

Response Planning And Monitoring Module (RPM)

User Guide

Version 1.0

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1. Introduction

This document is a guide to using HPC Tool's Response Planning and Monitoring (RPM) platform. It is aimed at field users responsible for using RPM to create and monitor the framework for humanitarian response plans. The guide introduces users to the functions and purpose of RPM, provides step-by-step instructions on how to create plan frameworks and upload monitoring data, and aims to address common questions and concerns addressed by the field.

The document is split into four primary sections:

- **RPM Overview:** In this section, we give a brief overview of what RPM is and how it connects to other HPC tools.
- **RPM Framework:** In this section, we highlight the importance of creating a cohesive framework for your response plan, how to initiate the set-up of a response plan in RPM, and how to properly complete the framework, with step-by-step directions.
- **Monitoring Application:** In this section, we explain how to best use RPM for monitoring your plan. This includes the prerequisites for starting the monitoring process, how to upload monitoring data manually and in bulk, and introductions to several related topics that will facilitate the process.
- **Frequently Asked Questions:** In this section, we address questions and concerns commonly raised by RPM users in the field.

If you have further questions that are not addressed in this document, we recommend trying the following resources:

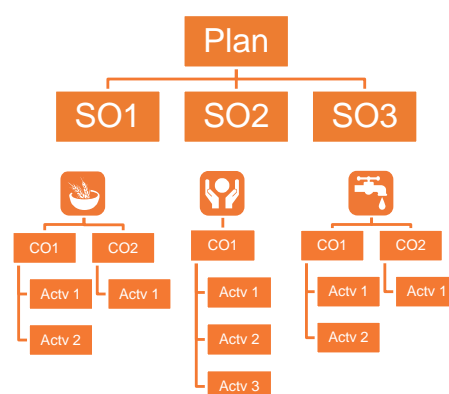
- [Response Planning and Monitoring \(RPM\) Tutorial](#): This video provides a step-by-step guide to uploading cluster frameworks, plan and cluster caseloads and cluster costs on RPM
- [Using RPM for Monitoring](#): This collection of short, accessible video guides addresses topics such as accessing RPM, uploading monitoring data, and how data in RPM is reflected in Insight.
- [KMP site for HPC Monitoring](#): This page on OCHA's Knowledge Management Platform (KMP) contains more (non-RPM) information on monitoring the Humanitarian Program Cycle (HPC), including guidance, templates, and presentations
- Microsoft Teams support chat: For any other enquiries please do not hesitate to contact HPC Tools HPC HQ through your country's designated Teams chat.

2. RPM Overview

The strategic framework is at the heart of any Humanitarian Response Plan (HRP). It provides the logical framework that guides implementation both at a strategic level – with inter-sectoral strategic objectives and key outcome indicators – and at operational level, with cluster- and sector objectives, activities, and output indicators.

The RPM tool manages the creation and subsequent monitoring of the strategic framework at the inter-cluster and cluster levels, supporting first the HRP planning process, and then the periodic monitoring processes throughout the year.

In doing so, it provides OCHA Field Offices with an essential service to support the existing workflows which they already implement. Instead of managing strategic frameworks through Excel and Word templates which are sent via email and manually assembled, RPM brings this process online. Through simple, easy-to-use interfaces, RPM enables OCHA, cluster coordinators, and cluster IMOs to manage their area of the strategic framework, while providing them the opportunity to extract and share information with partners, donors and other stakeholder involved.



2.1 How RPM connects to HPC Tools

RPM is the entry into OCHA's suite of tools (**HPC tools**) that assists humanitarians in planning and monitoring their collective humanitarian response.

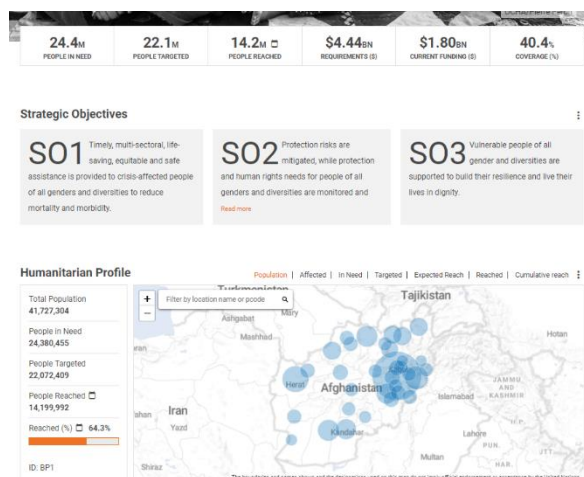
HPC tools are the information services provided by OCHA which enable the humanitarian community to manage the structured information around the HPC: needs indicators, strategic and cluster plan frameworks, response indicators, activities and projects, and financial requirements and attributed funds.



These tools are joined by a common data architecture that allows information entered in one tool to be immediately used in all other tools. This means that data must only be entered into HPC tools once but can be re-used for many different purposes. The short overview below demonstrates how data entered into RPM is used by the different HPC Tools.

2.1.1 Humanitarian Insight

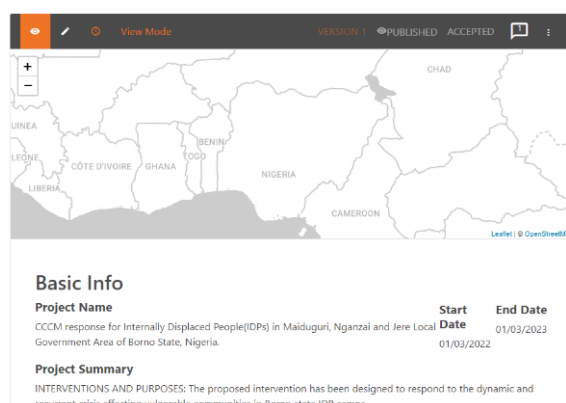
Humanitarian Insight acts as the presentation layer for the HPC Tools. It pulls needs and planning data from RPM, including the plan framework (humanitarian conditions, strategic objectives, specific objectives and all associated caseloads and indicators), cluster framework (cluster objectives, cluster activities, and all associated caseloads and indicators), and the latest monitoring data available. Insight then displays this information alongside funding data from the Financial Tracking Service (FTS) and project data from the Project Module (PM) to give donors, governments, partners, and the public a clear overview of the state of your humanitarian response, enabling more effective decision making and advocacy. For more information on Humanitarian Insight see the [guidance documentation on KMP](#).



2.1.2 Project Module (PM)

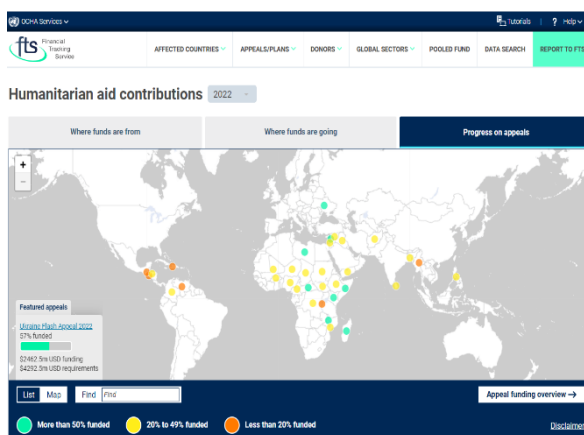
The **Project Module (PM)** is the portal where partner organizations can register projects against a response plan. The framework set up in RPM forms the basis for the project forms used in PM to guide partners through the process of planning their activities. This includes defining which cluster objectives and activities their project is aligned to, the indicators they will be using to measure progress, and the disaggregated population groups or geographical areas they are targeting. This ensures that projects are aligned with the goals and targets established by the clusters and HCT during the HPC planning process. For more information on the Project Module, see the [guidance documentation on KMP](#).

CCCM response for Internally Displaced People (IDPs) in Maiduguri, Nganzai and Jere Local Government Area of Borno State, Nigeria.



2.1.3 Financial Tracking System (FTS)

The **Financial Tracking System (FTS)** is a centralized source of data and information on humanitarian funding flows. For project-costed plans, publishing via the “major publish” feature on RPM will turn the status of all accepted projects to published. The sum all published project requirements will then display as the total requirements for the plan on FTS. For unit-based costed (cluster costed) plans, publishing via the “major publish” feature on RPM will result in FTS displaying the funding requirements entered as “cost attachments” in RPM as the total requirements of the plan. For more information on FTS, see the [guidance documentation on the FTS website](#).



2.1.4 Planning and Monitoring Bridge Tools

2.1.4.1 Planning Bridge Tool

The Planning Bridge Tool visually presents the activities and targets for a response plan outlined in RPM against the activities and targets proposed by partners and uploaded into Project Module. This allows partners to better align their projects according to the needs and targets defined by the clusters and it provides the clusters more oversight into the activities of project planning organizations. This gives cluster coordinators the chance to step in sooner and address potential gaps and duplications in project activities, steering partners towards priority activities, populations, and geographical areas. For more information on the Planning Bridge Tool see the [guidance documentation on KMP](#).

Education	Emergency Shelter and NFI	Food Security	Health	Multi-Purpose Cash	Nutrition	Protection
Indicator Description				Target	Partners Target PM	
Number of security threat information (STI) shared to humanitarian partners in BAY states				100	100	
Number of common operational areas covered by common security telecommunications network				10	10	
Number of common operational areas covered by internet connectivity services				8	8	
# of joint assessment conducted with other sectors such as Food security, WASH, Health				12	52	
Number of initial Rapid assessments conducted				24	28	
Number of security risk analysis and assessments conducted				10	40	
Number of security briefings conducted in the BAY states				30	500	
Project Name				Partner Organization Name		
Emergency Assistance and Early Recovery Project to Improve the livelihoods and Food Security for Conflict and COVID-19 Affected Population in Borno and Yobe States, Nigeria.				Action Against Hunger (9257)		
Enhancing food security and livelihoods in Borno and Yobe States, Nigeria				Action Against Hunger (9257)		
NFI and Shelter- multi-sectorial humanitarian emergency response for affected women, men, boys and girls including people with disability				Action Against Hunger (9257)		
Provision of Emergency integrated Nutrition and Health interventions to vulnerable population in Borno and Yobe states, Nigeria				Action Against Hunger (9257)		
WASH emergency response to the most affected Women, men, Boys and Girls in Yobe and Borno				Action Against Hunger (9257)		
Delivering Integrated Primary Health Care Services and Reproductive Health in an Emergency (DIRE)				Action Health Incorporated (885)		

on the Planning Bridge Tool see the [guidance documentation on KMP](#).

2.1.4.2 Response Monitoring Analysis (RMA) Tool

The RMA tool allows users to create customizable dashboards that connect information on Needs, Planning, Monitoring, and Funding in a way that allows country teams to easily visualize response progress at both the cluster and intersectoral level. From RPM, the RMA draws on the needs, targets, and disaggregation models established in the framework, as well the latest available monitoring data. This enhanced oversight gives cluster coordinators the ability to better track progress by severity level, target population, and geographical locations. For more information on the Response Monitoring Analysis Tool see the [guidance documentation on KMP](#).



3. The Framework in RPM

3.1 What is the Framework?

The logical framework is the central structure of any response plan. It defines the sequencing of objectives and activities that will guide humanitarian actors in their intervention, as well the caseloads and indicators that will be measured to determine their success. In RPM, frameworks are designed to be flexible enough to cover the unique needs of different types of response plans, such as HRP, RRP, Flash Appeals and others. This flexibility comes in the form of blueprints, which are framework templates that have been tailored to different response plan needs.

Below is a list of the suggested blueprints available in RPM. These can be used as is or as the basis for quickly creating new blueprints. The first four are the most common, with *Enhanced HPC Plan Blueprint – Clusters* being the typical framework for an English HRP (versions available in Spanish and French).

