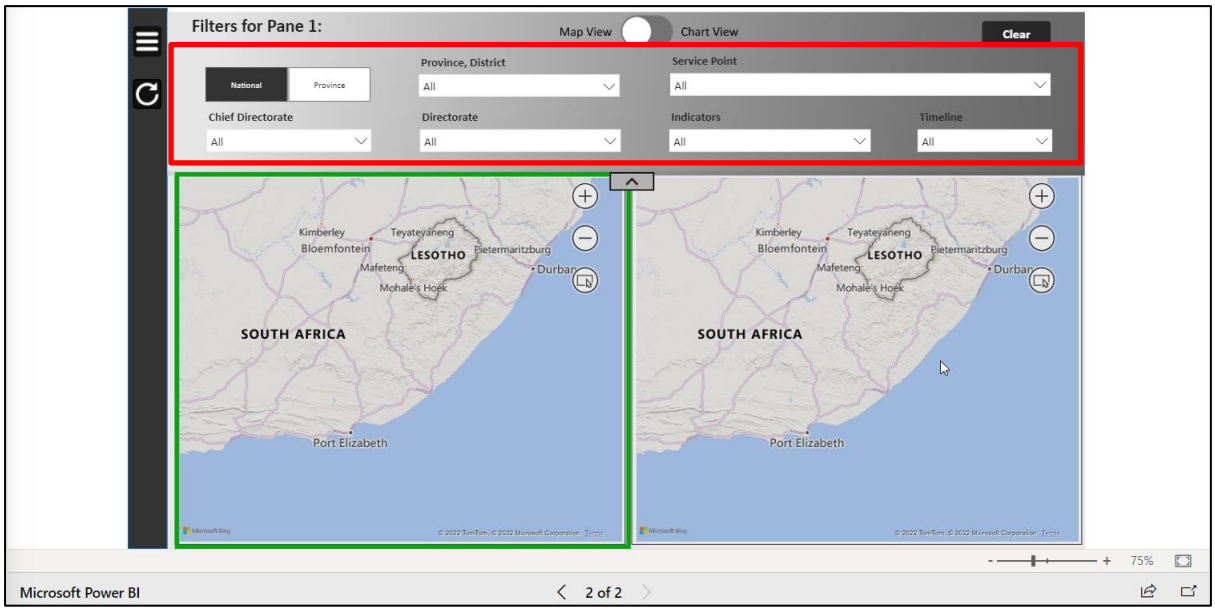
to view indicator comparison, or click on 'Page Navigation' icon highlighted below, then 'Indicator Comparison'



