

WINPACCS® CLOUD

Die integrierte Softwarelösung für internationale Hilfsorganisationen



Project planning and monitoring

Michael Bork, mbi GmbH

Workshop 01

SYMPOSIUM 2019



Michael Bork

Head of Conceptual Design



05.11.2019

Block I (11:45-12:30)


Project planning and monitoring

Discover a new functional area in WINPACCS in this *Project planning and monitoring* workshop. Learn how WINPACCS can enhance your project planning by creating Logframes and GANTT diagrams and all about the extensive functions it offers for impact monitoring.

Agenda


1. Project planning
2. Project management
3. Monitoring
4. Outputs or activities as a budget structure



Open > Project planning and monitoring


 **WINPACCS® CLOUD**


17.001 Community Health & Rural Development N...


michael.bork@partindev.org
Partner in Development


 > [Projects](#) > 17.001 Community Health & Rural Development Nepal


 | 



Project master data



Project funding



Journals



Bank details



Cashbooks



Project chart of accounts



Budget structures



Cost category groups



Budgets



Data packets



Assigned users and persons



Partner



Project data overview


Downloads


Project log


Postings
(WINPACCS Accounting 4)


Project controlling


Project planning and
monitoring

Three different sections

- Project planning
- Project management
- Monitoring

Project planning

Goal of Project planning section

User-friendly and structured entry of information for project planning based on the Logical Framework Approach with the following elements:

- Development goal
- Project goals
- Outputs
- Activities
- Assumptions relating to project goals and outputs
- Indicators

Project planning – compact view

WINPACCS® CLOUD

Planning compact

[michael.bork@partindev.org](#)
 Partner in Development

[Home](#) > [Projects](#) > [17.001 Community Health & Rural Development Nepal](#) > [Project planning and monitoring](#) > [Planning compact](#)

Navigation

Project planning

Planning compact

Logical framework

Project management

Default

Monitoring

Default

New

Display

Save view

Print

Export

Configuration

Documents

Search

Drag a column header here to group by that column.

Code	Level	Abbreviated name	Description
IM	Impact	Improved food security and livelihoods in Nepal	Improved food security and livelihoods of rural populations in Nepal
OU	Outcome	extended community-based health education	The people in Far Western Nepal in the districts Bajura and Mugu, have extended community-based health education and support in conjunction with sustainable rural development.
01	Output	Improved crop production and productivity	Improved crop production and productivity
01.01	Activity	Restoration of the indigenous seed sys	Support the restoration of the indigenous seed system.
01.02	Activity	Community-based seed production and supply.	Community-based seed production and supply.
01.03	Activity	Provide agricultural inputs	Provide agricultural inputs (direct distribution of seeds and tools, voucher and fair schemes, etc.).
01.04	Activity	Establish community seed banks	Establish community seed banks

User-friendly data entry of an element

WINPACCS® CLOUD

03 Direct discharge of wastewater households/fact...

michael.bork@partindev.org
Partner in Development

Home > Projects > 17.001 Community Health & Rural Development Nepal > Project planning and monitoring > Logical framework > 03 Direct discharge of wastewater households/factory

Navigation < Back Edit Delete Archive + New indicator Show indicator Print

Project planning

Planning compact

Logical framework

Project management +

Default

Monitoring +

Default

Code

Level

Contribution to

03

Output

OU extended community-based health education

Abbreviated name

Direct discharge of wastewater households/factory

Description

Direct discharge of wastewater by households and factories decreased

Indicators

Search

Drag a column header here to group by that column.

Num...	Indicator	Indicato...	Source ...	Starting...	Starting...	Final tar...	Final tar...
1	70 % of wastewater produced by factories is treate	70 % of wastewater produced by factories is treated in plants	Survey report of Municipalities	1/1/2019	50.00 %	12/31/2020	70.00 %

Project planning – Logical framework view

Logical framework

pidsupport@mbi.de
Partner in Development

[Home](#) > [Projects](#) > [17.001 Community Health & Rural Development Nepal](#) > [Project planning and monitoring](#) > [Logical framework](#)

Navigation

Project planning

Planning compact

Logical framework

Project management

Default

Monitoring

Default

New

Display

Print

Export

Configuration

Documents

B

I

U


	Impact			
	IM Improved food security and livelihoods of rural populations in Nepal			
	Outcome			
	OU The people in Far Western Nepal in the districts of Bajura and Mugu have better access to food, higher income and improved environmental conditions.	OU.I1 Cluster approach applied and implementing agriculture and food security cluster plans that comply with FAO's technical criteria for such plans.	Yearly country reports FSL Cluster reports	OU.A1 Security situation remains stable. OU.A2 Climatic conditions are advantageous for the harvest. OU.A3 The Nepalese Rupee remains stable.
	Output			
	01 Improved crop production and productivity	01.I1 Households provided with agricultural inputs and extension services increase area cultivated and average yield. A total of 800 households will be advised.	Training reports	OP.A1 A conducive environment for households to engage in production (stable security, reliable rainfall, etc.).
	02 Improved livestock health and	02.I1 Improved access to both veterinary	M&E and progress reports	

