PN-ACG-585

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

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

Ministry of Agriculture and Land Reclamation

AGRICULTURAL POLICY REFORM PROJECT

Reform Design and Implementation Unit
USAID CONTRACT NO. 263-C-00-97-00005-00

Report No. 59

Report On The Recustomization of the RDI TAMIS for The 1999 WorkPlan

Prepared by
Tonya Giannoni

March 1999

Reform Design and Implementation Unit
Development Alternatives Inc. Group: Office for Studies & Finance, National Consulting Firm, Development Associates, Cargill Technical Services, The Services Group, Training Resources Group, Purdue University, University of Maryland

A

TABLE OF CONTENTS

ACRONYMS LIST

ACRONYM	*DESCRIPTION*
AC	Agricultural Census
AERI	Agriculture Engineering Research Institute
AHD	Aswan High Dam
AIC	Agricultural and Irrigation Committee of the People's Assembly
ALCOTEXA	Alexandria Cotton Exporters Association
APRP	Agricultural Policy Reform Program
ARC	Agriculture Research Center
AY	Agricultural Year Locator (October 1st to September 30th of the following year)
BOD	Board of Directors
CAGA	Central Administration for Governorates Affairs
CAPMAS	Central Agency for Public Mobilization & Statistics
CAPQ	Central Administration for Plant Quarantine, MALR
CASC	Central Administration for Seed Certification
CASP	Central Administration for Seed Production
CAWD	Central Administration for Water Distribution
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
EAO	Egyptian Agriculture Organization
ELS	Extra Long Staple Cotton
ERSAP	Economic Reform and Structural Adjustment Program
ESAS	Egyptian Seed Association
ESAs	Employee Shareholder's Association
ESOPs	Employees Stock Ownership Program

ACRONYM	*DESCRIPTION*
EU	European Union
FAO	Food and Agricultural Organization of the United Nations
FDIs	Foreign Direct Investments
Fed.	Feddan = 4200 square meter
FIHC	Food Industries Holding company
FOB	Free on Board
FSR	Food Security Research Unit
GA	General Assembly
GATT	General Agreement on Tariffs and Trade
GDP	Gross Domestic Product
GOE	Government of Egypt
GTZ	German Technical Assistance Agency
HC	Holding Company
HEIA	Horticultural Export Improvement Association
IDA	International Development Association
IFC	International Financial Cooperation
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.
LOE	Level of Effort
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
MoTS	Ministry of Trade & Supply

ACRONYM	*DESCRIPTION*
MPE	Ministry of Public Enterprises
MPWWR	Ministry of Public Works & Water Resources
MLS	Medium-Long Staple cotton
MVE	Monitoring, Verification & Evaluation Unit
NARS	National Agriculture Research Center
NBE	National Bank of Egypt
NCF	National Consulting Firm
NFPA	National Food Processor Association
NGO	Non-Governmental Organization
O & M	Operation & Maintenance
OSAF	Office for Studies And Finance
OVR	Office of Variety Testing & Registration
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
PRA	Participatory Rapid Appraisal
PU	Purdue University
PVP	Plant Variety Protection
RDI	Reform, Design & Implementation Unit
ROW	Rest of the World
SCC	Sugar Crops Council
SCRI	Sugar Crops Research Institute
SIIC	Sugar and Integrated Industries Company
SK	Seed Kentar of cotton (157.5 kgs.)
SPC	Seed Privatization Committee
SS	Short Staple cotton
STTA	Short Term Technical Assistance
SWG	Sugarcane Working Group
TA	Technical Assistance

ACRONYM	*DESCRIPTION*
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
US$	United States Dollar
USPMA	U.S. Produce Marketing Association
USDA	U.S. Department of Agriculture
WB	World Bank
WTO	World Trade Organization
WUA	Water User Association

I. BACKGROUND

The APRP/RDI project management information system, known as TAMIS (Technical, and Administrative Management Information System) houses the RDI Unit's work plan in accordance with the work plan tasks per DAI's contract with USAID. The work plan is composed of nine major tasks, and dozens of subtasks. The information from all work activities related to all tasks is housed in the TAMIS. This includes documentation of every activity required in the conduct of a study, from the formulation of a terms of reference, through data collection, writing the final report, and presenting the results at a workshop or seminar. The TAMIS thus stores terms of reference, meeting reports, trip reports, records of important conversations, and follow up plans to implement recommendations derived from policy studies. Because the TAMIS is built in Lotus Notes, all members of the team have immediate access to the information and are able write comments on any entry into the system.

The RDI Unit TAMIS is used extensively and on a daily basis by all project staff. There are hundreds of entries, reflecting the production during 1998 of numerous technical reports, dozens of seminars, workshops and other training activities, plus the implementation of activities in support of established reforms. Access to the information housed in the RDI TAMIS is available to other APRP units and USAID. The MVE Unit uses the RDI TAMIS for assistance with its verification program, and USAID has access in order to be fully informed of RDI progress.

The purpose of this assignment is to alter the format of the RDI TAMIS for 1999, while ensuring that is remains simple for users to locate and enter information. The specific tasks assigned according to the terms of reference are:

- Review the 1999 Draft RDI work plan.
- Make alterations to the RDI TAMIS to make it consistent with the RDI Draft 1999 Work plan.
- Train members of the RDI Unit in the use of the TAMIS.
- Write a report on the assignment.

In addition to these tasks, the "Using" -- a living help document for TAMIS -- was updated and is included as an annex to this report.

II. REVIEW 1999 DRAFT RDI WORK PLAN

The draft work plan was entered into TAMIS and all completed activities from 1998 were archived. In the Activities module all views display those activities which are considered current by the users and the 1999 work plan. The numbering protocol for activities from the work plan for 1998, any subsequent activities, and the 1999 work plan is as follows:

Example: 1. 3. 01
Digit 1 = Arabic number for the Roman Numeral Workplan Section
Digit 2 = Project Year during which the activity started, 1998 = 2; 1999 = 3; etc
Digit 3 = Consecutive numbering between 01 - 99.

A report from TAMIS with the work plan is included in this report as Annex A.

III. ALTERATIONS TO THE RDI TAMIS

A complete list of changes made is included in Annex B. The methodology used for making alternations included discussions with users and review of the RDI quarterly report format. It anticipated that the quarterly report can be prepared using the information stored in the TAMIS and will include several TAMIS produced reports as annexes.

Outcome of discussions with users. Users wanted tools to help them find information more easily and assistance with clerical data entry of information. Consequently, the changes were made in the system to provide the users tools to find documents. Key changes were the creation of a search index [1], manipulation of views to provide more information, adding views (such as activities by policy area and benchmark), re-organizing the Archives, and adding help features on the activity form to ensure that all information is entered properly.

Quarterly reporting. The work plan format included in Annex A may be used as an annex to the quarterly report. This will require users to update the current status field on the activity form. Additional annexes, which can now be printed from TAMIS are the STTA LOE chart, the RDI publications list, and training and workshops by month. The inventory is also available in TAMIS.

The redesigned system differs from the previous TAMIS in several basic ways.

- The TOR form now does not save previous versions. A status button was added.
- The publication form is now a critical form for tracking progress on report deliverables and is to be completed by the technical advisor with primary responsibility.
- The other information form is de-emphasized. This form should only be used for storing documents, which are not publications, training documents, workshop documents, meeting notes, or trip reports.
- The STTA form is critical and must be completed by the technical advisor for all short-term technical assistance under an activity TOR. On a monthly basis the timesheet for STTA will be updated to reflect level of effort reported.
- The workshop and training forms, like the publications form are critical for tracking workshops and training. The forms can now store all of the documents related to an event and will be provide summary training information. This will require that once an event is completed that the form be updated to reflect the number of participants. It is hoped that once WINFAX is installed on the server that invitations will be able to be generated in TAMIS and faxed to contacts in the APRP contact system.

[1] The search bar is added by selecting the View Menu , and marking the Search bar as selected (a check should be displayed). For those operating on the APRP server the index has been created. Indexes must be generated on a server by server basis.

- The archiving system has been redesigned to archive on a year by year basis. Additionally, the functionality to look at products and activities across the life of the project has been added.