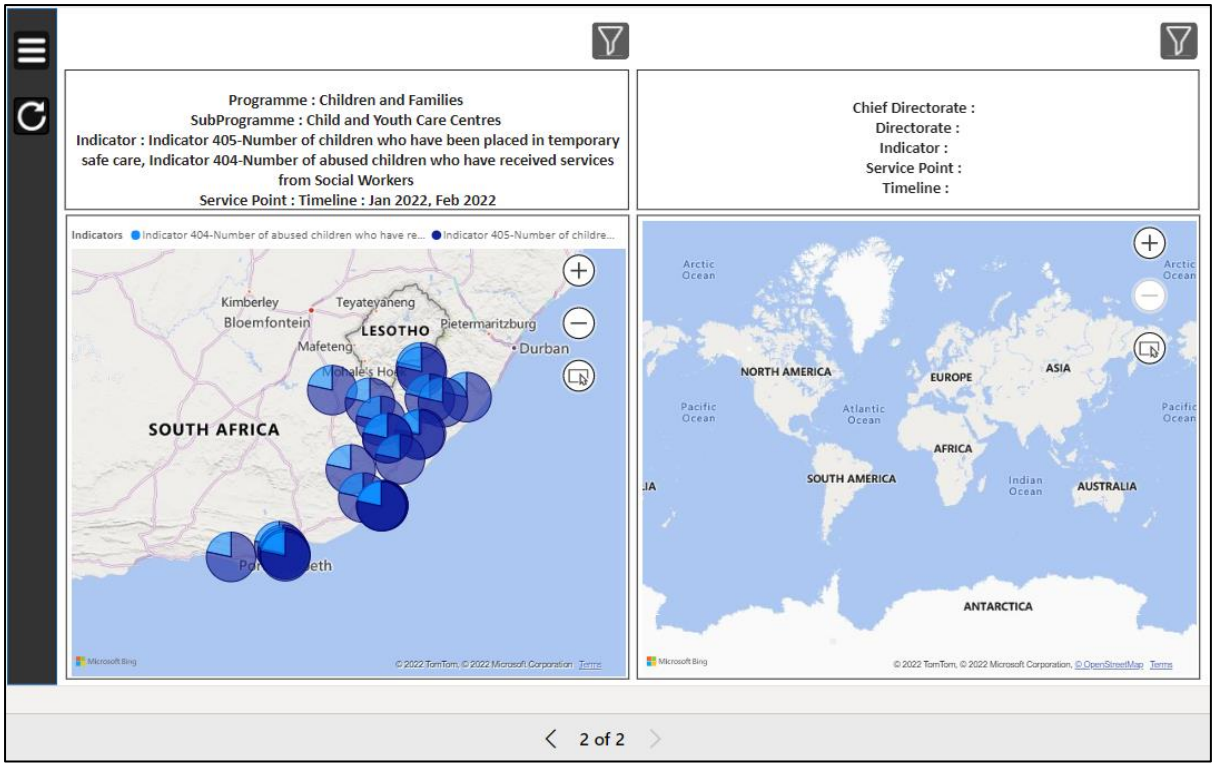
2. Screen below will display

3. Click on the highlighted filter icon to choose from the dropdowns for **Pane 1**.

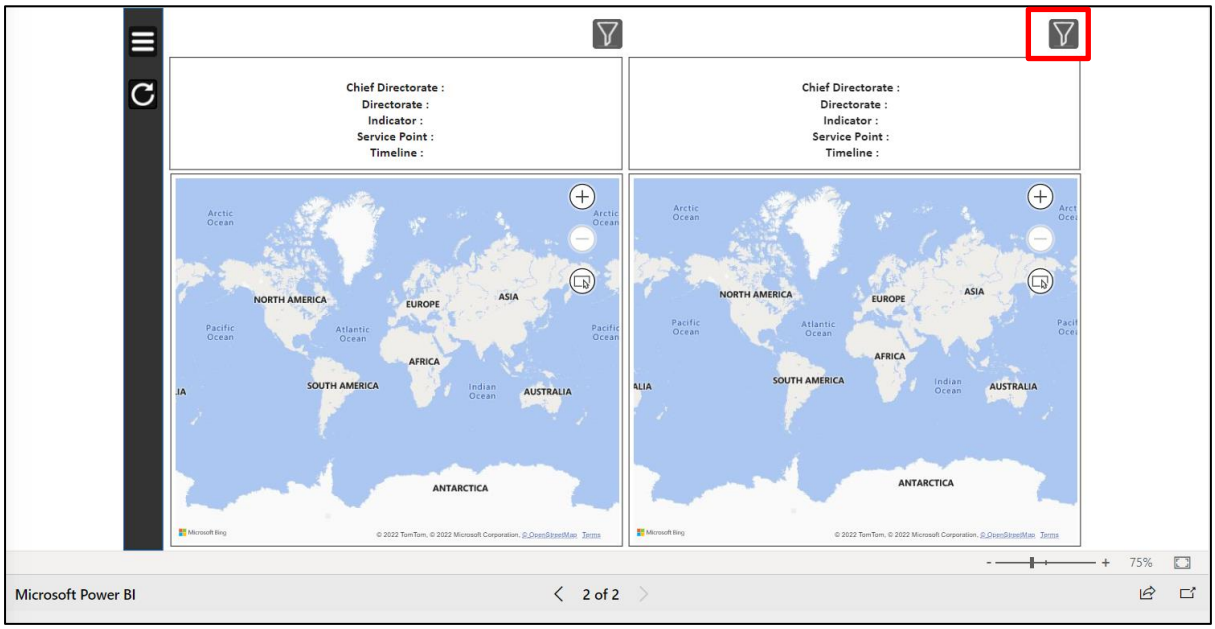
4. The highlighted dropdowns are available for the user to select in Pane 1.



