LEGAL SERVICES FACILITY

Monitoring & Evaluation System

User Guide

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24th February 2014

1   User Guide Summary

This user guide summaries the different features and functionalities within the LSF monitoring and evaluation system.

The user guide is classified into four main sections:

a. **System administration tasks**
This section will highlight different functionalities required to be set up before other sections of the system can be used. The system administration tasks will explain different content like wards, regions, districts, paralegal position etc which will be defined here and be accessible where required.

b. **Users access categories**
This section will explain different roles and accessible features to the given user access level. Depending on the defined user access category, each user will only be able to access authorized content.

c. **System access**
This section will explain how the M&E system can be accessed online and required regarding username, changing password and retrieving a forgotten password.

d. **System features**
This section will highlight all the other features for data collection, processing and reporting to be accessed under different user categories.

Content validation
For each form for adding data, the system has a built in feature for checking nature of input making it matches the expected defined input nature.

Mandatory fields check
For each form, fields which must be filled in before data is added into the database will be highlighted in red when user hovers the mouse over them. A popup notification will also show in case user will try to submit data without filling in such mandatory fields.

2   System Administration Tasks

The system administration tasks are reserved for users with privileges to add definition features of the system. Each submenu under Admin Tasks main menu will be accessible to a privileged user who can add and edit the content.

The contents under Admin Tasks are:

a. **Population**
   Section for defining expected population for the given district, to be used as denominator for population based reports.

b. **Occupation**
   Submenu for managing (adding, editing) occupation to be associated to different clients and paralegals to be added into to the system

c. **Regions**
   Submenu for managing regions names, regions to be added under this submenu will be accessible as a dropdown selection menu item when other users register grantees, clients, meeting details etc

d. **Districts**
   Submenu for managing operational districts linked with regions above. Other system features/content like definition of grantees; paralegal units require them to be assigned a district.

e. **Wards**
   Submenu for managing names of wards in different districts, adding ward details will require user to first select region and district where the ward is located.

f. **Paralegal positions**
   Submenu for defining paralegals roles within their grantees' organizations; some of the initial positions include secretary and chairperson.

g. **Paralegal Training Modules**
   Submenu for adding and managing different modules which will later be selected to be associated with paralegal trainings conducted.

3   User Access Categories

The M&E system has four main user access categories:

a. **LSF STAFF**
   User classified as LSF staff will be able to access menu sections as per selected features of roles assigned during user registration.

Figure 1: Menu options to be associated with LSF Staff during new user registration

Note: For roles like paralegals, legal clients, any user from LSF staff category will only be able to access content added by grantees users but he/she will not be able to add or edit content.

b. Grantee administrator

Users defined as grantee administrators will be responsible with adding and editing data for menu access points to be accessed by grantees' users.

In addition grantee administrators will also be able register new users who will be linked with their organizations and be able to add more. These users added by grantee administrators will not be privileged to register new users.

Note: Each user added as grantee administrator or users to be added by the registered grantee administrators will only be able to access data associated with their own organization only.

c. Donor/Partner user

This category is for users who will be added and be privileged ONLY to access the dashboard and reports categorized as Donors and Partners reports.