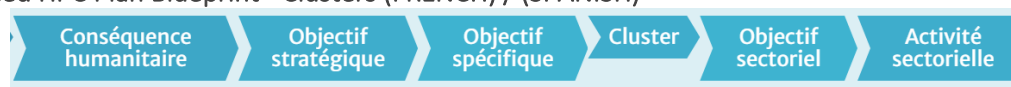
Basic Plan Blueprint



Enhanced HPC Plan Blueprint – Clusters



Enhanced HPC Plan Blueprint - Clusters (FRENCH) / (SPANISH)



Enhanced HPC Plan Blueprint - Clusters (SPANISH)



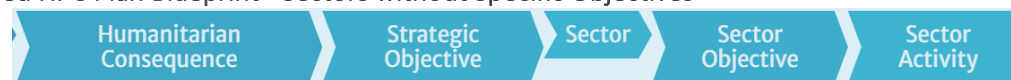
Enhanced HPC Plan Blueprint – Sectors



Enhanced HPC Plan Blueprint - Clusters without Activities



Enhanced HPC Plan Blueprint - Sectors without Specific Objectives



Enhanced HPC Plan Blueprint - Clusters without Specific Objectives



Enhanced HPC Plan Blueprint - FLASH APPEAL (Sectors)



3.2 Step by Step Guide to Building the Framework

3.2.1 Setting up the Response Plan

In order to build the framework, the first step is to set up the response plan in RPM. Plans are created by the HPC HQ team on an annual basis, in preparation for the Global Humanitarian Overview (GHO) usually launched in early December. Please notify the HPC HQ team of your need to set up a new plan and provide them with the following essential information:

Plan Name	e.g. Nigeria Humanitarian Response Plan 2021
Plan Type	HRP, Flash Appeal, Regional or Others
Plan Costing	Project-based costed, Unit costed or Hybrid
Plan framework	Based on the HPC guidance, HPC HQ will propose a standard framework structure (e.g., Enhanced HPC Plan Blueprint) that can then be amended to reflect the plan's contextual needs (e.g., does it require Humanitarian Conditions, Strategic Objectives, Specific Objectives, Cluster Objectives, Cluster Activities? Does it use Sectors or Clusters? What is the language of the plan?)
Define Clusters / Sectors and AORs	<p>Provide a list of the clusters/sectors operating in your plan (make sure to note whether they are called Clusters or Sectors), including whether there will be a portfolio for Multi-Purpose Cash (MPC) and Refugee Response (only include these cluster if they will have associated targets and financial requirements). In the case of the Refugee Response cluster, please note if the cluster will need to be managed independently from other clusters/sectors.</p> <p>For the Protection cluster, provide a list of the Areas of Responsibilities (AoRs): GBV, Mine Action, Child Protection, HLP, etc. (For more information about the AoRs, please click here.)</p>
Monitoring period	Define how often you collect monitoring data: monthly, quarterly, bi-annually, annually, or custom
Admin Boundaries	Provide the latest version of the Admin boundaries to be shared (should be endorsed CODs) and include the longitude and latitude of all locations. APMB field support team in Geneva HPC HQ will share a template.
Plan Leads accounts	The team who will manage the plan from the OCHA country office will be granted Plan Lead access so that they can manage data in HPC Tools. Plan Leads can then grant access to Cluster Leads to manage their cluster's framework data (see this section below for further details)
Timeframe for Project Registration	Provide time for project registration and approval process

Once this information has been collected and follow-up questions have been answered by the field, the HPC HQ team in Geneva will officially create the plan. This means a blueprint will be assigned to the plan, based on the information provided above. This creates an empty framework that the country team then populates with details of their response, such as plan- and cluster-level objectives, indicators, and GHO data.

3.2.2 Populating the Strategic and Cluster Frameworks

3.2.2.1 Logging in

1. Navigate to <http://plan.hpc.tools> and click *Login* in the top-right corner.
2. Using the latest version of Chrome or Firefox is recommended.
3. Enter your H.ID credentials. If you do not have an H.ID, please create a profile at: <https://auth.humanitarian.id/register>.
4. If you are logging in for the first time, H.ID will ask you to authorize RPM. Please do so.

Note: If you have logged in but cannot find your plan, it is likely because you have not been assigned the proper role access for that plan. In this case, contact the HPC HPC HQ team over Teams and request that they grant you access. For more information on how to grant Cluster Leads access to the plan, please see the section [How Plan Leads Can Grant Access to Cluster Leads](#).

3.2.2.2 Navigating the Application

1. Upon successfully logging in, the list of the plans that you have access to will be displayed, as shown below:



2. Identify the relevant plan, hover over the planning drop-down menu, and choose *Plan Details*.



- The plan details show the initial information collected from the field to set up the plan. Confirm that this information is correct.

Monitoring 1 2 3 4 5 6 7 8 9 10 11 12

Plan Locations Monitoring periods Disaggregation Condition humanitaire Objectif stratégique Objectif spécifique Sector Objectif sectoriel Activité sectorielle

Plan Details

Emergenc(ies)

Name, Type, and Date*

Burundi Humanitarian Response Plan 2021 Humanitarian

Plan start date* 01/01/21 Plan end date 31/12/21

Display plan as part of these years (FTS):*

2021

Restricted to internal use

Plan costing

Cluster requirements with project planning

Visible in HPC Projects

Cluster Selection*

Single Select Multi Select

Continue to Plan attachments (Optional)

Dashboard Continue

3.2.2.3 Defining Plan Attachments

- Click on *Plan Attachments* in the navigation ribbon to add the plan caseload, web content, and cost.

Plan Locations Monitoring periods Disaggregation Humanit Condi

Plan Attachments

Plan Details

Emergenc(ies)

Name, Type, and Date*

2. *Cost Attachment* is the estimated GHO financial requirement of the plan.
Note: The figure displayed here is typically an estimated figure which is used as a placeholder value as part of the GHO submissions. Once a plan process is concluded (i.e., cluster budgets are calculated), this number will be superseded (by the total sum of project requirements for project-costed plans or by the total sum of cluster requirements for unit-based costed plans).

Plan attachments
 Create caseloads or indicators only if locations and disaggregation models have been created before

Cost ID
 CS 1

Cost
 1006000000 US\$

Save - Remove

+ Cost

3. *Plan Caseload Attachment* includes the relevant population figures for the plan (population, affected, in-need, target). These figures should be drawn from the HNO and HRP where available. Add the source of the figures in the *Source* box and add the date that the figures were published in the *As of Date* box. For a breakdown of population groups, you can add disaggregated data by clicking on the *Add Disaggregation* button (see the step [Defining Disaggregation Models](#) to learn how to create custom models for your plan). Click Save.

Caseload BP1

Caseload ID: BP 1
 Description: 2021 Plan Caseload

As of Date: 31/12/20
 Source: 2021 HRP figures

Population: 13100000
 Affected: Affected
 In Need: 8700000

Targeted: 6400000
 Expected Reach: Expected Reach

Edit disaggregation

Save - Remove

- The Plan *Webcontent File* attachment is the cover image that is used on the plan’s Humanitarian Insight page. This should be a high-resolution image (~ 1MB, 1400 x 600 pixel), in JPEG format, cropped to a letterbox size. Please also provide us with the photo credit (agency/name). Add the image file, name, and the file credit. Click Save. **Note:** Please do not upload a hero image that lists plan related figures. As plans evolve and sometimes change over the course of their implementation, these figures may end up being incorrect and may thus cause confusion when viewing the overview page.

3.2.2.4 Defining Monitoring Periods

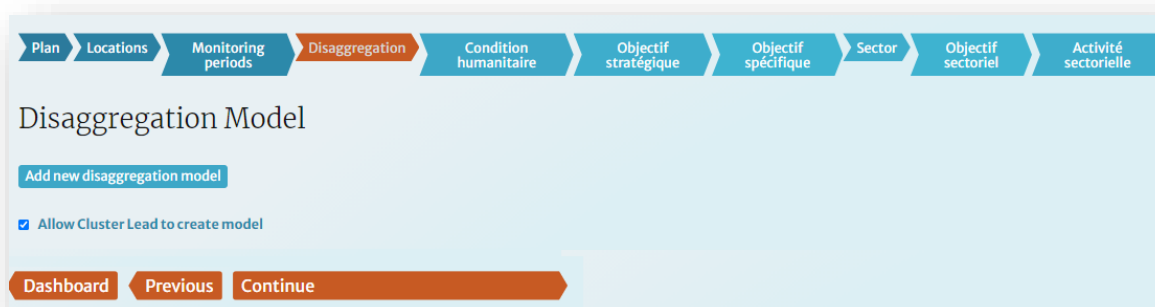
- Navigate to the *Monitoring Periods* screen by clicking [Save & Continue] or by clicking on the *Monitoring Periods* tab in the navigation ribbon.

Monitoring Period	Start date*	End date*	Expiry date	Remove
Monitoring Period 1	01/01/21	31/01/21	provide your e:	Remove
Monitoring Period 2	01/02/21	28/02/21	provide your e:	Remove
Monitoring Period 3	01/03/21	31/03/21	provide your e:	Remove
Monitoring Period 4	01/04/21	30/04/21	provide your e:	Remove

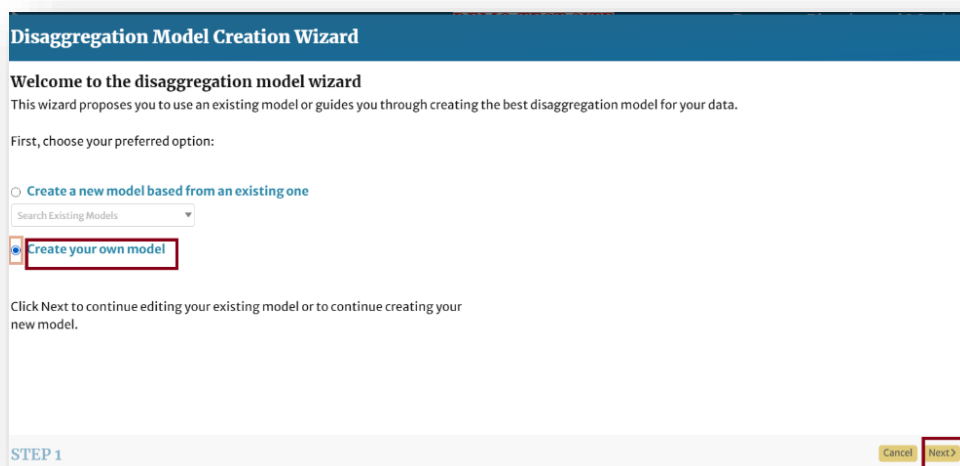
- Note that the number of monitoring periods is set by the HPC HPC HQ team, based on the initial information provided in the step, *Setting up the Response Plan*. In the example below, monitoring periods have been set to “monthly”, which means monitoring data will be collected and entered in the system on monthly basis. More details will be provided in the *Monitoring Application* section.
- Make any changes to the start and end dates as necessary. Custom periods and expiry dates for monitoring data entry can be added too.

3.2.2.5 Defining Disaggregation Models

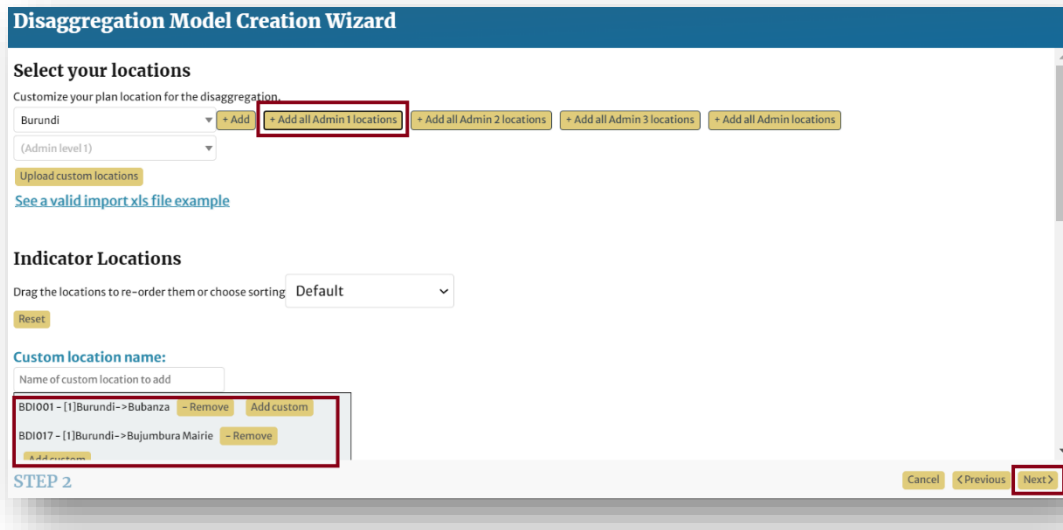
1. Navigate to the *Disaggregation Model* page by clicking [Save & Continue] or by clicking the *Disaggregation* tab on the navigation ribbon.
2. Select the checkbox *Allow Cluster Lead to create model* if you wish to allow Cluster Leads the ability to define their own disaggregation models.
3. To start, click [Add new *Disaggregation Model*].