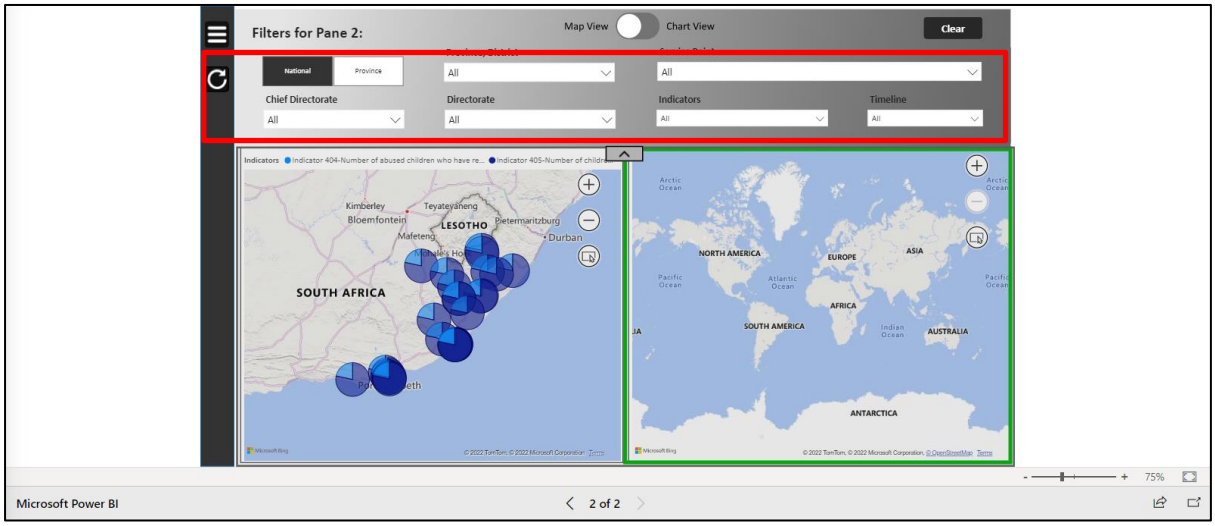
5. The user is able to use National or Provincial view
6. Once selecting from the dropdowns on Pane 1 the indicators will display on the map as per below.