d. TLS Staff

TLS staff user category will be assigned to users who can access the dashboard with summary data from all organizations and accessing the Training menu for registering and managing TOT Trainings.
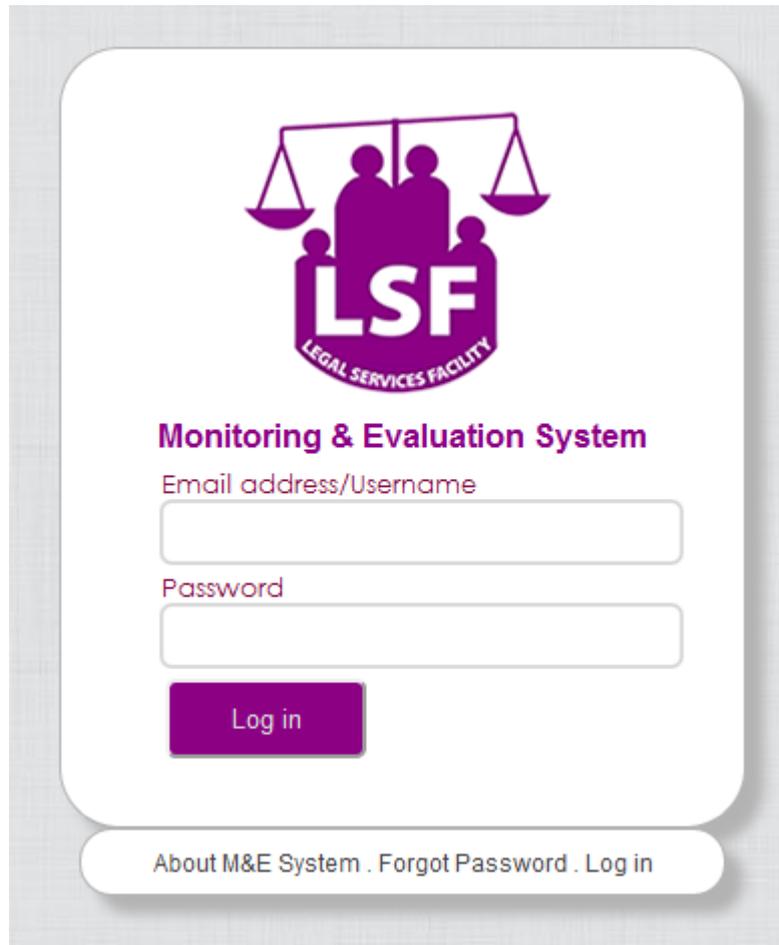
4   System Access

4.1   Login

The LSF M&E system can be accessed on **www.lsftz.org/me**. for users who were registered before the Afrimax consult maintenance changes, they can log in using either their username or email address and password.

For users who were registered after Afrimax consult there will only be able to log in using their email and password only.

For all new users, an email will be sent to them to notify them about the registration of the new account. Upon first login, each user will be required to change the auto-generated password sent to them in the notification email.

Figure 2: LSF M&E log in page

Figure 3: LSF M&E first login, change password page

Note: The login page also offers a link to the About M&E System which provides the objective and other descriptive content about the system.

4.2   Forgotten Password

Upon login, for users who will forget their password, they can click the Forgot Password link at the bottom of the login form. The link will take users to the page for submitting their request by filling in their registered email address.

Once the request is submitted, user will be sent a notification email with a link to follow for resetting the password. Each user can access for password reset only once. The reset password link will allow the given user to create his/her new password

