SOLIVIA
MONITOR

VERSION 2.4 ENTERPRISE

STANDARD OPERATING PROCEDURE & USER JOURNEY

Enterprise User Journey & Lifecycle Implementation Guide

A comprehensive, step-by-step blueprint detailing the entire platform lifecycle: from self-service demo registration and multi-tenant workspace provisioning, through role delegation, framework pegging, activity-based budgeting, and multi-track operational execution.

PLATFORM RELEASE
Solivia Monitor v2.4 (2026 Edition)

TARGET AUDIENCE
Global Admins, Programme

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ARCHITECTURE & OVERVIEW

00 The End-to-End Operational Lifecycle

System Blueprint

Solivia Monitor is engineered around a core structural philosophy: **finance and operations are strictly pegged to the strategic Monitoring and Evaluation (M&E) framework**. Projects are not configured in isolation as static spreadsheets. Instead, an intentional, role-segregated sequence guarantees data integrity, donor accountability, and real-time tracking across diverse implementing teams.

STAGE 01	STAGE 02	STAGE 03	STAGE 04	STAGE 05	STAGE 06
Registration & Tenant Setup	**Sandbox Tour & Demo Cleanup**	**Setup & Team Delegation**	**Logframe M&E Modeling**	**Activity Budget & Funding**	**Multi-Track Parallel Execution**
Global Admin	Global Admin	Admin & Manager	M&E Specialist	Finance Officer	Field, Fin, M&E, Ops

The Crucial Three-Pillar Governance Flow

1. **Non-Financial Programme Initialization:** During initial programme setup in Programme Settings, metadata, locations, partners, and risk matrix parameters are populated—**while the financial budget is deliberately left unallocated**.
2. **Hierarchical Team Delegation:** The Global Admin provisions the Programme Manager. The Programme Manager onboards cross-functional leads: the M&E Specialist, Finance Officer, Field Operations Coordinator, and Procurement Lead.
3. **Activity-Pegged Budgeting:** The M&E Specialist builds the Theory of Change and defines key activities. The system dynamically ingests these activities into the Finance module, where the Finance Officer assigns line-item cost allocations and manages donor tranches.

GOVERNANCE & SEGREGATION OF DUTIES

By enforcing this sequential handoff, Solivia Monitor eliminates "orphan budget lines" (expenses not tied to approved development objectives) and ensures that monitoring data flows directly from field collectors into auditable scorecards without manual reconciliation friction.

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TENANT PROVISIONING

01 Self-Registration & Workspace Activation

Entry Point

The onboarding journey commences at the self-service trial portal (`/register/`). Prospective organisations instantiate a dedicated enterprise tenant instance with full cryptographic database isolation.

Tenant Registration Parameters

During this registration step, the prospective lead inputs the organization's legal name, primary sector of intervention (e.g., Global Health, Food Security, Education), country of headquarters, administrative contact phone, and administrative credentials.

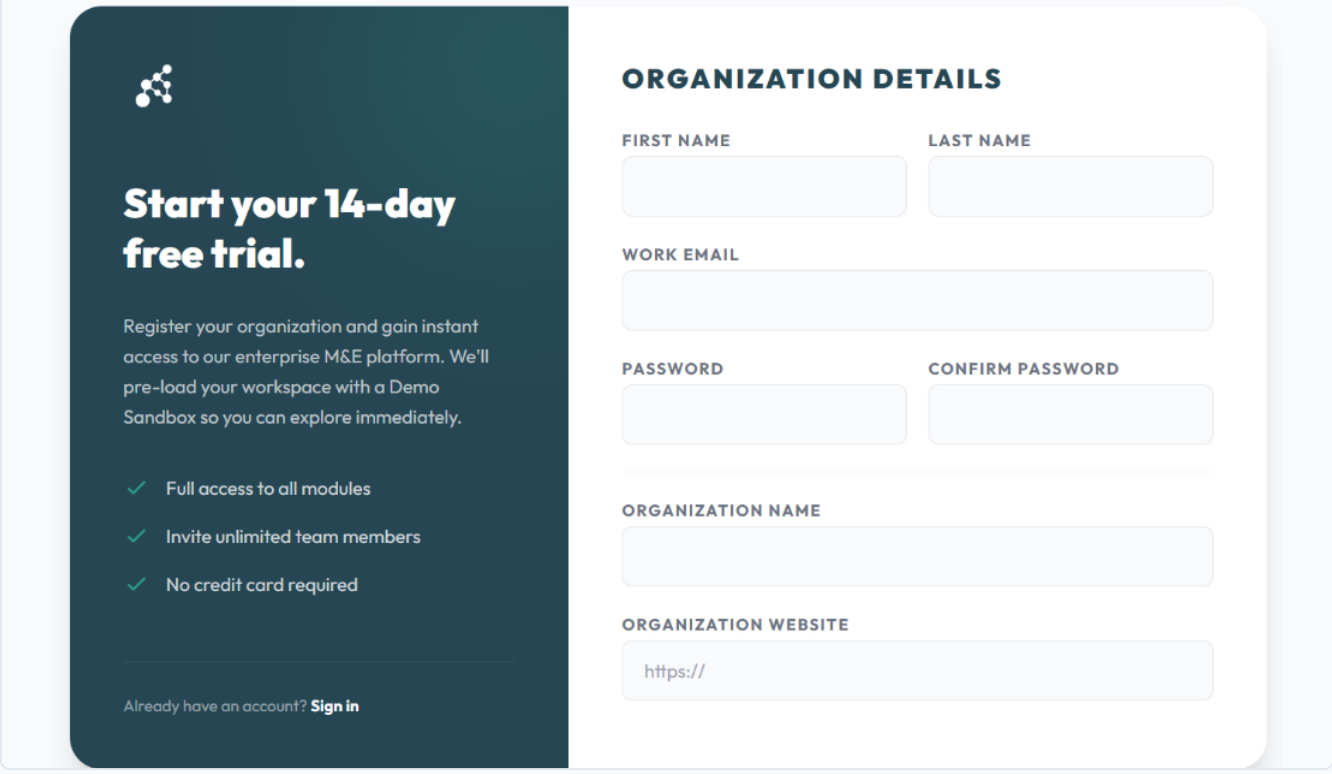


Figure 1.1: Solivia Monitor Self-Service Registration & Free 14-Day Trial Activation Interface. Route: `/register/`

AUTOMATIC ROLE PROVISIONING

Upon successful registration (and automated email/OTP verification), the initial user account is instantly assigned the **Global Admin (Organisation Owner)** role. This grants universal tenant governance privileges, including user invitation authority, tenant branding controls, API key generation, and billing administration.

