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MALARIA ALLIANCE | ALMA

Malaria Control and Elimination Scorecard Management Tool User Guide

Version 5.0
June 2019

What's new in this version…

ALMA workplan

Description	Date created	Start	Deadline	Status
Ensure funds are released from the budget to begin the insecticide tender	Aug 16, 2018		Jul 1, 2018	Action achieved
•Tender for IRS insecticide	Aug 21, 2018		Jul 25, 2018	Action achieved
Complete tender documentation	Aug 21, 2018		Jul 1, 2018	Action achieved
Issue tender	Aug 21, 2018		Jul 7, 2018	Action achieved
close tender and select winner of bid	Aug 21, 2018		Jul 28, 2018	Action achieved
Delivery of insecticide	Aug 21, 2018		Aug 19, 2018	Action achieved
Complete geographical reconnaisance and quantify insecticide requirements.	Aug 16, 2018		Aug 29, 2018	Action achieved
•Recruit and train spray teams	Aug 21, 2018		Sep 10, 2018	Action achieved
Organise spray team recruitment campaign	Aug 21, 2018		Sep 12, 2018	Action achieved
Organise 2 week training in District A	Aug 21,		Sep 19,	Action achieved

ALERT: the deliverable's deadline for 'procuring insecticide' on the Malaria workplan has passed.

Malaria & RMNCAH scorecard video training series

How to download the excel template and populate data in the scorecard

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- **Workplan manager**
  - A new functionality that allows the tracking of implementation of key deliverables in the annual workplan through the online scorecard platform, listing key milestones and action items and progress against them
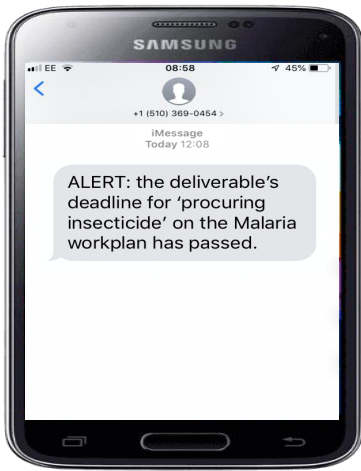
- **SMS Notifications**
  - SMS can now be set to alert senior stakeholders if a milestone has not been reached or there is a delay on the implementation of an action item

- **Video Tutorials**
  - Links to YouTube video tutorials to learn how to use the scorecard's key functionalities

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Table of contents

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Introduction to the Malaria Control and Elimination Scorecard Management Tool

- This document provides an overview of the features of the **Malaria Control and Elimination Scorecard Management Tool.** The tool is **country-owned**, based on **existing national data**, and reflects **national objectives and priorities** outlined in national health strategies and plans

- The tool consists of the following:

  - **Scorecard:** The scorecard summarises national and subnational performance on country-defined indicators and targets

  - **Subnational view:** This view shows the performance of all indicators at a specified level (national, subnational) over time

  - **Indicator view:** This view displays the performance of a single indicator at all levels (national, subnational) over time.

  - **Action Item tracker:** This enables national and subnational administrators and partners to identify, document, monitor, and track actions necessary to drive progress towards malaria control and elimination targets (e.g., bottleneck analyses, policy changes, programme implementation)

  - **Workplan manager:** a new functionality which allows the user to enter key actions and milestones in the annual workplan, enabling tracking of progress.

  - **Charts:** These help identify differences and changes in subnational performance over time

  - **Maps:** View differences in performance across subnational regions

  - **Waves:** Scorecards evolve over time as new data become available, national priorities change, and progress towards malaria control and elimination is made. Waves support forward-looking planning

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How to use this user guide

The document tracker at the top of each page indicates which feature the content applies to

| Introduction | Overview | **Manage** | Scorecard | Config. to |

⊞ Scorecard: Add Category

- Scorecard categories appear at the top of the scorecard and national indicators

Category A		Category B		Category C
Indicator 1	Indicator 2 / Indicator 3	Indicator 4	Indicator 5	Indicator 6

Screenshot	Step	Instruction

| ① | Indicator |
| Manage Scorecard |
| Manage Region |
| Manage Category |

Click on **Manage Category** in the scorecard Sidebar

Shift Category

← →

| ② | + ✎ 🗑 |

Click on the "+" button to open form to create a category

| Manage Indicator |
| Edit Cell |
| Upload / Download |

Screenshots will depict each step
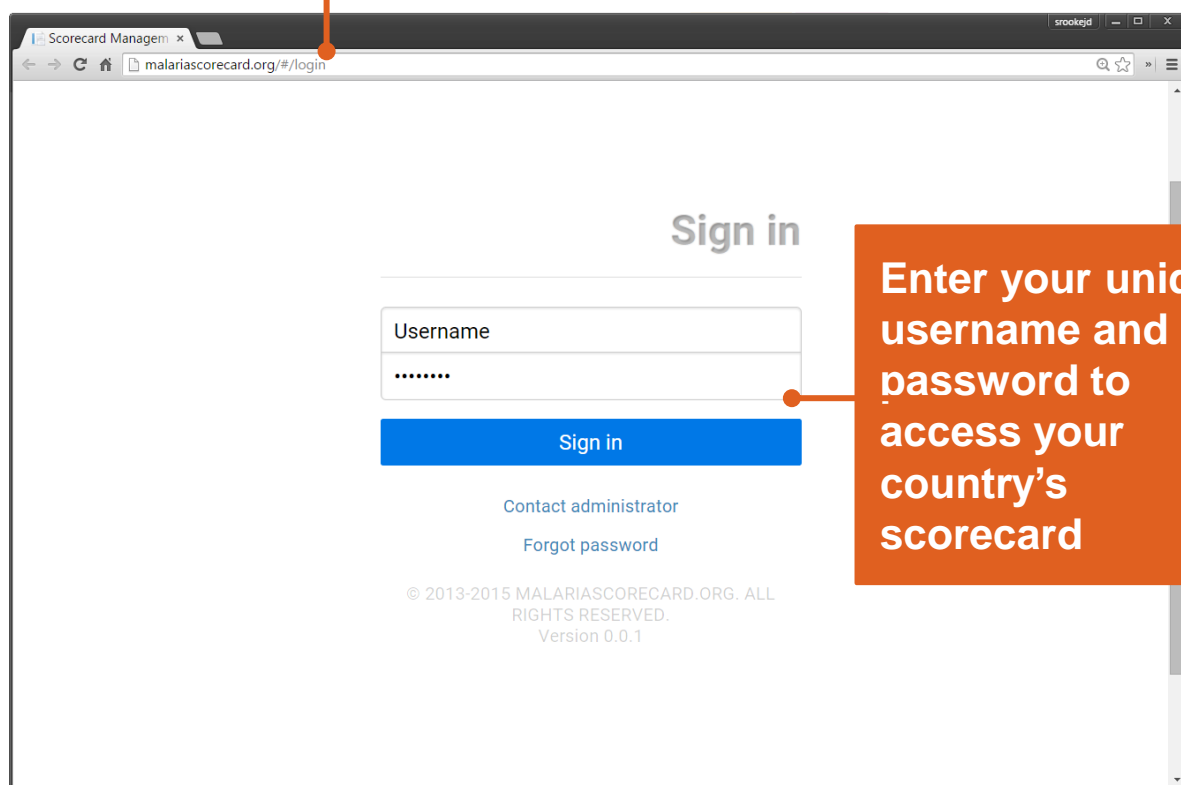
Name:

Name

Enter name and click **Create**

Create

30

Screenshots show where to look on the screen

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Accessing the management tool

The Malaria Control and Elimination Management Tool can be accessed at **www.malariascorecard.org**
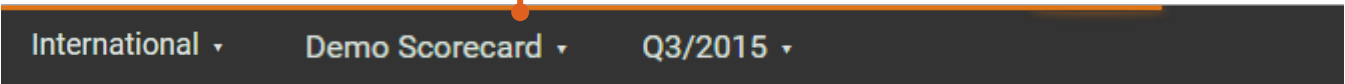
Scorecard Managem ×

malariascorecard.org/#/login

srookejd

Sign in

Username

••••••••

Sign in

Contact administrator

Forgot password

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Version 0.0.1

Enter your unique username and password to access your country's scorecard

Note: When an account is created or when the "forgot password" link is clicked, the user will receive an email with his/her username and a link to set his/her own password. If the user has not received this email, they can contact the national administrator or click on the **"Contact administrator"** link on the sign in page

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Visual notifications

An **orange bar** at the top of the screen will display what percentage of the page has been loaded
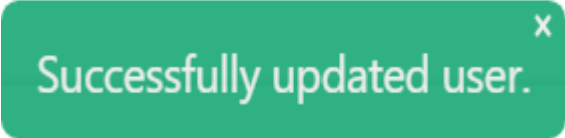
International ▾   Demo Scorecard ▾   Q3/2015 ▾

An orange circle will periodically appear in the middle of the screen when information is being retrieved from the server

Alerts will appear in the bottom right-hand side of the page notifying if a modification has been successfully registered or if there was an error (e.g., data has successfully uploaded)

Successfully updated user.   ×

🛡 Error creating scorecard!   ×

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Users

There are three types of users for the web platform:

- **Admin:**
    - They can create / edit scorecards and action items, upload data.
    - Admins can also add users (see p73)
    - Admins are usually M&E officers

- **User:**
    - Users can read and download the scorecard, create / edit action items, create/ edit workplans, add comments on action items and deliverables on the workplans
    - Users usually include programme managers, regional health managers, MPs/ Honourable ministers etc.

- **Viewer:**
    - Viewers can read the scorecard and edit his/her own action items
    - Viewers are usually partners

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Technical requirements to use the platform

Required hardware

- Computer running the required **office software** and a compatible **web browser**
- Internet connection

Required Office software
(Admins only)

Microsoft Excel
Version 2007 or later

Required web browser

Google Chrome
All versions

Google chrome is available to download here:

https://www.google.com/chrome/

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The Malaria Control and Elimination Scorecard Management Tool has eight core features

Core features

Scorecard: Summary of national and subnational performance against country-defined indicators

Subnational view: Summary of performance of each indicator at a specified level (national or subnational) for multiple reporting periods

Indicator view: Summary of performance of a single indicator at multiple levels over time

Action Items: List of actions and responses identified by national and subnational administrators and users

Workplan: Project management tool to track implementation of key milestones in the annual workplan

Charts: Data visualisation tool to compare indicators subnationally and view how performance has changed in graphs

Maps: Data visualisation tool to view performance nationally and subnationally

Waves: Tool to support documentation and planning on how the indicators will evolve as new data and interventions become available

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The Malaria Control and Elimination Scorecard Management Tool has additional useful features
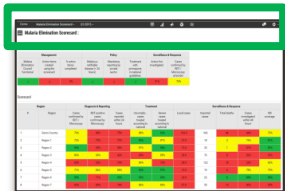
Additional useful features
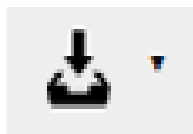
Export: Allows the user to download a copy of the scorecard, district reports, charts, action items, maps, or waves as a PDF. The scorecard can also be downloaded as an Excel file.
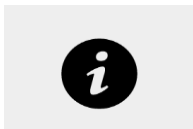
Notifications: Notifies the user when there are changes to the scorecard and action items (e.g. new scorecard finalised)

Scorecard Forum: Community of tool users sharing best practices and answering frequently asked questions
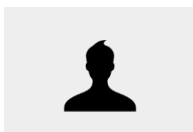
Account settings: Tools to update your email address, language preferences, and password

Administrator Mode: Allows administrators to access additional features for management of the web platform

Log out: Users can log out of the web platform

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The Malaria Scorecard Management Tool is also optimised for use on mobile phones

The web platform has been optimised for smart phones, allowing users to access the management tool and to view features, including Indicator and Subnational views, Charts, Maps*, and Action items in an offline mode.
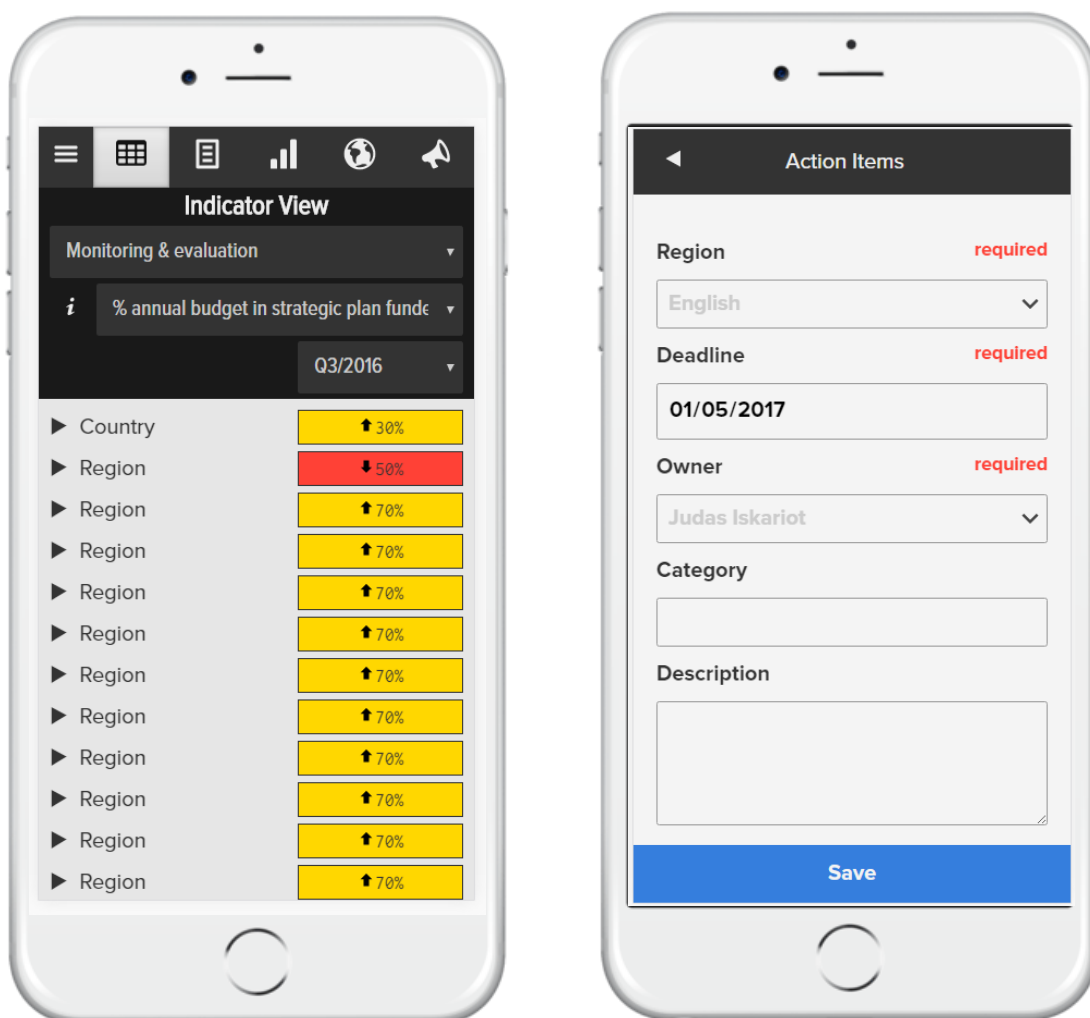
Map view available only if shape files are loaded to desktop web platform.