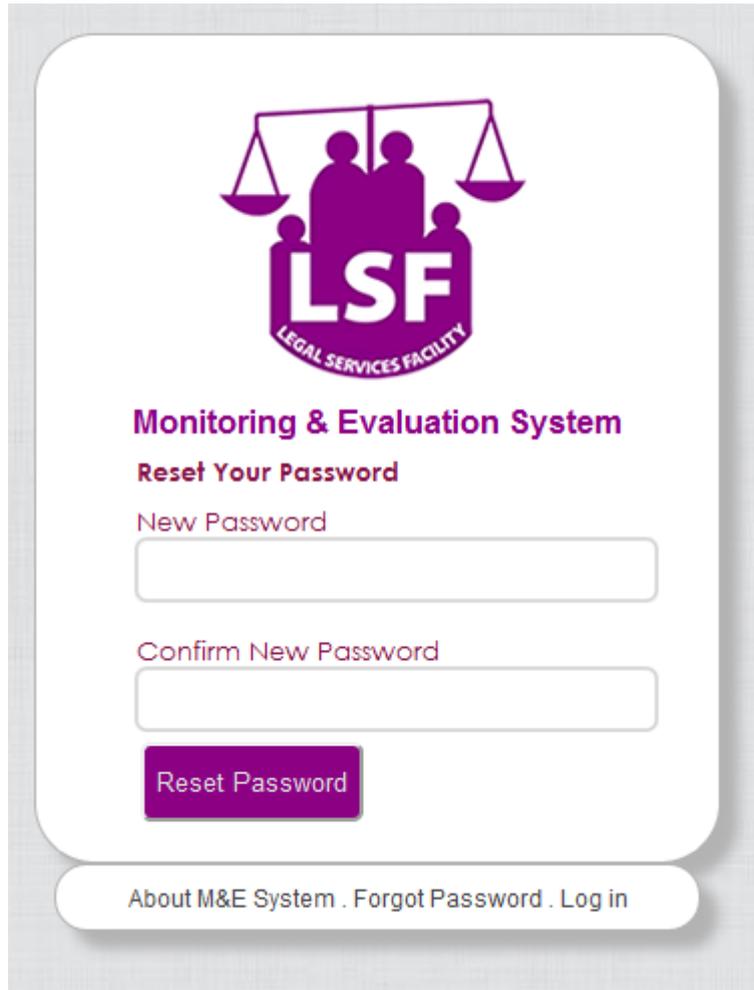Figure 4: Page for submitting user's email in case of a forgotten password

Figure 5: page for resetting a forgotten password

4.3   Change password

Once a user is logged he/she can still change his/her password after accessing the change password link of the user's logout menu section on the right hand of the M&E system layout.

The logout menu bar also contains links to the help page and display the registered name of the current logged in user.

Figure 6: Circled in blue, link for accessing the change password page

Change Password
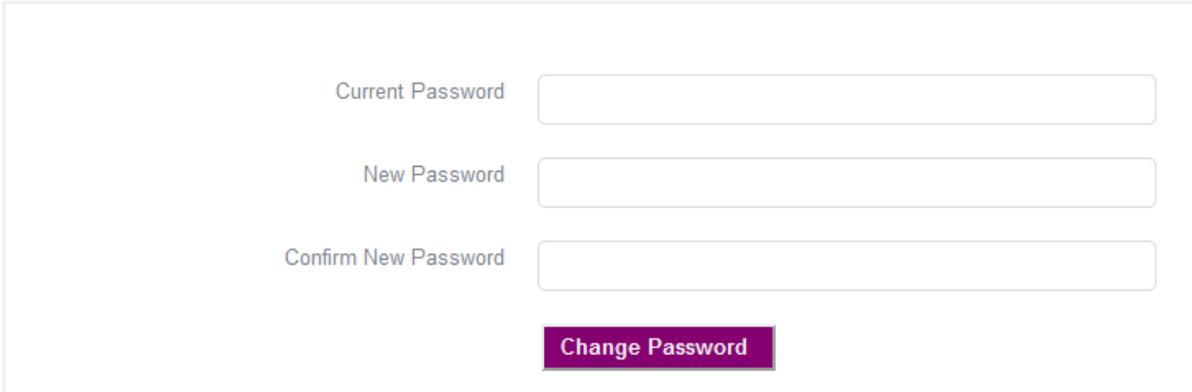
| Current Password | |
| Confirm New Password | |

Change Password

Figure 7: Form for changing user's password

4.4 Logout

On the logout menu bar, users can access the logout link which will automatically end the current logged in user's session and take the given user onto the login page.