Logical framework – print preview

Project 17.001

Logical framework

Last updated on 10/29/2019



Project number

17.001

Project

Community Health & Rural Development Nepal

Project duration

7/1/2017 - 10/31/2020

Country

Nepal

Description	Indicators	Source of evidence	Assumptions	
Impact				
IM Improved food security and livelihoods of rural populations in Nepal				
Outcome				
OU The people in Far Western Nepal in the districts of Bajura and Mugu have better access to food, higher income and improved environmental conditions.	OU.I1 Cluster approach applied and implementing agriculture and food security cluster plans that comply with FAO's technical criteria for such plans.	Yearly country reports FSL Cluster reports	OU.A3 The Nepalese Rupee remains stable. OU.A1 Security situation remains stable. OU.A2 Climatic conditions are advantageous for the harvest.	
Output				
01 Improved crop production and productivity	01.I1 Households provided with agricultural inputs and extension services increase area cultivated and average yield. A total of 800 households will be advised.	Training reports	OP.A1 A conducive environment for households to engage in production (stable security, reliable rain etc.).	
02 Improved livestock health and production.	02.I2 Decreased incidence of livestock disease outbreaks from 8% to 4% annual incidence of disease among livestock.	M&E and progress reports Assessment reports Training reports		
	02.I1 Improved access to both veterinary services and service delivery. At least 1,000 households out of 20,000 have access to veterinary services.	M&E and progress reports Assessment reports Training reports		
03 Direct discharge of wastewater by households and factories decreased.	03.I1 70% of wastewater produced by factories is treated in plants	Survey report of municipalities		
	03.I2 80% of wastewater produced by households is treated in plants by 2025	Survey report of municipalities		
Activity				
01.01 Support the restoration of the indigenous seed system. 01.02 Establish community-based seed production and supply. 01.03 Provide agricultural inputs (direct distribution of seeds and tools, voucher and fair schemes, etc.).				

10/29/2019 12:04:21 PM

Support, mbi (pidsupport@mbi.de)

WINPACCS® CLOUD

Page 1 of 2

Monitoring

Aim of this section

- Enables the entry and recording of indicators and measured values for impact monitoring
- Indicators can be monitored and managed

Monitoring

<div> <div>Navigation</div> <div> <div>+ New indicator</div> <div>Show indicator</div> <div>Print</div> <div>Export</div> <div>Monitoring view</div> </div> <div> <div>Configuration</div> <div>History</div> <div>Documents</div> </div> </div>										
<div> <div>Project planning</div> <div>Planning compact</div> <div>Logical framework</div> <div>Project management</div> <div>Default</div> <div>Monitoring</div> <div>Default</div> </div>										
<div> <div>Drag a column header here to group by that column.</div> <div> <div>←</div> <div>≡</div> <div>🔍</div> <div>⌵</div> <div>↺</div> <div>Search</div> <div>🔍</div> </div> </div>										
Code indica...	Indicator d...	Starting val...	Final target ...	Actual value	Target value	Unit	Indicator pr...	Person resp...	Status	
OU.I1	Cluster approach applied and implementing agriculture and food security cluster plans that comply with FAO's technical criteria for such plans.	Very Bad	Very Good	Bad	Average			Doe, John	● in difficulties	
01.I1	Households provided with agricultural inputs and extension services increase area cultivated and average yield. A total of 800 households will be advised.	0 household	800 household	220 household	300 household	household	27.50 %	Doe, John	● Deviation	
	Improved both access to veterinary services and service									

Master data of indicator

▼ Master data

Assigned level

Output

Assigned element

01 Improved crop production and productivity

Indicator number

1

Code indicator

Indicator type

Number

Unit

household

Indicator

Households provided with agricultural inputs

Indicator description

Households provided with agricultural inputs and extension services increase area cultivated and average yield. A total of 800 households will be advised.

Person responsible

Doe, John (michael.bork@partinddev.org)

Deputies

Smith, John (andre.scharmann@partinddev.org)

Explanations

Indicator type

- Selection of either: units or scale

Unit

- Units can be defined by the organisation, for example percent, persons or square kilometres. All measured values are recorded in this unit.