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⊞ Scorecard: Overview

The scorecard is composed of **national priority indicators** and **subnational indicators**

Demo Country ▾   Demo Scorecard ▾   Q1/2015 ▾

⊞ Demo Scorecard : Demo Country (Q1/2015)

▼ **National indicators**

Indicator A	Indicator B	Indicator C	Indi
210	61	X	

Scorecard

Region	Category A		Category
Region	Indicator 1	Indicator 2 / Indicator 3	Indicator 4
Demo Country	↓0%	↓87% ↓23.6%	19%
Region 1	↑64%	55% ↓15.8%	↑68%
Region 2	↓18%	↓38% ↓46.8%	5%
Region 3	↑87%	↓96%	
Region 4	↑63%	↑55%	
Region 5	↓91%	↑25%	
Region 6	↑92%	↑6%	
Region 7	42%	64%	↓1%
Source:	DHIS2	DHIS2	DHIS2

National priority indicators form the top of the scorecard

Subnational indicators form the main body of the scorecard

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⊞ Scorecard: Indicators, thresholds, and arrows

Demo Country ▾   Demo Scorecard ▾   Q1/2015 ▾

⊞ Demo Scorecard : Demo Country (Q1/2015)

▾ **National indicators**

Indicator A	Indicator B	Indicator C	Indicator D
210	61	X	32%
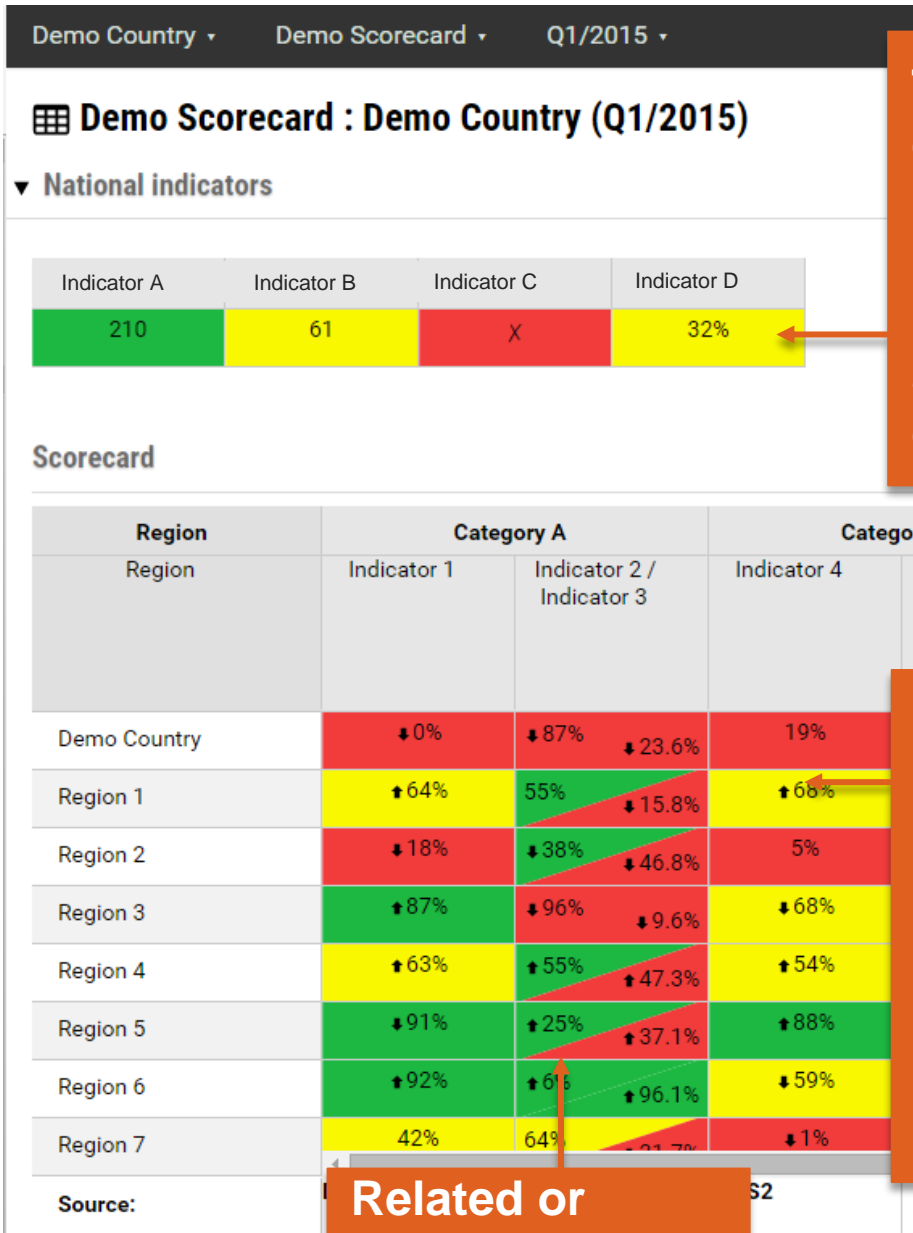
Traffic-light colours indicate how performance measures against pre-defined targets

Scorecard

Region	Category A		Categor...
Region	Indicator 1	Indicator 2 / Indicator 3	Indicator 4
Demo Country	↓0%	↓87% ↓23.6%	19%
Region 1	↑64%	55% ↓15.8%	↑66%
Region 2	↓18%	↓38% ↓46.8%	5%
Region 3	↑87%	↓96% ↓9.6%	↓68%
Region 4	↑63%	↑55% ↑47.3%	↑54%
Region 5	↓91%	↑25% ↑37.1%	↑88%
Region 6	↑92%	↑6% ↑96.1%	↓59%
Region 7	42%	64% ...	↓1%
Source:			...S2

Arrows indicate increasing or decreasing performance compared to previous scorecard

Related or similar indicators can be grouped together as triangle indicators

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Scorecard: Sorting and filtering data

Indicators on the scorecard can be **sorted** and **filtered**

Click on the indicator name to rank the data on the scorecard
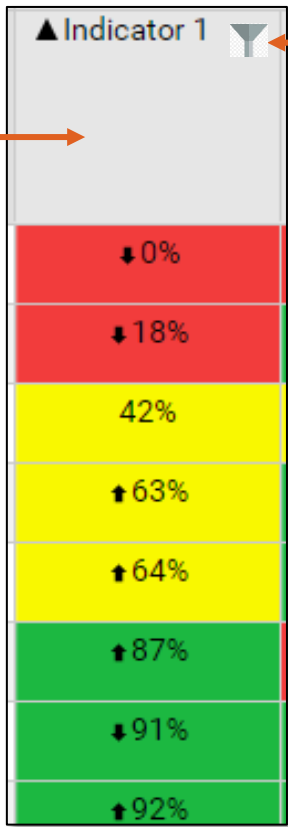
Click on the filter icon to the right of the indicator name to access options to filter indicator values

Clear the text to remove the filter

▲ Indicator 1

↓0%
↓18%
42%
↑63%
↑64%
↑87%
↓91%
↑92%

to
☑ Green
☑ Yellow
☑ Red

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Scorecard: **PDF downloads**

Web platform users can create a PDF* image of the screen being viewed. This feature can be used for the scorecard, district reports, charts, maps, and action items.

In the top toolbar, click on the download icon to export a PDF image of the screen
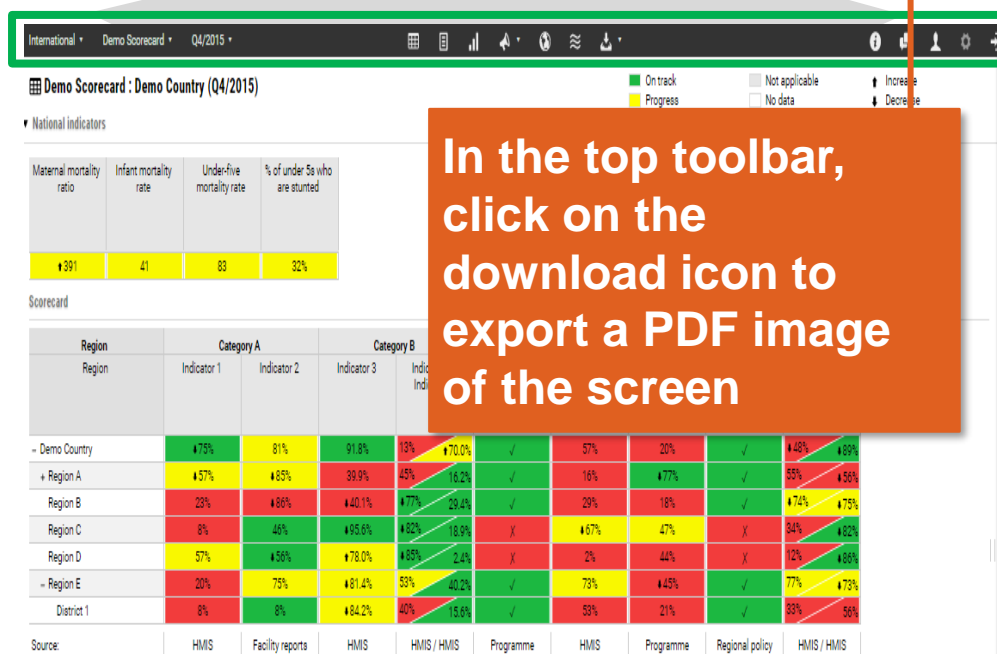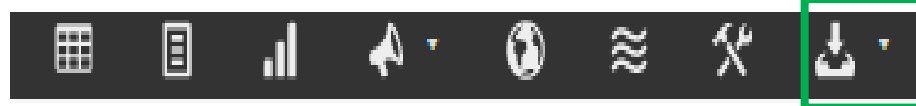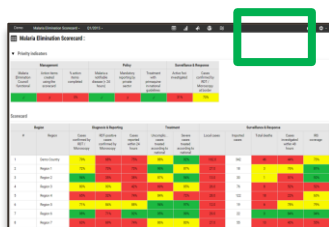
* Scorecards and list of user accounts can also be downloaded as Excel worksheets.

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Subnational view

A report of the performance of every indicator for a specific level (e.g. national, regional, provincial, district) can be generated for multiple periods.

The report displays performance for multiple reporting periods

Category	Indicator	Q4/2015	Q1/2016	Q2/2016	Q3/2016
National indicators	*i* Indicator A	68%	53%	53%	53%
	i Indicator B	280	280	280	280
	i Indicator C	102	102	102	102
	i Indicator D	83.0%	79.0%	79.0%	79.0%
	i Indicator E	X	✓	✓	✓
Category A	*i* Indicator 1	30%	↓ 9%	↑ 78%	↑ 99%
	i Indicator 2	8%	↑ 40%	↑ 71%	↓ 40%
Category B	*i* Indicator 3	60.7%	↓ 22.3%	↓ 6.4%	↑ 52.9%
	i Indicator 4	54%	49%	↑ 97%	↓ 18%
	i Indicator 5	58%	↓ 22%	↑ 80%	↓ 59%
Category C	*i* Indicator 6	94	103	109	100
	i Indicator 7	75%	↑ 96%	↓ 44%	↑ 95%
	i Indicator 8	30%	↑ 98%	↓ 36%	↑ 41%
Category D	*i* Indicator 9				
Category E	*i* Indicator 10	8%	↑ 40%	↓ 8%	↑ 33%
	i Indicator 11	30%	↑ 67%	↑ 83%	↓ 73%

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Indicator view

A report of the performance of a single indicator relative can be viewed for all levels (e.g. national, regional, provincial, district) over time.

The report displays performance for multiple reporting periods

Indicator view: Indicator 3

Legend: On track (green) · Progress (yellow) · Not on track (red) · Not applicable (grey) · No data (white) · ↑ Increase · ↓ Decrease

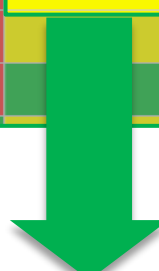| Region	Q4/2015	Q1/2016	Q2/2016	Q3/2016	Q4/2016
▾ Demo Country	60.7%	↓22.3%	↓6.4%	↑52.9%	↑67.7%
▾ Region A	94.7%	↓65.3%	↓35.5%	36.2%	↑61.3%
District 1	7.4%	↑93.1%	↓8.6%	↑58.6%	↓14.8%
District 2	30.6%	↓20.9%	↑91.4%	↓69.7%	↓54.5%
District 3	22.6%	↑61.0%	↑72.4%	↓28.2%	↑57.5%
▾ Region B	73.0%	↑97.2%	↓26.8%	↑60.3%	↓52.1%
District 4	74.1%	↓26.1%	↑83.5%	86.5%	83.4%
District 5	14.7%	↑67.2%	↓43.1%	↓30.9%	↑56.7%
▾ Region C	59.9%	↑80.9%	↓42.2%	↑69.1%	↑91.7%
District 6	27.6%	↓2.3%	↑16.4%	↑58.2%	↑96.1%
District 7	86.2%	↓22.4%	↑47.2%	↓29.5%	↑74.0%
▾ Region D	49.6%	↓37.6%	39.0%	↑46.5%	↑89.5%
District 8	3.1%	↑35.9%	↑66.6%	↑99.1%	↓37.4%
District 9	83.7%	↓75.8%	↓13.0%	↑73.1%	↓52.8%
District 10	78.9%	↓0.9%	↑57.1%	↑86.3%	↓24.1%
▾ Region E	79.9%	↓18.9%	↑33.7%	↑65.3%	↓38.1%
District 11	23.5%	↓11.9%	↑23.7%	↑69.8%	↓11.6%
District 12	31.6%	↑63.6%	↓50.2%	↑96.0%	↓5.6%
▾ Region F	23.5%	↑64.2%	↑72.6%	↓22.1%	↑91.2%
District 13	1.4%	↑77.5%	↓11.0%	↑30.8%	↑37.0%
District 14	1.7%	1.1%	↑98.2%	↓37.2%	↓23.7%
District 15	39.3%	↓25.9%	↑72.3%	↓64.2%	↓57.6%

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📢 Action Item Tracker: Overview (1/2)

The scorecard drives national and subnational action and accountability. Poor or declining performance on the scorecard should lead to the creation of action items to be implemented and monitored

Region	Category A		Category B		Category C
▲Region	Indicator 1	Indicator 2 / Indicator 3	Indicator 4	Indicator 5	Indicator 6
Demo Country	↓0%	↓87% ↓23.6%	19%	↓85.2%	↑✓
Region 1	↑64%	55% ↓15.8%	↑68%	↓95.2%	X
Region 2	↓18%	↓38% ↓46.8%	5%	↓27.0%	↓✓
Region 3	↑87%	↓96% ↓9.6%	↓68%	↑12.3%	✓
Region 4	↑63%	↑55% ↑47.3%		↑6.3%	↓✓
Region 5	↓91%	↑25% ↑37.1%		↓68.5%	X

Overdue: 4 (80%)			Due: 0 (0%)			Completed: 1 (20%)					
Region	Category	Description	Date created	Deadline	Status	Status explanaton	Owner	Stakeholder / collaborator	Community	# of comments	
Demo Country	Supply chain management	Distribute Commodity X to all regions.	Dec 1, 2016	Dec 29, 2016	Some progress		Admin1			0	
Region C	M&E	Provide refresher training to M&E officers in DHIS2 data entry.	Dec 1, 2016	Dec 12, 2016	No progress	Training canceled.	User2			2	
District 4		Orient health service providers in updated Child Health Guidelines.	Dec 1, 2016	Dec 14, 2016	Deliverable not yet due		Admin1			0	
Demo Country		Submit proposal for support to train health service providers in all regions in updated Child Health Guidelines.	Dec 1, 2016	Nov 30, 2016	Action achieved		User2			0	
Region A		Meet with District Medical Officers to review quarterly facility reports.	Dec 1, 2016	Dec 7, 2016	Some progress	Invitations sent to all DMOs.	Admin1			0	

📢 Action Item Tracker: Overview (2/2)

The online tool has built in features to support tracking the implementation of action items. Action items should be created and reviewed regularly.