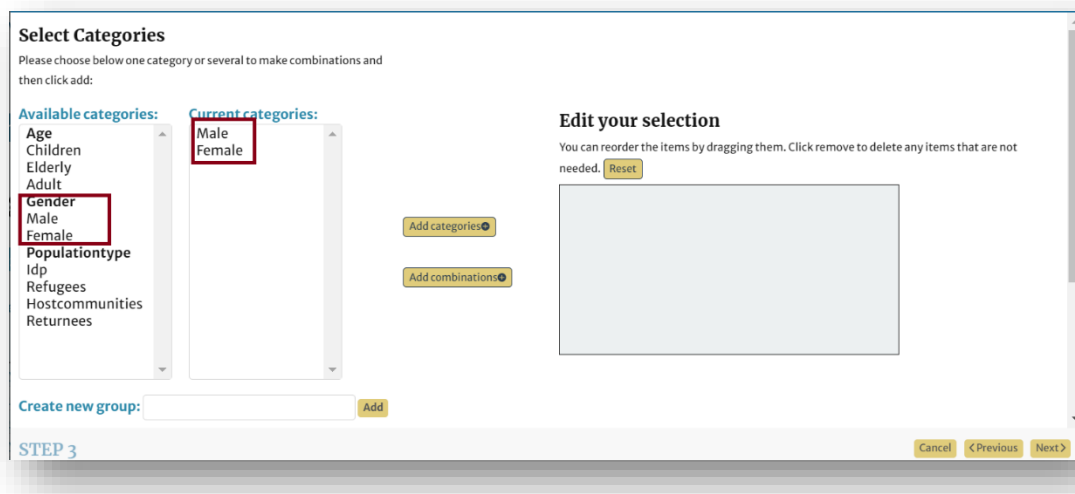
4. You can create a model from scratch or use an existing model as a template. (Note that RPM allows multiple disaggregation models to be created.) For this example, we will create a model which disaggregates beneficiaries by 'admin 1' locations, gender, and age groups.
5. Select *Create your own model*, then click [Next].



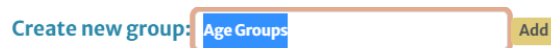
6. Locations and categories are handled separately. Add locations by clicking the [+ Add all Admin 1 locations, or Admin2 or Admin3] button, then click Next. You can also add custom locations.
7. Under the *Indicator Locations* heading, you can re-order locations alphabetically, manually, or according to p-code. However, maintaining the default setting is recommended.



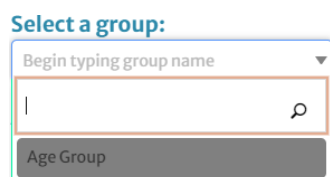
- Choose the categories you wish to add from the *Available Categories* list on the far left. They will be added to an intermediate list called *Current Categories*. In the example below, selecting *Gender* as a category will result in *Male* and *Female* being added to the *Current Categories* list.



- Although a category for *Age* exists, there is no category listed for *Age Group* ((0 – 5), (6 – 17), (18 – 59) and (60+)). This must be added as a custom group.
- In the box *Create new group*, add the name of the custom category “Age Groups”, then click *Add*.



- Select *Age Groups* from the dropdown list *Select a group*.

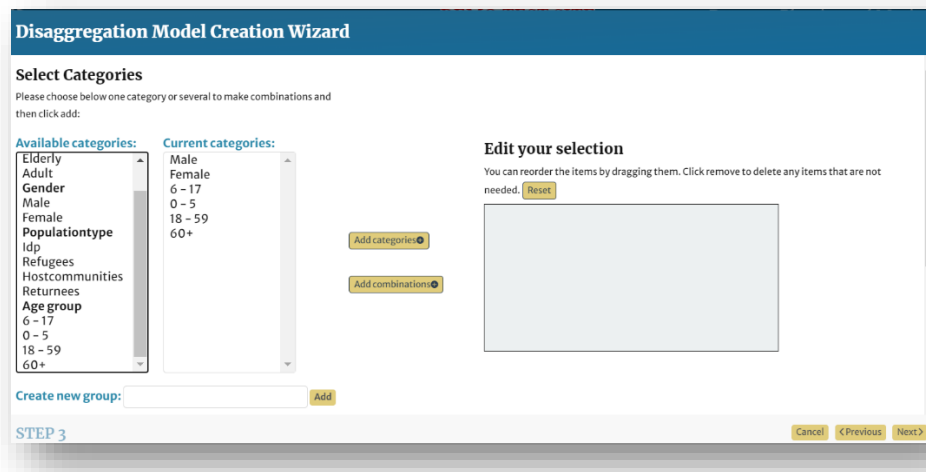


- In the category text box, start adding the categories: (0 – 5), (6 – 17), (18 – 59) and (60+), then click “Add”. Repeat the steps until all categories have been added.

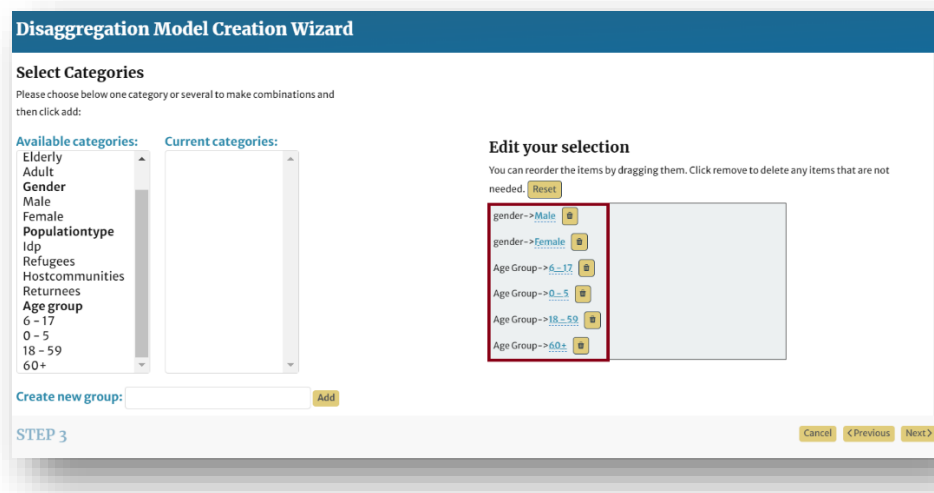
Add category to group Age Group:

0 - 5 Add

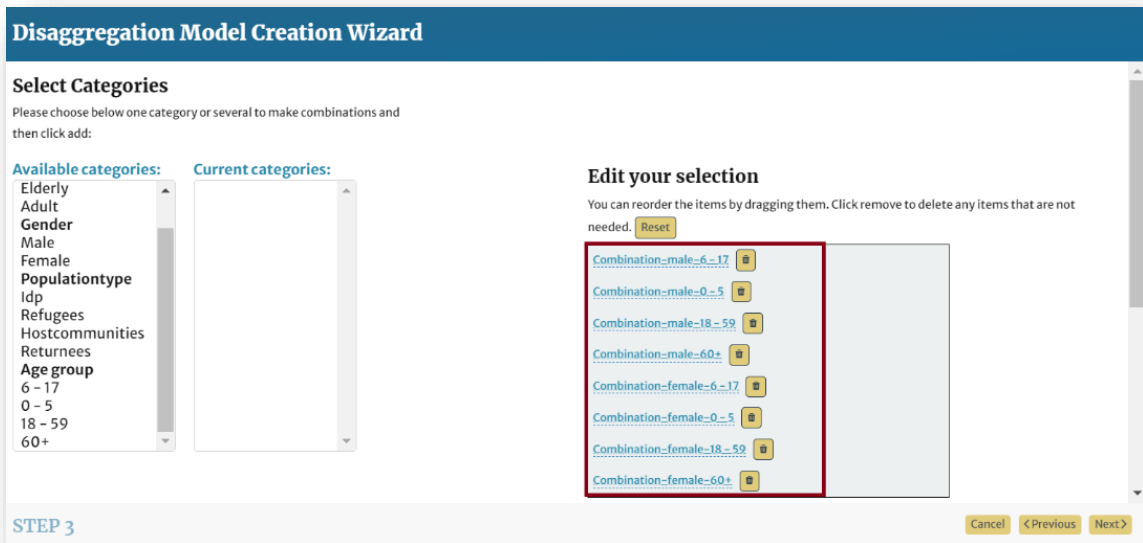
- After adding the custom group *Age Groups*, select it from the list of *Available Categories*



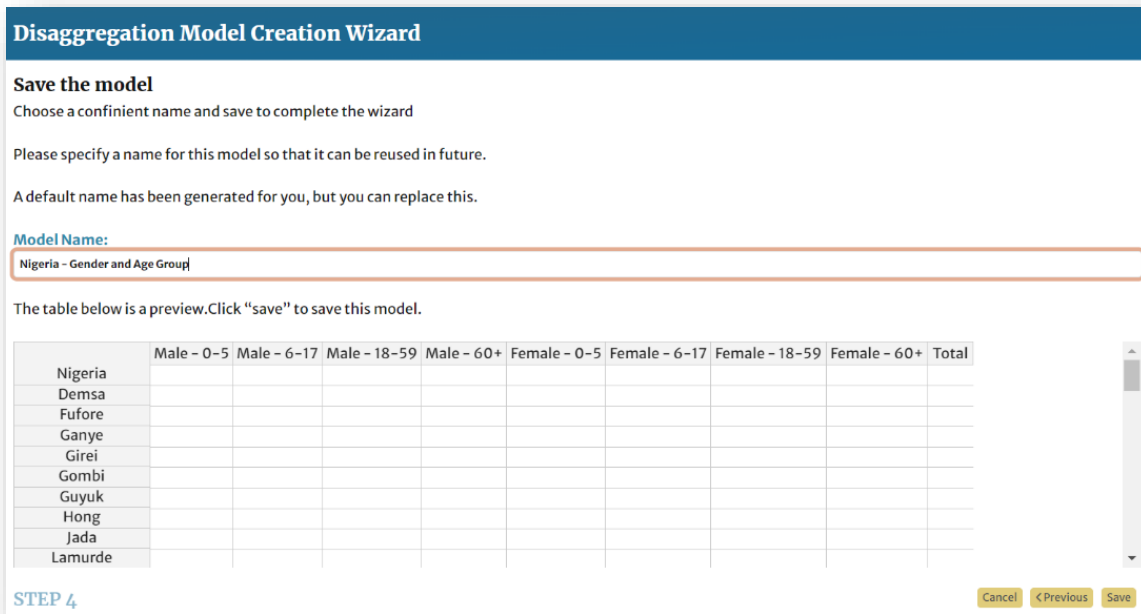
- To use the selected categories as separate categories, click [Add categories]. This will result in separate categories for age and gender.



- To create combination categories, (i.e., female-adults, female-children, male-adults, etc.) click [Add combinations]. By clicking on the name of the new combination category, you can rename that category (e.g., from “Combination-male-18-59” to “adult male”)



16. When you are satisfied with the model and naming scheme, click next.
17. Name the model. It is strongly recommended you specify the categories in the name. Click Save.



18. Create as many disaggregation models as needed. The models should be created to fit the disaggregation data for the cluster objectives/activities indicators.

3.2.2.6 Adding “Humanitarian Conditions”

1. Navigate to *Humanitarian Conditions* by clicking [Save & Continue] or by clicking on *Humanitarian Condition* in the navigation ribbon.
2. To add your first humanitarian condition, click the [+ Humanitarian Condition] button.



3. Type the condition description in the *Description* field
4. If the humanitarian condition has one or more indicators, click [+ Add indicator]. If not, click [+ Humanitarian Condition] again to add another condition.
5. There are two ways to add an indicator:
 - 5.1. Select an indicator from the Indicator Registry (IR): To use an indicator from the IR, start by clicking the *Indicator Details and Guidance* link, which opens the IR in another browser tab.