Data integrity. In addition to entering the 1999 work plan, during this assignment, Ms. Giannoni reviewed all of the information contained in the TAMIS and focused on solving several data problems. For instance, STTA LOE, RDI publications, and workshops were not being entered into the database using the prescribed forms. While the information existed in text form, without the use of the specific forms, status reporting was nearly impossible. Therefore, during the course of the stay in addition to entering the work plan, Ms. Giannoni:

- Updated the publication list so that the current view -- 5. Miscelleanous\1. Official Project\1. Publications -- includes all publications completed to date, as well as the pending reports.
- Entered the STTA LOE (expatriate and local) through June 1998. The LOE from July 1998 to present will be entered in the next few weeks.
- Reviewed workshops and training and identified areas which need additional data review. This task is assigned to the public awareness/workshop unit.

IV. TRAINING AND DOCUMENTATION

A presentation was delivered on 3 March 1999 to the entire team. This interactive session was designed to review the 1999 work plan, the alternations made to the system and a review of the RDI TAMIS process. A copy of the presentation agenda is included in Annex C. Following the presentation, several individual and group training was conducted.

Individual training on a non-formal basis was provided to users through-out the two weeks. In addition to training on TAMIS, training and instruction was provided for Notes Mail features.

Annex D is the Using (Help function) for the TAMIS was the basis for this presentation. Il of this information is available in TAMIS. The using can be accessed via the help menu and all documents prepared by Ms. Giannoni are stored under the Activity 5.3.09. Recustomize TAMIS for the 1999 Work plan.

V. LESSONS LEARNED/RECOMMENDATIONS:

TAMIS usage continues to be widespread. All users should continue to use the system and follow the RDI TAMIS process discussed during the training presentation on 3 March 1999. An effort should be made to make sure that the individual who generates the information is the individual that enters it. Additionally, as discussed below under follow-up actions, system maintenance is necessary.

VI. FOLLOW-UP ACTION ITEMS:

1. Maintenance

Maintenance of the data should be done. A suggested schedule for on-going maintenance is included as Annex E of this document. It is best that someone be assigned to review each item per the schedule to ensure that it is done. In addition to these regular items, over the next few weeks, the following items should be addressed:

a) Year 1997 activities should be reviewed and information completed, such as the dates of the activities. The numbers of the activities should be changed to reflect the new numbering protocol;

b) Training and workshop events should be reviewed to ensure that they reflect accurate and current information;

c) STTA LOE from July 1998 to present should be entered. The DAI Home Office will enter the expatriate STTA and the RDI Cairo office will enter the Egyptian STTA.

2. Further updates and improvements

a) It is recommended that the participant lists be generated using the contact database. This will require that the contact database be updated on a regular basis.

b) Adding a feature to generate workshop invitations in the system.

c) Integrating WINFAX into the use of the system.

d) Adding the functionality that adds an entry to the APRP Library database for the RDI produced publications, which will not be entered on a regular basis.

ANNEX A

RDI 1999 WORK PLAN

5

RDI Work Plan (1999)

Activity	Status	Start	End	Primary Responsibility	Deliverable	Status and comments
I. Develop Annual Work Plans						
1.3.01. Draft Work Plan	In Progress	01/01/99	03/31/99	Max Goldensohn	Annual Work plan	
1.3.02. Present draft work plan	In Progress	01/20/99	03/31/99	Max Goldensohn	1 Draft Work Plan	RDI/PMU workshop 27JAN98. Draft Work Plan Completed
1.3.03. Work plan: USAID/PPC comments	In Progress	02/22/99	03/31/99	USAID/PPC	Oral & written comments	
1.3.04. Final Work Plan Submission	In Progress	03/01/99	03/31/99	Max Goldensohn	Final work plan to PPC & USAID	
1.3.05. Work Plan Approval	In Progress	03/01/99	03/31/99	USAID/PPC	Note in PPC minutes showing approval of both parties	
II. Establish and Implement Process For Identifying and Understanding Policy Barriers						
2.2.01.4. Subsector Map for Feed, Maize, Vegetable Oils	In Progress	07/01/98	12/31/98	Ken Swanberg	Subsector Map,Report,Presentation	
2.2.03.2. Partial Equilibrium Model for Wheat Marketing	In Progress	04/01/98	09/30/98	Edgar Ariza-Nino Ibrahim Siddick	model,report,presentation	
2.2.04.02. Joint Plan for APRP Use of ASME Model	In Progress	04/01/98	09/30/98	Jane Gleason Sayed Hussein	Plan	
2.2.04.1. Sugar Cane Land and Water Use Analysis	In Progress	01/01/98	06/30/98	Sayed Hussein Jane Gleason	Analysis,Policy Recommendation,Report	
2.3.01. Study to identify procedural and regulatory constraints impeding imports and exports of horticultural products	Not Yet Begun	04/01/99	09/30/99	Richard Magnani Mohamed Zaki Gomaa	Report,Recommendations	This work will focus on customs procedures in both air and sea ports. Bill Hargrave and Joe Pietrus are possible consultants on this.
2.3.02. Structure, conduct and performance study on the sugar industry	Not Yet Begun	04/01/99	12/31/99	Jane Gleason Sayed Hussein	Report,Recommendations	To look at possible reform measures in the sugar industry in support of the sugar cane work done by the MALR and the MPWWR.
2.3.03. Structure, conduct and performance study on inland fisheries	Not Yet Begun	07/01/99	12/31/99	Jane Gleason Sayed Hussein	Report,Recommendations	To identify constraints to development of inland fisheries in Egypt. Proposed Consultant is Martha Blaxall of DAI.
2.3.04. Study on policy constraints to improving fisheries industry in the Alexandria Lakes region	Not Yet Begun	07/01/99	12/31/99	Jane Gleason Sayed Hussein	Report,Recommendations	First attempt to coordinate the activities of the Ministries of Agriculture, Environment, and Water to look at policy issues which prevent a resurgance of the fishing industry in Alexandria. Proposed consultant is Michele Zador of DAI
2.3.05. Structure, conduct and performance study on maize	In Progress	01/01/99	09/30/99	Edgar Ariza-Nino Ibrahim Siddick	Report,Recommendations	To idenitify constraints in the maize industry. Proposed consultants are Ron Krenz and Magdy Guindy

RDI Work Plan (1999)

Activity	Status	Start	End	Primary Responsibility	Deliverable	Status and comments
2.3.06. Structure, conduct and performance study on feed for large animals	In Progress	04/01/99	12/31/99	Lawrence Kent		To identify possible constraints in this industry. Proposed STTA: Dr. Hatim Muhammed Ali
2.3.07. Agricultural Sector Model (ASME) - Egypt	In Progress	01/01/97	12/31/99	Jane Gleason Sayed Hussein Max Goldensohn	One working model,institutional capacity,new sets of cropping pattern recommendations	Conducted jointly with EPIQ. Dr. Bayoumi of the MPWWR heads a working group to update the model, with Dr. John Keith of EPIQ.
2.3.08. Geographic Information Systems: Part II	In Progress	01/01/99	12/31/99	Max Goldensohn	Institutional structure,Geographic Typology,Report	TOR to be developed in consultation with Dr. Bayoumi of MPWWR and Dr. Rogers of USAID
2.3.09. Partial Equilibrium Model for Rice (Updates)	In Progress	01/01/98	12/31/99	Edgar Ariza-Nino	model,report,presentation	
III. Design and Conduct Policy Analyses and Studies						
3.2.02.1. Analysis and Repertory of Rural Organizations Participating in the Agricultural Economy	In Progress	01/01/98	06/30/98	Kamal Nasser Max Goldensohn Richard Magnani	Report,Presentation,Recommen for BM	
3.2.02.5. Second Priority Studies - The Impact of Liberalization and Privatization in the Agricultural on Women: Employment, Incomes, Participation	Not Yet Begun	06/01/98	12/31/98	Max Goldensohn Kamal Nasser	Study	
3.2.03.4. Improvement of Cotton Quality and Value	In Progress	01/01/98	06/30/98	Edgar Ariza-Nino Ibrahim Siddick	Report,Presentation,Recommen for BM	
3.2.03.4.3. Privatization of MOTS' Agribusiness Joint Venture Companies	In Progress	10/01/98	06/30/99	Fatma Khattab Lawrence Kent	Valuation Reports,Policy Analysis and Recommendations	Carry out short diagnostic studies. Prioritize companies. Produce work plan. Start implementation of work plan
3.2.04.1. Study on Lifting the Import Ban on Fabrics	Not Yet Begun			Edgar Ariza-Nino Ibrahim Siddick	Study	
3.2.04.1. Turn-Around Fund to Ensure Sustainability of Textile Privatization	In Progress	01/01/98	06/30/98	Fatma Khattab Ken Swanberg	Plan for fund creation	
3.2.04.2. Develop a Competitive Strategy for Agribusiness in Egypt (3 Year Activity): Alternatives to Divestiture and Principles for Developing a Marketing Position Strategy	Not Yet Begun	07/01/98	12/31/98	Fatma Khattab Ken Swanberg	Report,Presentations	
3.2.05. Study of Labor Impacts of Policy Reforms to Inform Design of Future Reforms	In Progress	09/24/98		Lawrence Kent	report and workshop	
3.3.01. Competitiveness Analysis in horticulture	In Progress	01/01/99	09/30/99	Ken Swanberg Mohamed Zaki Gomaa Richard Magnani	Report,Recommendations	To provide GOE, the private sector and APRP with an approach to improve the environment to achieve a competitive advantage in the horticulture sector. Proposed expatriate consultant is Bagie Sherchand from DAI. Local consultant also will be required from University of Menoufeya Competitiveness