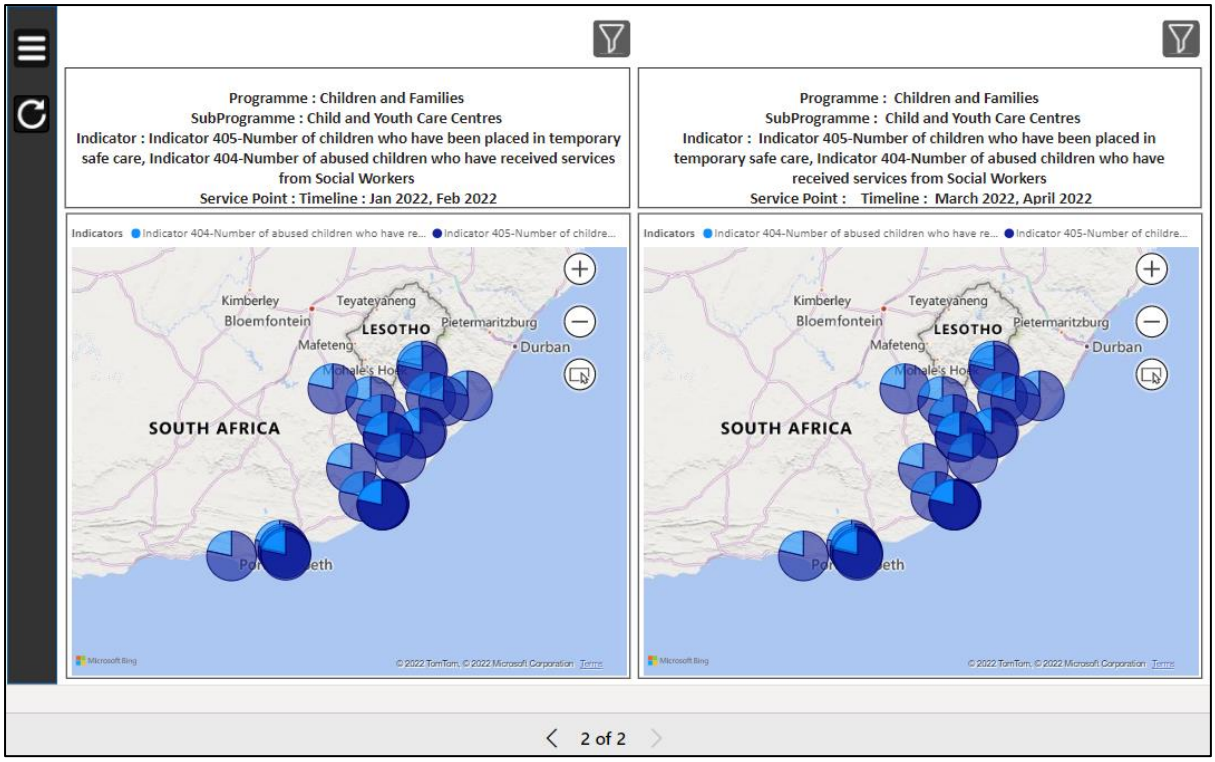
7. The user will then click on the filter icon below for **Pane 2.**



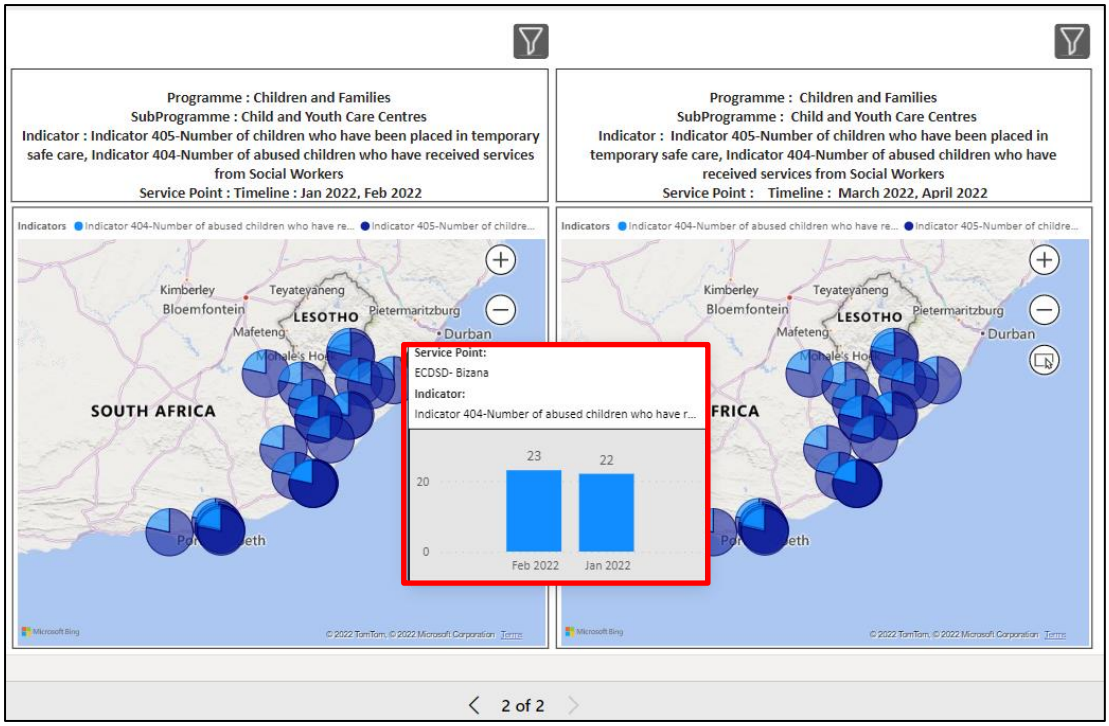
8. The highlighted dropdowns are available for the user to select in Pane 2.