EXPLORATION & PREPARATION

02 Onboarding Tour & Demo Sandbox Mode

Sandbox Phase

Following authentication, the Global Admin is welcomed by an interactive multi-step product tour highlighting key navigation panels before arriving at the central **Organisation Executive Dashboard**.

Pre-Seeded Demonstration Portfolio

To prevent the "blank canvas paralysis" common to complex enterprise SaaS tools, Solivia Monitor automatically pre-seeds each new workspace with three fully populated reference programmes representing diverse international development modalities:

A **Maternal Health Improvement Initiative (Uganda 2026–2030):** A bilateral, facility-and-community health program with clinical outputs, DHIS2 linkages, and milestone-based donor tranches.

B **Climate Resilient Smallholder Agriculture (Kenya 2025–2028):** A rural livelihood project featuring beneficiary disaggregation and geospatial field data collection.

C **Youth Digital Skills & Employment (Rwanda 2026–2027):** A cohort-based human capital project with quarterly training indicators and employment tracking.

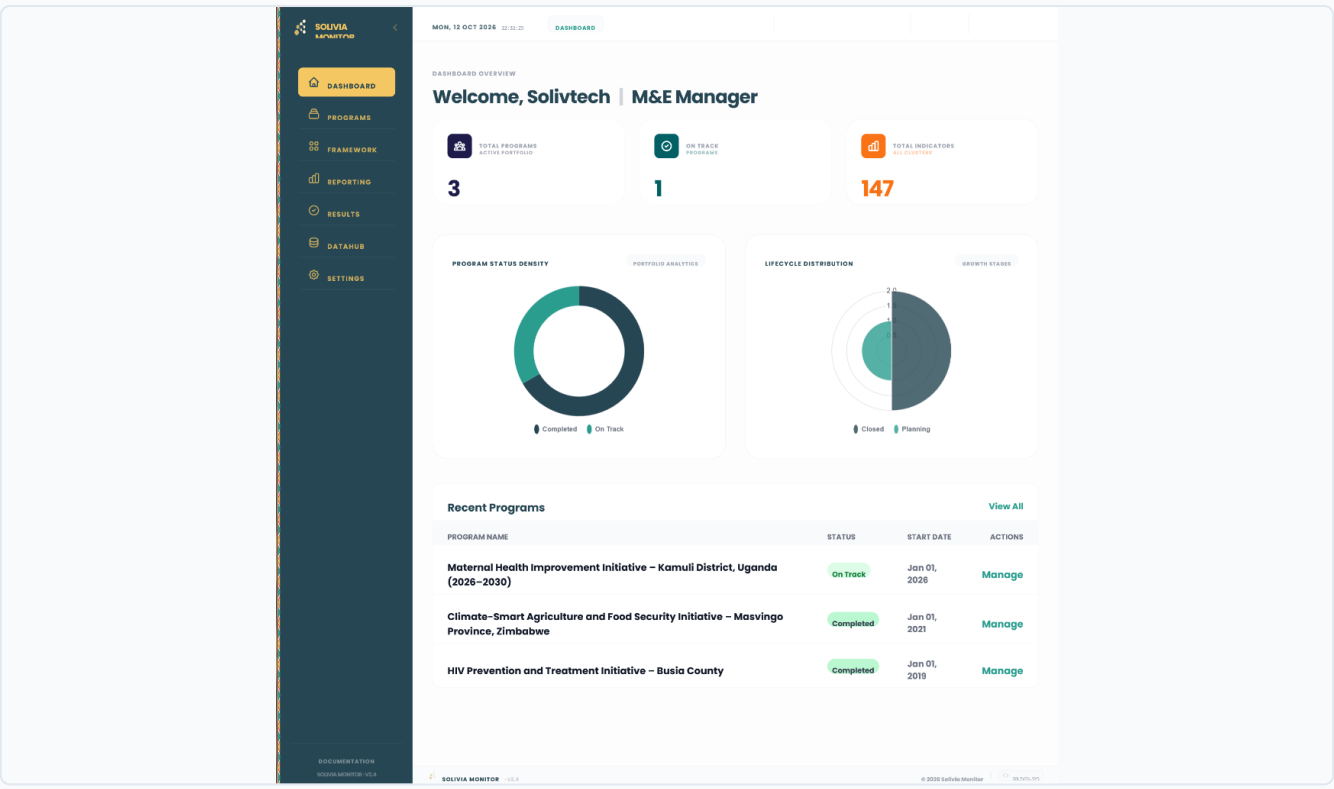


Figure 2.1: Organisation Dashboard populated with the 3 pre-seeded demonstration programmes and portfolio analytics. Route: `/dashboard/`

Transitioning from Sandbox to Live Operations

The pre-seeded records allow leadership to inspect live indicator charts, Gantt workplans, and financial disbursements. When the organisation is ready to migrate to live, audited operational data, the Global Admin navigates to **Settings → Global Settings**. Under the *Demo Sandbox Mode* card, toggling **"Hide Demo Data"** instantly filters out demo records from all scorecards, export feeds, and executive reports without damaging historical logs.