7

RDI Work Plan (1999)

Activity	Status	Start	End	Primary Responsibility	Deliverable	Status and comments
3.3.02. Competitive analysis in cotton	Not Yet Begun	04/01/99	12/31/99	Ken Swanberg Ibrahim Siddick	Report,Recommendations	To provide GOE, the private sector and APRP with an approach to improve the environment to achieve a competitive advantage in the cotton textiles sector. Proposed expatriate consultant is Bagie Sherchand from DAI. Local consultant will be required from University of Menoufeya Competitiveness
3.3.03. Agribusiness rehabilitation and promotion fund	Not Yet Begun	04/01/99	12/31/99	Amani El-Feky Ken Swanberg Richard Magnani	Proposal for operation of a fund	
3.3.04. Analysis of the land registration system	In Progress	01/01/99	09/30/99	Jane Gleason Sayed Hussein	Report,Recommendations	To be conducted with the cooperation of the Ministries of Justice and Water and Egyptian STTA with expatriate tbd.
3.3.05. Land Tenure III	Not Yet Begun	10/01/99	12/31/99	Jane Gleason Sayed Hussein	Report	Yearly report to monitor the effects of the Land Law implemented in October 1997. Mohamed Sharaf is proposed as the consultant for the study.
3.3.06. Study on the private provision of agricultural mechanization services	Not Yet Begun	07/01/99	12/31/99	Jane Gleason Sayed Hussein	Report,Recommendations	This will help to define the role of the private and public sectors in the provision of mechanization services. Proposed consultant is Don Humpal.
3.3.07. Sugar cane and water study in Aswan	Not Yet Begun	04/01/99	12/31/99	Jane Gleason	Report,Recommendations	To look at alternatives to gravity irrigation in Aswan. To be done cooperatively with EPIQ, with EPIQ the lead unit.
3.3.08. Study on the impact of EU/Egypt partnership	In Progress	01/01/99	09/30/99	Ibrahim Siddick Edgar Ariza-Nino Mohamed Zaki Gomaa	Report,Recommendations	This may be done in cooperation with GTZ. To look at possible means of Egypt better using its formal relationship with the EU. Proposed consultant is Mr. Bud Anderson.
3.3.09. Study on dumping and anti-dumping	Not Yet Begun	07/01/99	12/31/99	Edgar Ariza-Nino Ibrahim Siddick Mohamed Zaki Gomaa	Report,Recommendations	To discuss the calculations involved in dumping (especially to the UE), the regulations governing dumping, and how it can be prevented. Expatriate STTA TBD.
3.3.10. Policy study on issues related to air cargo and cold storage	In Progress	01/01/99	06/30/99	Richard Magnani	Report,Recommenations	This will be condusted in collaboration with an ATUT study funded by CIPE for HEIA. ATUT will take the lead.
3.3.11. Study on the possible structure, role of commodity councils, especially horticulture.	In Progress	01/01/99	09/30/99	Fatma Khattab Lawrence Kent Max Goldensohn	Report,Recommendations	Hamdy Salen will contribute to this study. It is a high priority within the Ministry of Trade. Proposed consultants are Dr. Ragaa El Amir, Conselor Ahmed Hassa, and Kamal Nasser.
3.3.12. Study on private and public roles relating to grades and standards, especially rice.	In Progress	01/01/99	09/30/99	Lawrence Kent Fatma Khattab	Report,Recommendation	This study will look at the development and implementation of grades and standards. It will also focus on government committm enforce export contracts. Eric Wailes and

RDI Work Plan (1999)

Activity	Status	Start	End	Primary Responsibility	Deliverable	Status and comments
3.3.13. Study on maize seed liberalization	In Progress	01/01/98	06/30/99	Fatma Khattab Lawrence Kent Mohamed Zaki Gomaa	Report and recommendations for privatization	Proposed consultant is Dr. James Fitch, Dr. Abd El Salam Gomaa, and Dr. El Rabo
3.3.14. Study on public and private roles in self-pollinated seed production and marketing	Not Yet Begun	04/01/99	09/30/99	Lawrence Kent Mohamed Zaki Gomaa Fatma Khattab	Report,Recommendation	
3.3.15. WID II	Not Yet Begun	04/01/99	09/30/99	Max Goldensohn	Report	Proposed consultants are Nagat El-Sanabary, Kamla Mansoura, Zorha Merabat, and others
3.3.16. Study on rural credit and the PBDAC	In Progress	04/01/99	09/30/99	Max Goldensohn Mohamed Nour	Report,Recommendations	To be developed with Dr. Hassan Kheidr
3.3.17. Study on limits of use of certified seeds	Not Yet Begun	07/01/99	12/31/99	Amr Moussa	Report	This is a second tier study to be condcuted in conjunction with GTZ.
3.3.18. Study on the structure of outputs in spinning and weaving in Egypt	Not Yet Begun	04/01/99	12/31/99	Edgar Ariza-Nino Ibrahim Siddick Ken Swanberg	Report,Recommendations	
V. Present Information in an Effective Manner						
5.2.04. Quarterly Reports	In Progress	01/01/98	12/31/98	Max Goldensohn	Quarterly Report	
5.3.01. RDI Newsletter	In Progress	01/01/99	12/31/99	Steve Joyce	Four Newsletters	On schedule and ongoing
5.3.02. RDI Policy Briefs	In Progress	01/01/99	12/31/99	Steve Joyce	12 Policy Briefs	On schedule and on-going
5.3.03. Stakeholder workshops	In Progress	01/01/99	12/31/99	Steve Joyce	Six Workshops	Workshop topics could include: New Valley Afforestation/Wastewater; Intellectual Property Rights; Contract Farming; Research and Extension III; Pest Management II; Refrigerated containers
5.3.04. After studies seminars and workshops	In Progress	01/01/99	12/31/99	Steve Joyce	Eight workshops or seminars	Workshops and seminars could include: Poultry Feed Liberalization; Land Tenure II; Horticulture regulations - roadmpa; Sugar cane industry seminar; Tax reform seminar; WID II; Competitive Advantage - horticulture; Labor in Rice
5.3.05. Technical training in support of policy reform	In Progress	01/01/99	12/31/99	Steve Joyce	Training	Areas include: Sugar cane farmer training in Luxor; Short duration/water management training for extensionists - Kafr Sheikh; Short-duration rice/water management - Kafr Sheikh; Rice Milling ESOPs
5.3.07. Weekly National Press Review	In Progress	01/01/99	12/31/99	Steve Joyce	52 issues of weekly press review	On schedule and on-going