A

| Overdue: 4 (80%) | Due: 0 (0%) | Completed: 1 (20%) |

B **C** **D** **E** **F** **G** **H** **I** **J** **K**

| Region	Category	Description	Date created	Deadline	Status	Status explanaton	Owner	Stakeholder / collaborator	Commu-nity	# of com-ments
Demo Country	Supply chain management	Distribute Commodity X to all regions.	Dec 1, 2016	Dec 29, 2016	Some progress		Admin1			0
Region C	M&E	Provide refresher training to M&E officers in DHIS2 data entry.	Dec 1, 2016	Dec 12, 2016	No progress	Training canceled.	User2			2
District 4		Orient health service providers in updated Child Health Guidelines.	Dec 1, 2016	Dec 14, 2016	Deliverable not yet due		Admin1			0
Demo Country		Submit proposal for support to train health service providers in all regions in updated Child Health Guidelines.	Dec 1, 2016	Nov 30, 2016	Action achieved		User2			0
Region A		Meet with District Medical Officers to review quarterly facility reports.	Dec 1, 2016	Dec 7, 2016	Some progress	Invitations sent to all DMOs.	Admin1			0

The action item list provides detailed information about each action item including:

A **Summary:** Summary of actions that are Overdue, Due, and Completed

B **Region:** Country or subnational region where the action is applicable

C **Category:** Optional field for grouping action items thematically

D **Description:** A detailed description of the action to be taken with specific objectives and targets, if available

E **Date created / deadline:** Clear timeline for when the action was created and when it is expected to be complete

F **Status:** Colour coded status update on current implementation status (e.g., green = Action achieved)

G **Status explanation:** Brief explanation of current status

H **Owner:** Individual responsible for implementing the action item

I **Stakeholder/Collaborator:** Optional field to document others involved in implementation of the action item

J **Community:** Checkbox to mark actions that engage the community level

K **Comments:** Number of comments on the action items

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Action Item Tracker: Comments

Administrators and Users can **comment** on action items in order to drive a dialog around completion of the action items
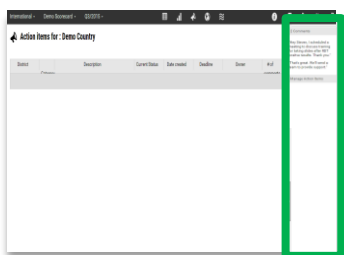
Comments

Dec 1, 2016

User1:

Why was the training canceled?

Dec 1, 2016

User2:

Training is postponed to next month due to availability of staff.

Add comment

Add

Comments are displayed in the Sidebar. Everyone with access to the online tool can read the comments; however, only Administrators and Users (i.e., not Viewers) can comment on action items by typing into the text box

Workplan manager: Overview (1/2)

The new feature enables the creation of national and subnational workplans to monitor implementation progress. The system allows admins and users to create groups of activities around specific deliverables and objectives.

Objective	Description	Date created	Start	Deadline	Status	Status explanation	User	Partner	# of comments
▾ CASE MANAGEMENT;100% Availability of antimalarial commodities	▾ Annual malaria commodity needs for 2020 estimated	Jan 30, 2019	Sep 2, 2019	Oct 31, 2019	Deliverable not yet due	Not yet delivered	Tamara Ngona	GRZ/MACEPA/GF/PAMO/CHAZ	
	Annual Malaria commodity quantification meeting	Jan 30, 2019	Sep 2, 2019	Oct 31, 2019	Deliverable not yet due	Not yet due	Tamara Ngona	GRZ/GF/CHAZ/PSM	0
	▾ Malaria commodities procured	Jan 31, 2019	Sep 1, 2019	Oct 31, 2019	Deliverable not yet due	Deliverable not yet due	Tamara Ngona	PMI/GF/CHAZ/PSM	0
	Initiation of procurement	Jan 31, 2019	Jan 1, 2019	Mar 31, 2019	Some progress	letters for initiation of procurement of Artesunate injection has been submitted	Martha Mulenga	PMI/GF/PSM/CHAZ	0
	Receipt of Malaria Commodities Process	Jan 31, 2019	Jun 28, 2019	Dec 31, 2019	Deliverable not yet due	Not yet due	Deovolent Daka	PMI/GF/PSM/CHAZ	0
	Tendering Process	Jan 31, 2019	Apr 30, 2019	Dec 31, 2019	Deliverable not yet due	Not yet due	Deovolent Daka	PMI/GF/PSM/CHAZ	0

The workplan function allows to manage the operational workplan online linked automated reminders by SMS and emails to enhance accountability.

A Activities and Deliverables: Stratified groups of Objectives, Deliverables & Activities. Actions can also be shared with the action tracker

B Date created / deadline / start date of activity: Clear timeline for when an activity is supposed to start and its deadline, as well as the date it was created in the system

C Status: Colour coded status update on current implementation status (e.g., green = Deliverable met / Activity completed)

D Status explanation: Allows managers to monitor the progress of implementation

E User: Individual responsible for implementing the deliverable / activity for enhanced accountability

F Partner: Optional field to document partners involved in implementation of the activity

G Comments: Allows users to have conversations around implementation

Note: The web platform also allows users to add customized columns

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Workplan manager: Overview (2/2)

For greater accountability, we have created an online automated notification system. SMS and email reminders will be sent to activity owners if a deadline has not been met, and can be set up to alert management if a critical workplan milestone is overdue.
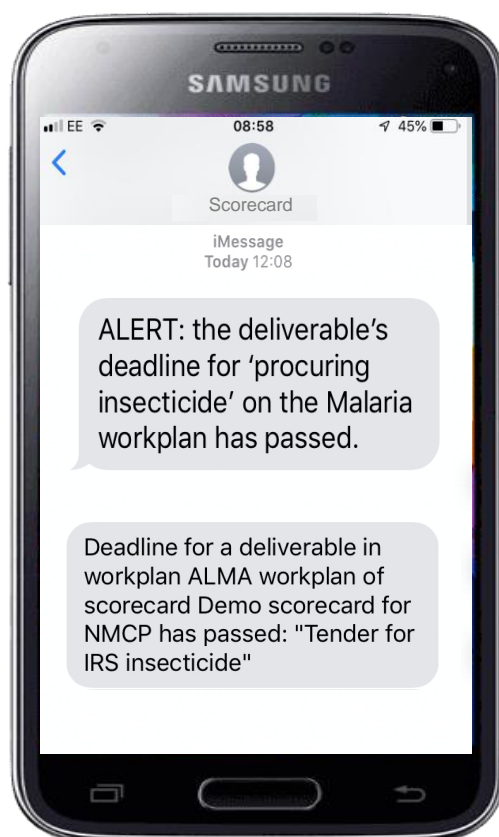

SMS can be set up to be sent automatically to alert senior stakeholders of any urgent bottleneck (e.g. tender not sent for procurement of insecticide), including any outstanding milestone on the annual workplan, and escalate any urgent action

📊 Charts: Overview

The online tool automatically generates line and bar charts displaying performance of an indicator over time compared to traffic-light thresholds.

Images of the charts can be downloaded as a PDF via the top toolbar.

Line chart

Red / yellow / green colours are based on the selected indicator's thresholds*

Bar chart
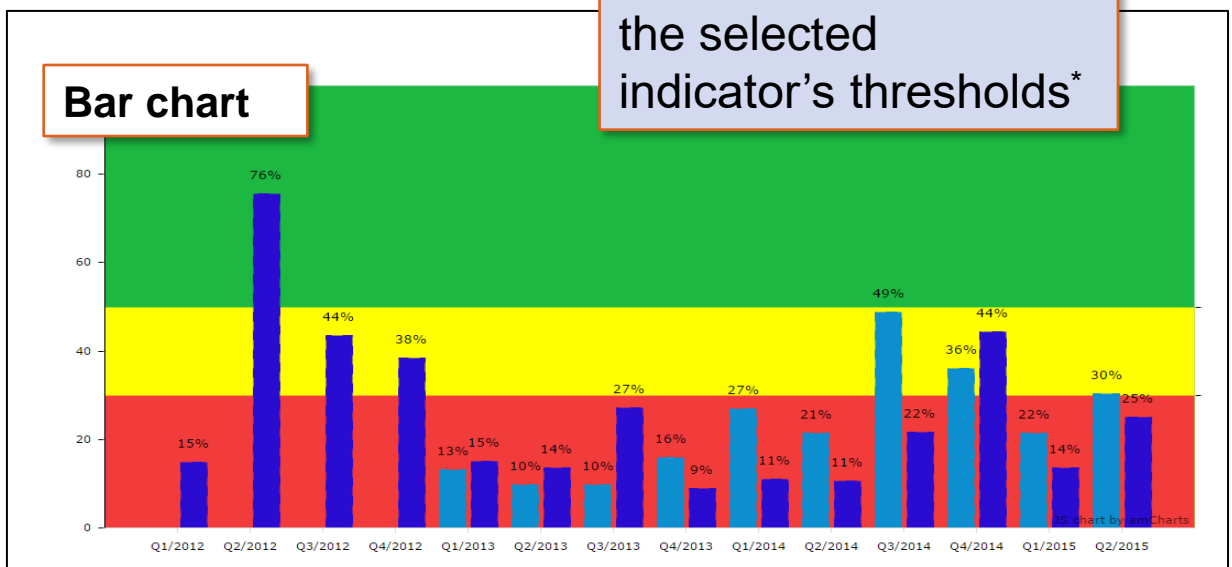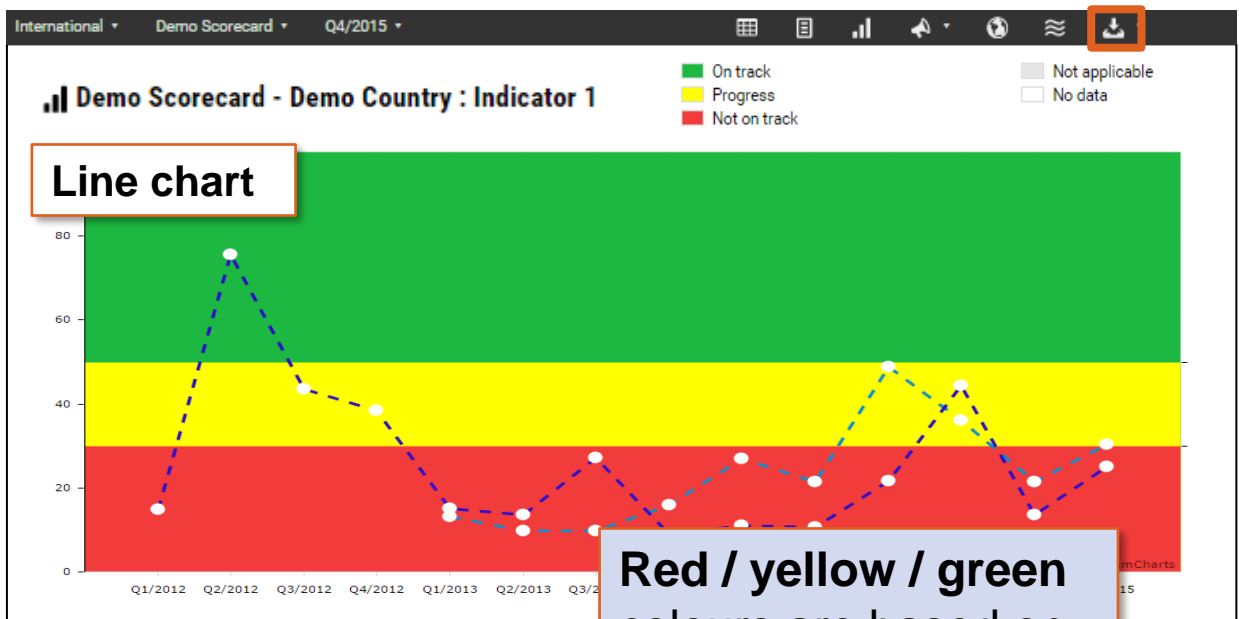
*See Scorecard overview on page 12

📊 Charts: Selecting regions and indicators

Use the Sidebar to select the first and last reporting periods, indicator, and regions to display on the chart. You can also select whether to display the chart as a line chart or a bar chart.
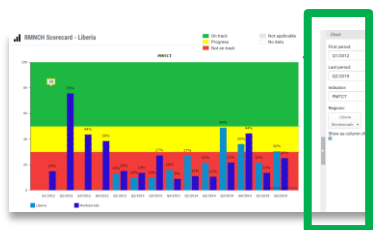
Chart options

Indicator

Category:

Category A ▾

Indicator:

i   Indicator 1 ▾

Periods

First period: Last period:

Q4/2015 ▾   Q3/2016 ▾

Regions

Demo Country ✕

Region A ✕

Region B ✕

◄ Region B ▾ ＋

Options

☐ Show as column chart

Use the category and indicator dropdowns to select which indicator to show on the chart

Use the First period and Last period drop-down menus to choose the time series range for the graph (e.g. Q4 2015 to Q3 2016)

Select one or more regions to display on the chart from the list.

Tick this box to show data as column chart

ALMA

🌍 Maps: Overview

The online tool automatically generates maps[*] to compare indicator performance subnationally.

Images of the maps can be downloaded as a PDF via the top toolbar.

International ▾   Demo Scorecard ▾   Q4/2015 ▾

🌍 Demo Scorecard : Demo Country (Q4/2015) : Indicator 3

- 🟩 On track
- 🟨 Progress
- 🟥 Not on track
- ⬜ Not applicable
- ⬜ No data

Regions are coloured based on their performance against the selected indicator's thresholds

ALMA
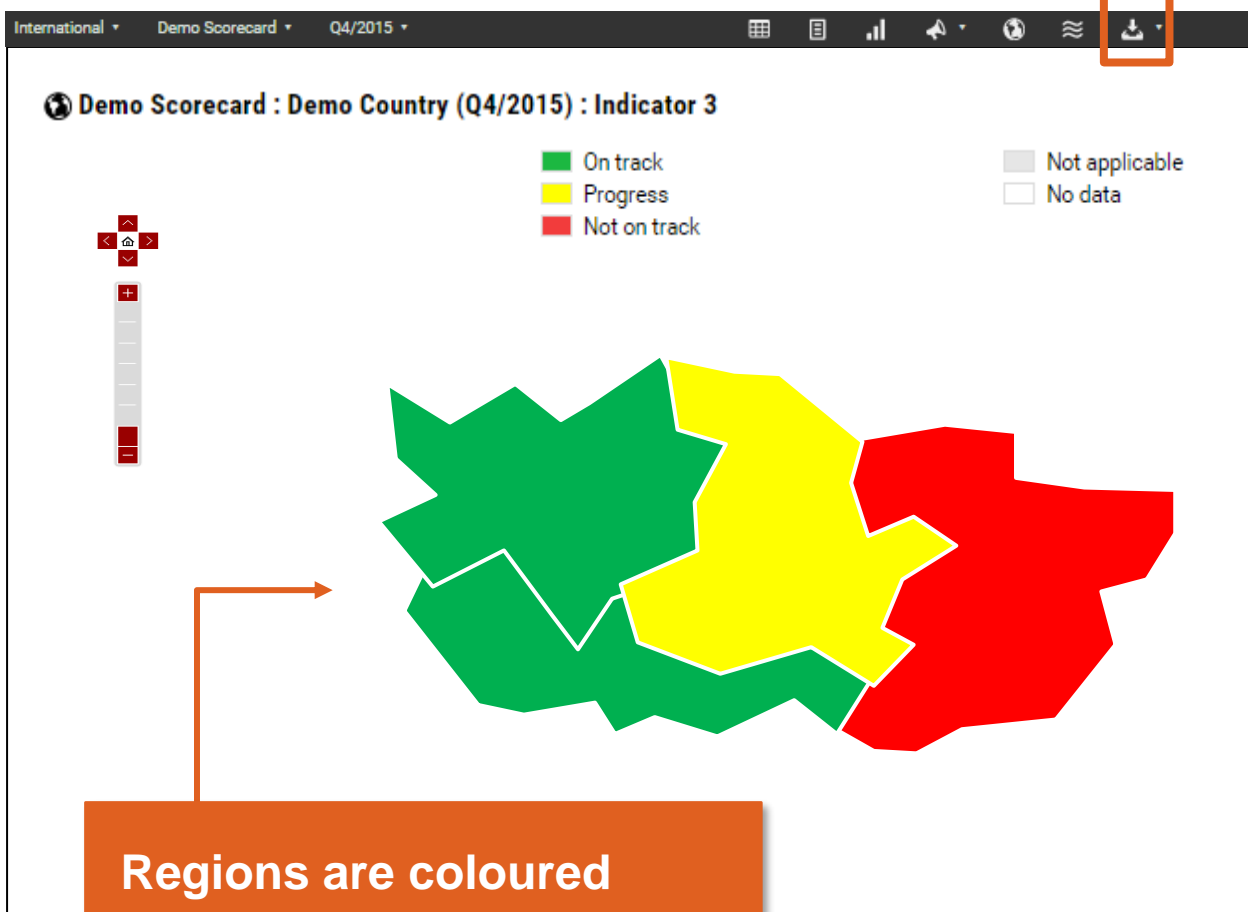
🌐 Maps: Selecting indicator

Use the Sidebar to select the indicator to display on the Map
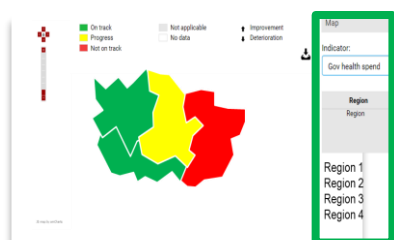
Select Indicator

Category:

National KPIs

Indicator:

ℹ % spend on health
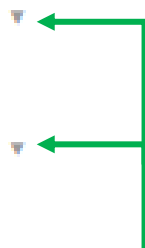
Use the indicator dropdown in the sidebar to select the indicator to display on the map

Note: The maps feature will only be visible to users once an Administrator uploads map shape files or DHIS2 regional data (see page 59).