The screenshot shows the 'Indicator IN 1' form. It includes the following fields:

- Indicator ID:** A text input field containing 'IN 1'.
- Global Indicator:** A dropdown menu with the text 'Begin typing indicator name or ID here'. A link labeled 'Indicator Details and Guidance' is highlighted with a red box below the dropdown.
- Indicator Text:** A text input field containing 'Indicator Text'.
- Unit:** A dropdown menu with the text 'Begin typing u...'.
- Calculation Method:** A dropdown menu with the text 'Begin typing calcu...'.
- Goal Period:** A text label indicating 'from 1 January 2021 to 31 December 2021'.
- Target:** A text input field containing 'Target'.

Search for the relevant indicator using the search bar on the left. You can filter by cluster, keyword, key indicator status, and more.

Global cluster	Code	Sub-domain	Title	Description / Rationale
Early Recovery	R-18	708	Number and percentage of CBO leaders in affected areas trained in disaster risk reduction and planning	Community based organisation leaders can be defined as people who initiate and manage community groups that benefit people in the community or neighbourhood. If these CBOs are either affected by disaster, or are contributing to humanitarian response, then the leaders may benefit from skilling up.
Early Recovery	R-17	708	Number and percentage of	Micro enterprise owners can be

Start typing the name or ID of your desired indicator in the Global Indicator field. Autocomplete should suggest all relevant indicators.

5.2 Create a custom indicator: To create a custom indicator from scratch, type the indicator description in the *Indicator Text* field. The term “Custom Indicator” should appear automatically in the *Global Indicator* field.

The Indicator Registry

The Indicator Registry (IR) is a guidance tool for countries to select indicators, and where possible, seek standard definitions and applications of those indicators. Developed in collaboration with the global clusters, it lists the principal needs and response monitoring indicators for each cluster and provides a unique identifier, similar to a p-code, for every indicator. The registry also offers search, filter and export functions. While recognizing that indicators cannot be fully standardized across countries, given the vast range of emergencies and country contexts, it is recommended to adopt and use the indicators listed as ‘key’ to allow comparison of needs and response monitoring across countries. Visit the IR at <https://ir.hpc.tools/>

- Complete the indicator data entry by adding a Unit from the list and entering the in-need and target figures. You can add a comment for reference.

Indicator IN 1: # of people

Indicator ID: IN 1

Global Indicator: Custom Indicator

Indicator Text: # of people

Calculation Method: Begin typing calcu...

Goal Period: from 1 January 2021 to 31 December 2021

Target: Target

Comments: Comments

Add disaggregation

- You can add the disaggregated target data by using any of the disaggregation models that were created in the previous step. Click [Add disaggregation], select the relevant model from the drop-down menu, then click [Select model].

Disaggregation Wizard

caseLoad details

Description:

Period: from

Unit:

Overall totals:

In Need	Targeted
In Need	Targeted

Select disaggregation model

Please specify how this indicator should be disaggregated. You have to select from an existing model.

Select existing model

Search Existing Models

Select model

- Add the target figures and click [Save and continue].

Disaggregated goals

indicator details

Description:
 Period: from
 Unit:

Overall totals: Target
Target

Disaggregated goals

Zoom Export to CSV (beta)

Note: Please use the tab and arrow keys to navigate between the data rows and columns

	Male - 0 - 5	Male - 6 - 17	Male - 18 - 59	Male - 60 +	Female - 0 - 5	Female - 6 - 17	Female - 18 - 59	
	Target	Target	Target	Target	Target	Target	Target	
Bubanza>Bubanza								
Bubanza>Gihanga								
Bubanza>Mpanda								
Bubanza>Musigati								
Bubanza>Rugazi								
Bujumbura Mairie>Muha								
Bujumbura Mairie>Mukaza								
Bujumbura Mairie>Ntahangwa								
Bujumbura Rural>Icale								
Bujumbura Rural>Kabezi								
Bujumbura Rural>Kanyosha1								
Bujumbura Rural>Mubimbi								
Bujumbura Rural>Mugongomanga								
Bujumbura Rural>Mukike								
Bujumbura Rural>Mutambu								
Bujumbura Rural>Mutimbuzi								
Bujumbura Rural>Nyabiraba								
Bururi>Bururi								

Close Select Different Model Save and copy Save and continue

9. To add another indicator, click [Save and add another indicator]. To minimize the indicator, click the arrow in the top left of the indicator panel.
10. To add a caseload that aggregates all in-need and target values for all indicators, click [+Caseload].
11. Add the caseload description, the source of the in-need and target figures (i.e., GHO estimates), the aggregated in-need and target figures, and the disaggregated data for these figures, if available. When the HRP is published, change the description to something like Final HRP caseload

Caseload 1

Caseload ID
BF 1

Description
Description

As of Date
09/04/21

Source
GHO 2021

In Need
In Need

Targeted
10000

Add disaggregation

Save **- Remove**

12. Repeat these steps for all other humanitarian conditions.

3.2.2.7 Adding “Strategic Objectives”

1. Navigate to *Strategic Objectives* by clicking [Save & Continue] or by clicking on *Strategic Objective* in the navigation ribbon.

- To add your first strategic objective, click the [+ Add Strategic Objective] button.



- Type the objective description in the *Description* field. Please keep the default value of the custom ID. Make sure to align the SO with the relevant Humanitarian Conditions added in the previous step. This alignment shapes the framework pyramid by connecting all entities together.

- Add all required indicators and caseloads (including disaggregated data), following the same procedure outlined under Humanitarian Conditions.
- When you have entered all Strategic Objectives and their indicators, click [Save and Continue].

The Importance of Connecting the Framework

When building the framework in RPM, please make sure to align all entities with the entities that came before them: i.e., align Cluster Activities to the Cluster Objectives, Cluster Objectives to Specific Objectives, Specific Objectives to Strategic Objectives, and Strategic Objectives to the Humanitarian Conditions. Maintaining this hierarchy of information allows for more meaningful analysis, as it helps us to trace high level outcomes back to their potential sources in our activities and projects.

3.2.2.8 Adding “Specific Objectives”

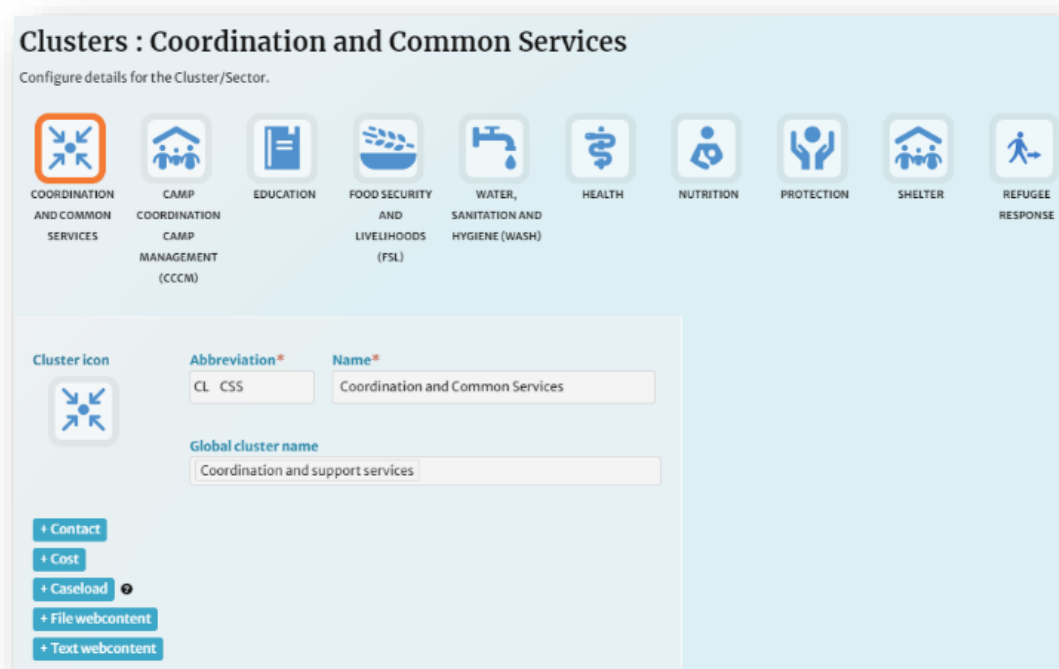
1. Navigate to *Specific Objectives* by clicking [Save & Continue] or by clicking on *Specific Objective* in the navigation ribbon.
2. Repeat the steps above to add “Specific Objectives”, making sure that you align the Specific Objectives to the Strategic Objectives.

3.2.2.9 Defining “Cluster/Sector Details”


1. Navigate to *Cluster/Sector Details* by clicking [Save & Continue] twice or by hovering over the *Cluster/Sector* tab on the navigation ribbon and clicking on *Cluster/Sector Details*.



2. The “clusters” themselves will be created by the HPC HQ team, based on the initial information provided by the field team. Please confirm that they are correct. If any changes need to be made, please contact HPC HQ for assistance.
3. Navigate between the clusters by clicking their icons.



4. For each cluster, add the coordinator, co-lead and/or cluster IMO by clicking [+ Contact]. For each contact, you can use the default ID or overwrite it. Enter the relevant details for each contact. When you are finished, click [Save].

Cluster icon 

Abbreviation*

Name*

Global cluster name

Contact ID

Contact name*

Contact email

Contact agency

- For cluster-costed plans, you will need to add the financial requirements for each cluster. However, only HPC HQ has the ability to add and edit cost attachments in RPM. Therefore, you will need to contact HPC HQ and provide them with the required figures. The cost for the Protection cluster needs to be split into the sub-costs for each the Protection AoRs.

Cost ID

Cost

Cost Breakdown

Protection	<input type="text" value="43195000"/>	<input type="text" value="US\$"/>
Gender Based Violence	<input type="text" value="38715584"/>	<input type="text" value="US\$"/>
Mine Action	<input type="text" value="9213267"/>	<input type="text" value="US\$"/>
Child Protection	<input type="text" value="18655000"/>	<input type="text" value="US\$"/>
Housing, Land and Property	<input type="text" value="4783900"/>	<input type="text" value="US\$"/>

- For each cluster, add the caseload (in-need and target) figures. Fill in the source and description, and add the relevant disaggregation model, with in-need and targeted figures. When you are finished, click [Save].

✓ Caseload 1

Caseload ID
BF 1

Description
Description

As of Date
Date

Source
Source

In Need
In Need

Targeted
Targeted

Add disaggregation

Save **- Remove**

- For the Protection cluster, it is important to create a caseload for each AoR that is budgeted as shown below:

Cluster icon

Abbreviation*
CL PRO

Name*
Protection

Global cluster name
Protection Gender Based Violence Child Protection

+ Contact

+ Cost

>> Caseload CLPRO/BF1

>> Caseload CLPRO/BF3

>> Caseload CLPRO/BF2

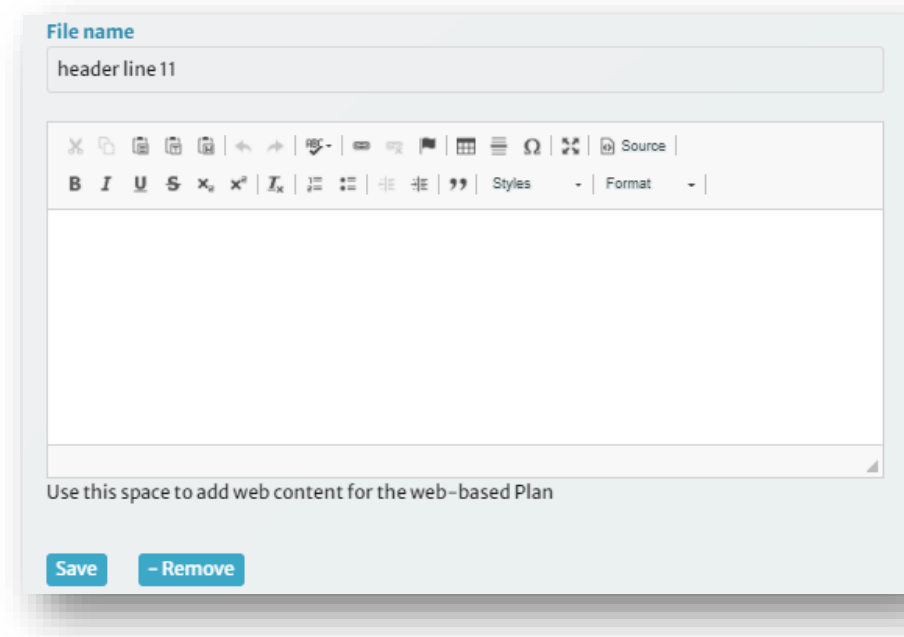
8. Add the relevant description to each AoR caseload (General Protection, Mine Action, GBV, etc), and the caseload figures (in-need and target). Add the disaggregated caseload data, if available.