RDI Work Plan (1999)

Activity	Status	Start	End	Primary Responsibility	Deliverable	Status and comments
5.3.08. Y2K Problem Analysis and Solution	In Progress	01/02/99	01/02/2000	Jane Gleason Randall Parks	Report and solution to possible Y2K problems	
5.3.09. Recustomize TAMIS for the 1999 Workplan	In Progress	02/20/99	03/05/99	Jane Gleason Max Goldensohn	1999 TAMIS	
5.3.10. Develop a webpage for CATGO	In Progress	01/01/99	06/30/99	Edgar Ariza-Nino Ibrahim Siddick	One webpage	
5.3.11. Donor Coordination	In Progress	11/01/96	06/30/2000	Amani El-Feky Edgar Ariza-Nino Fatma Khattab Ibrahim Siddick Jane Gleason Ken Swanberg Lawrence Kent	coordination,meeting reports	on-going meetings
VI. Design and Implement Reform Measures; Action plans and Project-like Activities						
6.2.01.1. Analyze 97/98 Cotton Marketing Year and Recommend Changes	Completed	01/01/98	03/31/98	Edgar Ariza-Nino Ibrahim Siddick	Report,Conference,Public Awareness	
6.2.02.1. Establish Inventory/Salvage Company	In Progress	01/01/98	12/31/98	Ken Swanberg Fatma Khattab	Develop Approved Strategy; Identify Authorized Sources of Funding	
6.2.02.2. Work to Change Ministry of Finance Instructions on Disposal of Inventory	In Progress	01/01/98	06/30/98	Max Goldensohn Kamal Nasser	New Instructions to HC/ACs on Disposal of Outdated Inventory	
6.2.02.4. Privatize 3 Textile Sub-sector ACs or Units Thereof	In Progress	01/01/98	12/31/98	Ken Swanberg Fatma Khattab	Privatize 3 Textile Sub-Sector ACs	
6.2.02.6. Develop Privatization Plan for MALR Seed Units	In Progress	01/01/98	12/31/98	Fatma Khattab Jane Gleason Ken Swanberg Lawrence Kent Sayed Hussein	Privatization Plan	
6.2.03.4. Improve Collection. Analysis, Presentation of Cost of Production and Farm Income Statistics	Not Yet Begun	04/01/98	09/30/98	Jane Gleason Sayed Hussein	Plan,Implementation	
6.2.04.3. Research and Extension Institutional Reform	In Progress	01/01/98	09/30/98	Kamal Nasser Max Goldensohn	Approved Plan	
6.2.04.4. Olive Producers & Processors Association	Not Yet Begun	01/01/99	12/31/99	Fatma Khattab Lawrence Kent		meet with Association
6.2.06. Sugar Cane/Water monitoring in Upper Egypt	In Progress	07/31/98	06/30/2000	Jane Gleason Sayed Hussein	Report	
6.3.01. Freeing Yarn Exports (Benchmark A2)	In Progress	01/01/99	06/30/99	Edgar Ariza-Nino Ibrahim Siddick	Completed benchmark	This benchmark will be completed with the cooperation of TCF.

10

RDI Work Plan (1999)

Activity	Status	Start	End	Primary Responsibility	Deliverable	Status and comments
6.3.02. Lower Import Tariff on Rice (Benchmark A4)	In Progress	01/01/99	06/30/99	Lawrence Kent Fatma Khattab	Lowered tariff on rice imports	Mr. Nour is in charge of sending a letter to Dr. Saad who will then contact the Ministers
6.3.03. Phytosanitary regulations - adopting regional certification (Benchmark A5)	In Progress	02/02/99	03/15/99	Jane Gleason Sayed Hussein	New set of regulations	The new regulations will include a regional certification program for exporting countries. To be conducted with GTZ. Consultants are Eric Joseph (GTZ) and Dr. Taha Sharqawy (RDI)
6.3.04. Inventory Sales (Benchmark B1)	In Progress	01/01/99	06/30/99	Ken Swanberg	Policy to permit sale of inventories	Will require local and expatriate STTA
6.3.05. Privatization of three spinning and weaving companies (Benchmark B2)	In Progress	01/01/99	06/30/99	Ken Swanberg Fatma Khattab	Privatized companies	The activities for this benchmark focus on checking the status of the privatization process for three companies - Shebin, Stia, and Ameriya
6.3.06. Generating private sector jobs in the textile sector (Benchmark B3)	In Progress	01/01/99	06/30/99	Ken Swanberg Amani El-Feky	2000 New Jobs	Completion of status report (MVE)
6.3.07. Privatizing 15 joint venture companies (Benchmark B5)	In Progress	01/01/99	06/30/99	Amani El-Feky	15 privatized firms	A workplan has been developed and submitted to the MOTS. Candidate firms have been chosen and work is underway.
6.3.08. Leasing Guidelines (Benchmark B6)		01/01/99	06/30/99	Ken Swanberg	Leasing guidelines	RDI will work with the HC and PEO staff to prepare guidelines. Proposed consultants include Gen. Hallouda, Gen. Adel, Prof. Gamal, and Counselor Fathy Naguib.
6.3.09. Privatization in the Agricultural Development Holding Company (Benchmark B7)	In Progress	01/01/99	06/30/99	Amani El-Feky	Three privatized firms	Tow of the three firms have been privatized, the third is in process
6.3.10. Sugar Cane and water (Benchmark C5)	In Progress	01/01/99	12/31/99	Jane Gleason Sayed Hussein Steve Joyce Amr Moussa	Two areas of private sugar cane with new on-farm irrigation technology to save water	Conducted in collaboration with EPIQ. Ahmed Behery is coordinating the training of farmers, Dr. Allam of SCRI is coordinating the sugar cane working group. This Minister has agreed to a budget.
6.3.11. Rice - Short season expansion (Benchmark C6)	In Progress	01/01/99	06/30/99	Jane Gleason Steve Joyce Sayed Hussein Amr Moussa John Keith	Six canals have been designated to expand last year's demonstration for improved water management on rice. A policy will be approved	Dr. Tantawi is designated to write the official policy for the Minister's approval. Conducted with EPIQ. There is a rice working group, headed by Dr. Tantawi, to coordinate the activities of the group.
6.3.12. Standard contract for contract farming (Benchmark D1)	In Progress	01/01/99	06/30/99	Max Goldensohn	Standard contract	To assess the current contracts and recommend a standard contract for approval by the ministry. Possible STTA: Peter Little, and a local agricultural lawyer
6.3.13. Forest Plantations Using Treated Sewage Water (Benchmark D3)	In Progress	01/01/99	06/30/99	Max Goldensohn	Policy on wastewater reuse	The GOE official in charge of this is MamdouhRiad. RDI to draft letter to Dr. Riad

RDI Work Plan (1999)

Activity	Status	Start	End	Primary Responsibility	Deliverable	Status and comments
6.3.14. Seeds: New Variety Release Regulations (Benchmark D5)	In Progress	01/01/99	06/30/99	Jane Gleason Lawrence Kent		
6.3.15. Hirsutum Cotton (Benchmark D6)	In Progress	01/01/99	06/30/99	Jane Gleason Sayed Hussein	Policy on Hirsutum cotton	RDI to consult with Dr. Saad about completion of this benchmark
6.3.16. Pest Management Services (Benchmark D7)	In Progress	01/01/99	06/30/99	Sayed Hussein Richard Magnani Jane Gleason	Review of laws on pesticides; and two outlines of regulations on pesticide registration and licensing of pest management services providers	In cooperation with GTZ. Dr. Salwa of the pesticide residue laboratory is coordinating the activities from the GOE side.
6.3.17. Research and extension pilot zone (Benchmark D8)	In Progress	01/01/99	06/30/99	Max Goldensohn	One pilot zone selected and a pilot project plan	In cooperation with GTZ. MG to meet with the new Director of Extension
6.3.18. Rice marketing information system	In Progress	01/01/99	09/30/99	Fatma Khattab Lawrence Kent Edgar Ariza-Nino Ibrahim Siddick	Support to the Egyptian Rice Union	
6.3.19. Rice ESOP	In Progress	01/01/99	09/30/99	Fatma Khattab Lawrence Kent Steve Joyce	Continued support for the Rice mill ESOPs. Plans for Phase II and Phase III of the program	Dr. Abd Ghani Hassan proposed to conduct Phase II and Phase III programs
6.3.20. Rice Association Support	In Progress	06/01/98	12/31/99	Fatma Khattab Lawrence Kent Mohamed Zaki Gomaa Richard Magnani		In the second & third quarters: founders signed on the establishmed of the association association framework drafted mini group to contact Dr. Wali and Dr. Goweili formed
6.3.21. Seed Association Support	In Progress	06/15/98	12/31/98	Fatma Khattab Lawrence Kent Mohamed Zaki Gomaa		meet with Seed Association to plan support
6.3.22. Support for Citrus Association	Not Yet Begun	10/01/98	12/31/99	Fatma Khattab Lawrence Kent Mohamed Zaki Gomaa Richard Magnani		
6.3.23. Umbrella Organization	In Progress	03/01/98	12/31/99	Ken Swanberg		

