



Ministry Of Agriculture & Land Reclamation
US Agency For Int. Development
Agricultural Policy Reform Program
Reform Design and Implementation

PN-ACS-477

وزارة الزراعة واستصلاح الأراضي
الوكالة الأمريكية للتنمية الدولية
مشروع إصلاح السياسات الزراعية
وحدة تصميم وتنفيذ السياسات

APRP - RDI Unit

USAID CONTRACT No. 263-C-00-97-00005-00

Report No. 31



REDESIGN & RECUSTOMIZATION OF THE LOTUS NOTES TECHNICAL AND ADMINISTRATIVE MANAGEMENT INFORMATION SYSTEM (TAMIS)

by

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March 1998

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ACRONYMS LIST

<i>ACRONYM</i>	<i>DESCRIPTION</i>
AC	Agricultural Census
AIC	Agricultural and Irrigation Committee of the People's Assembly
ALCOTEXA	Alexandria Cotton Exporters Association
APRP	Agricultural Policy Reform Program
AY	Agricultural Year Locator (October 1 st to September 30 th of the following year)
BOD	Board of Directors
CAGA	Central Administration for Governorates Affairs
CAPQ	Central Administration for Plant Quarantine, MALR
CBE	Central Bank of Egypt
CIDA	Canadian International Development Agency
CIF	Cost, Freight and Insurance
CMA	Capital Market Authority
Co.	Company
COP	Chief of Party
CSPP	Egyptian-German Cotton Sector Promotion Program
CTS	Cargill Technical Services
DA	Development Associates, Inc.
DAI/B	Development Alternatives, Inc./Bethesda
ELS	Extra Long Staple Cotton
ERSAP	Economic Reform and Structural Adjustment Program
ESAs	Employee Shareholder's Association
ESOPs	Employees Stock Ownership Program
EU	European Union
FAO	Food and Agricultural Organization of the United Nations
FDIs	Foreign Direct Investments
Fed.	Feddan = 4200 square meter
FOB	Free on Board
FSR	Food Security Research Unit
GA	General Assembly
GDP	Gross Domestic Product
GOE	Government of Egypt

<i>ACRONYM</i>	<i>DESCRIPTION</i>
HC	Holding Company
IDA	International Development Association
IPPC	International Plant Protection Convention
IPO	Initial Public Offering
IIMI	International Irrigation Management Institute
IR	Intermediate Results
Kg.	Kilogram
Kt.	Kentar
Libra	Pound of 0.45359 kilogram, also abbreviated as lb.
LE	Egyptian Pound
LK	Lint Kentar of cotton, 50 kgs.
LS	Long Staple cotton
MALR	Ministry of Agriculture & Land Reclamation
MENA	Middle East North Africa
MEIC	Ministry of Economy & International Cooperation
MIMW	Ministry of Industry & Mineral Wealth
MT	Metric Ton
MTS	Ministry of Trade & Supply
MPE	Ministry of Public Enterprises
MPWWR	Ministry of Public Works & Water Resources
MLS	Medium-Long Staple cotton
MVE	Monitoring, Verification & Evaluation Unit
NBE	National Bank of Egypt
NCF	National Consulting Firm
NGO	Non-Governmental Organization
OSAF	Office for Studies And Finance
PA	People's Assembly
PBDAC	Principal Bank for Development and Agricultural Credit
PEO	Public Enterprise Office
P&L	Privatization & Liberalization
PIDP	Partnership In Development Project
PMU	Project Management Unit
PPC	Program Planning Committee

<i>ACRONYM</i>	<i>DESCRIPTION</i>
PU	Purdue University
RDI	Reform, Design & Implementation Unit
ROW	Rest of the World
SK	Seed Kentar of cotton (157.5 kgs.)
SS	Short Staple cotton
STTA	Short Term Technical Assistance
TA	Technical Assistance
TAMIS	Technical & Administrative Management Information System
TAT	Technical Assistance Team
TF	Task Forces
TO	Training Officer
TOR	Terms of Reference
TNA	Training Needs Assessment
TRG	Training Resources Group
TSG	The Services Group
UMD	University of Maryland
USAID	United States Agency for International Development
USS	United States Dollar
WB	World Bank
WTO	World Trade Organization