ALMA

≈ Waves: Overview

The **waves function** shows how scorecard indicators will evolve.

- Indicators are sorted into waves based on when data are expected to be available.

- As data become available and new interventions are introduced, future wave indicators (e.g., Wave 2, Wave 3) are added to the scorecard

- Wave 1 indicators may also be removed once performance is consistently above the target threshold

≈ Waves for Demo Scorecard : Demo Country

Category	Wave 1	Wave 2	Wave 3
Category A	Indicator 1 Indicator 2	Indicator 3	Indicator 4
Category B	Indicator 5 Indicator 6		Indicator 10
Category C	Indicator 7		
Category D	Indicator 8	Indicator 9	

Data for indicator available

Available in near-term

Available in long-term

ALMA

Account Settings: Overview

Users can update their account settings by using the **Account menu** in the menu bar at the top of the page

- Update name and contact information
- Set region view
- Change password

Account Preferences

Username*

A John Doe

Email*

B jidoe@yahoo.com

Affiliation

C

Preferred language*

D English

View tools for

E ◄ Demo country

Mobile phone

F

[Save] [Reset]

Change Password

Current password

G Current password

New password

H New password

Confirm new password

Confirm password

[Save]

A **Username:** The name that will appear on the management tool (e.g., in comments, notifications, list of users)

B **Email:** Address where notifications and password reset messages will be sent

C **Affiliation:** The programme, organization, institution, etc. with which the user is affiliated.

D **Preferred language:** Language that will be displayed on the tool. Currently supports:
  – English
  – French
  – Portuguese

E **View tool for:** Region or sub-region that will show when you sign in

F **Mobile phone:** Number to which SMS notifications can be sent to, when enabled

G **Current Password:** The password you currently use to sign into the online tool

H **New Password / Confirm new password:** The new password you would like to use to sign into the online tool

ALMA

Administrators have additional features to manage the online tool

Administrators have additional tools on the online tool that they can use to manage the scorecard, action items, users, and other features of the web platform

Administrator Mode

⚙️ **Administrator Mode:** Click on the **gear icon** to unlock "Admin Mode," which enables the ability to edit the platform

Additional "Admin Mode" features

Scorecard: Create the scorecard, add categories and indicators, add regions, upload data

Configuration Tool: Quickly update indicators

Workplan: Create new workplans

Action items: Create Action Items and types

Maps: Upload shape files

Manage Users: Create and manage user accounts

ALMA

Administrative tools appear in the sidebar (1/2)

Sidebar

- Admin tools to manage the scorecard (e.g., add indicators), action items, map shape files, and other aspects of the tool are available in the sidebar of the appropriate pages

- Admin tools appear after initiating "**Admin Mode**"

Click on the **"gear"** icon to enter admin mode
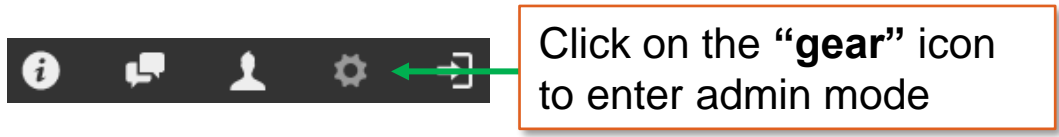
Administrative tools appear in the sidebar (2/2)

Administrators of the web platform can manage various features of the scorecard through the sidebar.

Screenshot   Step   Instruction
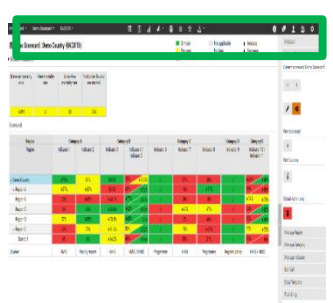
1

In the toolbar at the top, click on the **"gear"** icon to enable Admin mode.

2

Indicator
Manage Scorecard
Manage Region
Manage Category
Manage Indicator
Edit Cell
Data Template
Publish

Indicator
Manage Scorecard
Manage Region
Manage Category
Category A
← → + ✎ 🗑
Manage Indicator
Edit Cell
Data Template
Publish
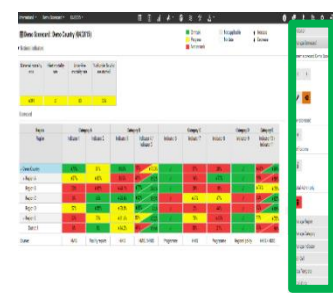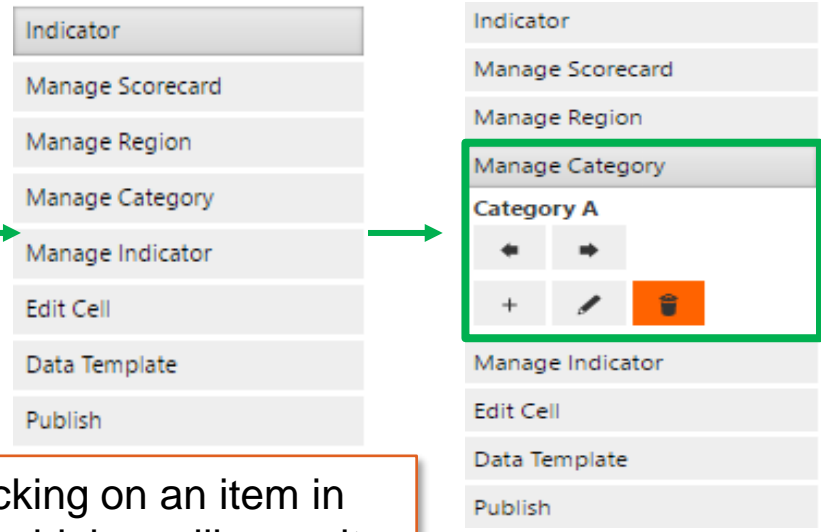
Clicking on an item in the sidebar will open its management features. Click on the item again to collapse it.

The user guide details each of the management features of the sidebar.

ALMA

⊞ Create new scorecard (1/5)

Create first scorecard

- If no scorecard exists for the country or a subnational region, you will be prompted to create a scorecard

International ▾   ⊞ 🗐 ⬛ 🔊▾ 🌐 ≋   ❶ 🔲 👤 ⚙ ⤇

International

Currently, no scorecard exists for International.

Create scorecard   **Create subregion**   **Edit International**   **Delete International**
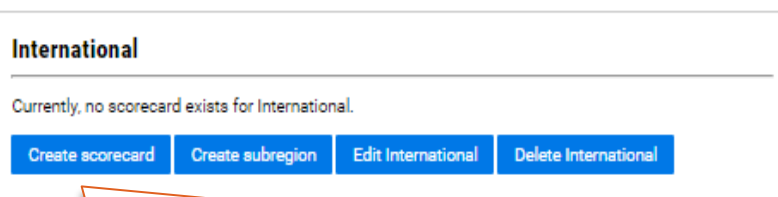
Click on the **"Create Scorecard" button** to open the form to create the new scorecard

Create additional scorecards

- The platform can support multiple national and subnational scorecards (e.g., commodities, human resources)
- Additional scorecards can be added from the Sidebar on the "Scorecard" view

Manage Scorecard

Current scorecard: Demo Scorecard

<   >

✏   ⬛

New scorecard

+

Notifications

i

Click on the **"+" button** to open a form to create the new scorecard

ALMA

Create new scorecard (2/5)

The form to create the scorecard will appear in the middle of the screen

There are four sets of settings for creating a new scorecard
Details to follow

1 **Scorecard details**

2 **Formatting**

3 **Labels**

4 **Advanced**

ALMA

⊞ Create new scorecard (3/5)

① Scorecard details

| Name:* | New scorecard | Region:* | Demo country ▾ |
| Reporting frequency: | Quarterly ▾ | First period: | Q2/2017 ▾ |

- **Name:** Enter the name of the scorecard (e.g., Malaria Control and Elimination Scorecard)
- **Reporting frequency:** Select how frequently the scorecard will be updated (e.g., quarterly, annually)
- **Region:** Select the country or subnational region of the scorecard
- **First period:** Select the reporting period of the first scorecard (e.g., Q1 2015)

② Formatting

Formatting

Name:*	Country indicators		Scorecard
Show data source row*	☐		☐
PDF Orientation:		Landscape	
Number of locked columns:*		1	

⊞ **Malaria Elimination Scorecard:**

▾Country indicators

% annual budget in strategic plan funded	% NMP positions filled	% reference group meetings conducted	% partner meeting conducte
	80%	0%	↓0%

Scorecard

| Region | |

- **Name:** Change default name labels for country indicators and scorecard body.

Other formatting configuration options include:
- **Show data source row**: Choose to display the data source on the scorecard (e.g. DHIS2)
- **PDF Orientation:** Set the page orientation (e.g., landscape, portrait) for the PDF export
- **Number of locked columns:** Choose the number of columns in the scorecard that are locked in place when scrolling left and right

⊞ Create new scorecard (4/5)

③ Labels

Legend labels

🟩 *	On track	⬜ *	Not applicable	↑ *	Increase
🟨 *	Progress	⬜ *	No data	↓ *	Decrease
🟥 *	Not on track				

- You can customize the legend labels for the scorecard (or use the default values)

④ Advanced

Access restriction
☐ Restrict access

Advanced
☐ Show inactive fields

- **Restrict access**: Allows administrators to restrict users' access to a specific scorecard if more than one scorecard exists on the web platform
- **Show inactive fields:** If selected, inactive indicators (e.g. for a future wave) will be visible to administrators when "Admin mode" is enabled.

✏️ **Note: You can change / edit scorecard settings later by clicking on the Pen icon through Manage Scorecard in the sidebar**

ALMA

🖽 Create new scorecard (5/5)

> **By default, the new scorecard will have the following:**
> **①** A new indicator in the national indicator section
> **②** A "New Category" <u>and</u> a blank indicator in the scorecard body
> **③** One region for the country / subnational region where the scorecard was created

🖽 Demo Scorecard : Demo Country (Q3/2015)

▼ **Priority indicators**

Summary
New indicator
①

Scorecard   **②**

#	Region	New categ...	
	Region	New indicator	
③	Demo Country		

ALMA

⊞ Scorecard: Overview

> Scorecards are composed of **three key features**:
>
> ❶ Scorecard categories
>
> ❷ Indicators
>
> ❸ Regions

Demo Country ▾   Demo Scorecard ▾   Q1/2015 ▾

⊞ Demo Scorecard : Demo Country (Q1/2015)

▾ **National indicators**

A	B	C	C
210	61	X	32%

Scorecard

Region	❶ Category A		Categor...
Region	Indicator 1 ❷	Indicator 2 / Indicator 3	Indicator 4
Demo Country	↓0%	↓87% ↓23.6%	19%
Region 1	↑64%	55% ↓15.8%	↑68%
Region 2	↓18%	↓38% ↓46.8%	5%
Region 3	↑87%	↓96% ↓9.6%	↓68%
Region 4	↑63%	↑55% ↓47.3%	↑54%
Region 5	↓91%	↑25% ↓37.1%	↑88%
Region 6	↑92%	↑6% ↑96.1%	↓59%
Region 7	42%	64%	↓1%
Source:	DHIS2	DHIS2	DHIS2

ALMA

⊞ Scorecard: Add Category

- Scorecard categories appear across the top of the scorecard. A category is a group of indicators, and can be an intervention such as 'vector control'/

Category A		Category B		Category C
Indicator 1	Indicator 2 / Indicator 3	Indicator 4	Indicator 5	Indicator 6

Screenshot | Step | Instruction

1

Indicator

Manage Scorecard

Manage Region

Manage Category ◄

Click on **Manage Category** in the scorecard Sidebar

Shift Category

← →

2

+ ✎ 🗑
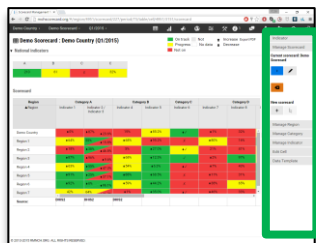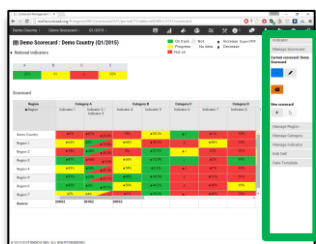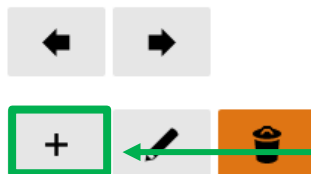
Click on the **"+"** button to open a new form to create a category.
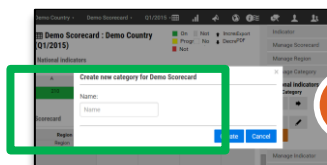
Manage Indicator

Edit Cell

Upload / Download

3

In the new form that opens, enter the category name and click **Add**

Add category ✕

Name*	

Add **Cancel**

ALMA

⊞ Scorecard: Edit Category

An administrator may want to update a category name to better match current priority categories for indicators, add further detail to the name or correct spelling errors in the category name.

Screenshot | Step | Instruction

1

	Category A	
Indicator 1	Indicator 2 / Indicator 3	
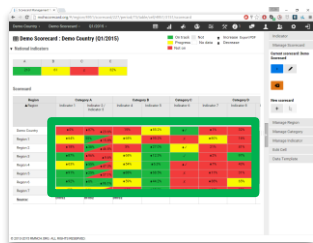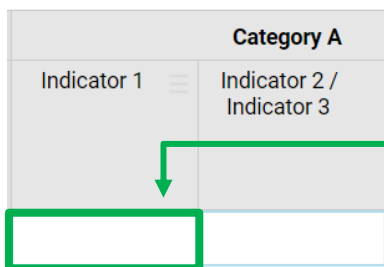
Select a cell beneath the category that you want to edit

2

Indicator

Manage Scorecard

Manage Region

Manage Category

Click on **Manage Category** in the scorecard Sidebar

Shift Category

← →

3

+ ✏ 🗑
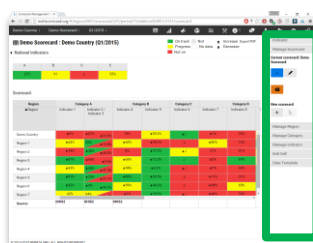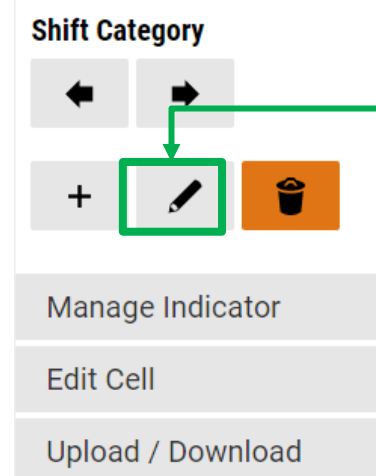
Click on the **"pen"** button to open a new form to edit the category

Manage Indicator

Edit Cell

Upload / Download

4

In the new form that opens, enter the category name and click **Save**

Edit category

Name*	Category D

Save   Cancel

ALMA
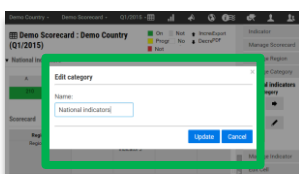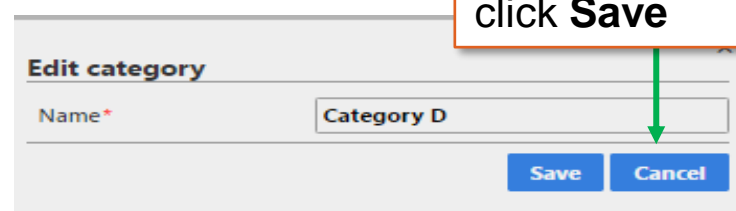
⊞ Scorecard: Add indicator (1/7)