The screenshot shows a web form for managing caseloads. At the top, there's a 'Global cluster name' section with three tabs: 'Protection', 'Gender Based Violence', and 'Child Protection'. Below this are two buttons: '+ Contact' and '+ Cost'. The main section is titled 'Caseload CLPRO/BF1' and contains several input fields: 'Caseload ID' (with value 'BF 1'), 'Description' (with value 'Protection'), 'As of Date' (with value '01/01/70'), and 'Source' (with value 'Source'). There are also two input fields for 'In Need' (value '2334757') and 'Targeted' (value '722291'). At the bottom of this section are buttons for 'Edit disaggregation', 'Save', and '- Remove'. Below this are two more sections, 'Caseload CLPRO/BF3' and 'Caseload CLPRO/BF2', each with a double arrow icon.

9. Add a cover image for the cluster, to be displayed on Humanitarian Insight, by clicking [+File Webcontent]. This should be a high-resolution image (~ 1MB, 1400 x 600 pixel), in JPEG format, cropped to a letterbox size. Add the image file, name, and the file credit. Click [Save]. **Note:** Please do not add a hero image (an image with plan related figures). As plans evolve these may end up displaying wrong information.

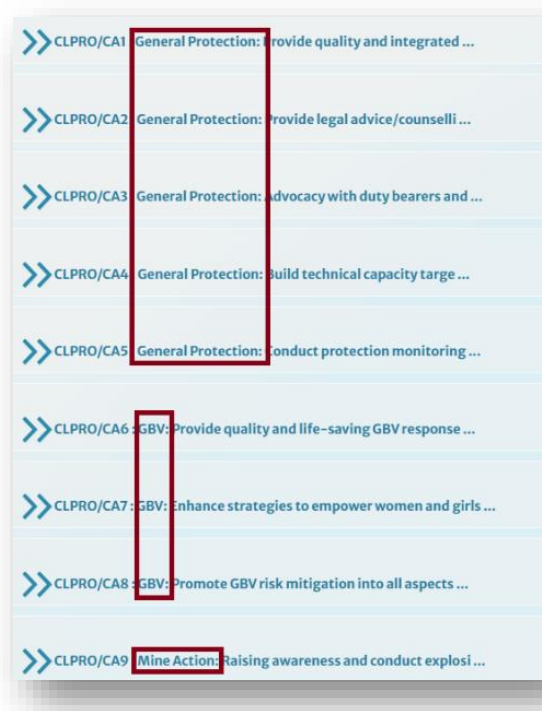
The screenshot shows a form for adding a cover image. It has three main sections: 'File ID' with a text input field containing 'FI 1' and a 'header line 01' label; 'File credit' with an empty text input field; and 'Webcontent File' with an 'Upload File' button and a text instruction: 'Upload a wide-format image for the Plan header background here.' At the bottom are 'Save' and '- Remove' buttons.

10. Add a description of the cluster, to be displayed on Humanitarian Insight, by clicking [+Text Webcontent]. Add the description and click [Save].



3.2.2.10 Adding “Cluster/Sector Objectives”

1. Navigate to *Cluster/Sector Objectives* by clicking [Save & Continue] or by clicking on *Cluster/Sector Objectives* in the navigation ribbon.
2. To add Cluster/Sector Objectives, follow the same steps outlined in Humanitarian Conditions, Strategic Objectives, and Specific Objectives. Make sure that you align Cluster/Sector Objectives with Specific Objectives.
3. When adding Cluster/Sector Objectives to the Protection cluster, make sure to prefix each objective with the relevant AoR. This is important to apply the Protection AoR categorization in the system.



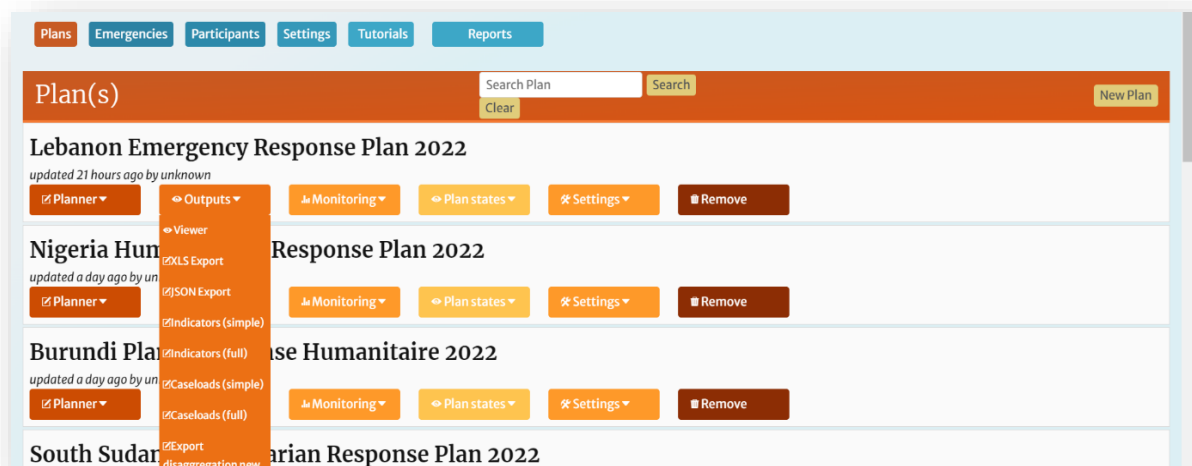
3.2.2.11 Adding “Cluster/Sector Activities”

1. Navigate to *Cluster/Sector Activities* by clicking [Save & Continue] or by clicking on *Cluster/Sector Activities* in the navigation ribbon.
2. To add Cluster/Sector Activities, follow the same steps outlined in Humanitarian Conditions, Strategic Objectives, Specific Objectives, and Cluster/Sector Objectives. Make sure that you align Cluster/Sector Activities with Cluster/Sector Objectives.
3. When adding Cluster/Sector Activities to the Protection cluster, make sure to prefix each activity with the relevant AoR. This is important to apply the protection AoR categorization in the system.

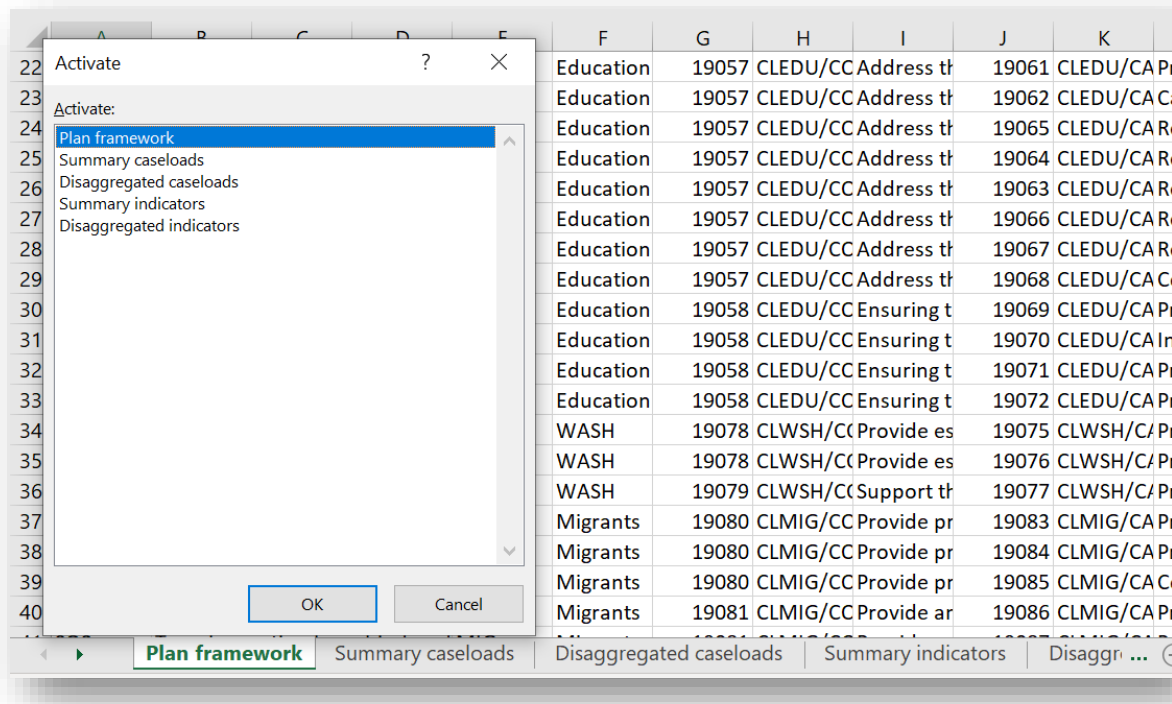
3.2.3 Publishing the Framework

When you have completed the framework in RPM, it is important to review it for completeness. The easiest way to do this is by using the XLS export function.

1. Navigate to the *Plans* page in RPM and find your plan.
2. On your plan’s menu, click the [Outputs] button and then click the [XLS Export] button on the dropdown list.



3. Open the spreadsheet once it is finished downloading. The spreadsheet contains summaries of the plan framework, caseloads, disaggregated caseloads, indicators, and disaggregated indicators all in one place. This can make it more efficient to review than clicking through RPM.



Go through each tab and ensure that the following information is included:

- Plan Framework:** Ensure that the strategic framework (Humanitarian Conditions, Strategic Objectives, Specific Objectives) is complete, and the cluster framework (Cluster Objectives and Cluster Activities) is complete.
- Summary Caseloads:** Ensure that there are, at minimum, overall caseloads available at plan and cluster level, with figures for In Need and Targeted.
- Disaggregated Caseloads:** Check that there are disaggregated caseload data available and that they are populated with figures for In Need and Targeted. This data will show up on Insight in the form of maps, on Project Module for partners to register activities against, and in the Bridge Tools for more granular analysis.
- Summary Indicators:** Check that all your required indicators have been added and that they have been populated with target data.
- Disaggregated Indicators:** Check that disaggregation models have been added to indicators (where required), and that they have been populated with target data.

Note: For an example XLS export, with detailed instructions on how to review the framework, see [Monitoring Framework Check](#).

- When you are certain that the framework is complete, please contact the HPC HQ Team to have the framework published and opened for monitoring (see [Monitoring Application](#) for more information).

3.2.4 How RPM Data is reflected in Insight and FTS

Once published, much of the information you have entered in RPM will become visible in Insight and FTS. Here is a quick snapshot of how some of that information will be presented.

3.2.4.1 Caseloads and Monitoring Data

When a plan is published in RPM, caseloads and their associated monitoring data will become visible in Humanitarian Insight. Here, you can see just one example of the ways that the overall Plan Caseload is reflected on Insight.



Strategic Objectives

- S01** Timely, multi-sectoral, life-saving, equitable and safe assistance is provided to crisis-affected people of all genders and diversities to reduce mortality and morbidity.
- S02** Protection risks are mitigated, while protection and human rights needs for people of all genders and diversities are monitored and
- S03** Vulnerable people of all gender and diversities are supported to build their resilience and live their lives in dignity.

3.2.4.2 Disaggregation Models

Disaggregation models in RPM form the basis of the interactive maps in Humanitarian Insight. Fully populated disaggregation models give the users the ability to filter these maps and therefore better understand how the response is progressing by location and population type.