VII. Identify and Develop Progress Indicators

Activity	Status	Start	End	Primary Responsibility	Deliverable	Status and comments
7.2.03. Impacts of Policy Changes and remaining Foci of Policy Reform Process	In Progress	08/01/98	12/31/98	Jane Gleason Kamal Nassor Max Goldensohn Sayed Hussein	report,workshop	
7.3.01. Develop Tranche IV Benchmarks	In Progress	01/01/99	06/30/99	Edgar Ariza-Nino Fatma Khattab Ibrahim Siddick Jane Gleason	Set of Draft BMM for consideration by USAID and PPC by 20FEB99	This quarter the RDI team will start brainstorming ideas. The team will prepare first drafts for submission to USAID by February 1, 1999.

RDI Work Plan (1999)

Activity	Status	Start	End	Primary Responsibility	Deliverable	Status and comments
7.3.02. Develop APRP/RDI Indicators	In Progress	01/01/99	12/31/99	Max Goldensohn	Indicators proposed in Year 2; and submitted to MVE for integration with those developed by MVE	MVE is in charge of monitoring and impact evaluation. RDI monitoring is restricted to tracking project outputs and policy progress
7.3.03. Develop Vision for future of Agricultural Policy Reform in Egypt	Completed	01/01/99	03/31/99	Max Goldensohn Jane Gleason Lawrence Kent Richard Magnani Ken Swanberg Edgar Ariza-Nino Fatma Khattab	One set of Vision Statements for key sub-sectors	These visions, developed jointly with EPIQ, FSRU and MVE were published in January 1999. They will be updated as required.
VIII. Arrange In-Country and Off-Shore Training Activities						
8.3.01. Carry out approved training plan	In Progress	01/01/99	12/31/99	Max Goldensohn Laila Salem	Training events	By the end of Q1, RDI will have fulfilled its objective of arranging for and sending over 100 participants and invitational travelers for off-shore training. This implies completion of our first training plan. We will propose further overseas training and travel in a new training plan. In-country training will proceed as per
8.3.02. Amend Training plan as required	In Progress	01/01/99	12/31/99	Max Goldensohn Laila Salem	Amendments to training plan (as required) and approved by USAID CTOR	The training plan must remain flexible to respond to the needs of the APRP stakeholders - Ministries, HC/AC, and private sector
8.3.03. Prepare new overseas Training Plan	In Progress	01/01/99	03/31/99	Max Goldensohn Laila Salem	One overseas training plan through PACD	The initial overseas training plan required two years to complete and satisfied the RDI/DAI contractural requirements to send at least 100 participants and travelers for off-shore training, observation tours and invitational travel. Our budget should allow us to send an additional 30-40 travelers between Q1 of year
8.3.04. Specific Training Deliverables	In Progress	01/01/99	12/31/99	Max Goldensohn Laila Salem	20 participants on off-shore events (including courses and invitational travel),9 workshops on RDI study topics,6 Stakeholder workshops,100 participants in courses in Egypt,25 on-the-job trainees	
IX. Procurement						
9.3.01. Procure small items as needed to ensure efficient functioning of RDI teams	In Progress	01/01/99	12/31/99	Abdel Shakour Max Goldensohn	Procured items in inventory	Procurement needs are discussed among TA teams in the Companies Building in Dokki. Funds remaining are limited and will be used for critical items only.

15

ANNEX B

SUMMARY OF PROGRAMMING CHANGES

HIGHLIGHTS OF PROGRAMMING CHANGES MADE

Views

Added

- *1. Activities Module*
  View #6 By Policy Area. This sorts the current work activities by policy area.
  View #7 By Benchmark. This sorts the current work activities by benchmark, if the activities are a benchmark.

- *2. Technical Assistance Module*
  View #3: This view lists all of the short-term technical assistance by name. This view is the look-up for the STTA form (do not delete) -- Timesheets can also be completed from this view.
  View #4: STTA Management. Sorts by Status, then year, then contractor and manages the TORs for each individual and the timesheet. On a monthly basis, the on-going view (by the end of the month) should be used to complete the timesheet per approved level of effort. If an individual works multiple months on the same TOR with an approved level of effort, all time should entered on that timesheet. A new timesheet needs to be completed for each new TOR.

- *3. Training Module*
  View #3: Includes all training events and workshops by Month
  View #4: Training Calendar: Includes all training events and workshops in calendar format
  View #5: Training Deliverables: This gives a quick look at the accomplishment of training deliverables included in the work plan.

- *4. Reporting Module*
  1. General Project\6. Deliverables This view provides a quick overview of deliverables for 1999 and whether they are complete
  2. Quarterly Reporting
    View #5: STTA LOE
    Added views to track by quarter and prepare the quarterly report.

- *5. Misc\1. Official Project\1. Publications*
  View #1: Includes all publications sorted by report type
  View #2: Includes all publications in series number order (to be used with the quarterly report)
  View #3: Includes Policy Briefs only.
  View #4: Matrix to track distribution. Includes all final publications in series number order (Buttons automate the process for marking sent)
  View #5: Sorts out those publications , policy briefs, and newsletters which are pending. (uses date and not status field)

- *5. Misc\1. Other Information*
  View #7 Includes all TORs with the most recently composed at the top of the view. Sortable columns provide the user flexibility in viewing the information

- *5. Misc\3. Mailing Lists*
  Added view to store project mailing lists

- *6. Archive Module.*
  View # 1: Changed view so that there is a Year 1997 and a Year 1998 view (includes button with explanation)

15

View #3: Includes all work plan activities sorted first by work plan task area and then by Year.
View #4: Includes all work plan activities sorted first by Component and then by Year.

Modified

- *1. Activities Module*

  1. By Workplan: Added a publications creation button and the publications form

  Added icons for workshops, training, publications, newsletters, & policy briefs Completed activities and publications are marked with a check.
  2. By Component: Added the Activity number to the view. The user can do a secondary sort on the activity title in order to be able to look either by number or by activity name in alphabetical order. Added icons for workshops, training, publications, newsletters, & policy briefs Completed activities and publications are marked with a check.
  3. By Advisor: Added the Activity number to the view. The user can do a secondary sort on the activity title in order to be able to look either by number or by activity name in alphabetical order. Added icons for workshops, training, publications, newsletters, & policy briefs Completed activities and publications are marked with a check.
  4. By Product: Added the Activity number to the view. The user can do a secondary sort on the activity title in order to be able to look either by number or by activity name in alphabetical order. Added icons for workshops, training, publications, newsletters, & policy briefs Completed activities and publications are marked with a check.
- *2. Reporting Module*

  1. General Project\1. Activity Progress Report\1. By work plan
  Modified the report to print in final format
  1. General Project\1. Activity Progress Report\1. By component
  Same report as above but by component
  1. General Project\Activities & their Deliverables
  Modified the view to include publications and more information regarding achievement
  1. Quarterly Reporting

Forms

Modified

- *Activities form*
  - Modified the Archive field to include Year 1998 so that documents from 1998 could be archived separately. Made the Archive field shared.
  - Reformatted the form to make it look better.
  - Moved the Work plan task field to the top since it is this field that determines the numbering protocol. The user will be prompted to complete this field should he or she pass it without completing it.
  - Added a button for help in numbering
  - Added the Policy Area field (keyword list)
  - Added the Is benchmark? field (Yes, No, Possible)
  - Added the Benchmark field. The user can use the Tranche III button which looks up to the MVE system. The user can use the Tranche IV which looks up to the RDI system. If the Benchmark is not on the list then it can be added. After selecting the Benchmark, the button completes the Tranche indicator and then the Benchmark name.