- Scorecard indicators appear at the top of the scorecard and are grouped by category

Category A		Category B		Category C
Indicator 1	Indicator 2 / Indicator 3	Indicator 4	Indicator 5	Indicator 6

Screenshot   Step   Instruction

1

Category A	
Indicator 1	Indicator 2 / Indicator 3
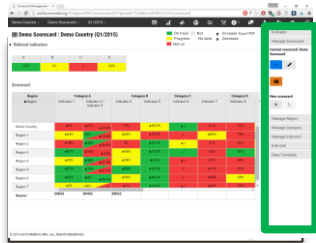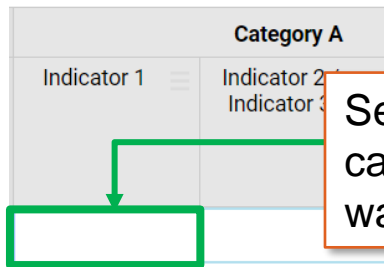
Select a cell beneath the category to which you want to add an indicator
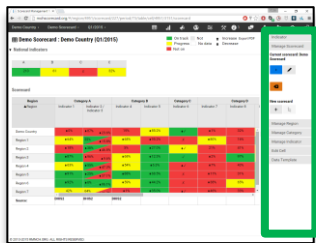
2
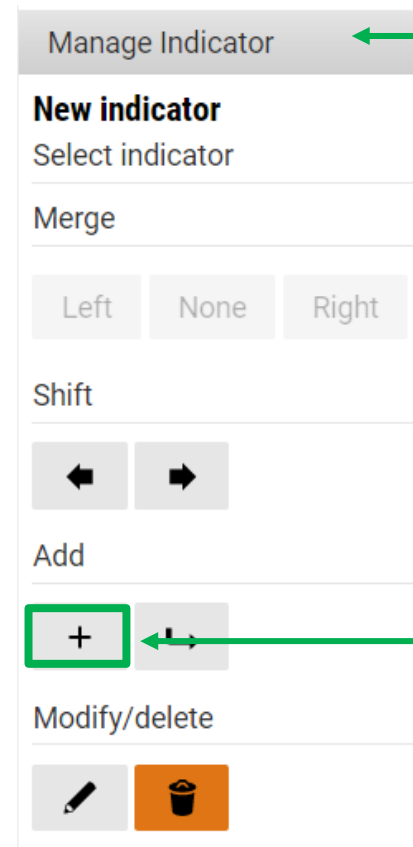
Manage Indicator

New indicator
Select indicator

Merge

| Left | None | Right |

Shift

← →

Add

Click on **Manage Indicator** in the scorecard Sidebar

3

+ ↵

Modify/delete

✏ 🗑

Click on the **"+"** button to open form to create an indicator

ALMA

⊞ Scorecard: Add indicator (2/7)

Create indicator ✕

General   Description   Thresholds   DHIS

There are four sets of indicator settings:
- **General:** Name, indicator format
- **Description:** Numerator / denominator, source
- **Thresholds:** Thresholds for traffic-light colours (e.g., red/yellow/green) and arrows
- **DHIS*:** For connecting the indicator to a DHIS2 database

Screenshot   Step   Instruction

4a
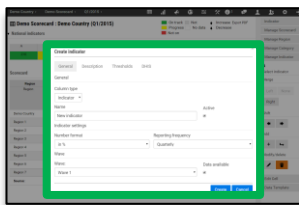
General

Column type *   Indicator ▼

Name *   New indicator   ☑ Active *

Select the **Column type** *(Indicator or Label†)* and enter the indicator **Name**

Select **Active** if the indicator should appear on the scorecard

*† **Note on type:** A Label will be text-only; an indicator can be numeric, Yes/No, colour format.*

* The DHIS tab will only appear once the DHIS2 configuration application has been installed for the country. See Annex for more details.

ALMA

⊞ Scorecard: Add indicator (3/7)
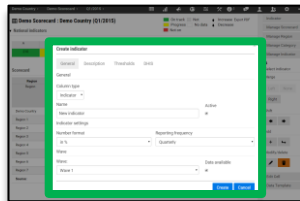
Screenshot	Step	Instruction

4b Indicator settings

Number format

in %

Reporting frequency

Quarterly

> Select the number format (e.g., %, 'yes/no, colour only) from the drop-down menu

> Select how frequently the data is reported (e.g., quarterly)

4c Wave

Wave:

Wave 1

Data available ☑

> Select which **Wave** (e.g. 1, 2, 3) the indicator falls under. **Note:** This determines where the indicator appears in the Wave View (see Page 28)

> Mark if there are data available for the indicator.

≈ Waves for Demo Scorecard : Demo Country

Category	Wave 1	Wave 2	Wave 3
Category A	Indicator 1 Indicator 2	Indicator 3	Indicator 4
Category B	Indicator 5 Indicator 6		Indicator 10
Category C	Indicator 7		
Category D	Indicator 8	Indicator 9	

ALMA

⊞ Scorecard: Add indicator (4/7)

Create indicator   ✕

General   Description   Thresholds   DHIS

Screenshot   Step   Instruction
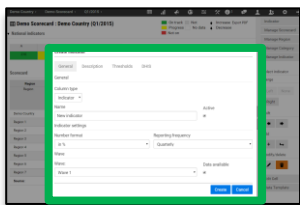
5a

Source

[   ]

Definition

[   ]

Enter the indicator source and definition

5b

Numerator

[   ]

Denominator

[   ]

Describe the numerator and denominator

44

ALMA

⊞ Scorecard: Add indicator (5/7)

Create indicator ✕

General   Description   Thresholds   DHIS

Screenshot	**Step**	**Instruction**
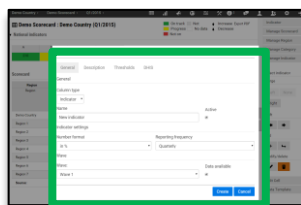
6a

Arrows

Previous value

Previous scorecard ▼

Arrows, which indicate an increase or decrease in performance, can compare to the last scorecard or the scorecard from the same reporting period from the previous year (e.g., for seasonal diseases)

Up threshold

.05

Down threshold

-.05

Enter the minimum change that is necessary to display an arrow.

ALMA

⊞ Scorecard: Add indicator (6/7)

Create indicator   ×

General   Description   **Thresholds**   DHIS

Screenshot	Step	Instruction
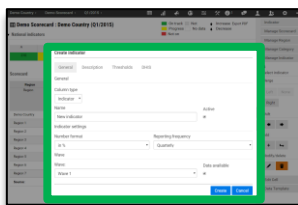
6b

Color thresholds

Red to Yellow

.65

Yellow to Green

.8

> Enter the thresholds for displaying the red, yellow, and green colours on the scorecard.

The pictured example: *Illustrative*

- Yellow to Green

- Red to Yellow

>80%
65–80%
<65%
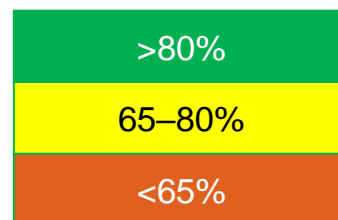
7

Create

> Click **Create** to create the indicator

ALMA

⊞ Scorecard: Add indicator (7/7)

Create indicator   ×

General   Description   **Thresholds**   DHIS

Screenshot   Step   Instruction
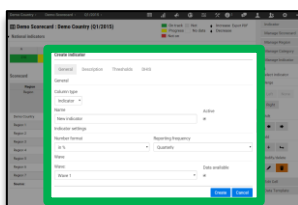
*8 Additional features will be un-hidden by checking **Advanced options**. These are non-mandatory fields

Check Advanced options to access additional settings.

Check **Disable colours** to display an indicator without colours.

Arrows		
Previous value	Previous scorecard	▾
Up threshold *	15.0%	
Down threshold *	-15.0%	
Should arrows reflect absolute or relative change? *	Absolute	▾

Red to Yellow *	60.0%	
Yellow to Green *	80.0%	
Green to Yellow		
Yellow to Red		
Disable colors	☐	

☑ Advanced options

Select whether the arrows reflect absolute or relative* change in the drop-down.

Use the (optional) lower two boxes too if the target value is in the middle of potential value

Illustrative

>50 per 1000
30-40
20-30
10-20
<10 per 1000

* **Absolute / Relative arrows**
- Absolute = arrow displays if the change is greater than the value specified
- Relative = arrow displays if the percentage change exceeds the value specified e.g. arrows will be displayed if indicator value increases or decreases by 5%

47

ALMA

🔲 Scorecard: Edit indicator

An administrator may want to edit an indicator name, update thresholds, change reporting frequency, modify the data source, etc.

Screenshot   Step   Instruction
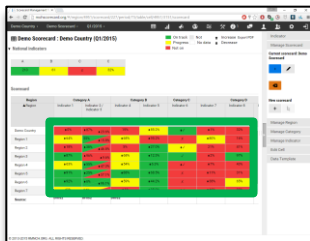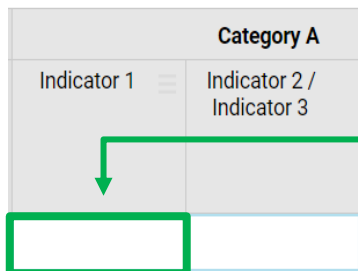
1

	Category A
Indicator 1	Indicator 2 / Indicator 3

Select a cell beneath the indicator that you want to edit

2

Manage Indicator

New indicator
Select indicator

Merge

| Left | None | Right |

Shift

← →

Add

+ ↵

Modify/delete

✏️ 🗑️
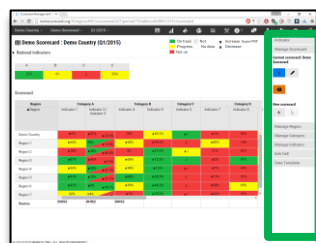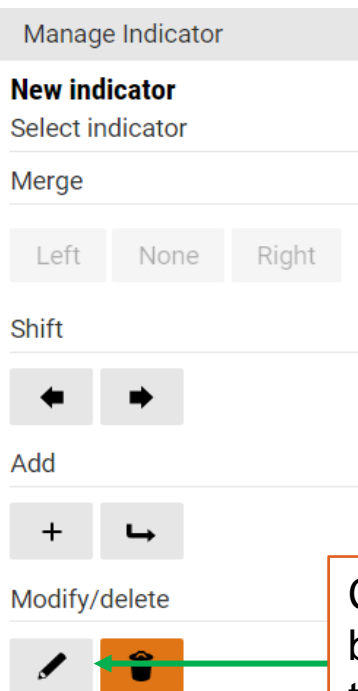
Click on **Manage Indicator** in the scorecard Sidebar

3

Click on the **"pen"** button to open form to edit the indicator
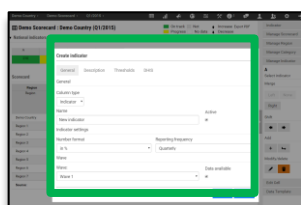
4

Edit indicator   ×

| General | Description | Thresholds |

General

| Column type * | Indicator ▾ |
| Name * | Indicator 1 | ☑ Acti |

Indicator settings

| Number format * | in % ▾ | Reporting frequency * | Qua |

Wave

| Wave: * | Wave 1 ▾ | ☑ Data available |

* fields are mandatory   Update Cancel

Make edits in the new form that opens and then click **Update**

ALMA

Scorecard: Triangle indicators

Scorecard

Region	Category A		Category B	
	Indicator 1	Indicator 2 / Indicator 3	Indicator 4	Indi
Demo Country	92% ▼	6% / 76.4%	18%	
Region 1	23%	51% / 75.8%	10%	
Region 2	66%	33% / 95.0%	18%	
Region 3	24%	77% / 40.2%	90%	
Region 4	23% ▲	65% / 39.1%	39%	
Region 5	100%	96% / 13.1%	51%	
Region 6	24%	95% / 86.7%	68%	
Region 7	40%	67% / 42.0%	65%	

Related or similar indicators can be grouped together as triangle indicators

Screenshot	Step	Instruction

1

Category...
Indicator 1   Indicator Indicator
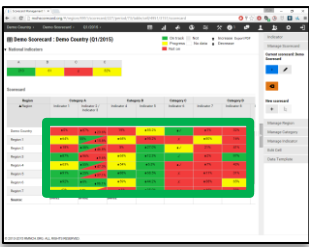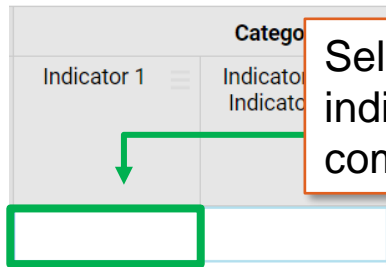
Select a cell beneath the indicator that you want to combine

2
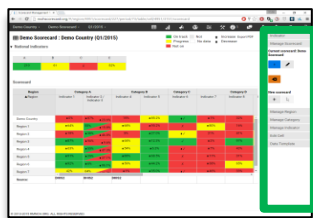
Manage Indicator

Click on **Manage Indicator** in the scorecard Sidebar

Indicator 1
Select indicator

3

Merge

Click on **left** or **right** to form a triangle with the indicator directly to its left or right.

| Left | None | Right |

Shift

◄ ►

To shift an indicator to be directly next to another, use the **Shift arrows.**

ALMA

⊞ **Scorecard: Manage regions**

Screenshot	Step	Instruction

1

Region
Region

— Demo country

+ Region A
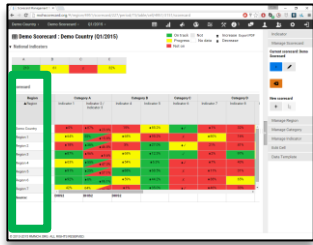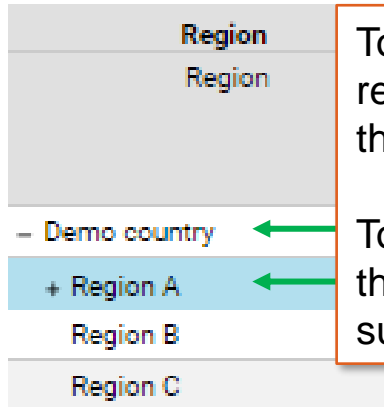
Region B

Region C

To add a subnational region to a country, select the row with country name.

To add a sub-level below that, select the row with the subnational region name.

2

Manage Region

Demo Country

+

✏ 🗑

↑ ↓

↕

Import DHIS2 config
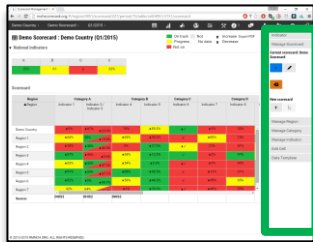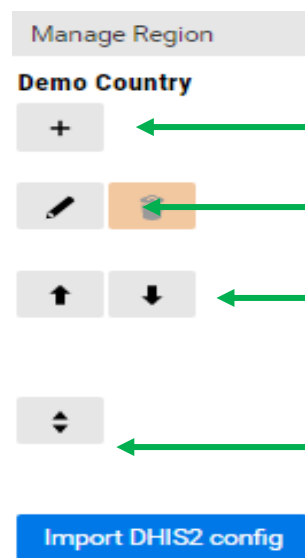
Click on **Manage Region** in the Sidebar. Click on the plus sign to add a region and the pen icon to edit.

Use the arrows to move the order of the regions up and down and the Sort button to sort the regions to their original configuration.
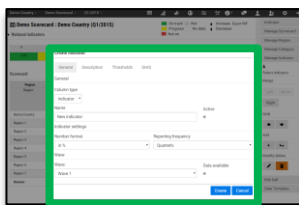
3

Create new region for Demo Country

General | Create from DHIS

Name: * | Name

* fields are mandatory

Create | Cancel

In the new form that opens, enter the region name and click on the **Create** button.

* The DHIS tabs will only work once the DHIS2 configuration has been uploaded for the country. See Annex for more details.