Detailed Monitoring Information

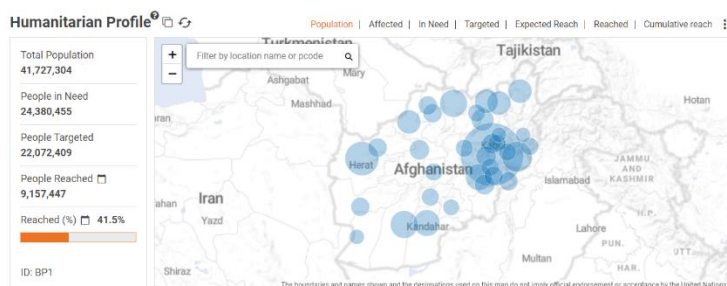
Attachment details
Description: Final plan caseload
Unit:

Overall totals:

Population	Affected	In Need	Targeted	Expected Reach	Reached	Cumulative reach	Covered
41727304	35851938	24380455	22072409		9157447	22854073	

Disaggregated Measurements
Reporting period: from 1 January 2022 to 30 June 2022

	Internally displaced people (new in 2022) - b			Internally displaced people (new in 2022) - g			Internally displaced people (new in 2022) - n			Internally displaced people (new in 2022) - n		
	Reached	Cumulative reach	Covered	Reached	Cumulative reach	Covered	Reached	Cumulative reach	Covered	Reached	Cumulative reach	Covered
Afghanistan	20645	44722		18904	45312		16132	40697		311		
Badkhisshan	630	833		628	786		15	533		9		
Badkhisshan	1047	3205		522	2951		2349	4823		39		
Baghlan	1061	1061		1164	1164		464	464		7		
Balkh	1082	2566		1070	2596		265	1575		154		
Bamyan	1	867		0	1011		0	690				
Daykundi	1766	1766		1736	1736		4702	4702		52		
Farah	0	1049		0	1163		48	631				
Faryab	1044	3787		1331	4317		660	3815		31		



3.2.4.3 Cost Data

RPM is also used to publish your plan's cost data. For unit-based costed plans, the cost information entered in the *Cluster Details* section of RPM (pictured below), will form the source of your plan's financial requirements. When the plan is published, these figures will be pushed to FTS and Insight, as seen below.



For project-costed plans, the sum of project requirements in Project Module will form the source of your plan's requirements. However, this information can only be published through RPM. Publishing in RPM will result in all approved projects in PM being published and the total of their requirements being pushed to FTS and Insight. Below you can see how the requirements in PM are reflected in FTS after publishing in RPM.

Project Module				FTS	
By Cluster	# of Projects	Original Requirements	Revised Requirements	Field cluster/sector	Current requirements US\$
Camp Coordination and Camp Management	25	\$22,713,288	\$22,713,288	Camp Coordination and Camp Management	22,713,288
COORDINATION AND SUPPORT SERVICES	10	\$21,253,085	\$21,253,085	COORDINATION AND SUPPORT SERVICES	21,253,085
Early Recovery and Livelihoods	37	\$58,948,891	\$58,948,891	Early Recovery and Livelihoods	58,948,891
Education	40	\$100,173,309	\$100,173,309	Education	100,173,309
Emergency Shelter and NFI	21	\$59,294,653	\$59,294,653	Emergency Shelter and NFI	59,294,653
Emergency Telecommunications	1	\$1,600,000	\$1,600,000	Emergency Telecommunications	1,600,000
Food Security	31	\$450,889,266	\$450,889,266	Food Security	450,889,266
Health	23	\$52,684,573	\$52,684,573	Health	52,684,573
Logistics	1	\$30,446,311	\$30,446,311	Logistics	30,446,311
Multi-Purpose Cash	3	\$4,977,438	\$4,977,438	Multi-Purpose Cash	4,977,438
Nutrition	35	\$144,288,433	\$144,288,433	Nutrition	144,288,433
Protection	83	\$78,400,935	\$78,400,935	Protection	78,400,935
Water and Sanitation	43	\$101,541,459	\$101,541,459	Water and Sanitation	101,541,459
				Not reported	0

4. Monitoring Application

The monitoring application allows you to submit data on the caseloads and indicators defined in your plan's framework, thereby enabling you to measure progress against your plan's activities and objectives. It allows for the collection of data from all clusters in one comprehensive platform and connects this cluster-level data to the specific and strategic objectives defined at plan level. Linking the information in this way allows for more meaningful analysis and a better understanding of where strategic changes need to be made. This information can then be analyzed within RPM itself, exported as an XLS file, or analyzed within other HPC tools, such as Humanitarian Insight or the RMA tool.

4.1 Step-by-Step Guide to Using the Monitoring Application

4.1.1 Prerequisites for Opening a Monitoring Period

Once your plan is published (see [Publishing the Framework](#) for more details on how to do this), you can begin uploading monitoring data. To begin this process, you must first send a request to the HPC HQ team to open the monitoring period (MP) for data entry. Before opening the MP, HPC HQ will first need to confirm that the framework is fully populated. Please review the framework to ensure the following are accounted for:

1. **Plan caseloads:** Total and disaggregated are populated
2. **Strategic framework:** Humanitarian Conditions, Strategic Objectives and Specific Objectives (and their indicators) are populated
3. **Cluster caseloads:** Total and disaggregated for all clusters are all populated
4. **Cluster framework:** Cluster Objectives and Cluster Activities (and their indicators) are populated

Note: Although every effort should be made to complete the framework, the minimum information required to open an MP is a Plan Caseload and Cluster Caseloads.

4.1.2 Entering Monitoring Data Manually

4.1.2.1 Logging in

1. Navigate to <http://plan.hpc.tools> and click *Login* in the top-right corner.
2. Using the latest version of Chrome or Firefox is recommended.
3. Enter your H.ID credentials. If you do not have an H.ID, please create a profile at: <https://auth.humanitarian.id/register>
4. If you are logging in for the first time, H.ID will ask you to authorize RPM. Please do so.

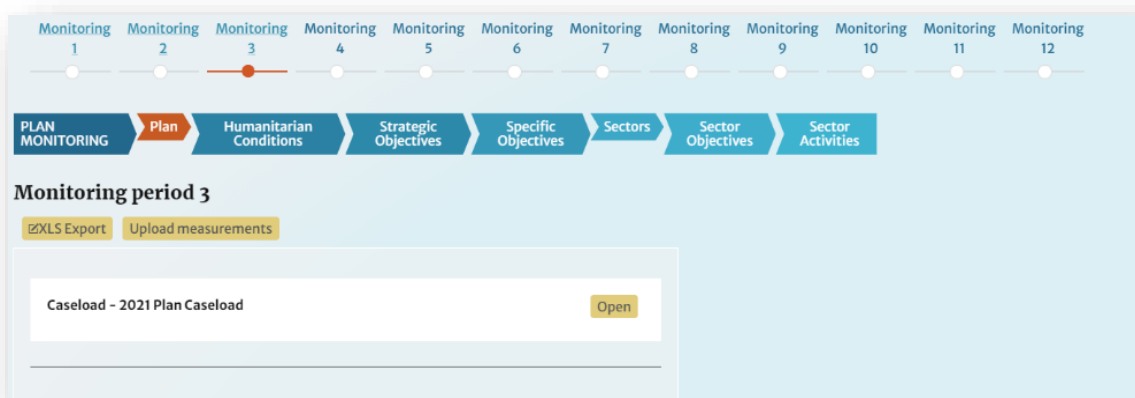
4.1.2.2 Navigating the Application

1. Upon successfully logging in, the list of the plans that you have access to will be displayed.

2. Hover over the *Monitoring* tab and select the MP for which you wish to enter data.



3. The plan framework will be displayed in the navigation ribbon. Select the part of the framework for which you wish to enter data, e.g., Plan, Strategic Objectives, Cluster Objectives, etc.



4.1.2.3 Updating Caseload Data

1. The process of updating caseloads is virtually identical for all levels of the framework (with one additional option at Plan level). For any entity with a caseload attached, click [Open] to open the caseload window.
2. In each caseload window, you have the option of updating the following fields:
 - a. **Expected Reach:** This option is only available at Plan level and is used to provide an estimated figure for the cumulative total of people reached by the plan for the entire year. This field is intended for use in the GHO and is not mandatory, unless requested by HPC HQ.
 - b. **Reached:** This figure is the total number of people reached during the *current* monitoring period only. This field is mandatory.
 - c. **Cumulative Reach:** This figure is the total number of people reached from the start of the year, up to and including the current monitoring period. This field is mandatory.

- d. **Covered:** This figure is the total number of people covered (people who have received every intervention for which they had a need) for the current monitoring period. This field is not mandatory.

Caseload - 2021 Plan Caseload Close

Goal period: from 1 January 2021 to 31 December 2021
Report period: from 1 March 2021 to 31 March 2021

Population	Affected	In Need	Targeted	Expected Reach
13100000		8700000	6400000	
Reached	Cumulative reach	Covered		

Disaggregation

Caseload Comments:

Comments:

Comments

Save

3. Where disaggregated data is available, click the [Disaggregated] button and enter all available data into the cells of the table that appears. Note that this table contains no automated calculations. Make sure to enter any relevant subtotals and totals along with granular data. You can enter multiple values at once by selecting the range of destination cells and simply pasting your data. Please ensure that the arrangement of rows in the source file matches that of the form on-screen.

Detailed Monitoring Information

Attachment details

Description:
Unit:

Overall totals:

Population	Affected	In Need	Targeted	Expected Reach	Reached	Cumulative reach	Covered
		6989485	5518010		1476286	1825314	

Disaggregated Measurements

Reporting period: from 1 April 2022 to 30 April 2022

Zoom Export to XLSX (file) Show hidden goals

	Idpl - girls			Idpl - boys			Idpl - women		
	Reached	Cumulative reach	Covered	Reached	Cumulative reach	Covered	Reached	Cumulative reach	Covered
Nigeria	321835	349111	0	277459	300187	0	238419	264040	0
Demsa	1252	1252		1217	1217		768	768	
Fufore	1763	1763		1461	1461		1386	1386	
Ganye	551	551		535	535		338	338	
Gombi	1540	1540		1276	1276		1211	1211	
Girei	58	259		73	121		0	0	
Guyuk	54	269		66	237		0	0	
Hong	68	322		65	288		0	0	

Close

4. There are three buttons in the disaggregation window that may assist you with entering data.
 - a. Clicking [Zoom] opens a full-size window that may be more comfortable for data entry.
 - b. Clicking [Export to XLSX (file)] will export the table and all data that it contains to an XLSX file. You can then complete the table in Excel and copy it back into RPM. However, **please take caution** to ensure that the data you copy into RPM from Excel is in the same order as the table presented in RPM. Issues can arise when the admin areas in Excel and RPM are filtered differently (e.g., alphabetically vs. by p-code).
 - c. Clicking [Show hidden goals] will show the columns for the figures Population, Affected, and Expected Reach. This data can be added but is not necessary.
5. Once you have updated the aggregated and disaggregated caseload figures, click [Save].
6. Repeat this process with any caseload figures you have added to Humanitarian Conditions, Strategic Objectives, Specific Objectives, Clusters/Sectors, Cluster/Sector Objectives or Cluster/Sector Activities.

4.1.2.4 Updating Indicator Data

1. The process of updating indicators is identical for all levels of the framework (Strategic Objectives, Specific Objectives, Cluster/Sector Objectives, etc.). For any entity with an indicator attached, click [Open] to open the indicator window.
2. In each indicator window, you have the option of updating the *Measure* field with the latest data for that indicator.
3. Where disaggregated data is available, click the [Disaggregated] button and enter all available data into the table that appears, following the same procedure outlined previously.

Indicator - # of individuals in functional reception centers receiving support Close
 Unit: Individuals

Goal period: from 1 January 2022 to 31 December 2022
 Report period: from 1 April 2022 to 30 April 2022

Target	Measure
39616	4661

Disaggregation

Indicator Comments:

Comments:

Comments

4. Once you have updated the aggregated and disaggregated indicator data, click [Save].
5. Repeat this process with any indicators you have added to Humanitarian Conditions, Strategic Objectives, Specific Objectives, Cluster/Sector Objectives or Cluster/Sector Activities.