- *Activity TOR form*
  - Eliminated the response hierarchy for previous versions

1b

- Took out the word "Task" from the Number field which inherits information from the Activities form

- *STTA form*
  - Made the STTA Name field to be a look-up to the
  - Took out the word "Task" from the Number field which inherits information from the Activities form

- *Subactivity form*
  - Added "Progress" to the Subactivity type
  - Took out the word "Task" from the Number field which inherits information from the Activities form

- *Publications form*
  - Changed Date field to be MM/YYYY and added a function so that the date is translated from numbers to words. Note that publications that were entered had the date in text although the field was a date field therefore, this was causing problems. The form should be composed on the activity form.
  - Added Status field
  - Added Distribution Section -- the drop down list for the distributed to will be the mailing list view.
  - Added the Staff Responsible field so that publications can be tracked in the publication pending view
  - Changed the key word list, the only report types are: REPORTS, WORK PLAN, POLICY BRIEFS, NEWSLETTERS, WORKSHOP PROCEEDINGS
  - Un-hid the Deliverable field so that the publication form can specify the deliverable

- *Workshop form*
  - Reformatted to make it easier for the user
  - Changed the keyword list so that only workshop is a choice.

Added

- *Mailing Lists*, Form provides for storage of the mailings lists which is found in the mailing list views.

- *STTA timesheet,* Form stores the level of effort per scope of work. Time is entered in hours.

Agents

- *1998 Achive selected document* will mark the Archive field in the form to 1998 and the documents will be available in the Archive by year and all document views.

- *Change Activity Name.* This will prompt the user to enter the new Activity Name and run the agent on all selected documents to change the Activity Number field. This is required whenever changing activity names **after** depedent forms have been created, ie Activity TORs, etc.

- *Change Activity Number.* This will prompt the user to enter the new Activity Number and run the agent on all selected documents to change the Activity Number field. This is required whenever changing activity names **after** depedent forms have been created, ie Activity TORs, etc.

- *Change Policy Area.* This will prompt the user with the list of policy area and run the agent on all of the selected documents changing the policy area as per the user selected value. This is for mass-changing of policy areas. Most forms do not have the policy area field.

- *Change Workplan Task.* This will prompt the user with the list of work plan tasks and run

17

the agent on all of the selected documents changing the policy area as per the user selected value. This is for mass-changing of policy areas. This is required whenever changing activity names **after** depedent forms have been created, ie Activity TORs, etc.

- *Change Advisor.* This will prompt the user to enter the new Activity Number and run the agent on all selected documents to change the Activity Number field. This is required whenever changing activity names **after** depedent forms have been created, ie Activity TORs, etc.

- *Change RDI Component.* This will prompt the user with the list of work plan tasks and run the agent on all of the selected documents changing the policy area as per the user selected value. This is for mass-changing of policy areas. This is required whenever changing activity names **after** depedent forms have been created, ie Activity TORs, etc.

- *Other.* Under the Actions Menu, the Other will list all of the agents. This lists other Agents:

    - Change Publication Type (used during development)
    - Change Product. This will prompt the user to enter the new Activity Number and run the agent on all selected documents to change the Activity Number field.

15

ANNEX C

PRESENTATION AGENDA

PRESENTATION ON THE UPDATED RDI TAMIS
FOR
WORKPLAN 1999

MARCH 3, 1999

by Tonya Giannoni

AGENDA

1. RDI 1999 WORKPLAN
   - >>> Where to find it?
   - >>> Numbering Protocol
   - >>> Reports Available

2. RDI TAMIS PROCESS
   - >>> From Start to Finish

3. SUMMARY OF NEW FEATURES
   - >>> Activity TOR -- New Status Button
   - >>> Search Bar
   - >>> Publication Form !!
   - >>> Getting Help
   - >>> Agents
   - >>> Calendars

4. TIPS FOR FINDING DOCUMENTS
   - >>> Documents forwarded by email (Meeting Report, Trip Reports, TORs)
   - >>> Status of STTA approvals

5. MAINTENANCE CONCERNS
   - >>> Replication Conflicts
   - >>> Deleting old TORs

6. QUESTION AND ANSWER

<<<FOR THOSE THAT WOULD LIKE TO CONTINUE FOR ADDITIONAL TRAINING >>>>

7. ROUND THE TABLE
   - >>> How do each of you use TAMIS?
   - >>> What would you like TAMIS to do for you? and
   - >>> What can you do for TAMIS?

8. ADDITIONAL INSTRUCTION ON ITEMS IDENTIFIED DURING THE SESSION

TIPS AND TRICKS

CHEAT SHEET

NUMBERING PROTOCOL

Example

1. 3. 01

Digit 1 = Arabic number for the Roman Numeral Workplan Section

Digit 2 = Project Year during which the activity started. 1998 = 2 : 1999 = 3; etc

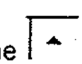
Digit 3 = Consecutive numbering between 01 - 99.

PLEASE USE THE 0 BEFORE ALL SINGLE DIGIT NUMBERS!!

FINDING MEETING REPORTS, TRIP REPORTS, TRAINING EVENTS

Check under 5. Misc.\2. Other Info\All meeting reports which is sorted by Date, identify the number and viola.

CHANGING THE SORT ON THE BY COMPONENT AND ADVISOR VIEWS

Don't know the Activity Number. Click on the  at the top of the view.

SEARCH BAR

Select the View Menu and make sure that the Search Bar is checked. 

REMINDERS

- **COMPLETE THE ACTIVITY FORM**
- **PUBLICATION FORM IS VERY IMPORTANT:**

  >> A BUTTON ON ALL VIEWS WHERE IT CAN BE COMPOSED HAS BEEN ADDED
- **DON'T USE THE OTHER INFORMATION FORM**
- **COMPLETE YOUR STTA FORMS**
- **COMPLETE YOU WORKSHOP FORMS**
- **ACTIVITY TORS DO NOT KEEP THE HISTORY**
- **MARK COMPLETE ACTIVITIES COMPLETE**

21

ANNEX D

"USING"

HELP DOCUMENT

IN

THE

RDI TAMIS

ANNEX D

"USING"

HELP DOCUMENT

IN

THE

RDI TAMIS

USING THE RDI-APRP TAMIS DATABASE

RDI-APRP

TAMIS

CONTENTS

1. A Tip For Using This Help Document

You can word search this document to find help on a particular topic. For example, if you would like to find information on how and when to compose an STTA form, search for the phrase "STTA."

a. To do this, select Edit, Find and Replace (but you will not have the rights to replace).

b. In the dialog box, enter the word you are searching for in the Find field. In our example, this is the word STTA. Click on Find Next.

c. The system will take you to the first instance of the word and highlight it. You can continue to Find Next (the next instance of the word) using the dialog box.

TIP: Cancel the dialog box and use Ctrl+G to find the next instance. You will be able to see more of your screen this way. The system will continue to remember your last entry until you make a new one.

2. Finding Information Quickly and Easily: Navigating Views

The trick to finding the information you are looking for quickly and easily is to first select the right view. This means that if you are looking for detailed information on training, you will most likely want to begin looking in a training view. There are also views that create reports -- you just need to print the right view to obtain a hard copy of the report you want. There are 45 different views in the database. The views are categorized to make selection easier. Categories include Activities, STTA, Training, Monitoring and Evaluation, Approvals, Miscellaneous, Comments and Subgrants, Subcontracts, and Procurement. The main view, and the most useful, is the Activities\Activity Information Summary view.