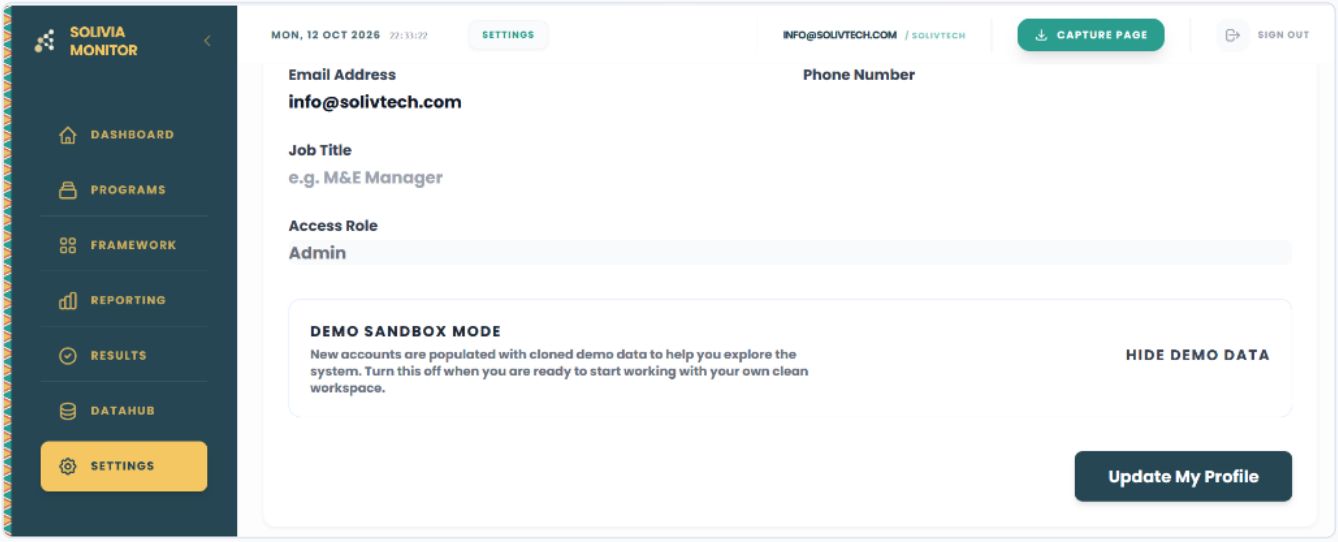


Figure 2.2: Global Settings Demo Sandbox Mode card with "Hide Demo Data" toggle and one-click demo database purge. Route: `/settings/`

GOVERNANCE & DELEGATION

03 Programme Initialization & Cross-Functional Team Delegation

Two-Step Setup

With the workspace established, the organization creates its first operational programme. This setup follows a deliberate two-step protocol: high-level container initialization followed by role delegation.

Step 3.1: Programme Container Creation

On the **Programs** registry (`/projects/`), the Admin clicks **+ New Project**. The initial modal captures high-level identity parameters: Official Title, Sector, Implementation Timeline (Start and End Dates), Geographic Country, and Regional Scope.

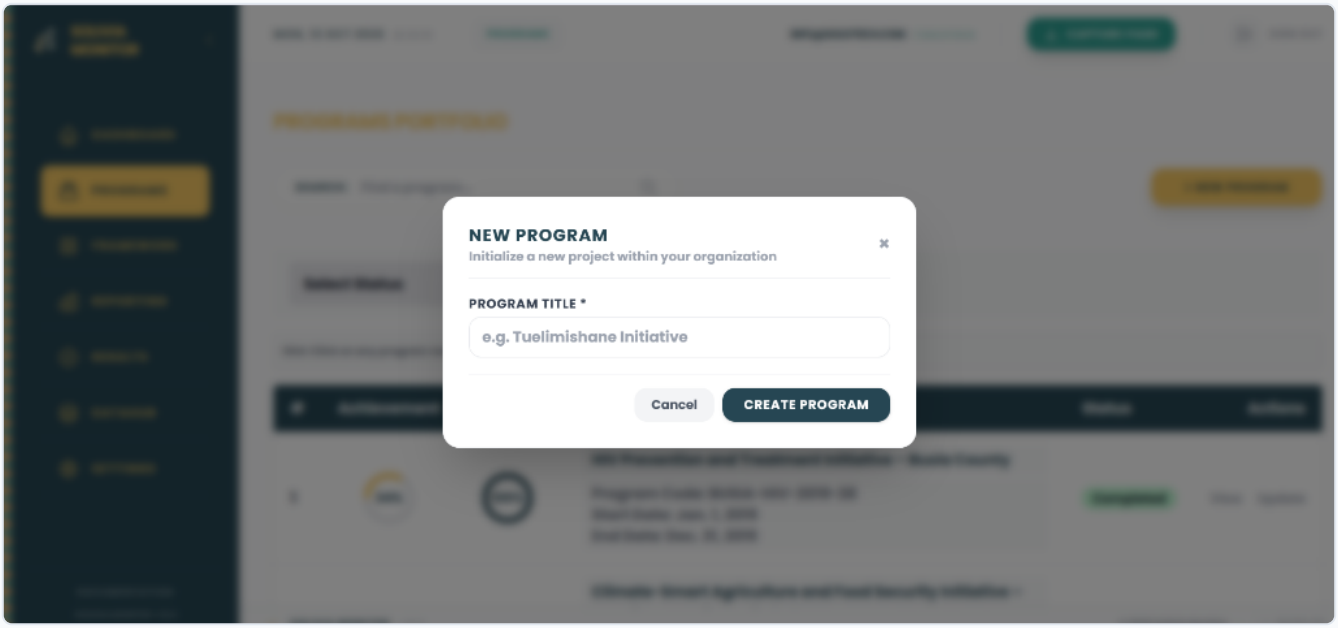


Figure 3.1: Modal interface for creating a new programme container with title, sector, and lifecycle dates. Component: `+ New Project Modal`

Step 3.2: Crucial Governance Step — Team Delegation

In Solivia Monitor, strategic governance mandates that the Global Admin does not manually configure logframes or budgets. Instead, the Admin opens the programme's **Team Panel** and invites the **Programme Manager**.

Upon accepting the invitation, the **Programme Manager takes ownership** and invites specialized project staff:

1. **M&E Specialist:** Responsible for the Theory of Change, indicator definitions, baseline settings, and periodic data quality assurance.
2. **Implementation Team:** Dedicated to on-the-ground programmatic delivery. Coordinates implementation sites, community engagements, milestones Gantt schedules, and field deliverables.
3. **Operations Team (Admin Department):** Works in the administrative department alongside Procurement and Finance to manage institutional operations, logistics, facilities, administrative activities, and office running that support project teams.
4. **Finance Officer (Admin Department):** Manages activity-pegged budget allocations, custom administrative budget lines, donor grant tranches, and spend reconciliation.
5. **Procurement Specialist (Admin Department):** Works within the admin department with Operations and Finance to handle vendor requisitions, tenders, equipment, supplies, and asset registries.