EXECUTIVE SUMMARY

The objective of this assignment was to redesign the Reform, Design and Implementation (RDI) unit's Lotus Notes Technical and Administrative Management Information System (TAMIS). The RDI project began in November 1996, and its TAMIS was built three months later. Since its creation in February of 1996, the RDI TAMIS has seen a high level of usage among most of the project's technical advisors. However, after one year of operation, the information system was in need of being redesigned to incorporate the year two workplan. In addition, additional enhancements to better reflect the informational needs of the project and to increase the system's usage were sought with the redesign. As the largest component among nine in USAID's Agricultural Policy Reform Program (APRP), RDI is a complex project that works with many players in the development community and in both the ministerial and private sector areas of the Egyptian agricultural scene. Given the project's broad mandate, the role of the Lotus Notes TAMIS system can be instrumental in unifying the many and varied players involved in project implementation. During its first year of operation, TAMIS contributed substantially to unifying the project. The goal of this redesign was to increase TAMIS' unifying tendency by simplifying the TAMIS interface, streamlining its function and improving its content to facilitate greater coherency and clearer organization among project participants. The broad use of this dynamic, systematic information system will enable more transparent tracking of workplan-specified deliverables, while at the same time fostering greater information sharing and communication across the project.

Lotus Notes can be a powerful tool. In the ideal, it can serve as a collective mind for a project team. When a team's collective mind is organized through a Notes information system in an easy-to-access intuitive manner, and the data contained therein is current, the database becomes a dynamic, unifying, efficiency-catalyzing system. If, however, participants are not dedicated to using Notes and if the bulk of the information in the database is 'stale', the power of Notes is severely compromised and its potential is wasted. The goal of this assignment was to contribute to the former scenario, preventing the latter.

INSTITUTIONS/INDIVIDUALS VISITED:

APRP/RDI; APRP/MVE; APRP/PMU; APRP/EPIQ; USAID/Egypt

ACTIVITIES/ACHIEVEMENTS:

Mr. Charley Schollaert over a three week period from March 7 to March 26th, 1998 redesigned the RDI TAMIS, worked with MVE and PMU in enhancing their TAMIS', met with the EPIQ team to discuss the creation of an EPIQ TAMIS, and visited USAID to present the redesigned RDI TAMIS. The principle assignment was the RDI TAMIS redesign, and on this, Mr. Schollaert worked closely in an iterative manner with Dr. Jane Gleason, Dr. Max Goldensohn and Ms. Heba Hosny to devise the structure of the new system. Also, Mr. Schollaert spent time with each member of the RDI team, both individually and collectively obtaining their input on informational needs and structural/work-flow process alteration desires. Also, Mr. Schollaert provided training to each advisor in the use of the redesigned system.

The RDI TAMIS now consists of six modules comprised of 34 views through which can be accessed the 22 forms of the database. Views present the information in columns and rows categorized and sorted in a variety of manners. Forms carry the 'data' of the project and contain the fields that allow for the input of pertinent information. The redesigned system differs from the previous TAMIS in several basic ways.

- It increases the avenues through which information can be accessed. Now, not only can information on an activity be found within the workplan numerical sequence, as was the method in the previous TAMIS, but also by RDI component, advisor responsible and product addressed.
- Its reporting module has been improved to ease the generation of quarterly reports and to allow for better tracking of project activities.
- All the forms and views have been altered to query and/or present the important information in an improved manner. Where utility is no longer apparent, some fields, forms and views have been hidden. And, new fields, forms and views have been added where required:
 - ◇ The Subactivity form was added to allow for clear separation of all of the public awareness and training activities under an activity;
 - ◇ The Project Information form was added to house project reference information;
 - ◇ The Workshop form was added to allow for clear separation of these events from training events;
 - ◇ The Subcontractor Information form was added to house information on the RDI subcontractors;
- Links to other views in the MVE Kunuz and the PMU TAMIS have been added to keep track of benchmark progress and general APRP technical, financial and administrative information.
- An archiving system has been added in order to keep the contents of the database current. 99% of the year one entries into TAMIS have been archived.

A WALK THROUGH OF THE REDESIGNED TAMIS

As stated above, the redesigned TAMIS is now comprised of six modules with 34 views containing information from 22 forms. The modules of the redesigned RDI TAMIS are: 1) Activities, 2) Technical Assistance, 3) Training, 4) Reporting, 5) Miscellaneous and 6) Archives. Below is a description of each module.

Activities Module

Under this module exists the views that present the activities and all work directly related to them (activity terms of references, consultant information, meeting/interview notes, trip reports, workshop/seminars and training).

The five views of the Activities Module are:

- The **'By Workplan'** view which sorts all activities by workplan numerical sequence.
- The **'By Component'** view, which sorts all activities by RDI Component or technical area (Agricultural Sector Support Services, Resource Economics, Privatization and Investment Promotion, Marketing and Agribusiness, Public Awareness, Training and Chief of Party/Office Administration).
- The **'By Advisor'** view, which sorts all activities by responsible advisor
- The **'By Product'** view, which sorts all activities by product addressed, i.e. cotton, rice, etc.
- The **'By Status'** view, which presents all activities by their current status (not yet begun, in progress, completed or cancelled).