After you have selected the appropriate view, the next step is to navigate quickly to the information you seek. In some cases, collapsing the view will help you to find the information more quickly. For example, if you are looking at the Activity Information Summary view and want to look at just one task group, you might want to collapse the view and then expand just that one task group's information. In other cases, an expanded view will be more useful.

TIP: Pay attention to the "+"s in the left hand margin of the view. These "+"s tell you when there is more information in the view. Expanding the view will reveal the information.

TIP: The View Navigation icons will help you the most. These icons  will be particularly useful.

It is frequently easier to "find" in a collapsed view. To collapse a view, use the View Collapse All icon  (or Shift -). If you are in the Activities\Activity Information Summary view and you are looking for a specific task group, just type the number of the task group, for example, "3" for "III. " and you will go to the first category beginning with the "III".

Note: If you try typing the "3" and just get a "beep", your view is not active. Click once anywhere in the view and the highlight bar will darken. You now have an active view and can type "3".

TIP: Once you have placed the highlight bar on the category that you are interested in, (in this case, "III. ") you may hit Enter to expand one layer (you will also have to move down one level each time you press Enter) OR, to save time, try using the View Expand icon  (or * on the number keyboard; Shift 8 expands all the levels) to expand the levels under that one category. You will now be able to see all the information under "III", but the rest of the view (the other components' documents) will remain collapsed.

---

3. When To Use Each View (Includes a brief description of the purpose of each view)

Views in Lotus NOTES display the data entered in the forms. They are essentially reports. The number of views that can be generated from the forms in a NOTES database is infinite; limited only by the imagination of the users. TAMIS has over 40 views at present. It is expected that the number will increase as the system is customized for the RDI/APRP PROJECT and users decide which views are most helpful in managing the project. The following table presents descriptions of the RDI/APRP TAMIS views.

RDI/APRP TAMIS VIEWS

CATEGORY	TITLE	DESCRIPTION
1. ACTIVITIES MODULE	1. By Work plan	The default view. Contains reference to other documents associated with the activity. Activities are in order by work plan tasks and then sorted by activity number. The numbering protocol is: Example 1. 3. 01 Digit 1 = Arabic number for the Roman Numeral Workplan Section Digit 2 = Project Year during which the activity started, 1998 = 2 ; 1999 = 3; etc Digit 3 = Consecutive numbering between 01 - 99. PLEASE USE THE 0 BEFORE ALL SINGLE DIGIT NUMBERS!!

25

	2. By Component	Contains reference to other documents associated with the activity. Activities are in order by RDI Component and then sorted by activity number. A secondary sort will sort the activities alphabetically.
	3. By Advisor	Contains reference to other documents associated with the activity. Activities are in order by Advisor and then sorted by activity number. A secondary sort will sort the activities alphabetically.
	4. By Product	Contains reference to other documents associated with the activity. Activities are in order by Product and then sorted by activity number. A secondary sort will sort the activities alphabetically.
	5. By Status	This needs to be re-designed.
	6. By Policy Area	Contains reference to other documents associated with the activity. Activities are sorted first by Policy Area and then then sorted by activity number.
	7. By Benchmark	Contains reference to other documents associated with the activity. Activities are sorted first by Benchmark (shows those activities which are possible benchmarks) and then then sorted by activity number.
2. STTA	1. STTA Information	Lists by work plan task, consultant name, position, and days associated with each STTA assignment
	2. By Contractor - LOE	Lists for each STTA assignment the actual days approved, the actual used, and the leftover days.
	3. By TA Name	Lists all STTA by Name (first name) and includes the STTA form and any corresponding timesheet.
	4. STTA Management	Lists all STTA by Status and includes the STTA form and any corresponding timesheet.
3. TRAINING	Training by Status, Type, and Location	Lists all training events by current status, type, and location
	List of Participants	Lists names of participants by training event
	Workshops and Events by Month	Lists all training events and workshops by month, type and location with participant weeks and percent female participants
	Training Calendar	Lists all training events by with a calendar format
	Training Deliverables	Shows progress towards achieving training deliverables.
4. REPORTING	1. General Project	
	Activity Progress By Workplan	Lists project activities in work plan submission format.
	By Component	Lists project activities in work plan submission format.
	Activities and Deliverables	Lists all contract deliverables.

	LTTA LOE	This is out of date
	LOE by Contractor	This is out of date
	Subcontractor Information	This needs to be completed
	Deliverables	Lists all contract deliverabes and shows progress at a glance
	2. Quarterly Reporting	
	Progress Report	Like the Activity Progress by work plan but includes plans for next quarter
	Training	USAID training report for inclusion in quarterly report (there are other alternatives as well under the training module0
	Narratives	This does not seem to be used
	STTA LOE	Includes view by quarter of LOE. Needs to be updated.
MISCELLANEOUS	1. Official Project	
	Publications	1. Lists all publications by type 2. Lists all reports in report number order 3. Lists all Policy Briefs and Newsletters 4. Lists distribution of the all reports, policy briefs, and newsletters 5. Lists all pending reports
	Team Memos	Lists all team memos by number, date, and subject
	Success Stories	Lists all Success Stories
	.Project Assumptions	Lists project assumptions by project year.
	Procurement	Lists items purchased under the project in accordance with USAID reporting requirements
	Project Information	Includes project information form (do not delete this view)
	2. Other Information	
	Benchmark comments	Link to MVE
	Trip	Lists all trip reports
	Meeting	List all meetings by date
	Training	Lists all subcontracts
	Workshops	Lists all workshops
	Comments	Lists all comments
	3. Mailing Information	Lists all mailing lists
ARCHIVE MODULE	1. By Year 1997 1998	Each year includes only those documents from the year's workplan or activities that started in the year.

	2. All Documents Workplan	Displays all activities under the project by workplan task, includes archived and non-archived documents.
	3. Workplan by Year	Displays all activities by year, by workplan task, includes archived and non-archived documents.
	4. All by Component	Displays all activities and corresponding documents sorted by RDI Component.
ALL	All	Lists all documents in the database

4. Adding and Editing Information: Composing and Editing Forms Includes a brief description

It is very important when adding information to have your highlight bar on the correct document. This is because frequently the information you are adding will inherit text from a pre-existing document. The only way for that text to be inherited correctly is for your highlight bar to be in the correct place. This means that you will also want to be in the right view when adding information. In the table below, the TAMIS forms are listed with a general description and the view and cursor position you should use to create documents.

Also, whenever you are adding or editing information, remember that useful help is provided in the Field Help window. The Field Help window is shown immediately above the Status Bar at the bottom of your screen whenever you are in Edit mode (remember you are only in edit mode when there are brackets indicating fields). If you do not have any field help showing, you may need to activate it. To do this:

a. Edit any document

b. From the Menu bar, select View, Show, and click on Field Help

c. This will "toggle" your field help and turn it on. You can only see field help when you are in edit mode.

Creating Forms

There are several ways to create a form. You can:

1) Select the choice from the Create menu on the Menu bar, or
2) Use one of the user friendly buttons on the action bar, or

3) Use the user friendly buttons on the action bar while viewing a form.

Note that anytime you create a new document the author, author date, editor and editor date will be entered for you. Frequently, other fields such as the activity name, workplan task, or component will also be completed for you.

Editing Forms

There are several ways to edit a form found in a view that displays the form. You can:

1) Double click on the form you wish to edit and it should appear on your screen. Double click again and you will be in edit mode and able to change the information on that form, or
2) Double click on the form and select the edit pencil from the icon bar, or
3) Ctrl-E.