Explanations

Scale

- Qualitative entry possible. Scales can be defined by the organisation, e.g. "very good, good, average, poor, very poor".

Progress planning

- Entry of target values and target date

▼ Progress planning

Measuring interval
quarterly

Starting value

Starting date

0 households

1/1/2019

Final target value

Final target date

800 households

12/31/2020

Target figures

No. target value	Target date	Target value
1	3/31/2019	100 households
2	6/30/2019	200 households
3	9/30/2019	300 households
4	12/30/2019	400 households

Add measured value

Add actual value

Target date

12/30/2019

Target value

400 household

Target date met

Yes

Actual date

12/30/2019

Actual value

380

household

Measured value status

Deviation

Entered by

e, John (michael.bork@partindev.org)

Action required

No

Risk monitoring

Comment on the actual value

Add

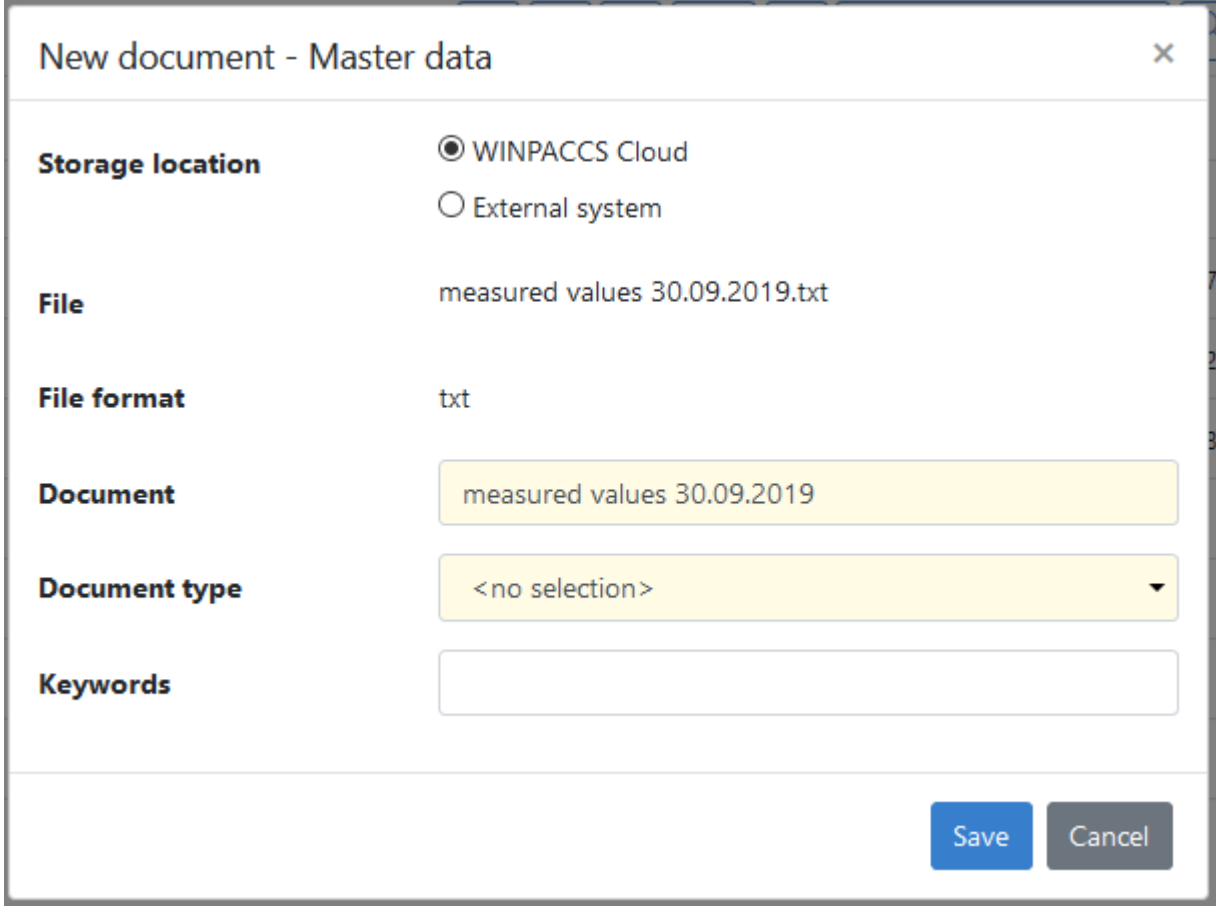
Cancel

Target/actual comparison of an indicator

<div> <div> <div></div> <div></div> <div></div> <div></div> <div></div> </div> <div>Search</div> <div></div> </div>								
Drag a column header here to group by that column.								
Actual date ▼ 1	Target date ▼ 2	Actual ...	Target ...	Deviati...	Indicat...	Measu...	Entere...	Ac
9/30/2019	9/30/2019	220 household	300 household	80 household	27.50 %	Deviation	Doe, John	Ye
6/30/2019	6/30/2019	180 household	200 household	20 household	22.50 %	as planned	Doe, John	Nc
3/31/2019	3/31/2019	70 household	100 household	30 household	8.75 %	Deviation	Doe, John	Nc