ALMA

⊞ ## Scorecard: Creating subnational scorecards

National administrators can create a copy of the country scorecard for a subnational region which can be modified (e.g. add or delete indicators; change indicator thresholds) without changing the national scorecard. However if a change is made to the national scorecard, it will be reflected on the subnational scorecard. Data uploaded for any indicator in a subnational scorecard will be shared (i.e. can be uploaded and changed by subnational and national admins).

Screenshot   Step   Instruction
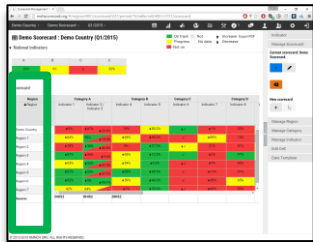
1
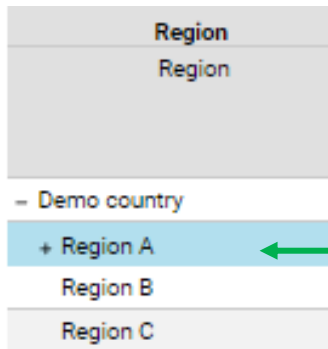
To copy the national scorecard to a subnational, first select the region for which you want to create the scorecard.
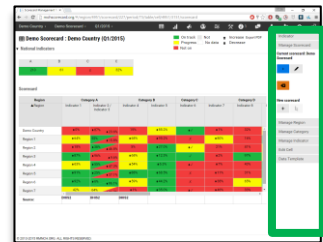
2
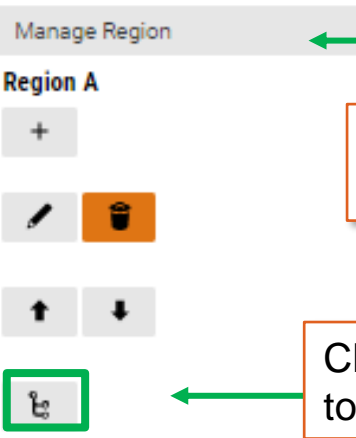
Click on **Manage Region** in the Sidebar

Click Copy scorecard to subregion

3
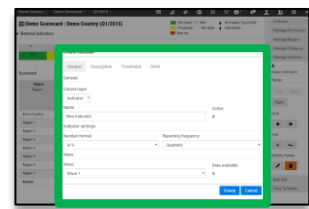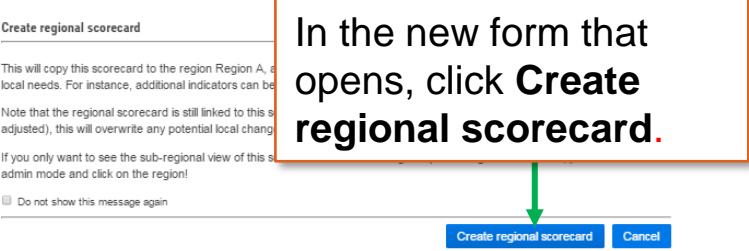
In the new form that opens, click **Create regional scorecard**.

ALMA

⊞ Scorecard: Add new time period to scorecard

Administrators can also add the next or previous time period to an existing scorecard. This creates a new blank scorecard for the previous or next time period.

Screenshot   Step   Instruction
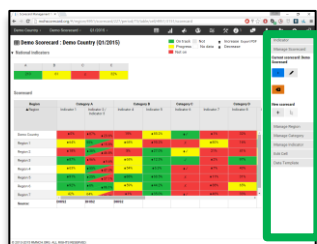
1

Manage Scorecard

Current scorecard: Demo Scorecard

Click on the left arrow to add the previous time period and on the right arrow to add the next time period to an existing scorecard.

New scorecard

Notifications

Note on historical integrity for scorecards:
The web platform is configured to maintain the integrity of past scorecards when the configuration is updated. This means that any changes made to a scorecard's configuration (e.g. new indicator added, colour thresholds updated) will only apply to that current period and the periods that follow it, but won't affect previous scorecards. This allows for period-specific scorecard and indicator settings.

ALMA

⊞ Scorecard: Upload data (1/3)

Uploading and downloading data is done using an Excel data template that is automatically created by the tool. These instructions explain how to download and upload the template

Screenshot   Step   Instruction
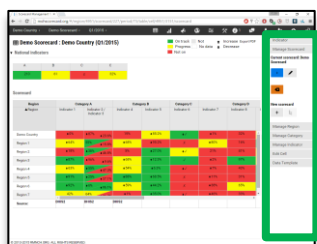
1 Data Template

First period: Last period:

Q3/2015 ▾   Q4/2015 ▾

Demo country ▾

Region depth:*   2

Download Excel

Upload Excel

Import DHIS Values

Click on the **"Data Template"** section in the sidebar.

Select the periods of data and region to upload or download.

Region depth refers to the number of levels of sub-national regions included in the template (i.e. country, region, district, etc.).

Click on **Download Excel** to download the Microsoft Excel data entry template

To add the Next or Previous period to the Data template, use Manage scorecard. See page 49 for details.

ALMA

⊞ **Scorecard: Upload data (2/3)**

Screenshot   **Step**   **Instruction**

2

Enter the data into the downloaded Excel template and save the file

Data Template

First period: Last period:

Q3/2015 ▾   Q4/2015 ▾

Demo country ▾

Region depth:*   2

Download Excel

3

Upload Excel

Import DHIS Values

In the web platform, click **Upload Excel** and select the file on your computer.

See Annex for instructions on how to import data from DHIS2.

ALMA

⊞ Scorecard: Upload data (3/3)

A video tutorial is available on youtube on how to upload data and update the scorecard using an excel template

How to update the scorecard using an excel template

LINK:

https://youtu.be/8JdXMdVPM04

⊞ Scorecard: Edit cell

To edit a single value in the scorecard, follow the instructions below.

Screenshot Step Instruction
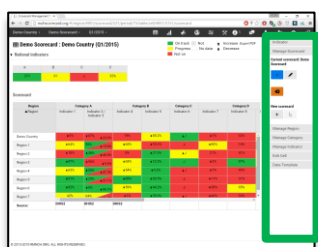
Click on the **"Edit Cell"** section in the sidebar.

Edit Cell

Indicator 1

Cell Value:*

1 0.7487

☐ Not applicable

Enter the data value in the format in which is was programmed.

2 Update 🗑

Check here if indicator value is not applicable, for example, if it's an indicator for intervention not available in that district (e.g. IRS)

Click update to edit the data value.

ALMA

⊞ Scorecard: Editing mode

Administrators can work on a specified period of a scorecard in Editing mode before releasing it for view by other users. When in this mode, only Administrators can see that period of the scorecard.

Screenshot   Step   Instruction
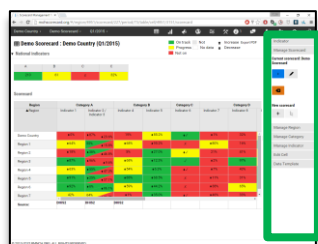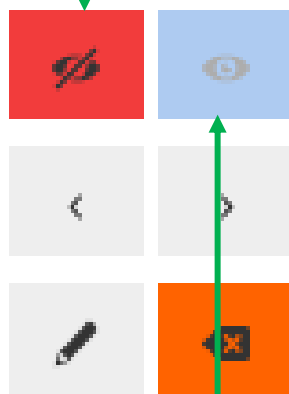
1 Under Manage scorecard section in the sidebar, click **Enable edit mode**

2 When the scorecard is ready for viewing, click **Disable edit mode**.

Demo Country ▾   Demo Scorecard ▾   Q4/2015 ▾   ⊞ 📄 ☰ ▮▮ 📢▾ 🌐 ≈ ⚒ ⬇▾

⊞ Demo Scorecard: Demo Country (Q4/2015)

Scorecard is in Edit mode - only visible to Admins. Deactivate Edit mode to show to users!

When Editing mode is turned on, a message will be displayed at the top of the screen. Users won't be able to see the scorecard for the period (e.g. Q4 2014) for which the editing mode was set until it is turned off. This allows administrators to only display the new scorecard when it is ready to be viewed.

ALMA

Insufficient source.

Scorecard Configuration Tool

- The **Scorecard Configuration Tool** provides a list of all of the indicators on the scorecard, including description and thresholds
- Administrators can **click on an indicator** to edit it directly in the form. This enables rapid updates to thresholds and indicator specifications

Configuration for Demo Scorecard : Demo Country (Q4/2015)

Active	Category	Indicator	Description	Numerator	Denominator	Source	Thresholds	Is data available?	Wave
✔	National indicators	Indicator A				DHS	Yellow to green: 0.75 Red to yellow: 0.55	✔	Wave 1
✔	National indicators	Indicator B				National policy	Yellow to green: 1 Red to yellow: 0	✔	Wave 1
✔	National indicators	Indicator C				MICS	Yellow to green: 0.8 Red to yellow: 0.6	✔	Wave 1
✔	National indicators	Indicator D				DHS	Yellow to green: 0.9 Red to yellow: 0.7	✔	Wave 1
✔	Category A	Indicator 1				HMIS	Yellow to green: 0.65 Red to yellow: 0.4	✔	Wave 1
✔	Category A	Indicator 2				Facility reports	Yellow to green: 0.85 Red to yellow: 0.6	✔	Wave 1
✔	Category B	Indicator 3				HMIS	Yellow to green: 0.9 Red to yellow: 0.55	✔	Wave 1
✔	Category B	Indicator 4				HMIS	Yellow to green: 0.75 Red to yellow: 0.5	✔	Wave 1
✔	Category B	Indicator 5				HMIS	Yellow to green: 0.9 Red to yellow: 0.7000000000000001	✔	Wave 1
✔	Category C	Indicator 6				Programme reports	Yellow to green: 0.8 Red to yellow: 0	✔	Wave 1
✔	Category C	Indicator 7				HMIS	Yellow to green: 0.9 Red to yellow: 0.65	✔	Wave 1
✔	Category C	Indicator 8				HMIS	Yellow to green: 0.65 Red to yellow: 0.45	✔	Wave 1
✔	Category D	Indicator 9				Regional policy	Yellow to green: 0.8 Red to yellow: 0	✔	Wave 1
✔	Categ...						...llow:	✔	Wave 1
✔	Categ...						...llow: 0.6	✔	Wave 1

Manage Indicator — Indicator A, Select indicator. Merge: Left / None / Right. Shift. Add. Modify/delete. Manage Category.

Clicking on any element allows the administrator to modify information on the indicator, including its category, name, description, source, wave, or thresholds. These changes will be reflected in the scorecard.

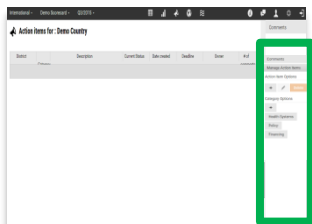Administrators can also manage indicators using the Sidebar view.
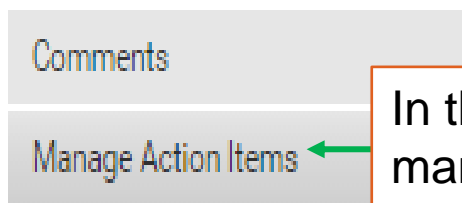
Action Items: Add New Action Item (1/2)

Screenshot	**Step**	**Instruction**

1

Click on the **Manage Action Items** in the top toolbar to access tools for adding / editing action items
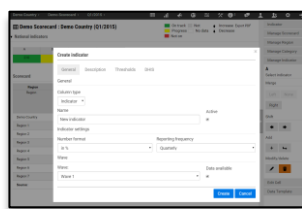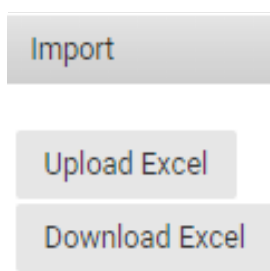
2

Comments

Manage Action Items

In the Action items management screen, select **Manage Action Items** in the sidebar.

+ / 🗑

Click on the **plus sign button** to open the form to add a new action item

Import

Click Import to import action items from an Excel template

Upload Excel

Download Excel

Action Item

Region *	Demo Country: Region A
Deadline *	01/26/2016	Owner *	
Description *		

Status	Some progress
Status explanation	

■ Action achieved
■ Some progress
■ No progress
■ Deliverable not yet due

* fields are mandatory

Save Cancel

A new form will open to enter the action item.

ALMA
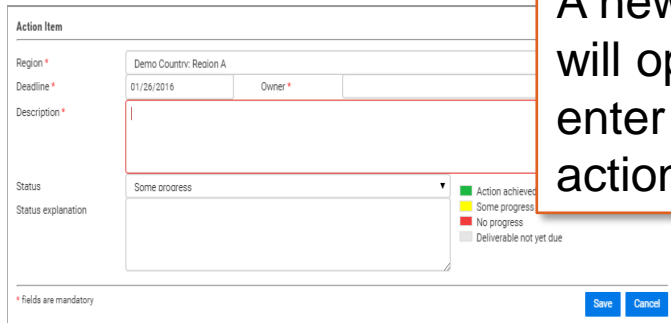
Action Items: Add New Action Item (2/2)

Screenshot | Step | Instruction
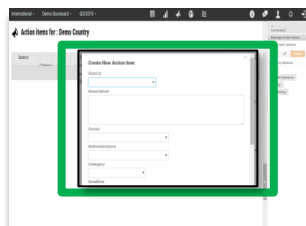
3 Complete the fields below and Save the action item.

Select **Region** for the action item

Enter a **Deadline** for completion of the action item

Use the **Owner** dropdown menu to select who will be responsible for completing the action

Add a **Category** for the action item *(optional)*

New Activity ×

| Region* | Demo Country | ▾ |
| Deadline* | 21/06/2019 | |

☐ Confirm: Deadline is in the past! *

Owner*	× ▾	Category	
Action description			
Stakeholder / collaborator			
Community engagement	☐		
Status*	Deliverable not yet due		
Status explanation			

🟩 Action achieved 🟥
🟨 Some progress ⬜

| Enable SMS notifications | ☐ |

Use the **Description** field to describe the required actions

Check here if the action item engages the community level.

Check here if you want automated alerts to be sent by **SMS** if an action is overdue

Add a stakeholder/ collaborator involved with implementing the action item (optional)

Enter a description of progress that has been made in **Status Explanation**

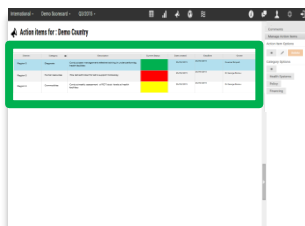Select the **Status** of the action item from the drop-down

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ALMA

Action Items: Edit Action Item
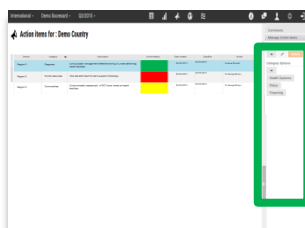
Screenshot	Step	Instruction

1

Region	Description	Date created	Deadline	Status	Status explanation	Owner	# of comments
Region 2	Hire three M&E staff members on temporary basis to clear backlog	15/12/2015	01/02/2016	Action achieved		Owner	1
Distr			2	No progress	Training cancelled	Owner	2
Reg	campaign to raise awareness of EBF	010	010	Some progress	Contacted managers	Owner	0

> Click on the **action item** you would like to edit

2

Manage Action Items

> Click on the **Manage Action Items** in the sidebar to access tools for adding / editing action items

3

Manage Action Items

➕ ✏️ 🗑️

> Click on the **pen button** to open the form to edit the selected action item

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ALMA

📢 Action Items: Video tutorial

A video tutorial is available on youtube on how to add and edit action items

How to use the action tracker.

LINK:

https://youtu.be/diUvtIfao1I

Workplan manager: Introduction

- The workplan manager is a new functionality that allows programmes to **create national and subnational workplans (operational plans)** and monitor progress of implementation.