5 System features

5.1 Dashboard

The dashboard is the first page to be accessed by a logged in user. For LSF staff, donors and TLS categories of users, the dashboard page will display summary statistics for data from all grantees. For users registered under grantee administrator category and those added by grantee administrators, they will access a dashboard page with data summary of their own organization.
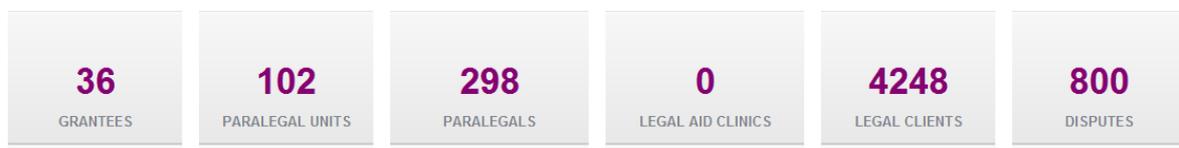
Dashboard

| 36 | 102 | 298 | 0 | 4248 | 800 |
| GRANTEES | PARALEGAL UNITS | PARALEGALS | LEGAL AID CLINICS | LEGAL CLIENTS | DISPUTES |

Figure 8: Screenshot of the dashboard

5.2 Grantees

The grantees menu will only be accessible to LSF staff added with privilege to access it. This menu will be used for registering names and descriptive details of all LSF grantees.

Upon adding grantee details, the system is designed to check for all mandatory fields, a reminder will be displayed in case user wants to register grantee details without filling in all the mandatory fields.
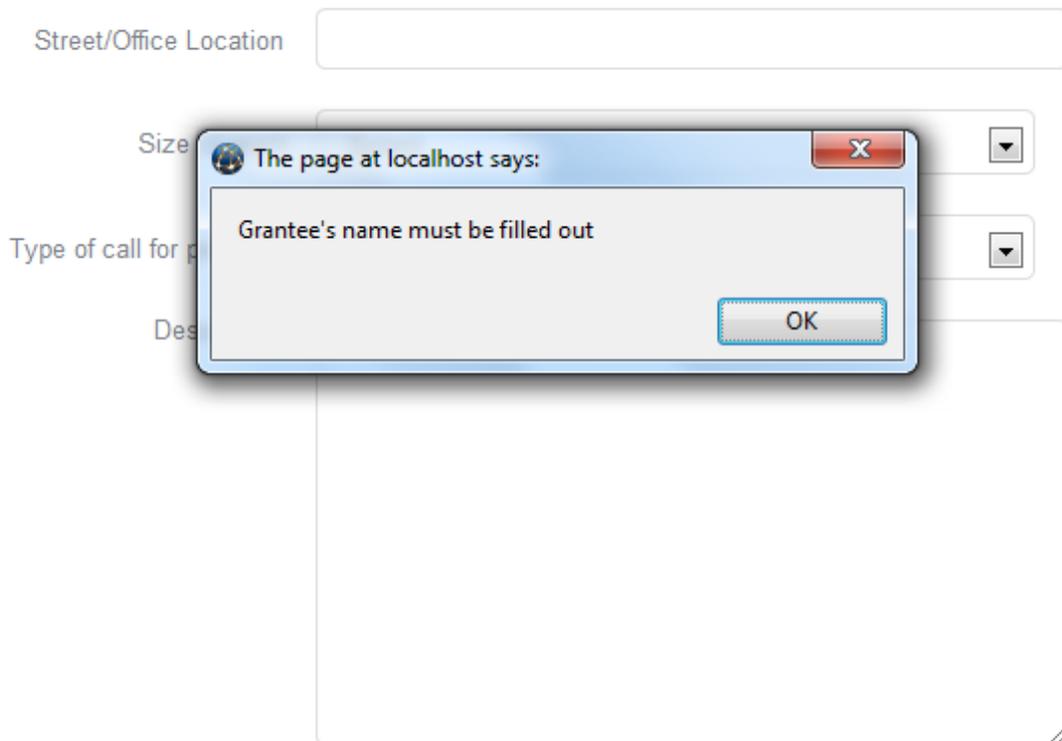
Figure 9: Sample notification message when user tries to register grantee details without filling in the grantee name

For each grantee details added, users can edit the information added or choose to delete all information. For deleting grantee details user can choose to follow a delete menu on the given grantee row details or select the checkbox for deleting grantee on the edit page.