The comparison of the selected indicators will be displayed as per below.



7. The user can hover on the different service point and the data will display for each selected indicator with the selected timelines as below.



Note: The user can use the comparison as follows:

- Choose the same indicator(s) and different Provinces
- Choose the same indicator(s) in same Province but different timelines (as per above example)
- Choose the same Province, different indicators in different service points

The comparison will be based on the selections made in each pane.

❖ Map View / Chart View

The user can toggle between Map View and Chart View using the highlighted icon.

Map View

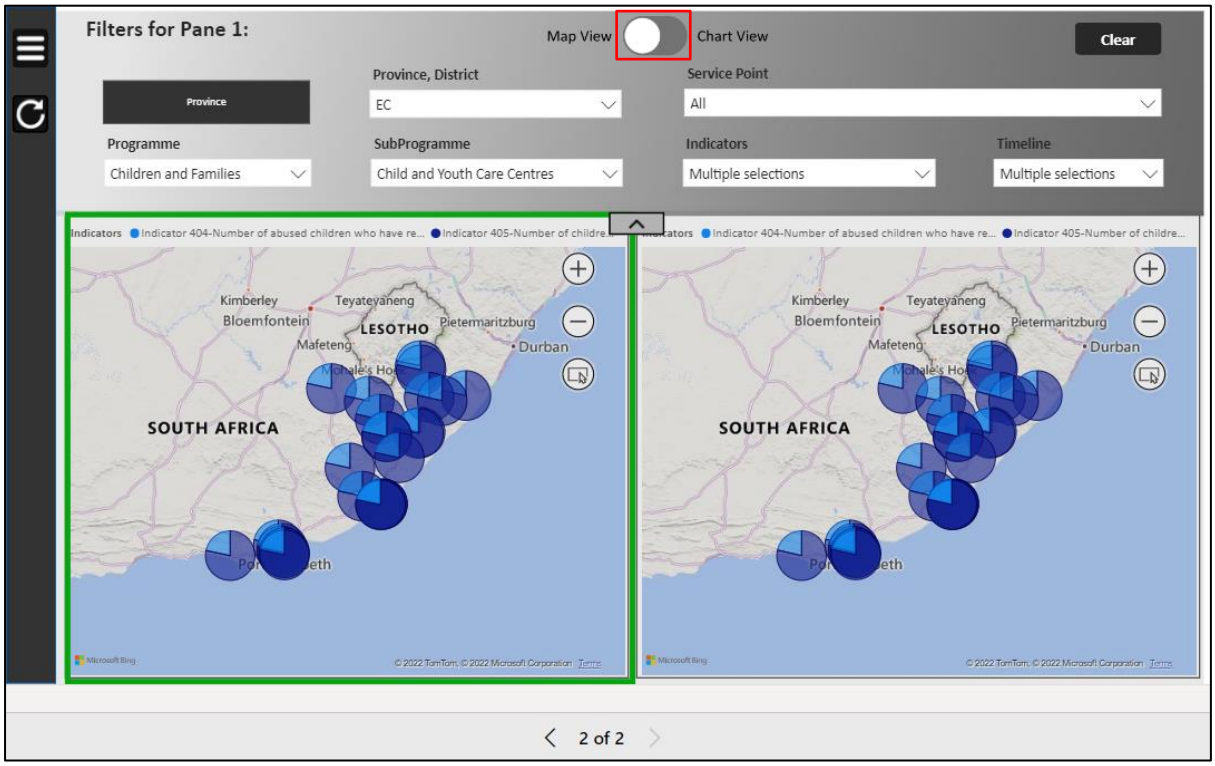
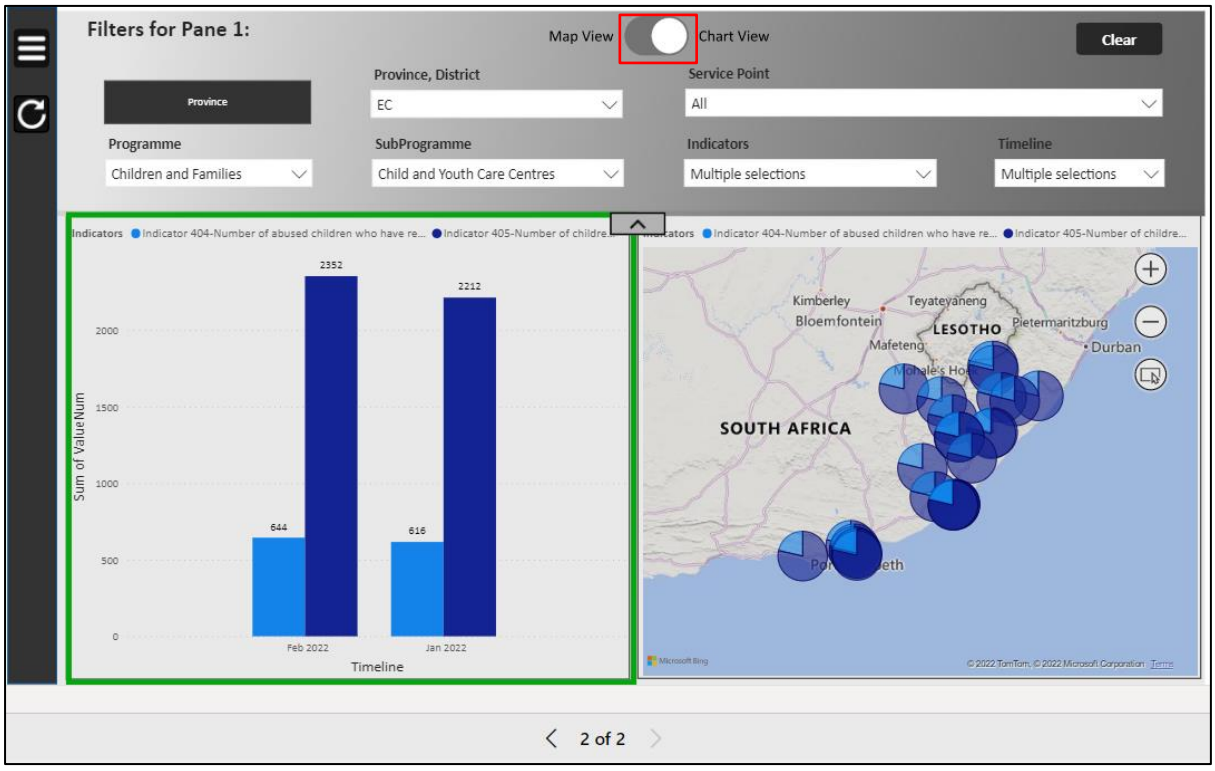
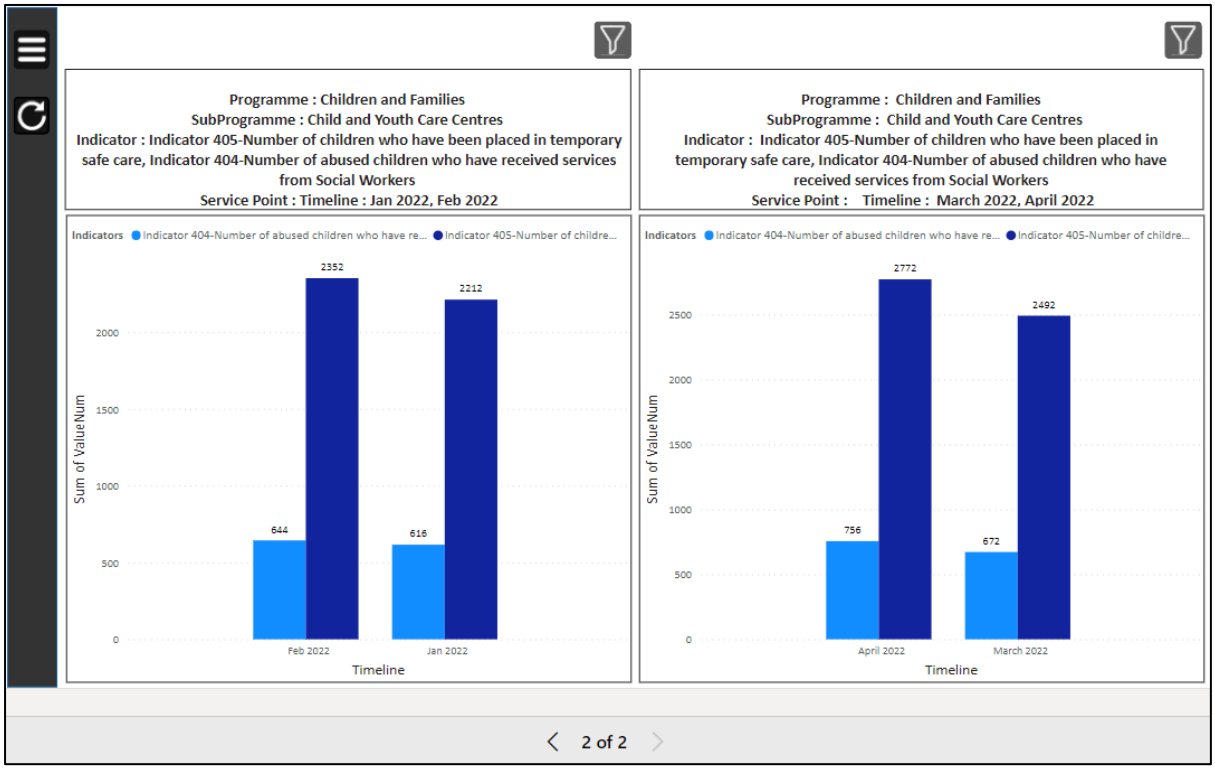