4.1.2.5 Moving to the Next Monitoring Period

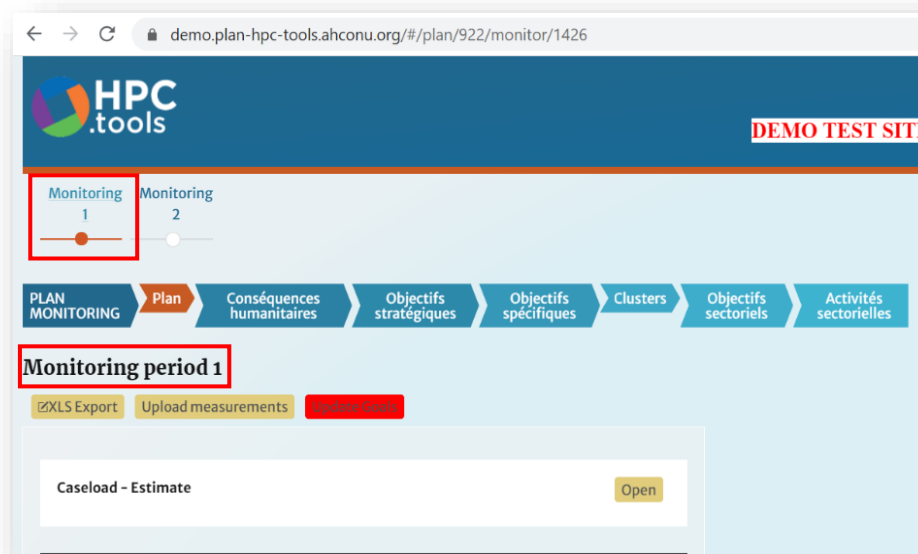
When all data has been uploaded and verified, contact the HPC HQ team and request that they publish the current monitoring period and open the next monitoring period. Once HPC HQ has moved the plan

to the next MP, you will no longer be able to edit data in the previous MP. If you do need to edit data from a previous MP, notify HPC HQ and they will open the previous MP for data entry.

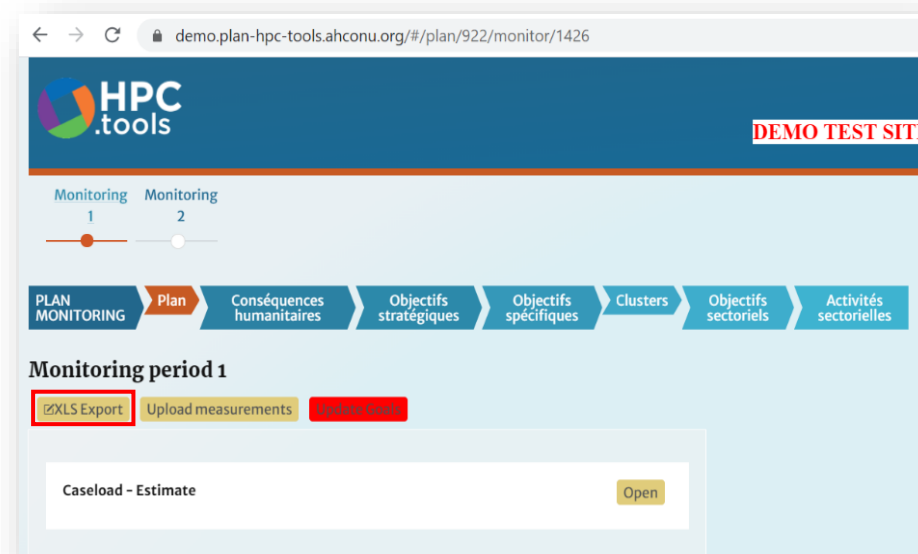
4.1.3 Uploading Monitoring Data in Bulk

RPM also contains a *Bulk Upload* feature that you can use to edit or upload monitoring data for the entire plan, for a single monitoring period, without having to navigate through RPM and enter data manually. Many operations find this feature useful, as it allows them to edit all the data shared with them by clusters in excel format and upload it together in a single file. The procedure is as follows:

1. Log-in to RPM using the same procedure outlined in the previous section (see [Logging in](#) for details).
2. Navigate to the Monitoring Period (MP) for which you wish to upload data (e.g., MP1)



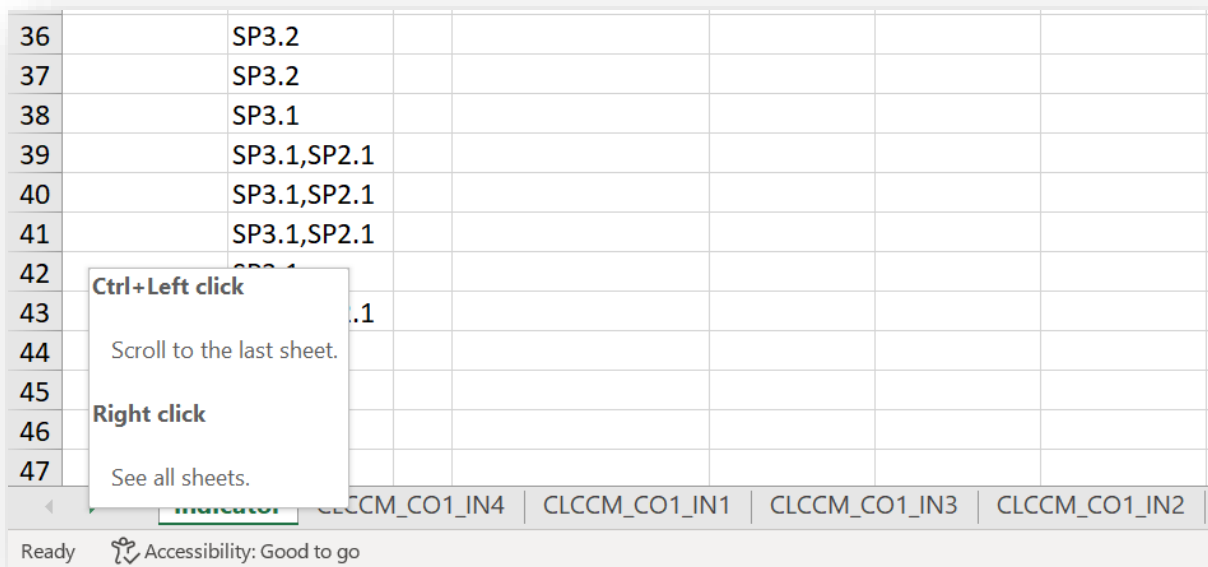
3. Click [XLS Export] to export an excel sheet with all existing framework and monitoring data, if it exists, for the given monitoring period.



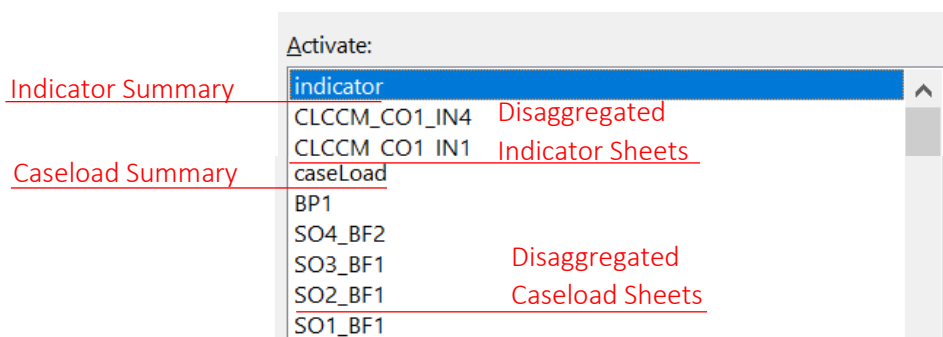
The exported sheet will include:

- a. Plan caseload data
- b. Humanitarian Conditions caseload/indicator data
- c. Strategic Objectives caseload/indicator data
- d. Specific Objectives caseload/indicator data
- e. Cluster/Sector caseload data
- f. Cluster/Sector Objectives caseload/indicator data
- g. Cluster/Sector Activies caseload/indicator data

4. Save the file. Note that the file name can be changed without causing any issues.
5. Open the File. You will notice that the file contains many sheets.
6. Right click on the sheet navigation arrows at the bottom left hand of your screen to see a summary of the sheets.



7. The sheet summary should look approximately like the one below (example has been condensed for readability). Here is a brief explanation of the how the file is structured:



- a. **Indicator Sheet:** This summary sheet contains data on all of the indicators for the entire framework as shown in the screenshot at the bottom of this page.
 - b. **Disaggregated Indicator Sheets:** Each indicator in the framework with a disaggregation model has its own sheet, where users can enter the disaggregated measurements for that indicator. The disaggregated data is only available for the open monitoring period.
 - c. **Caseload Sheet:** This summary sheet contains data on all of the caseloads for the entire framework.
 - d. **Disaggregated Caseload Sheets:** Each caseload in the framework with a disaggregation model has its own sheet, where users can enter the disaggregated figures for that caseload. The disaggregated data is only available for the open monitoring period.
8. Enter the measurement data for the current monitoring period. The Measure columns represent the different monitoring periods. In the example below, you can see that this plan is in MP7, thus the last column is called “Measure 7”. You will notice that reached data for all monitoring periods will be displayed, not just for the monitoring period that you are updating. However, any changes made to data in other monitoring periods will not be uploaded. Only data for the open monitoring period will be updated. Take note of the # symbol beside “reached” under the column Measure 7. This # symbol indicates that this is the open monitoring period for which data will be uploaded.

Indicator Name	Indicator Target	Data from Previous Monitoring Periods						Measure 7 = MP7							
Q	U	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK
1 attachmentName	Target	Measure2	comments	Measure3	comments	Measure4	comments	Measure5	comments	Measure6	comments	Measure7	comments7		
2 #indicator+name	#target											#reached	# = open MP		
30 # of individuals in displac	1336471	990738		1002368		988408		988354		1011658					
31 # of individuals in functio	39616	4856		4628		4661		4421		99999		99999	Tracking number of new arrivals re		
32 # of eligible individuals bi	379785	0		0		0		0		0					
33 # of eligible households r	62168	16410		7493		9220		4805		9706					
34 # of IDP trained in CCCM c	2166	14		115		0		81		46					
35 # of Community Centers e	1083	0		0		0		0		0					
36 # of partners and local au	1473	0		0		11		0		0					
37 # of site managers, local a	2166	511		581		15		232		138					
38 Number of LGAs and CSOs	2308							Provide training oppi	Provide tri	536			169		
39 Number of people reache	81707							Increase access to cr	Increase a	306			607		
40 Number of people benefit	112846							1123		3606			6246		
41 Number of people emplo	39645								Provide er	426			1510		
42 Number of people benefi	176804							1494		45			1385		
43 Number of basic infrastru	319							Rehabilitate/ Recons	Rehabilita	36			90		
44 Number of teachers (m/f)	23664	267		294		865		95		4417					
45 Number of conflict-affected	1183217	89883		18485		7317		66562		205066					
46 Number of Temporary lea	5129	0		0		0		0		0					
47 Number of conflict-affected	698254	2518		58445		15962		528036		9190					

9. Complete this step for all indicator and caseload sheets.
10. Once you have completed data entry, upload the XLS file to RPM. Do this by navigating to the open monitoring period and by clicking on the [Upload measurements] button.



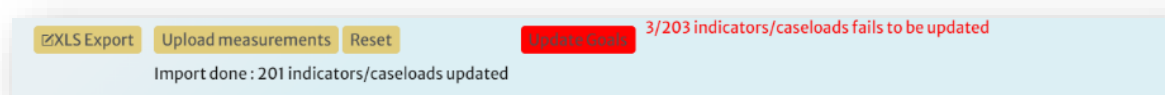
11. Once the file has finished uploading, check that the data has been correctly populated.
12. If all data is complete and correct, request that HPC HQ publish the current MP and open the next MP for data entry (for more information, see [Moving to the Next Monitoring Period](#) and [Prerequisites for Opening a Monitoring Period](#))

4.1.3.1 Important Notes

DO NOT alter the exported template, such as by removing rows and columns or changing row and column names. This will create an error that will prevent your data from being uploaded.

The bulk upload feature can only be used to update the measure or reached figures, but not the PiN or target. If you updated the target in the spreadsheet, the new value will not be uploaded to RPM. This is because the source of the plan framework data is RPM.