Before deleting the details, a notification will be displayed for user to confirm if he/she wants to delete the details.

Grantee	Abbreviation	Phone	Email	District	Website	Size of grant	Register Provider	
Legal Services Facility	LSF	+255222781061	info@lsftz.org	Kinondoni	http://www.lsftz.org		Edit	Delete
Zanzibar Legal Services Centre	ZLSC	+225242233784	zlsc@hudumazasheria.com	Mjini	http://www.zlsc.or.tz		Edit	Delete

Figure 10: delete option on the grantee's details row

Figure 11: check box to be selected on the edit page if user wants to delete grantee details
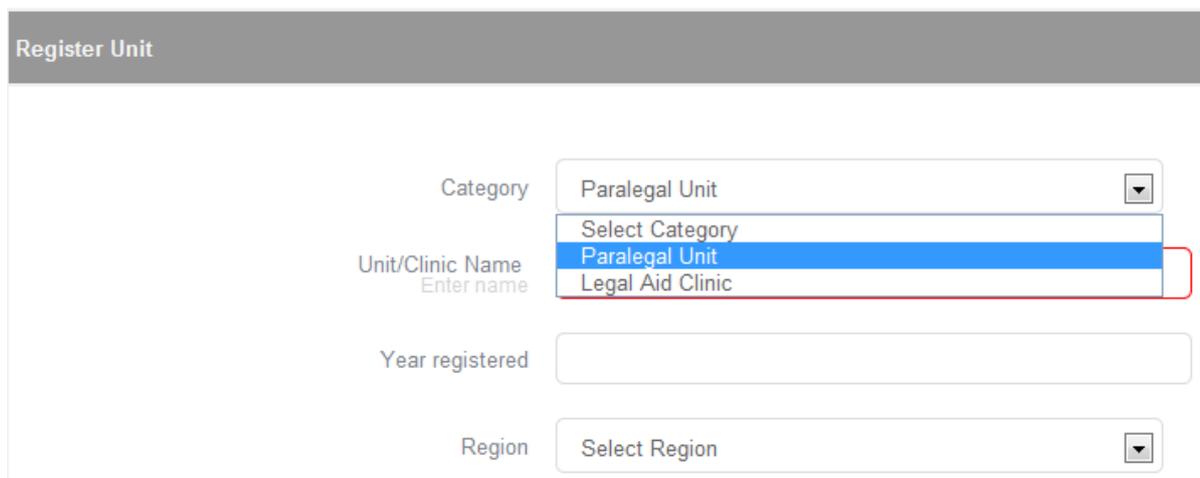

Figure 12: Notification message for user to confirm if he/she wants to delete grantee's details

5.3   Paralegal units & legal aid clinics

This menu section will be accessible to three user levels categories

a. **LSF Staff**
    LSF staff will only be able to view a list of added units and legal aid clinics but will not be able to register a new unit or clinic.

b. **Grantee administrator**
    This user level will be privilege to add and edit content for the units and clinics associated with their organizations

c. **User added by Grantee administrator**
    Similar to grantee administrator, this user level category will be able to add and edit units and clinics associated with their organizations.

Both paralegal units and legal aid clinics are managed under same section; they can only be differentiated by selected category during registration. Selecting Paralegal unit under Category menu item will instruct the system to associated information to be added as Paralegal unit data, the same applies if user will select Legal Aid Clinic

Figure 13: Selection of categories during registration of paralegal unit or legal aid clinic

5.4   Paralegals and Lawyers

This menu section will be accessible to three user levels categories

a. **LSF Staff**
LSF staff will only be able to view a list of registered paralegals and lawyers but will not be able to add or edit data submitted.

b. **Grantee administrator**
This user level will be privilege to add and edit content of paralegals and lawyers associated with their organization. Upon adding paralegal's or lawyer's profile, system will automatically populate list of paralegal units or legal aid clinics which should be associated with the paralegal's or lawyer's profile.

c. **User added by Grantee administrator**
Similar to grantee administrator, this user level category will be able to add and edit paralegals and lawyers details

5.5   Legal clients

Registered grantee administrators and other users will be privileged to register clients served by their organizations. All mandatory fields are highlighted in red colour upon hovering and the system will provide popup notifications in case one field is missed.