Chart View



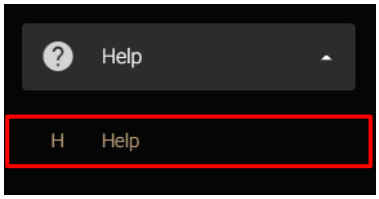
Screen below shows chart view on both panes



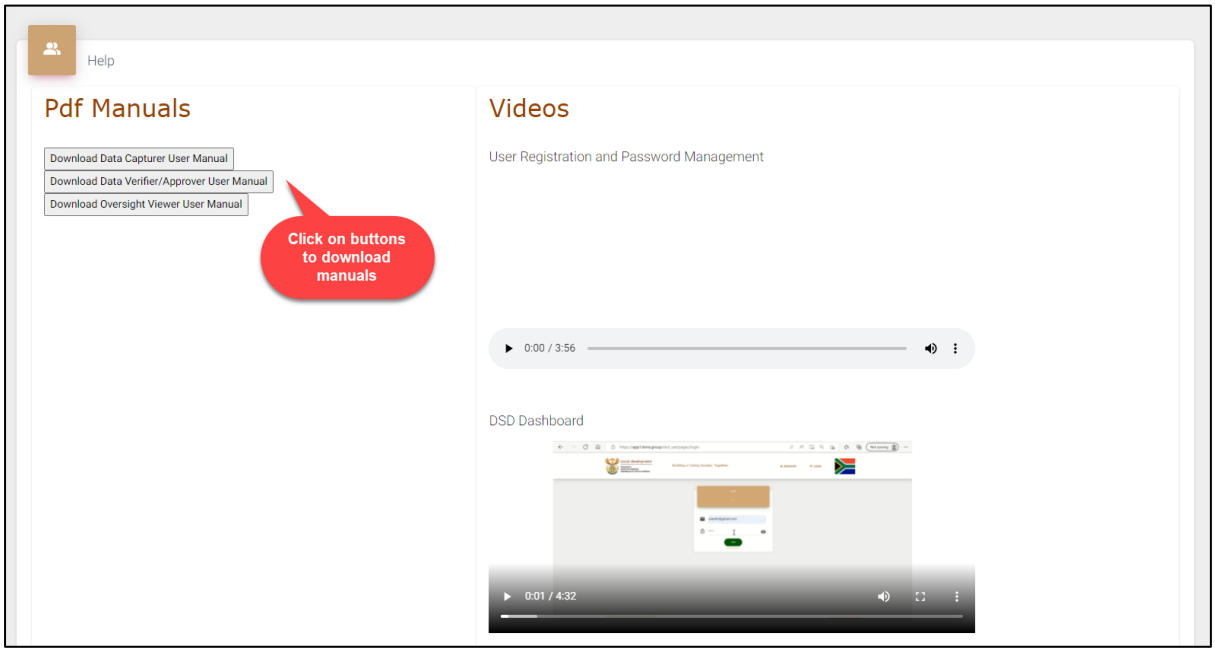
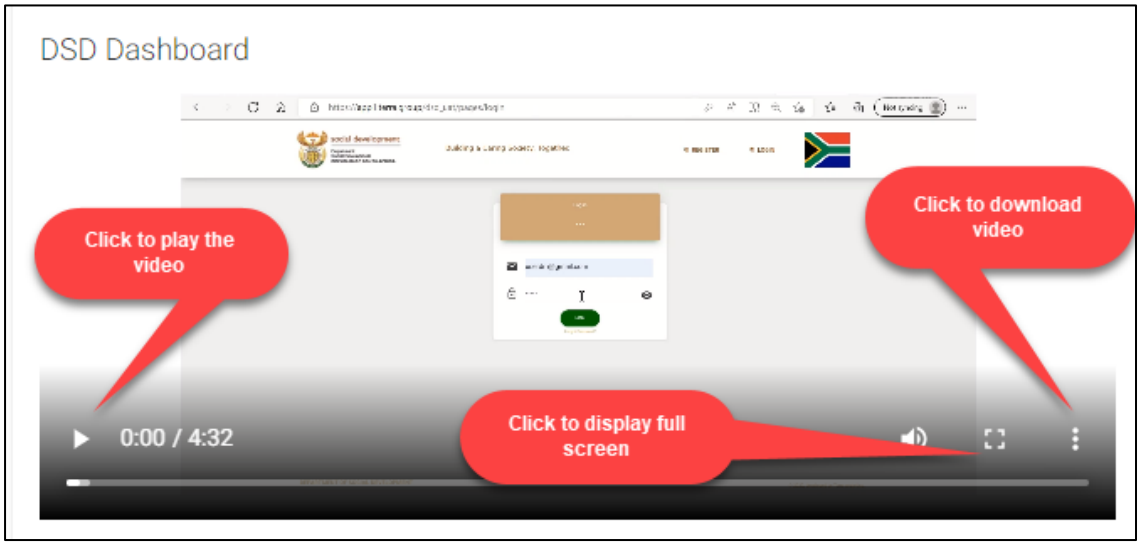
5. Help

The ‘Help’ function is available for users to view manuals and videos on how use the M&E System

To access this function, click ‘**Help’** under **Help** menu as below



1. Screen below shall display



2. Go to a specific video to download and display full screen