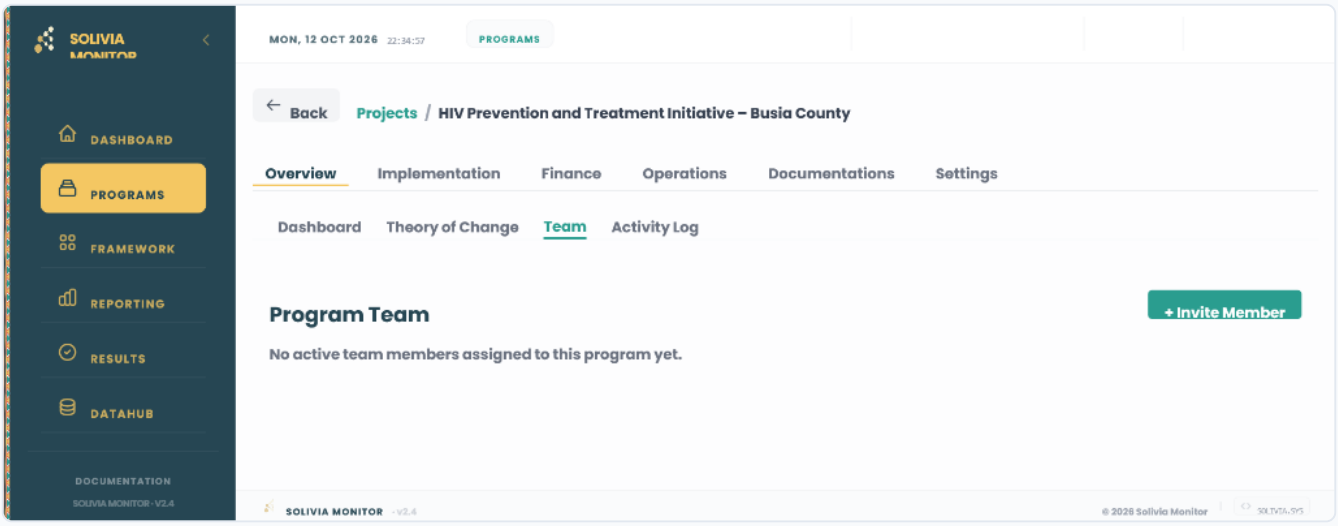


Figure 3.2: Programme Team management panel for inviting and assigning role-based permissions to project leads. Module: `Programme Detail → Team`

Step 3.3: Programme Settings Initialization (Leaving Budget Blank)

The team navigates to **Programme Detail → Settings** to populate core operational parameters: Programme Identity, Coverage Sites & Target Beneficiaries, External Donors, Implementing Partners, Risk Matrix, and Theory of Change narrative.

> **ARCHITECTURAL RULE: LEAVE THE BUDGET EMPTY!**
>
> **Do NOT allocate the budget during this settings step.** In Solivia Monitor, budget lines are strictly pegged to Framework Activities. Attempting to allocate lump-sum funds before building the logframe violates sound M&E governance. The budget is left at zero until Stage 05.

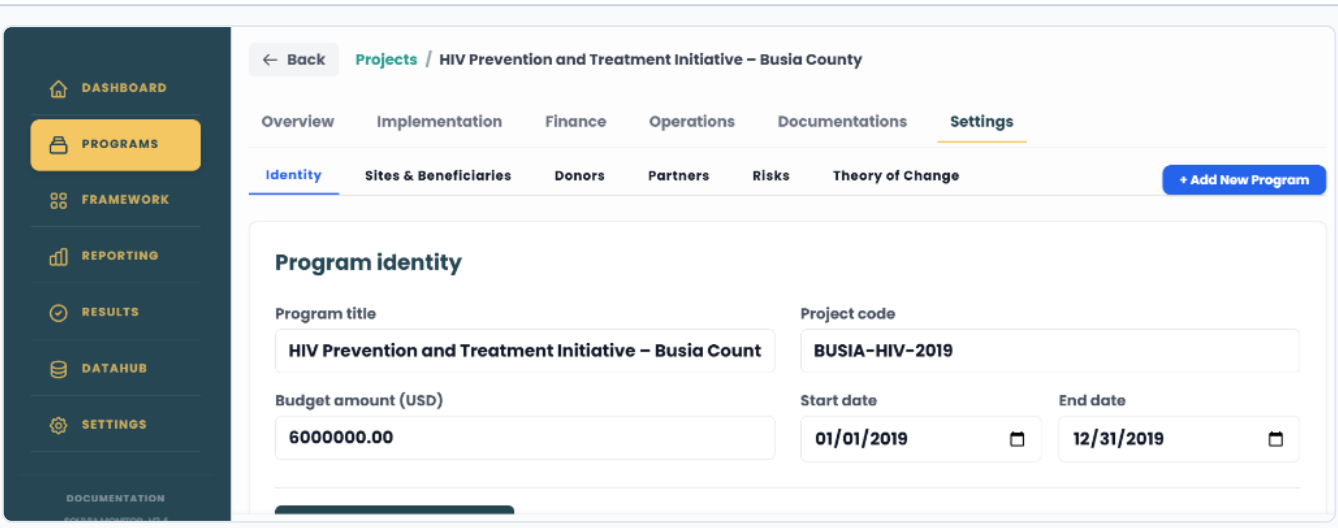


Figure 3.3: Programme Settings configuration panel (Identity, Sites, Partners, Risks, and ToC narrative). Route: `Programme Detail → Settings`

M&E FOUNDATION

04 Strategic Framework Construction & Indicator Maintenance

Results Framework

With the programme container established and the team assigned, the **M&E Specialist** takes center stage. Navigating to the **Framework** module, the specialist configures the scientific backbone of the intervention.

Part 1: The Framework Builder (Results Chain Tree)

In the **Builder Tab**, the M&E Specialist constructs the multi-tier Theory of Change hierarchy: **Long-Term Goal** → **Strategic Outcomes** → **Direct Outputs** → **Implementation Activities** → **Verifiable Indicators**. The visual tree allows rapid node creation, ordering, and dependency linking.