Each client need to be registered with his/her birth year which can be used to generate his/her age during registration.

LSF staff privileged to access legal client's details will only be able to view list of clients from all organizations but not be able to edit the information or add new client.

5.6   Disputes

This menu is reserved for registering disputes of registered clients. Upon registering a case/dispute, users will be required to first select client details to link him/her with the dispute details.

Each dispute will be associated with three possible statuses (stages) continued, referred and resolved.

Figure 13: Form for registering disputes

Note: once the dispute is registered a change of status should be registered through editing the registered dispute and not adding the dispute as a new one with its new status.

5.7 Trainings

The system has three categories of trainings to be added

a. TLS TOT trainings

User under the TLS user category will be responsible to register the TLS TOT trainings. For each training on the display page of trainings for the given organization a count of number of participants will be displayed.

Clicking on the Participants (#) will direct user to the page with details of all registered participants for the given training.

NOTE: Registered participants for TLS trainings will be used as facilitators' options for paralegal trainings to be registered.

b. Paralegal trainings

Each organization will be charged with the possibility to register paralegal trainings. Each paralegal training will have three main data sections

- **Training data:** this will constitute the main information of each training including selection of modules trained, training location and dates.

- **Facilitators' data:** each training requires a registration of facilitators. User will be required to choose if the facilitator they want to add is TLS trained or not. If facilitator is TLS trained, a dropdown menu will appear allowing user to choose facilitators among those by TLS's TOT trainings.
- **Participants' data:** each training also requires a list of participants to be registered. For each participant, individual level data like first name, middle name and contacts will be added.

c. **Other non-paralegal trainings:**

This menu is for different grantees to register other trainings they offer to their staff.

5.8 Workshops

Workshop menu is accessible to both LSF staff user category and grantee level user category. This is intended for registering different workshops conducted by LSF or grantees.

Each workshop has a link of participants' count which once clicked leads to the page with registered participants and link for registering participants.

5.9 Meetings

This menu is reserved for grantee level user category to register community sensitization meetings their conduct in different areas.

Each meeting profile requires users to register meeting details like location and description regarding meeting purpose. Grantees can also register number of participants for the given meeting. This will include a general count of male and female participants and a count of LSF staff who attended the training.

5.10 Reports

System reports are categorized in three main areas:

a. Grantee reports
b. Management reports
c. Donors and partners report

Each category of reports will access the following reports summarized different to suit needs of their category

- **Disputes:** summary of disputes received by location and grantees
- **Cases resolved:** summary of cases received and resolved by grantees and location
- **Cases received by age:** summary of cases received per given age group
- **Paralegals:** summary of paralegal and paralegal units per grantee and location

- **People trained:** summary of individuals trained in different categories of trainings conducted by grantees
- **Quarterly performance:** These reports will be accessed by grantee users and LSF staff only. Grantee users will be allowed to define the reporting period and generate report for the given timeframe.

Figure 14: Form for generating quarterly reports by grantee

Start date: Report's start date, this should be the start of the period to be reported for

End date: Report's end date, this should be the end date of the expected reporting period

After generating the report, clicking View Quarterly Reports on the top right, will take user to the page with all the reports generated.

Figure 15: Page for viewing all reports with link for viewing report details (rounded in blue)

Clicking the View details link on all reports page will take user to the extended details page for the given report. The extended report has a link (top right) for exporting the report into MS word format for printing purposes.

Figure 15: Page for viewing all reports details with link for exporting the report (rounded in blue)