- The **automated notification system** sends automatic reminders to action owners and subscribers through emails, SMS and the web platform, enhancing accountability

- The system allows admins and users to create groups of activities around specific deliverables and objectives:

```
                        National workplan
               |               |                |
          Objective 1      Objective 2      Objective 3
           |      |          |       |        |       |
      Deliverable Deliverable Deliverable Deliverable Deliverable Deliverable
          A        B           C          D          E          F
```

Deliverable A	Deliverable B	Deliverable C	Deliverable D	Deliverable E	Deliverable F
Activities Activities	Activities Activities	Activities	Activities Activities	Activities	Activities Activities
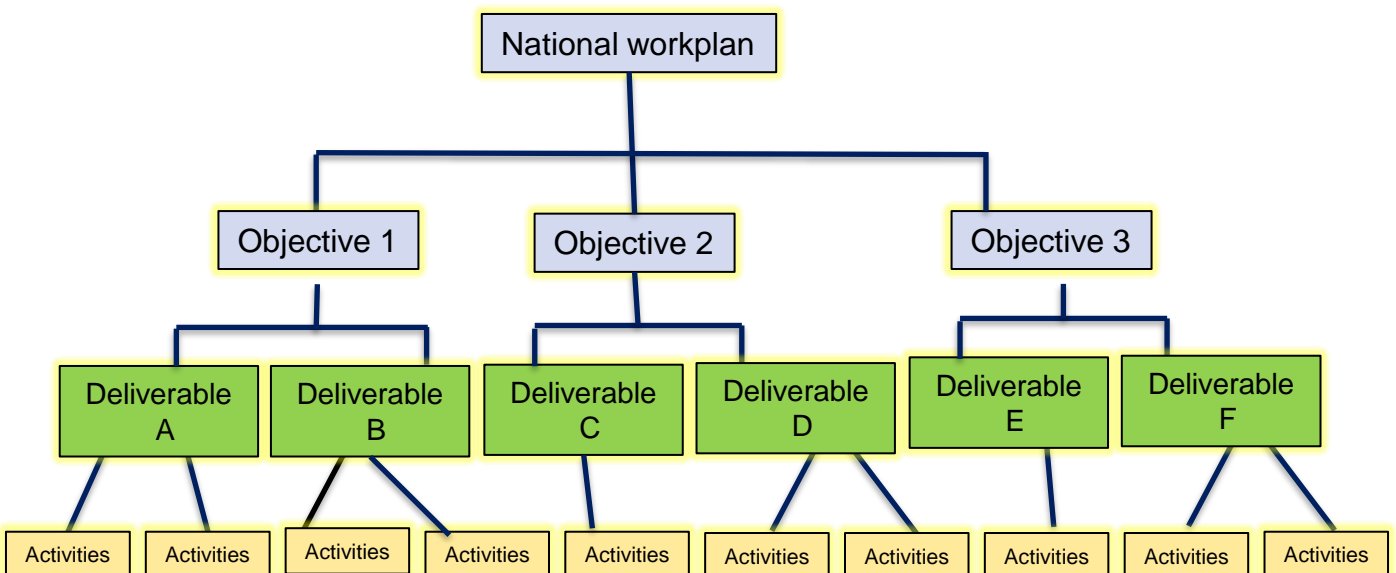
NOTE: Labels for Objectives, deliverables and activities can be modified

Example: Objective: increase the % of Pregnant women receiving IPT
Deliverable: Develop and produce communication tools and support materials
Activity 1: Produce Multimedia Campaign using SMS on malaria
Activity 2: Produce radio and TV massages for broadcasting

ALMA

Workplan manager: Add Workplan (1/2)

Screenshot | Step | Instruction
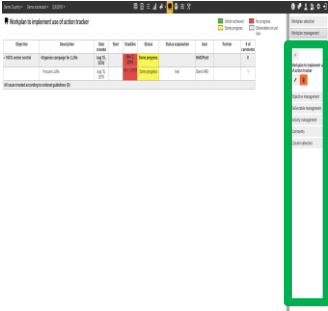
1

Click on the **workplan** icon in the top toolbar to access the workplan manager functionality

2

Workplan selection
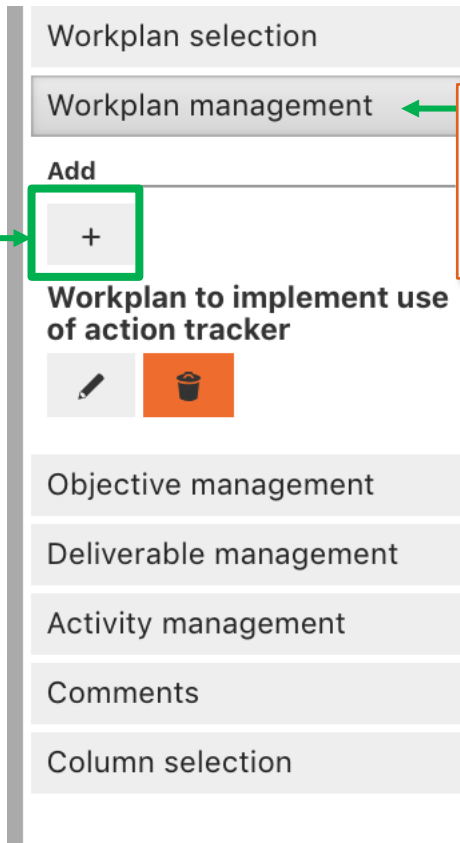
Workplan management ⬅ Select **workplan management** in the sidebar.

Add

+

Workplan to implement use of action tracker

✏️ 🗑️

Objective management

Deliverable management

Activity management

Comments

Column selection

Click on the **plus sign button** to open the form to create a new workplan

A new form will open to create a new workplan
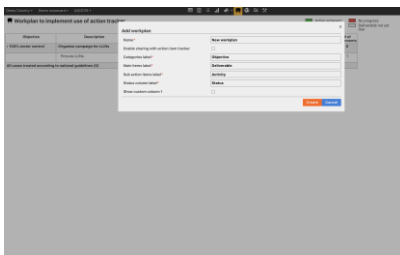
Add workplan

Name*	New workplan
Enable sharing with action item tracker	☐
Categories label*	Objective
Main items label*	Deliverable
Sub action items label*	Activity
Status column label*	Status
Show custom column 1	☐

Create Cancel

ALMA

Workplan manager: Add Workplan (2/2)
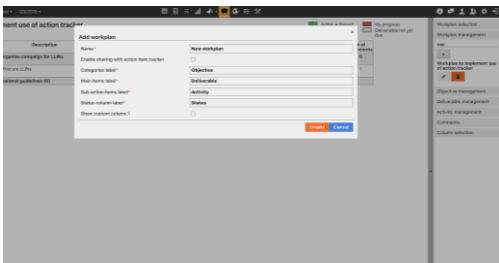
Screenshot	**Step**	**Instruction**

3 Name your **workplan,** Several workplans can be created and accessed on the '**workplan selection**' menu on the sidebar

Add workplan

Name*   New workplan

4 Check this box if you wish to share deliverables with the action tracker so it appears in the list of actions in the action tracker

Enable sharing with action item tracker

5 Customise the name of your labels

Categories label*   Objective

Main items label*   Deliverable

Sub action items label*   Activity

Status column label*   Status

Show custom column 1

Check here to create additional columns

6 Click create

Create   Cancel

ALMA

📋 Workplan manager: Create objectives

Screenshot · Step · Instruction

7 Add an objective by selecting **objective management** on the side bar

Workplan selection

Workplan management

Objective management

Add

+

Click on the **"+"** button to open a new form to create an objective

Deliverable management

Activity management

Comments

Column selection

In the new form that opens, enter the objective name and click **create**
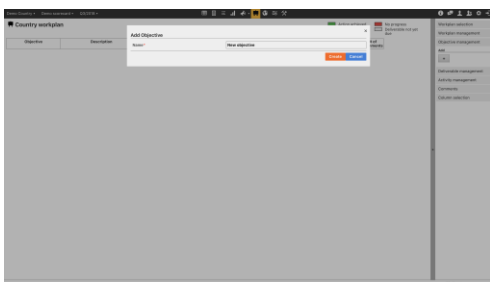
Add Objective

Name*   **New objective**

Create   Cancel

An example of objective can be '90% of structures sprayed'

ALMA

Workplan manager: Create deliverables (1/2)

Screenshot　　　　　　**Step**　　**Instruction**
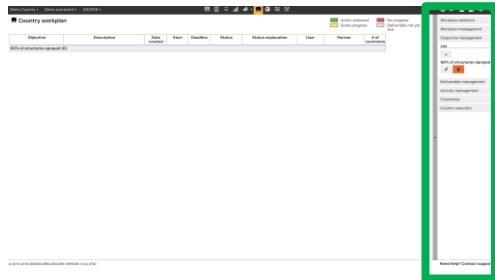
8 Add a deliverable by selecting **deliverable management** on the side bar

Select objective for which you want to create a deliverable for, the chosen objective will be highlighted by blue box

🖥 Country workplan

Objective	Desc...
90% of structures sprayed (0)	

Click on the **"+"** button to open a new form to create a deliverable

Deliverable management

Add

+

A new form will open to enter the deliverable
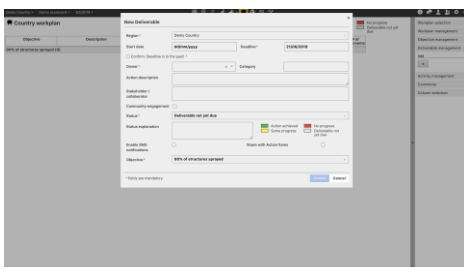
New Deliverable			
Region *	Demo Country		
Start date	dd/mm/yyyy	Deadline *	21/06/2019
☐ Confirm: Deadline is in the past! *			
Owner *	× ▾	Category	
Action description			
Stakeholder / collaborator			
Community engagement	☐		
Status *	Deliverable not yet due		▾
Status explanation		🟩 Action achieved 🟥 No progress 🟨 Some progress ⬜ Deliverable not yet due	
Enable SMS notifications	☐	Share with Action Items	☐
Objective *	90% of structures sprayed		▾
* fields are mandatory		Create Cancel	

Workplan manager: Create deliverables (2/2)

Screenshot	Step	Instruction
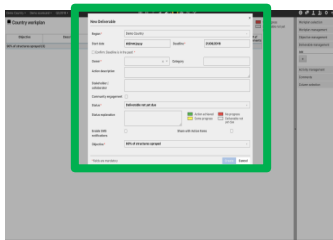
9 Complete the fields below and click **Create**

Select **Region** for the action item

Enter a **start date** for when the deliverable will start being implemented and a **deadline** for when this needs to have been completed by. A calendar will open to select the date

Use the **Owner** dropdown menu to select who will be responsible for completing the deliverable. This is also the person who will be reporting and coordinating on the activity

New Deliverable

Region *	Demo Country
Start date	dd/mm/yyyy
☐ Confirm: Deadline is in the past! *	
Owner *	× ▼
Action description	
Stakeholder / collaborator	
Community engagement	☐
Status *	**Deliverable not yet due**
Status explanation	
Enable SMS notifications	☐

Deadline * 21/06/2019

Category

Add a **Category** for the deliverable *(optional)*

Action achieved
Some progress

Share with Action Items

Check here if the deliverable engages the community level.

Check here to **notify the owner of any overdue** deliverable **by SMS**

Add the names of partners who may be involved with implementing the deliverable (optional)

Enter a description of progress that has been made in **Status Explanation**

Select the **Status** of the deliverable from the drop-down

ALMA

🖼️ Workplan manager: Edit deliverable

Screenshot

Step

1

2

3

Instruction

Objective	Description	Date created	Start
▾ CASE MANAGEMENT;100% Availability of antimalarial commodities	▾Annual malaria commodity needs for 2020 estimated	**Jan 30, 2019**	**Jul 15, 2019**
	aria commodity quantification 2020 needs	Jan 30, 2019	Jul 15, 2019
	ly selected Health Facilities	**Jan 30, 2019**	**Apr 22, 2019**
	ot checks for antimalarial commodities in 4 districts in each of the following provinces; Southern, Muchinga, Lusaka,Central and North western.	Jan 30, 2019	Apr 22, 2019

Click on the **deliverable** you would like to edit

Deliverable management

Click on the **deliverable management** in the sidebar to access tools for adding / editing deliverable

Deliverable management

Add

+

Organise campaign for LLINs

✏️ 🗑️ 👁️

Click on the **pen button** to open the form to edit the selected deliverable. Click on the orange dustbin **to delete** the deliverable

ALMA

Workplan manager: Subscribe to a deliverable

Screenshot   Step   Instruction

1

If a user is not the owner of a deliverable but wants regular updates on the status of a deliverable, he can subscribe to the deliverable by clicking on the **blue eye**

Deliverable management

Add

+

Organise campaign for LLINs

✏ 🗑 👁

2

ⓘ 💬 ♟ ⚙ ⤢

Users can select the type of notification they want to receive by clicking on the I icon on the top bar.

Notifications can be set to be sent by email, SMS or pop-up windows when logging in to the webplatform.

ALMA

Workplan manager: Create activity
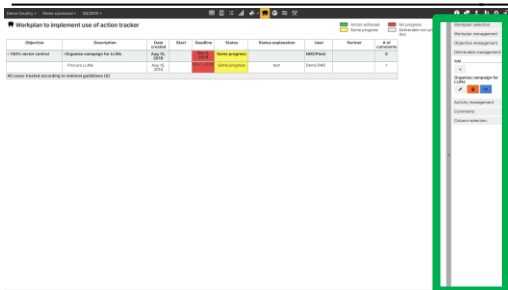
| **Screenshot** | **Step** | **Instruction** |

8 Add an activity by selecting **activity management** on the side bar

Activity management

Select the deliverable for which you want to create an activity for

▾Recruit and train spray teams

Click on the **"+"** button to open a new form to create a deliverable

Activity management

Add

+

New Activity

| Region * | Zambia |
| Start date | dd/mm/yyyy | Deadline * | 21/06/2 |
| ☐ Confirm: Deadline is in the past! * |
Owner *	× ▾	Category	
Action description	
Stakeholder / collaborator	
Community engagement	☐
Status *	Deliverable not yet due
Status explanation		▮ Action achieved ▮ No progress ☐ Deliverable not yet due ▮ Some progress
Funding Available		Budget	
Enable SMS notifications	☐	Share with Action Items	☐
Expected Output *	Malaria commodities for 2019 procured

* fields are mandatory   Create Cancel

A new form will open to enter the activity

ALMA

🌐 Maps: Upload Shape File

Screenshot	Step	Instruction

1

Click on the **Map** button in the top toolbar

2

Select Indicator

Manage Map

Add map

In the Maps view, select **Manage Map** from the sidebar. Then click on **Add Map** to select the shape file to upload.

Note: The online tool supports .KML files, which can be created using Google Maps or converted from other formats
- **For more information on creating KML files, see:**
  https://developers.google.com/kml/documentation/kml_tut

- **To convert existing shape files to KML, see:**
  http://www.mapsdata.co.uk/online-file-converter/

- **For country and subnational KML files, see:**
  http://www.gadm.org/

Note: The country and subnational region names in the .KML file must match the names entered on the online tool

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See DHIS2 Annex for instructions on how to import shape files from DHIS2

ALMA

Manage Users: Overview

The User Management interface lists all of the accounts that have been created for the country. It provides key information about each user including whether or not he or she has activated his or her account and when he or she last accessed the tool

Screenshot   Step   Instruction

1

Click on the **Manage users** icon in the top toolbar

2

User Operations
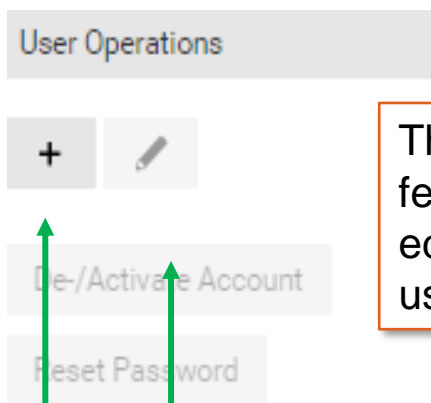
The **Sidebar** provides features for adding, editing, and deleting user accounts

To add a user, click on the plus sign.

To edit a user, click on the pen icon.