Technical Assistance Module

This module presents the short term technical assistance of the project in the first view by sequence in the workplan, and in the second view by contractor with a listing of associated level of effort.

Training Module

Under this module is housed a listing of all training activities under the primary view. Then, under the Participants view is a listing of all training participants and information on each of them.

Reporting Module

This module contains all the reporting concerns of the project divided in two components - general project and quarterly.

The general project component's view are:

- **'Activity Progress Report'** - lists all activities by quarter, their status and progress achieved this quarter and plans for next quarter;
- **'Activities and Their Deliverables'** - lists all activities and their associated deliverables;
- **'Level of Effort Report'** - lists LOE status across the contract;
- **'Level of Effort by Contractor'** - lists LOE status by contractor;

- **‘Subcontractual Information’** - lists basic subcontractual information including financial and level of effort details.

The quarterly reporting component of the Reporting Module presents quarterly reporting information in three views:

- **‘Activities’** - lists activity status;
- **‘Training’** - lists status of training opportunities;
- **‘Narratives’** - lists narrative chapters of the quarterly reports.

Miscellaneous Module

This module contains all miscellaneous elements of the TAMIS divided into two components - **‘Official Project’** and **‘Other Information’**.

The component of official project information contains listings of the following:

- **‘Publications’** - official project publications;
- **‘Team Memos’** - official memos issued by the COP;
- **‘Success Stories’** - narratives of project successes;
- **‘Project Assumptions’** - a listing of all project assumptions and how they change from year to year;
- **‘Procurement’** - a listing of all project procurement;
- **‘Project Information Form’** - contains useful project reference information.

The component of other information contains listings of other documents, most of which can be found elsewhere in the TAMIS. This section allows for them to be consolidated in the following views:

- **‘Benchmark Comments’** - which allows for the documenting of the status of a particular benchmark;
- **‘All Trip Reports’** - all trip reports;
- **‘All Meetings/Interviews’** - all meeting/interview notes;
- **‘All Comments’** - all comments.

Archive

The Archive module contains all the archived documents in the **‘Archived Documents’** view, and contains all project documents ever created in the **‘All Documents By Workplan’** view. To archive a document, the document(s) needs to be selected (with a check mark next to it), then Actions >> **‘Archive Selected Documents’** feature needs to be chosen.

PROTOCOLS/REMINDERS/OBSERVATIONS

⇒ **When using the Subactivity Form**, it is important to be sure the appropriate RDI component, ie. Public Awareness or Training, has been selected in the parent activity form to ensure that the subactivity appears in the **‘By Component’** view under the Public Awareness or Training component.

⇒ **Security.** Access to the database is controlled. It is up to the project to decide what sort of access rights are given to each team member to ensure database information integrity as well as user satisfaction in having control of his/her entries. As Notes usage on the project advances and users become more proficient, it may be wise to liberalize access rights for those with a high level of Notes proficiency.

MAJOR CONCLUSIONS (LESSONS LEARNED)/RECOMMENDATIONS:

TAMIS usage needs to continue to be widespread and thorough. Especially among a few of the technical advisors, usage needs to increase exponentially. TAMIS needs to evolve into an even greater part of the daily work of the project, to where using it and having knowledge of its contents would be absolutely vital to doing a technically sound job.

FOLLOW-UP ACTION ITEMS:

USAID needs to be given access to the MVE Kunuz and to the PMU TAMIS. In discussions with the USAID Lotus Notes Administrator, it is our understanding that the problem to access lies with the AID/Washington node of the four link chain. Mr. Schollaert will communicate with Jim Lindahl, USAID Notes Administrator, when he returns to Bethesda to ensure that USAID has these databases on their system, and that replication between DAI/Bethesda and AID/Washington is working smoothly.

USAID's access rights to the three TAMISes will be upgraded so that participants at USAID can add comments. This can be done from the APRP office, but should be coordinated with DAI/Bethesda to be sure the changes to the access control carry through the system.

Ms. Hosny and Dr. Gleason, as well as several others in the APRP complex, have a basic knowledge in Notes design thus can and should make changes to the TAMIS as they see fit. For larger, more complex changes, Mr. Schollaert and the DAI TAMIS team will be available to provide assistance from Bethesda

HELPFUL TIPS FOR USING LOTUS NOTES AND TAMIS

The Basics

Lotus Notes databases are comprised of information which can be broken down into three components – fields, forms and views.