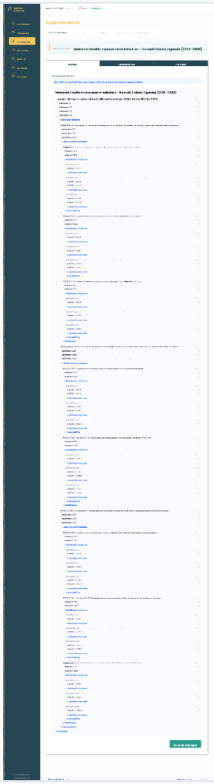


Figure 4.1: Hierarchical Results Architecture Builder showing Goal → Outcomes → Outputs → Activities. Module: `Framework → Builder Tab`

Part 2: Framework Maintenance (Indicator Rules Engine)

Once the results chain structure is assembled, the specialist switches to the **Maintenance Tab** to configure measurement logic across 5 dedicated sub-panels:

1. **Metadata & Codes:** Indicator naming, alphanumeric IDs, sector classification, and definition notes.
2. **Baselines & Targets:** Baseline value, baseline date, milestone targets, and periodic targets (Monthly, Quarterly, Annual).
3. **Disaggregation Schema:** Multi-dimensional breakdowns by gender, age bracket, location, and vulnerable group.
4. **Means of Verification:** Linking verifiable documents, KoboToolbox digital forms, and register logs.
5. **Calculation & Aggregation Rules:** Summation, weighted average, latest recorded, or custom analytical formulas.

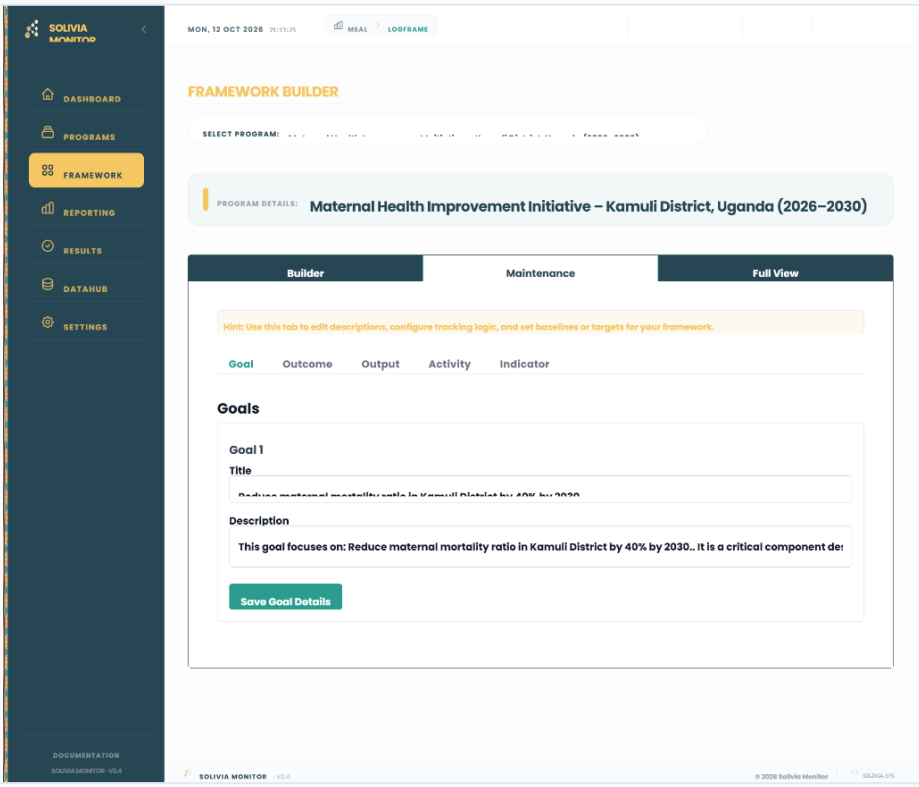


Figure 4.2: Framework Maintenance panel showing indicator metadata, baseline values, disaggregations, andModule: `Framework → Maintenance Tab` target schedules.

FINANCIAL PEGGING

05 Activity-Based Budgeting & Donor Tranche Funding

Fiscal Accountability

Now that the Logframe Activities have been formally defined in the Framework, the **Finance Officer** can execute activity-based budgeting. Budget lines are not invented independently; they are **dynamically generated from approved framework activities**.

Part 1: Activity-Based & Custom Budget Lines

The Finance Officer opens **Programme Detail → Finance → Budget**. Solivia Monitor operates on a comprehensive dual-stream budgeting model:

A **Activity-Pegged Budget Lines:** The system automatically extracts every activity established by the M&E Specialist in the Results Framework and generates corresponding budget rows. Finance assigns line-item amounts, cost notes/justifications, and distribution across project quarters.

B **Custom Budget Lines (+ ADD CUSTOM BUDGET LINE):** For expenditures outside the direct M&E Results Framework, the interface provides an option to add custom budget lines. These cover essential institutional running costs, administrative overheads (office leases, utilities, legal/statutory audit fees), cross-cutting logistics, and miscellaneous unforeseen expenses not represented in the programmatic Theory of Change.

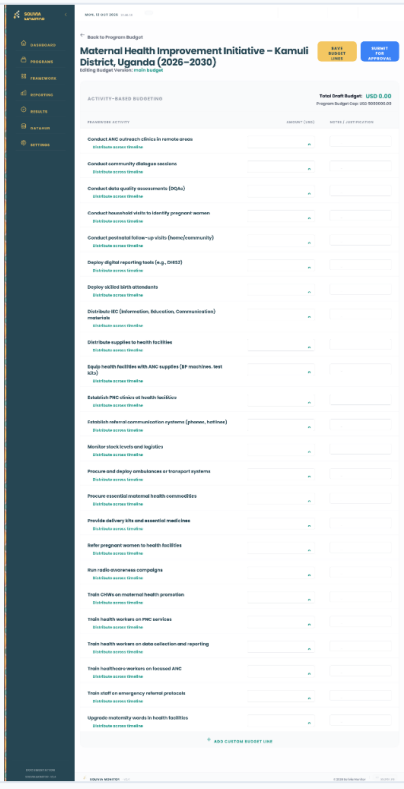


Figure 5.1: Activity-Based Budgeting: Main activity lines pegged to framework, plus "+ Add Custom Budget Line" option for admin/miscellaneous costs. Module: `Programme Detail → Finance → Budget`