- Actual date
- Target date
- Actual value
- Target value
- Deviation target/actual
- Indicator progress (%)
- Measured value status
- Entered by
- Action required
- Risk monitoring
- Target/actual deviation (%)
- Entered on
- Entered by
- Comment on actual value

Uploading documents to an indicator



The screenshot shows a dialog box titled "New document - Master data" with a close button (X) in the top right corner. The dialog contains several fields for document configuration:

- Storage location:** Two radio buttons are present. The first, labeled "WINPACCS Cloud", is selected with a filled circle. The second, labeled "External system", is unselected with an empty circle.
- File:** A text field containing the value "measured values 30.09.2019.txt".
- File format:** A text field containing the value "txt".
- Document:** A text field containing the value "measured values 30.09.2019".
- Document type:** A dropdown menu with a yellow background and a downward arrow on the right. The current selection is "<no selection>".
- Keywords:** An empty text field.

At the bottom right of the dialog, there are two buttons: a blue "Save" button and a grey "Cancel" button.

Project management

Project management – aim of this section

- Additional possibility to create sub-activities
- Clear presentation of all outputs, activities and sub-activities in a bar chart and detailed time scheduling of these elements
- Option to view costs and budget compared to time progress
- Supplementing the planning data with a lot of additional information
- Project management functions