- **What is a Field:**
Fields are the areas where information is entered, either in text or in a set manner either as a keyword list (ie. product, advisor, etc.) or as a number or date.
- **What is a Form:**
The form is the medium through which various types of data are entered. Information from various fields within the forms is conveyed in the views. There are 22 forms in the TAMIS.
- **What is a View:**
Views allow you to see the documents in the database in a prescribed manner, through programmed sorting and categorizing. The RDI TAMIS has 34 views divided into 6 sections. The sections represent types of information presented and the views within highlight various fields within the sections.

Expanding and Collapsing Views

There are two methods of expanding and collapsing views. The first involves the smarticons; the second, which is the best method for expanding specific categories, is to *hit the asterisk* in the top right portion of your *desktop* keyboard (unfortunately, this function isn't available with laptops).

Using the Navigation Smarticons

The View Navigation smarticons below make it easy to navigate the views.



The first pair move you to the next or previous unread document. The second pair move you to the documents you have selected, the third pair expand or collapse selected categories within the view, and the last pair expand or collapse all documents within a view.

It's frequently easier to find things in a collapsed view. To collapse a view, use the View Collapse All icon . Once you have placed the highlight bar on the category that you are interested in, use the View Expand icon  to expand the levels under that one category.

Finding Information

There are three methods at your disposal to find the information or document you seek.

1. *Going to the appropriate view within the database.* Be sure to know which view you are in and whether or not it is the most appropriate to find what you seek.

2. *To quickly scroll to the appropriate section of a view, simply type the first few letters or the number of item to which you would like to go (the word or number corresponds to the contents of the first column of the view), press enter, and you will then scroll down to any documents that begin with this word or number.*
3. *Using the search bar to search the text of the document. If you want to find out all information on a subject or a combination of subjects that may or may not be a keyword, hit View >> Searchbar, or hit the Smarticon that looks like a pair of binoculars. Type in the word, or combination of words, press enter and the documents *in that view* will appear on the screen with a checkmark next to them, and with a varying degree of darkness in the middle column, which corresponds to the frequency with which that word or phrase has appeared in the document. To see documents by that same search from other views, simply scroll between views with that search still active.*

Using the Smarticons

As with most any software application, using the smarticons is the way to optimize your usage of the application.

To access the smarticons, go to: file >> tools >> smarticons. You can edit (ie. revise your personal set in the toolbar) your smarticons through this window, ie. add, delete, change size, etc.

Here is a list of some of the more useful smarticons with their functions below:



1. 2. 3. 4. 5. 6. 7. 8. 9. 10. 11. 12. 13. 14. 15. 16. 17. 18. 19. 20. 21. 22.

1. Print - see below for more explanation;
2. Scroll to next unread document - very useful when going into database every other day or so;
3. Mark all documents unread - helpful to clear many days of unread marks from screen;
4. Mark all selected documents unread;
- 5-7. Cut, copy, paste;
8. Undo last error;
9. Spell check;
10. Edit document - allows edit mode;
11. Permanent red pen – useful when editing or commenting within a document;
- 12-4. Bold, underline, make text larger;
15. Bulletize (only works when writing in rich text fields);
16. Margins to left (helpful when pasting text and margins go way off to the right);
17. Center;
18. File attach, which attaches a 'dead' document, ie. not linked to the network or your hard drive, thus changes made in either the attachment or the one elsewhere do not update the other copy;
- 19-22. View expanding & collapsing (see above for explanation).

Linking to Files to the Network

1) **Attaching a file** - using the paperclip smarticon, this inputs a 'dead' file that exists in another application, ie. Microsoft Word.

2) **Linking a file** - this links a file into Notes from the network, making it a live document. Thus changes made in Notes transfer to the network version and vice versa. This requires that all TAMIS users are on the same network, thus for our purposes can be problematic and is not a desired approach.

3) **Embedding a file** - this embeds a file in its original application into TAMIS. Thus, for example, an Excel spreadsheet would be housed in Notes as an Excel spreadsheet and as a 'live' document. Thus changes made anywhere in the TAMIS version would carry through to others during the normal course of replication. To do this, you must create an object. To create an object go to 'Create' >> Object, then select the appropriate category (whether you are creating a new file, or embedding an existing file, etc.) and proceed as directed.

Printing

Printing with the smarticon is the best way to go. There are several variations with printing that you should know:

- 1) *To change the printed page layout from portrait to landscape*, go to the printer option from file >> print; then go to setup, and change the orientation accordingly. This function is especially helpful when printing a view and the columns, when printed, extend beyond the normal portrait-sized 8.5 inch width of the paper. This permanently changes the print format, so you must change it back to get the printing back to portrait.
- 2) To print a view rather than a document, you must select 'print view' under View Options, at the file >> print window.
- 3) To print several documents at once, select them in a view and be sure the 'print selected documents' option is selected under View Options, at the file >> print window.