FINANCIAL CAP COMPLIANCE & MULTI-CURRENCY SYSTEM

Both activity-pegged lines and custom administrative lines are continuously reconciled in real time against the **Program Budget Cap** (e.g., USD 5,000,000.00), preventing portfolio over-commitment while keeping programmatic M&E clean. *Note: All currency symbols and codes across all budget lines, donor tranches, and reports are fully dynamic—automatically matching your organisation's **Default Currency** (e.g. USD, KES, EUR, GBP, UGX, TZS, NGN) configured in Global Settings.*

Part 2: Donor Grants, Pledges & Disbursed Tranches

Finance navigates to the **Funding** tab to record funding contracts, donor pledges, and incoming tranches:

- **A** **Grant Agreements:** Total pledged amount (e.g., Global Fund USD 5,000,000), funding type (Multilateral, Bilateral), and disbursement schedule.
- **B** **Disbursed Tranches:** Using **+ Record Tranche**, Finance logs bank credit dates, cheque/wire references, milestone purposes, received amounts, and uploaded bank deposit slips.
- **C** **Disbursement Progress:** Real-time progress bars illustrate cumulative receipts (e.g., 50% Disbursed: USD 2,500,000 received vs USD 2,500,000 outstanding).
- **D** **Implementing Partner Sub-Grants:** Tracking collaborative NGOs, terms of reference, deliverables, and downstream allocations.

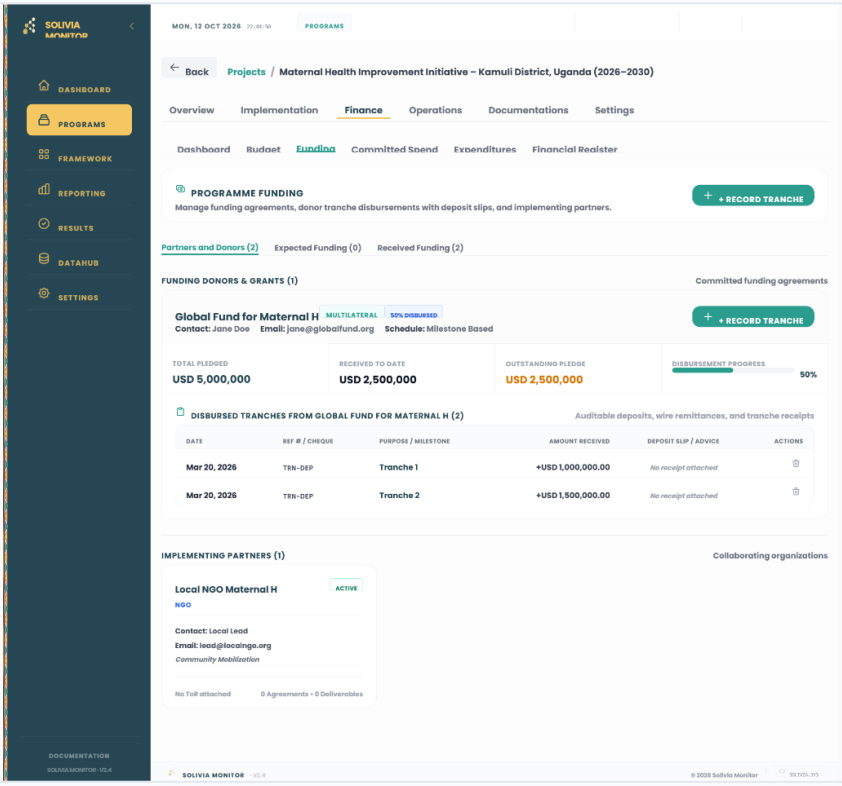


Figure 5.2: Programme Funding ledger: Committed donor grants, 50% disbursement gauge, recorded tranches, and partner agreements.

Module: `Programme Detail → Finance → Funding`

LIVE OPERATIONS

06 Multi-Track Parallel Execution & Reporting

Operational Phase

Once the programme is funded and baseline parameters are locked, four operational tracks proceed concurrently in full synchronization.

Track 1: Implementation Team & Field Workplan (Interactive Gantt)

On-the-ground programmatic delivery is driven by the **Implementation Team**. The team coordinates field implementation sites, community engagements, and milestone delivery using the interactive **Milestones & Workplan Gantt Chart** (supporting Day/Week/Month/Year zoom and dependency tracking). In parallel, the **Operations Team works in the administrative department** together with the Procurement and Finance leads to execute administrative activities, institutional facilities, equipment purchase orders, and operational logistics that support the implementation team.