Project management

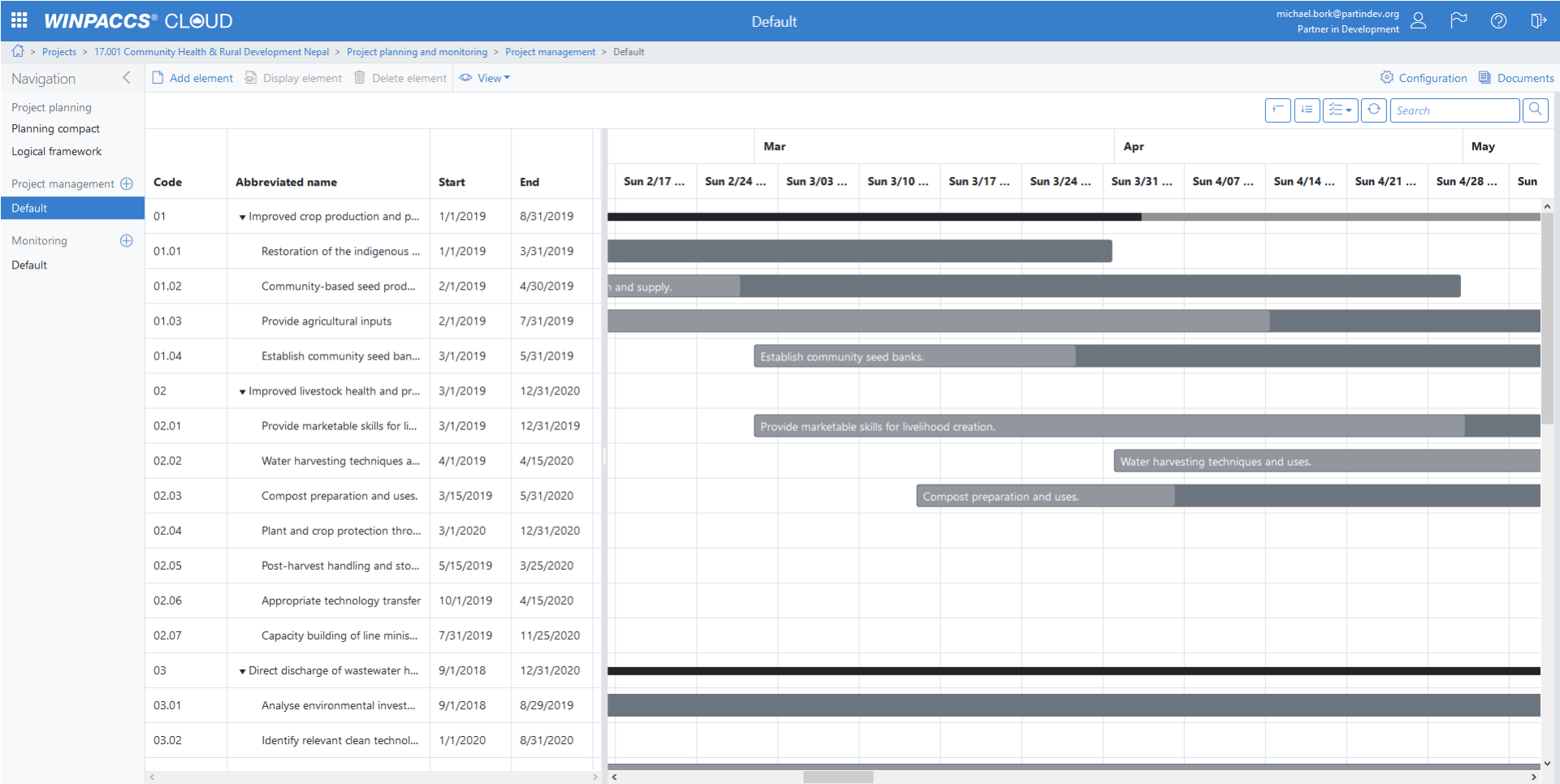


Table columns

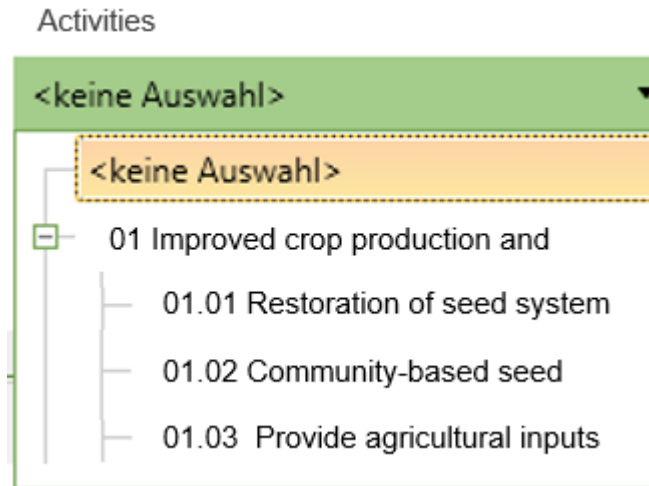
- Code
- Level
- Abbreviated name
- Start
- Planned start
- Finish
- Planned finish
- Duration in days
- Person responsible
- Deputies
- Deadline status
- Status display
- Time-based progress (%)
- % finalised
- Created by
- Created on
- Last change by
- Last change on

Outputs/activities/sub-activities as a budget structure

Outputs, activities or sub-activities as a budget structure

- Outputs, activities or sub-activities can be created as a budget structure
- Budget values can be assigned to budget lines
- Costs can be assigned to outputs, activities or sub-activities in the project accounting

Outputs/activities/sub-activities as a budget structure



Project management

Code	Abbreviated name	Time-based pr	% finalised	Budget (EUR)	Costs (EUR)	Budget spent (%)	Mar	Apr	M
01	▼ Improved crop production and productivity	100.00 %	38.00	19,000.00	0.00	0.00 %			
01.01	Restoration of the indigenous seed sys	100.00 %	20.00	10,000.00	0.00	0.00 %			
01.02	Community-based seed production and supply.	100.00 %	30.00	2,000.00	0.00	0.00 %			
01.03	Provide agricultural inputs	100.00 %	40.00	3,000.00	0.00	0.00 %			
01.04	Establish community seed banks.	100.00 %	30.00	4,000.00	0.00	0.00 %			
02	▼ Improved livestock health and production	35.71 %	40.00	33,560.00	0.00	0.00 %			
02.01	Provide marketable skills for livelihood creation.	78.43 %	20.00	7,500.00	0.00	0.00 %			
02.02	Water harvesting techniques and uses.	54.86 %	10.00	5,000.00	0.00	0.00 %			
02.03	Compost preparation and uses.	50.90 %	5.00	360.00	0.00	0.00 %			
02.04	Plant and crop protection through integrated ...	0.00 %	80.00	4,500.00	0.00	0.00 %			

Controlling – table columns

- Budget
- Costs CC
- Residual budget
- Residual budget (%)
- Budget spent (%)
- Quantity
- Unit of quantity
- Target quantity
- Residual quantity
- Residual quantity (%)
- Planned costs
- Planned revenue
- Planned contribution margin
- Planned contribution margin (%)

Any questions?