There are three types of users for the web platform:
- **Admin:** Create / edit scorecards and action items, upload data
- **User:** Read and download the scorecard, create / edit action items
- **Viewer:** Read the scorecard and edit his/her own action items

ALMA

Manage Users: Create New User (1/2)

Screenshot	Step	Instruction
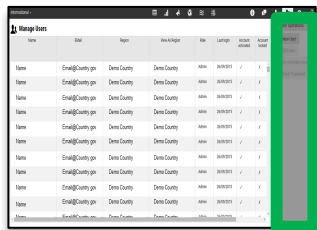
1 User Operations

\+   ✏
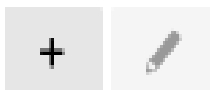
To add a user, click on the **plus sign** button in the Sidebar

De-/Activate Acc...

Reset Password
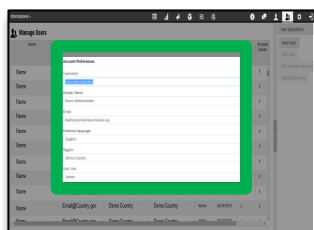
2

Account Preferences   ✕

Username*	
Display Name*	
Email*	
Preferred language*	English
Affiliation	
Region*	Demo Country
Role*	
Mobile phone	

* fields are mandatory   Create   Cancel

In the new form that opens, enter the user's details including his or her username, full name, and email address (**Note:** an email address is required)

NOTE: Mobile phone numbers must be entered in this format: +(countrycode)XXXX e.g. +263772382866

ALMA

Manage Users: Create New User (2/2)

New users will receive an automated email asking them to activate their accounts

Confirm your Malaria Scorecard management tool account

An account has been created for you in the Malaria Scorecard management tool.

Your user name is:

DemoAdmin

Please click here to activate your account.

Once you've activated your account, you can log in using your username and password at www.malariascorecard.org.

If the link doesn't work, please copy the following address to your web browser to open the activation page: http://www.malariascorecard. org/#/activate?UserId=db39d05c-180d-4d02-b864- db3360618027&Token=cNfyQJ%2f8v5dkuKfAEcPDO1FpRXRdkxLhjBb E5QdrGkBm5RR%2fTjT3x6Y1ebpjBsXS5i3sFqXBUx% 2bYHo71%2b3%2fClr0w%2bcwM1JzD0ufmgsNVO5R5qOH31tJldhrG9% 2btmTloU1zllhU786Wbk7zrc1mdMjo7IcWs9xRq3r1d165R8TuFce59C

If you have any questions, please contact the RMNCH Global Admin at globaladmin@rmnch.org

After receiving the email, click the hyperlink or copy and paste the link into your web browser

Activate account

Please set your password below.

| Password |
| Confirmation |

Activate

Contact administrator

Login screen

To **activate the account** create and confirm a password, and then click "Activate." Your password will be saved and then you will be taken to the home screen

ALMA

👥 Manage Users: Edit Users

Existing user accounts can be edited through the Manage Users interface

Click on the user account that you want to manage

User Operations

Additional features will be activated in the Sidebar that allow you to:
- **Edit** the user account (e.g., change password)
- **Deactivate** the account (e.g., delete the account so that the user can no longer access the tool)
- **Reactivate** an account
- **Reset password** (e.g., because the user forgot it)
- **Resend the activation email**

ALMA

Notifications

Notifications are created automatically to alert users of recent activity on the web platform. Users can update set their notification preferences by using the i icon. Notifications can be set to be received by in-app pop up messages, emails and SMS.

A list of recent activities on the web platform, with a date and time stamp, is displayed in the Notifications page.

The number of notifications is listed in the top toolbar. Click on the icon to see the Notifications page.

Using the dropdown menus under Preferences, select how users receive the Notifications.

Options for receipt of notifications include:
- No action
- Create notification
- Create notification and send email.

ALMA

Mobile version – Indicator view

The web platform has been optimized for use on smart phones, which allows users to view several features in an offline browsing mode. New action items can also be added through the mobile app when connected to a network.

Indicator view displays performance of a single indicator at all levels for a given time period.

To select an indicator, first choose the Category from the drop-down menu. Then select an indicator from menu below*.
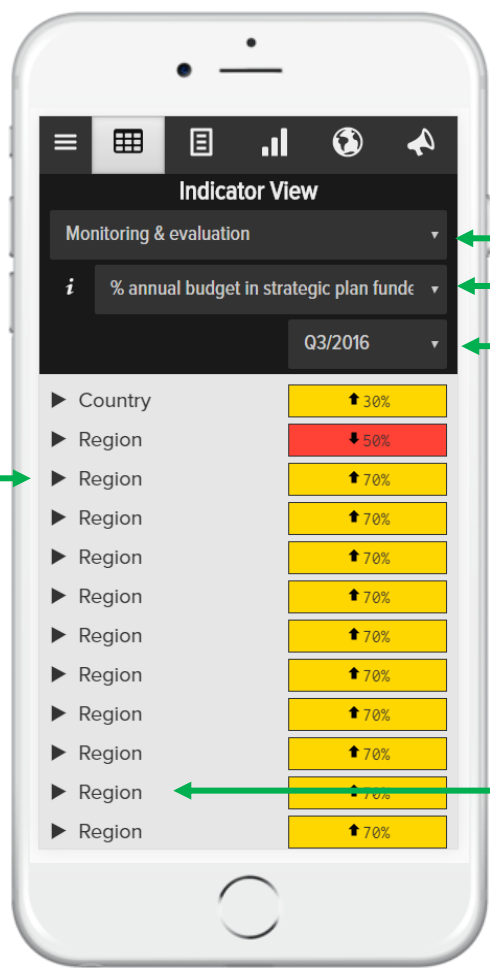
Tapping on an arrow will display sub-national data if available.

Navigate between periods using the drop-down menu.

Tapping on the region name will open to the Subnational view for that region

The list of Indicators that appear will be limited to those that fall under the selected Category

ALMA

Mobile version – Subnational view

Subnational view displays the performance of all indicators in a selected area for a single time period.

Return to the country view from the subnational area using the back arrow.

Navigate between regions and periods using the drop-down menus.

Click on the icon to view information (e.g. thresholds, data source) about the indicator.

Tapping on the indicator name will open the Indicator view for that indicator

ALMA
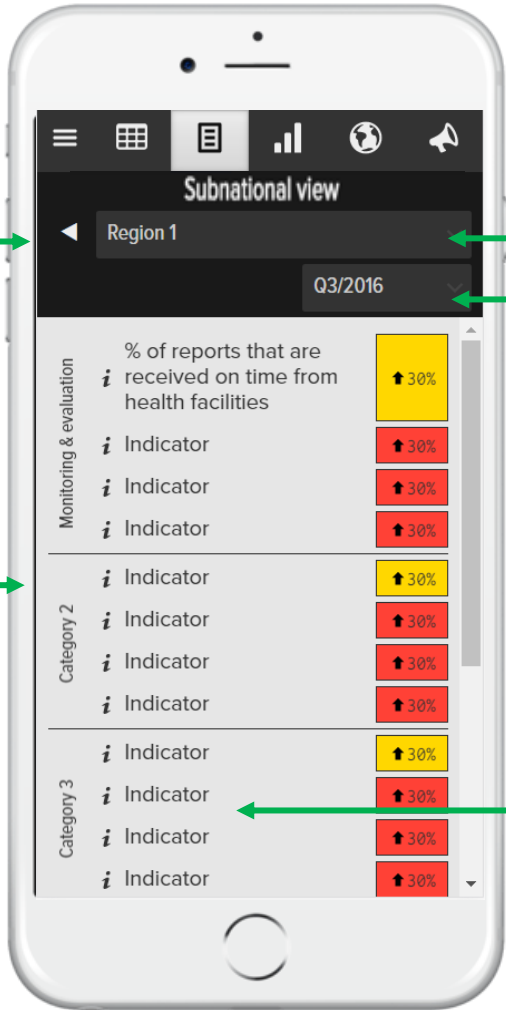
Mobile version – Charts and Maps

Performance of an indicator over time in multiple subnational areas can be viewed in the **Chart view**. Indicator performance for a selected time period can be viewed geographically in **Map view***.

Add multiple subnational areas to view on the chart.

Charts can be viewed as line or bar graphs.

Select start and end periods using drop-down menus.
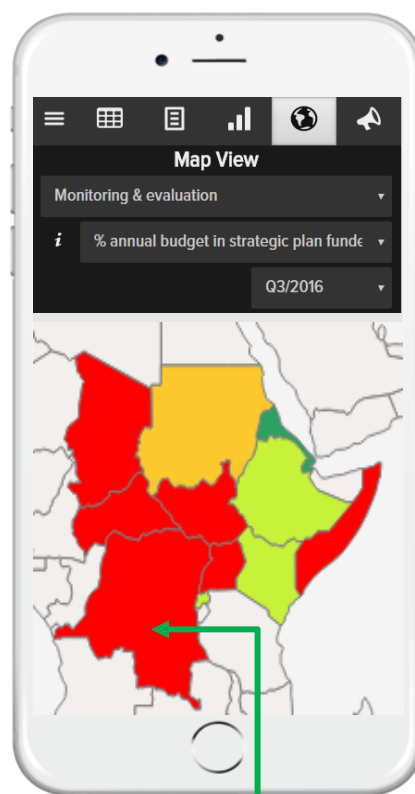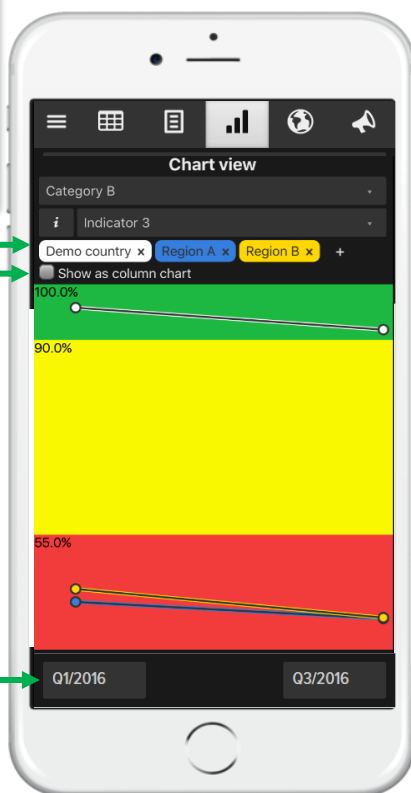
Tapping on a subnational area will zoom in to a disaggregated view for that area*.

Map view available only if shape files are loaded to desktop web platform. Maps can only be disaggregated down to lowest level loaded into desktop web platform.

ALMA

Mobile version – Action item tracker (1/2)

Existing action items can be viewed in the mobile version in offline browsing mode. Using the Filter and Arranged by icons allow users to organize the action items in various ways.

Users can select how the action items are arranged (e.g. by Due date, Subnational level, Owner, or Status of action item) using the Arranged by drop-down menu.

Clicking on the **Filter** button will open a new display where users can filter specific action items to view.

ALMA
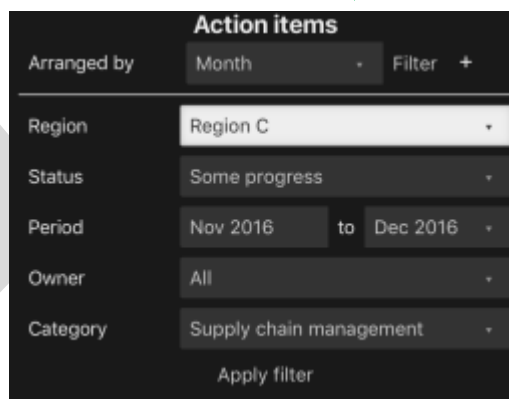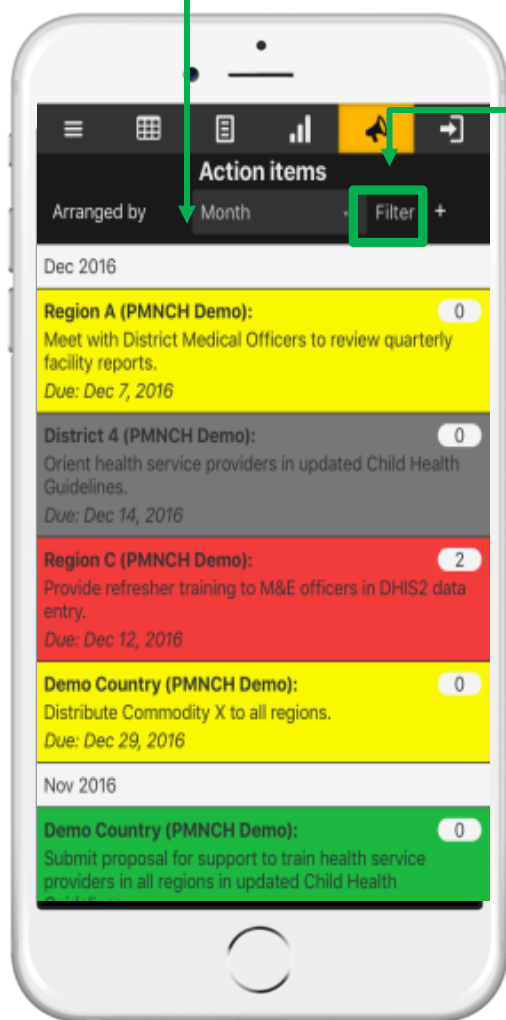
Mobile version – Action item tracker (2/2)

Users can add new action items and edit or comment on existing action items in the mobile version that will by synced with the desktop action item tracker*.

Clicking on the + icon will open another display where users can add new action items.
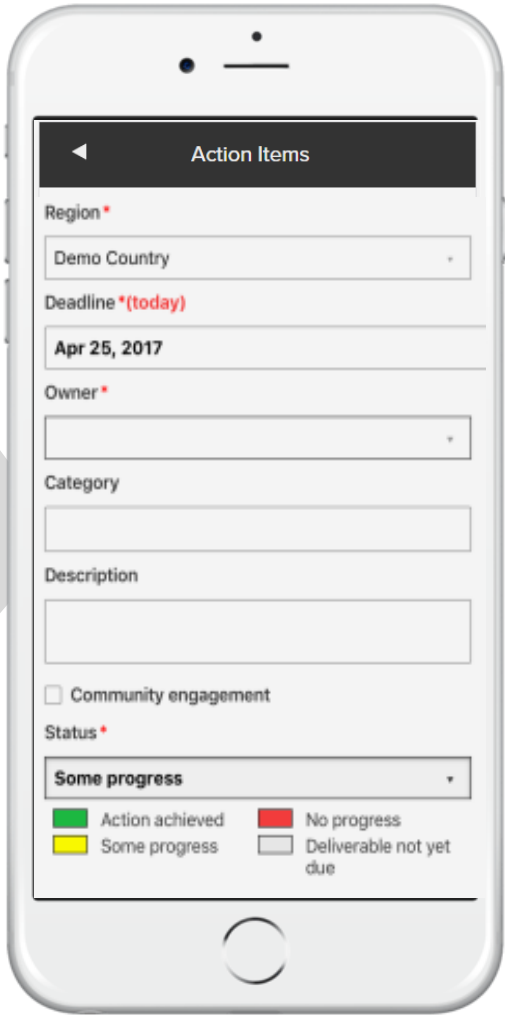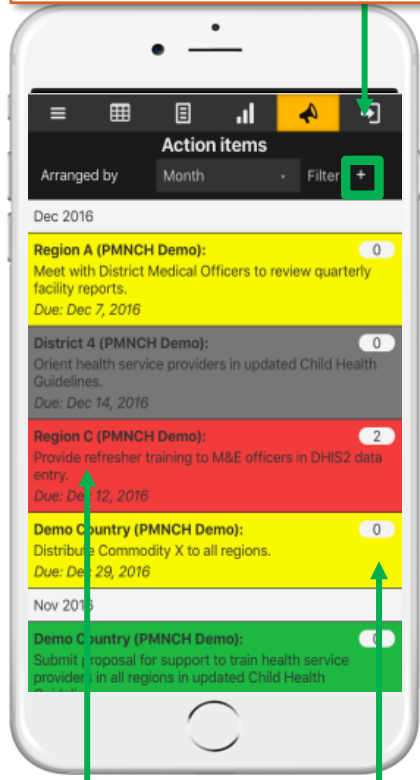
Clicking on an existing action item allows for editing.

Click on the on the icon to add or edit a Comment.

Note that syncing new and edited action items to the action item tracker requires network connectivity.