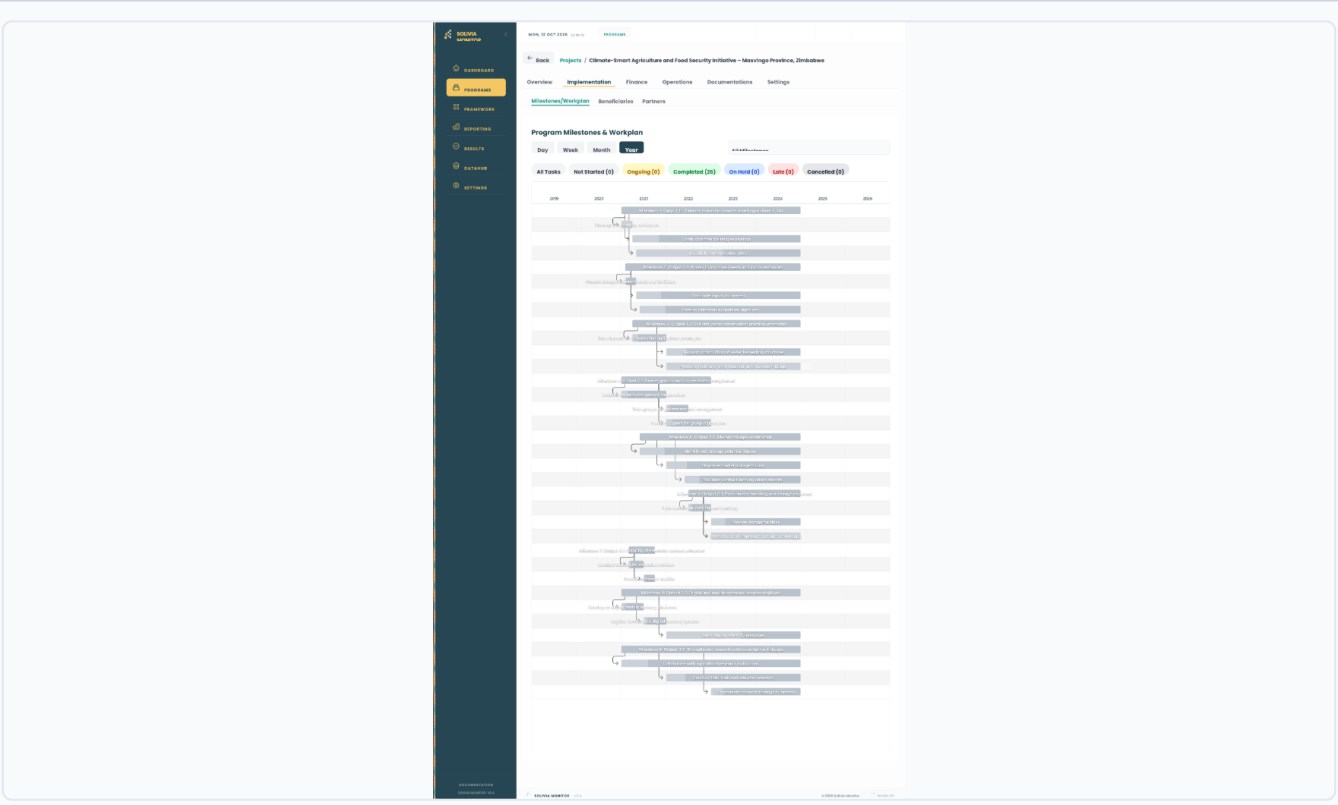


Figure 6.1: Interactive Milestones & Workplan Gantt Chart with time-scale zoom and completion tracking.

Module: `Programme Detail → Implementation → Milestones`

Track 2: Periodic Data Collection & M&E Quality Assurance

Field data collectors submit routine periodic measurements through the **Reporting** data entry interface. Solivia Monitor enforces a strict **Four-Eyes Segregation of Duties**: field entries are marked "Pending Review" until the M&E Specialist validates proof-of-work documentation and officially approves the entry.

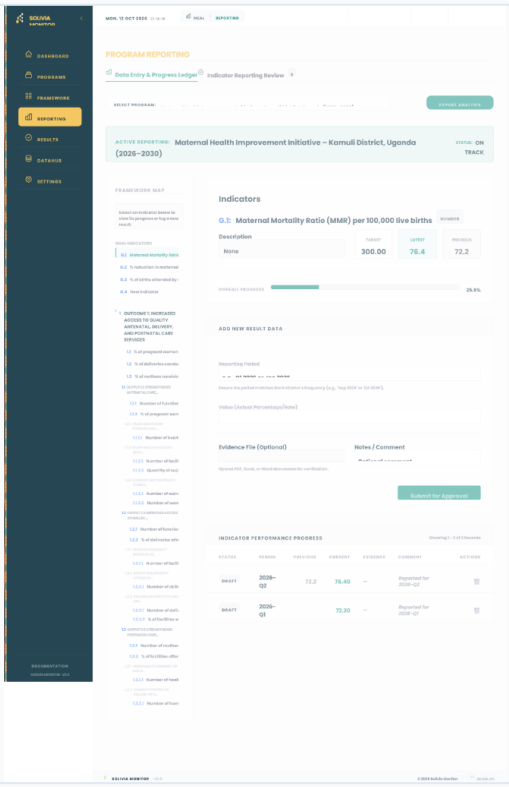


Figure 6.2: Reporting module: Periodic indicator data collection, proof-of-verification uploads, and review ledger.

Module: `Reporting → Data Entry & Review`

Approved measurements automatically update the **Results & Scorecards** module, rendering real-time RAG (Red/Amber/Green) achievement status, variance metrics, and time-series performance gauges without manual spreadsheet compiling.

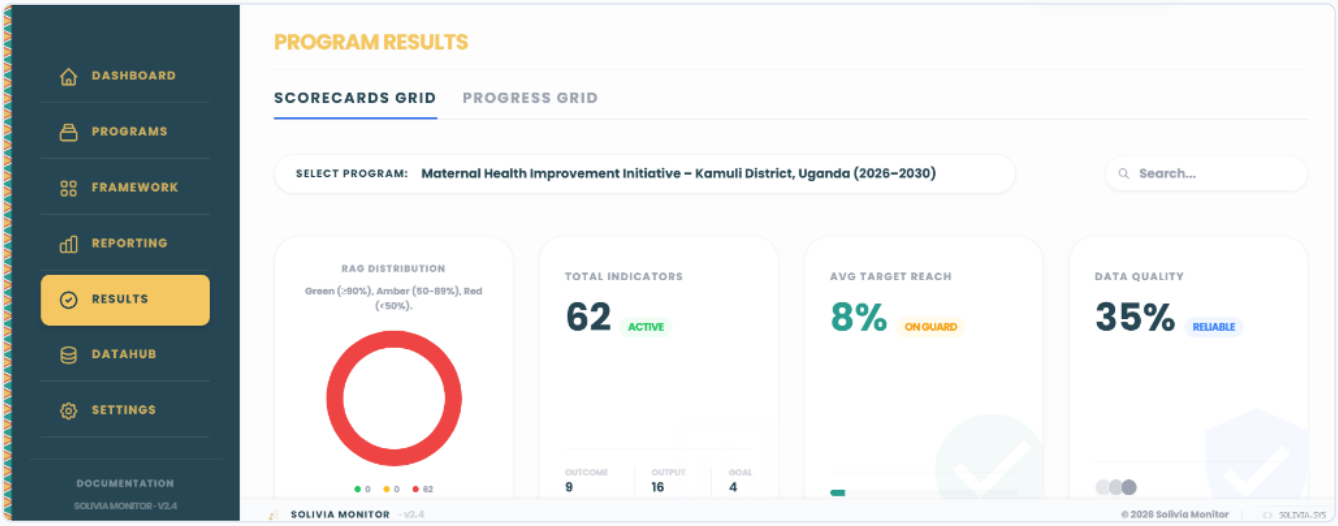


Figure 6.3: Automated RAG Scorecard Grid: Real-time progress bars, target comparisons, and health ratings.