If a monitoring period is already open, for example MP11, and you want to update the measurements for a previous monitoring period, for example MP10, you cannot do this using the bulk upload feature. Using bulk upload, only the data for the open monitoring period, MP11 in this case, will be updated. Otherwise, the system will raise an error as shown below:



4.1.3.2 Splitting the Template for Use by Clusters

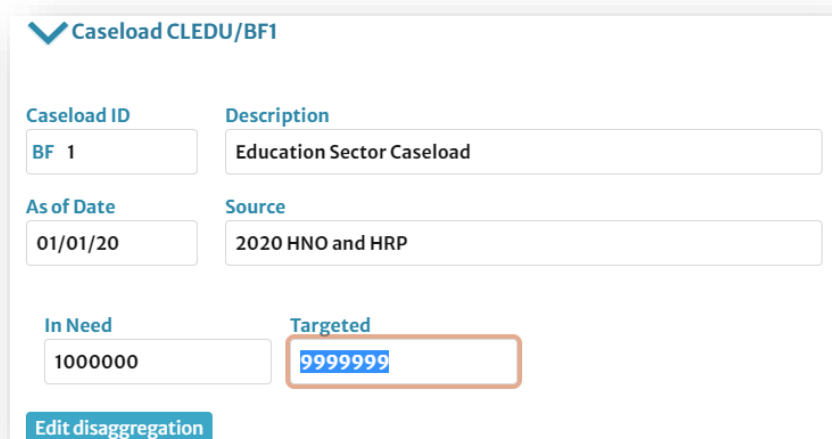
Many Plan Leads find it useful to send Cluster Leads or IMs only the section of the template that is relevant for their cluster, and then recombine the file for bulk upload. To do this:

1. Download the Bulk Upload monitoring template as explained in the previous steps.
2. Split the exported data into the relevant sheets for each cluster
3. Send the resulting sheets to the clusters to add their monitoring data at cluster, objectives and activities level, including indicators – all should go in the same sheet
4. Regroup the collected data received from the clusters in one sheet without changing the template or adding columns or headers, just add the monitoring data.
5. Upload the consolidated measurements using the *Upload Measurements* button.

4.1.4 Using the “Update Goals” Feature

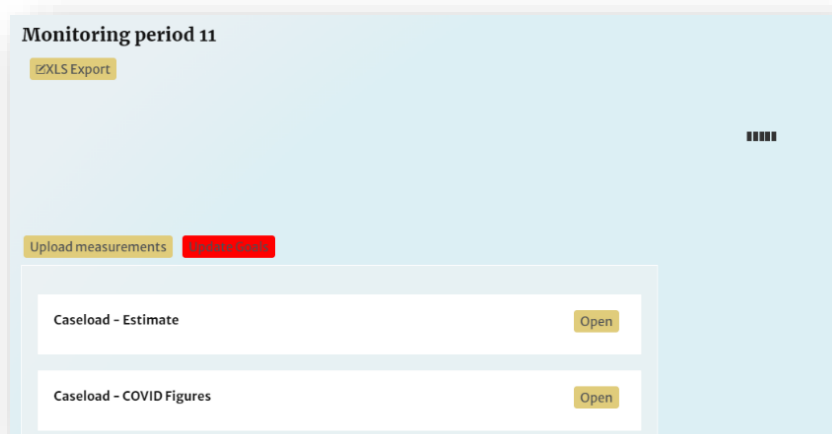
If one of your targets for a caseload or indicator changes, you must update this target in the RPM framework. You can then ensure this change to the framework is reflected in the monitoring application by using the *Update Goals* feature.

1. Go to the framework and update the target with your new figure. In this example, we have used the caseload for the Education cluster.



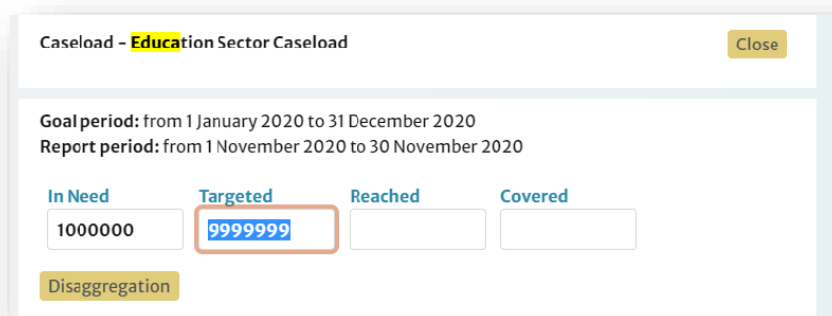
The screenshot shows a form titled "Caseload CLEDU/BF1". It contains several input fields: "Caseload ID" with the value "BF 1", "Description" with "Education Sector Caseload", "As of Date" with "01/01/20", and "Source" with "2020 HNO and HRP". Below these are two more fields: "In Need" with "1000000" and "Targeted" with "9999999". The "Targeted" field is highlighted with a red border. At the bottom left, there is a blue button labeled "Edit disaggregation".

2. To reflect these changes in the monitoring app, navigate to the open MP and click on [Update Goals]. It will copy all target values from the framework to the monitoring application.



The screenshot shows a "Monitoring period 11" interface. At the top left, there is an "XLS Export" button. Below it, there is an "Upload measurements" button and a red "Update Goals" button. Underneath, there are two sections: "Caseload - Estimate" and "Caseload - COVID Figures", each with an "Open" button to its right.

3. Check the value of the updated target. The new value should be there.



The screenshot shows a summary for "Caseload - Education Sector Caseload" with a "Close" button in the top right. It displays two periods: "Goal period: from 1 January 2020 to 31 December 2020" and "Report period: from 1 November 2020 to 30 November 2020". Below this, there are four fields: "In Need" (1000000), "Targeted" (9999999), "Reached" (empty), and "Covered" (empty). The "Targeted" field is highlighted with a red border. At the bottom left, there is a "Disaggregation" button.

4.1.5 How Plan Leads Can Grant Access to Cluster Leads

Using the Project Module, registered Plan Leads are now able to grant other users Cluster Lead access without requiring assistance from HPC HQ. In order to grant Cluster Lead access, one must already be registered as a Plan Lead in the Project Module (for assistance with granting Plan Lead permission, contact HPC HQ). The process for granting Cluster Lead access is as follows:

1. As the Plan Lead, check if the user has a registered Humanitarian ID. If the user does not have a Humanitarian ID, they can create one at: <https://auth.humanitarian.id/register>.
2. If the user is logging in for the first time, H.ID will ask them to authorize HPC Tools to access their data. Please ensure that they accept this prompt.
3. Have the user configure their account by entering their associated organization and country.
4. When the user has a functioning H.ID and PM account, navigate to the [Project Module](#) home page.
5. Click on *Admin* in the upper right corner to open the *General Administration* window.
6. Click on *Manage Users*, then type the email address the user used to register their H.ID in *Enter Email* box and hit [Search].

The screenshot displays the 'General Administration' section of the Project Module. At the top right, the 'Admin' link is highlighted with a red box and labeled '1'. Below this, the 'Manage users' link is highlighted with a red box and labeled '2'. The search area contains input fields for 'Enter Plan.', 'Enter Cluster.', 'Enter Role.', 'Enter Organization.', and 'Enter Email.', with the 'Enter Email.' field highlighted by a red box and labeled '3'. A 'SEARCH' button is next to it. Below the search area, the email 'brian.weatherby@outlook.com' is entered. A table below shows a list of users with columns for Name, Email, Roles, and Action. The 'Action' column for the user 'Brian Weatherby' has an 'Edit' button highlighted with a red box and labeled '4'. Navigation buttons 'Previous' and 'Next' are at the bottom left, and a '10' dropdown menu is at the bottom right.

Note: If you can't find the user, it likely means that they are not registered with Humanitarian ID for the address provided or that they have not accepted the prompt asking them to authorize HPC Tools to access their data. See the previous steps to resolve this issue.

7. Once you have found the user you are looking for, click on the [Edit] button under the *Action* column. This will open their profile page.

8. Once their profile page is open, click on the *Roles* tab.
9. In the *Add Role* box, select *Cluster Lead*.
10. In the *Plan* box, select the plan that you are leading.
11. In the *Governing Entity* box, select the cluster that the user is leading.
12. Once this information is complete, click [+ Add Role]

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Profile Roles Organizations

Roles:	Role	Plan	Entity	Action
Add Role	Cluster Lead			+ ADD ROLE
Plan		Nigeria Humanitaria		
Governing Entity			Camp Coordination	

13. You should receive a message saying, "Account updated". Please inform the new Cluster Lead that their role has been assigned.

5. Frequently Asked Questions

Question. Why can't I make changes to the framework, like adding indicators or caseloads?

Answer: Check with HPC HQ team. The plan revision state is likely set to "None", which means Plan Leads cannot edit the framework, but they still can add or update monitoring data in the active MP.

Question. Why can't I see the results from the latest monitoring period on Insight?

Answer: It may be that the latest monitoring period has not been published yet. You can contact the HPC HQ team over Teams to confirm this. If the latest monitoring period was only recently published, it may take an hour or more for the changes to be reflected in Insight.

Question. Can I assign more than one disaggregation model to one indicator or caseload?

Answer: No, but you can create complicated or composite groups for any model. For further assistance, you can always contact to the HPC HQ team over Teams.

Question. As a Plan Lead, can I update the data of a previous MP?

Answer: Yes, but you need to send a request to the HPC HQ team via Teams to help you to re-open any previous MP.

Question. What are the sources of the caseload figures?

Answer: You can use the HRP and HNO documents.

Question. Can Cluster Leads add indicators to their clusters?

Answer: Yes, if the Plan Lead grants them access rights to the plan. Please see the section [How Plan Leads Can Grant Access to Cluster Leads](#) for more information.

Question. What is the best way to add caseloads for Protection AoRs. Should we create a new disaggregation model to split CP and GBV data?

Answer: While this is technically possible, it is not recommended. Instead, create a new caseload attachment for each AOR, attached to Protection. In Insight, the cluster caseload table can correctly return multiple rows for multiple caseloads attached to one cluster.

Question. What if I want to update the disaggregated data for part of the monitoring data (i.e., one indicator or one cluster caseload) using the bulk upload feature? Can I upload a partially completed template with data from certain indicators/caseloads or I can only do so when I have all the data from all clusters?

Answer: Yes, you can update part of the measurements by replacing the value of that indicator or caseload in the template with the updated value, then uploading it using the *Upload Measurements* feature. You need to ensure you do not change any part of the template, even if it will not be updated (e.g., you need to keep the first tab "Indicator" and any other tabs for the indicators even if you do not plan on updating them).

Question. Can I change the name of the bulk upload template?

Answer: Yes, the template can be renamed as long as the same template structure is maintained.

Question. Can I edit a disaggregation model that has already been created?

Answer: No, once a disaggregation model has been created, it cannot be edited. However, you can create a new disaggregation model based on an existing one. If you need to delete or deactivate (make invisible / unavailable for use) a disaggregation model, contact the HPC HQ team.

Question. Can two monitoring periods be open at the same time?

Answer: No, unfortunately it is only possible to have one MP open at any given time.

Question. I am trying to add a user as Cluster Lead, but I cannot find their name or email address in the system. What is wrong?

Answer: If you can't find the user, it likely means that they are not registered with Humanitarian ID for the address provided or that they have not accepted the prompt asking them to authorize HPC Tools to access their data. Have them sign in to RPM with their humanitarian ID and accept the prompt asking them to authorize HPC Tools to use their data.

Question. I have just signed in to RPM but nothing is showing up. Why can't I see any plans?

Answer: If you have logged in but cannot find your plan, it is likely because you have not been assigned the proper role access for that plan. For Plan Leads, contact the HPC HPC HQ team over Teams and request that they grant you access. For more information on how Plan Leads can grant Cluster Leads access to the plan, please see the section [How Plan Leads Can Grant Access to Cluster Leads](#).

6. Additional Resources

- ❖ [Response Planning and Monitoring \(RPM\) Brochure](#)
- ❖ [Response Planning and Monitoring \(RPM\) User Guide](#)
- ❖ [Guide for Indicators calculation methodology](#)
- ❖ Explanatory videos : thematic [here](#) ; tutorial [here](#)