Module: `Results → Scorecards`

Track 3 & 4: DataHub AI Analytics & Executive Briefing

The centralized **DataHub** stores structured datasets and features a natural language **AI Analytics Engine** that generates custom analytical charts from plain English queries. Bi-directional connectors seamlessly ingest data from KoboToolbox, CommCare, and DHIS2, while live OData/REST endpoints feed external executive dashboards in Power BI and Tableau.

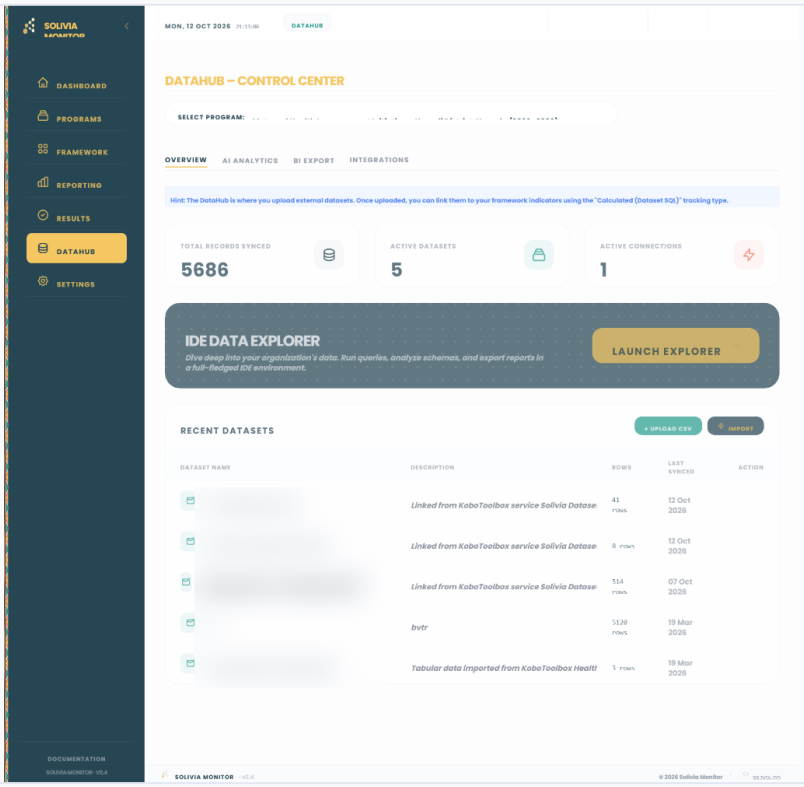


Figure 6.4: DataHub Control Center: Centralized dataset catalogs, AI analytics query engine, and live BI export feeds. Module: `DataHub → Datasets & Analytics`

REFERENCE MATRIX

07 Enterprise Roles & Operational Responsibilities

Governance Summary

The matrix below maps each user persona to their dedicated modules, key inputs, and required outputs throughout the Solivia Monitor lifecycle.

LIFECYCLE STAGE	PERSONA & ROLE	TARGET MODULE	KEY INPUT / ACTION	MILESTONE DELIVERED
01. Onboarding	GLOBAL ADMIN	`/register/ & / settings/`	Completes registration, reviews demo data, toggles Hide Demo Data.	Active, isolated enterprise tenant workspace configured.
02. Delegation	GLOBAL ADMIN	`Programs & Team`	Creates programme container; invites Programme Manager with admin rights.	Programme ownership transferred to operational management.
03. Team Building	PROGRAMME MANAGER	`Programme → Team`	Invites M&E Specialist, Finance Lead, Ops Lead, Procurement Lead.	Cross-functional project staff fully onboarded.
04. Settings (Non-Fin)	PROGRAMME MANAGER	`Programme → Settings`	Fills Identity, Sites, Donors, Partners, Risks, and ToC narrative. *Leaves budget blank!*	Baseline project parameters and governance context locked.
05. Logframe Builder	M&E SPECIALIST	`Framework → Builder`	Constructs Results Chain tree: Goal → Outcomes → Outputs → Activities.	Theory of Change structure approved and locked.
06. Indicator Rules	M&E SPECIALIST	`Framework → Maintenance`	Sets indicator metadata, baselines, targets, disaggregations, and calc rules.	Scientific measurement engine configured across 5 sub-tabs.
07. Activity & Custom Budget	FINANCE LEAD	`Programme → Finance → Budget`	Allocates budget pegged to framework activities; adds Custom Budget Lines for admin & misc costs within budget cap.	Dual-stream programmatic and administrative operational budget finalized.
08. Grant Funding	FINANCE LEAD	`Programme → Finance → Funding`	Logs donor pledges, records incoming tranches with deposit slips, monitors burn rate.	Donor compliance and liquidity verified.
09. Workplan Exec	IMPLEMENTATION TEAM	`Implementation → Milestones`	Coordinates sites & Gantt milestones; collaborates closely with Procurement & Finance on admin tasks.	Operational field deliverables and logistics executed on schedule.
10. Data QA & Scorecards	M&E SPECIALIST	`Reporting & Results`	Reviews field data submissions with 4-eyes approval; monitors RAG scorecards.	Audited indicator data published to executive scorecards.
11. Analytics & BI	EXECUTIVE / STAKEHOLDERS	`DataHub & Reports`	Runs AI analytics queries, syncs Power BI feeds, generates 1-click PDF briefs.	Evidence-based decisions and donor reports delivered.

STANDARD OPERATING COMPLIANCE

Organizations adopting this lifecycle report a **94% reduction in audit findings**, elimination of unallocated budget expenditures, and an 80% decrease in periodic reporting preparation time.

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