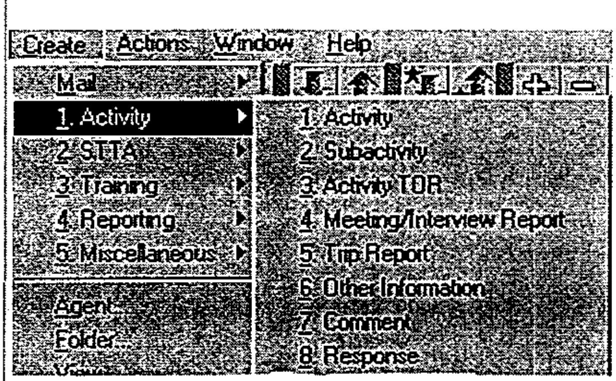
Saving Forms

When you finish filling in or editing the form, you must save it. To save the form, again, there are several ways:

1) Press ESC and click yes (preferred way)
2) From the Menu, Select \ Save, or
3) If you have set your user preference to close window with double-click, or
4) Ctrl-S

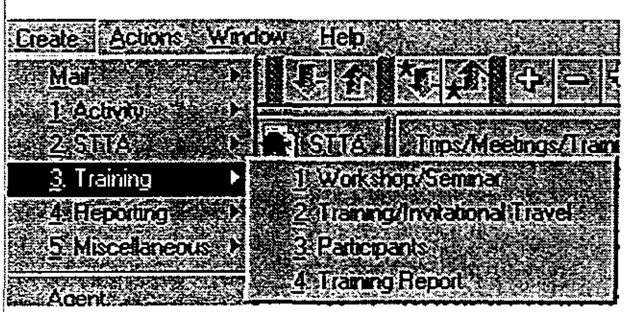
THE RDI-APRP CREATE MENU

1. Activity

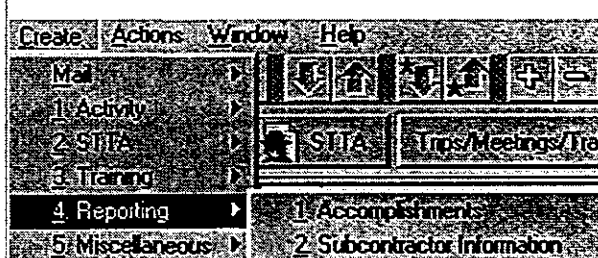


2. STTA

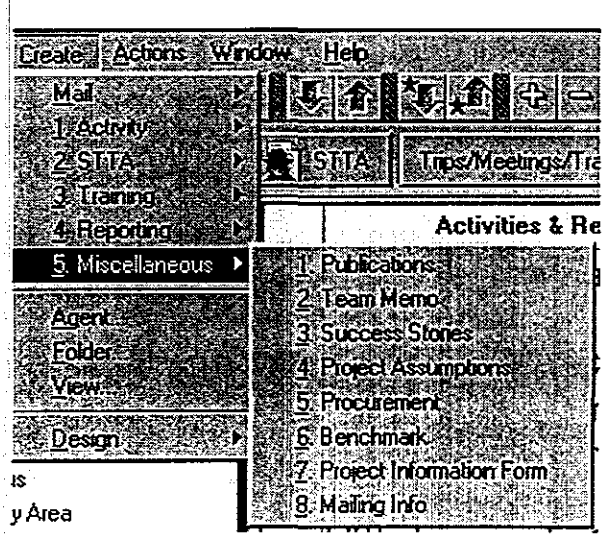
3. Training



4. Reporting



5. Miscellaneous



REMEMBER, IN ADDITION TO CREATING FORMS WITH THE CREATE MENU OPTION, YOU CAN ALWAYS USE THE ACTION BUTTONS INCLUDED IN THE VIEW.

TIP: IN GENERAL THE FORMS THAT YOU SHOULD BE CREATING IN A VIEW (AND ARE DISPLAYED IN A VIEW) HAVE THESE USER FRIENDLY BUTTONS.

RDI-APRP TAMIS FORMS

FORM	CONTENT	VIEW AND CURSOR POSITION TO CREATE
ACTIVITY		
Activity Form	Descriptive elements about the workplan activity	All views under the Activities Module, except for By Status; cursor position not important
Subactivity Form	Descriptive elements of a sub-activity (more detail tasks to be completed under an actiivty). The form serves a functional purpose and should be used to separate out public awareness, training activities, and progress towards major activities.	All views under the Activities Module, except for By Status; position cursor on the Activity form.
Terms of Reference	Terms of reference for the activity. On the RDI project the Activity TOR must be completed before completing the STTA form as the STTA form inherits the information from the Activity TOR.	All views under the Activities Module, except for By Status; position cursor on the Activity form.
Meeting Report/Interview Report	Date, attendees, location, and minutes of meetings	All views under the Activities Module, except for By Status; position cursor on the activity the meeting concerns
Trip Report	Required trip report	All views under the Activities Module, except for By Status; position cursor on the activity the trip report concerns
Other Information	This should only be used to store electronic documents that does not fit into the following categories: a) Publication (all publications should be housed in the publication form) b) Workshop (all workshops should be denoted using the workshop form) c) Training (all trainings should be denoted using the training form) d) TOR (all TORs should be typed into the TOR form) e) Trip report (all trip reports should be typed into the system -- you can always cut and paste from Word).	All views under the Activities Module, except for By Status; position cursor on the activity.
Comment	For users to make a comment on an activity	All views under the Activities Module; position cursor on the activity.

30

Response to Comment	Response to a comment or response to another response	All views under the Activities Module, except for By Status or Comment View; position cursor on the comment the response concerns; or on the response if your response is to a previous response
STTA		
STTA Information and Scope of Work	Name of the consultant, position, start and end dates, level of effort the contractor or subcontractor, and daily rate. The Scope of work is at the bottom of the form and information on the particulars of the STTA are filled in automatically	All views under the Activities Module, except for By Status; position cursor on the Activity TOR.
TRAINING		
Workshop/Seminar	To be used for: In-country Stakeholder and Policy workshops, seminars, or other in-country training events not mentioned below under Training. Title, type, category , the location, start and end dates, institution offering the training, number of participants by gender, estimated and actual cost, and participant list. Also stores all workshop related documents.	All views under the Activities Module, except for By Status; position cursor on the Sub-activity to which the training relates.
Training/Invitational Travel	To be used for: Invitational Travel, Observational Tours, Short Course, On-the-Job Training or Off-Shore Training Training title, type, category , the location, start and end dates, institution offering the training, number of participants by gender, estimated and actual cost, and a training logistics checklist. Also stores all workshop related documents.	All views under the Activities Module, except for By Status; position cursor on the activity to which the training relates.
Training Participants	To be used for training events where detailed participant information is required by the donor. Name, organization, address, gender, organization	Any view in which the training appears; position cursor on the training item, or click the compose participants button from the bottom of the training form

31

USAID Final Training Report	A formal one page training report for each course; reads information from the training activity form	Any view in which the training appears; position cursor on the training item
REPORTING		
Accomplishments	Descriptive data on the actual project achievements "Success Stories"	List of Outputs View; position cursor on the output for which progress is to be reported
Subcontractor information	Not used	
MISCELLANEOUS		
Publications	THIS FORM SHOULD BE COMPOSED WHEN THE REPORT IS IN PROGRESS. A STATUS FIELD WILL ASSIST WITH TRACKING THE PROGRESS OF THE REPORT Title, author, date, and brief description	Activity Information Summary View; position cursor on the activity the publication concerns
Team Memo	Memorandum to RDI Team on policies and procedures	Team Memo View; position of the cursor is not important
Success Stories	Success stories in a format which can be directly submitted to USAID	Success Story View; cursor position not important
Project Assumptions	Stores information on the project assumptions.	Project Assumptions view; cursor position not important.
Procurement	Details of items purchased for the project.	Procurement View; position of the cursor is important
Benchmark		
Project Information	Contains basic information on the project. This form must be completed in the system and can NEVER, EVER BE DELETED.	
Mailing Information	Stores mailing lists for document distribution and workshops	Mailing information view; position of curse is not important.
Timesheet	Monthly hours charged to the project for each core staff member	Timesheets view. To enter hours for a month, position cursor on the persons name and double click. Double click again while in the form to get into edit mode. Enter hours for the month and save. To create a new timesheet, select Create, Miscellaneous, Timesheet and enter the required information

32

An Activity Life-Cycle

A. THE STEPS:

FIRST STEP: It all starts with the Activity Form.

Each year all activities that are included in the work plan submitted to USAID are entered into TAMIS. This saves some of the bulk entry from the daily users. However, there will be activities that come up so you may need to compose an activity form.

See the above sections in the Using for some technical assistance in how to enter forms. It is important to complete the following fields in the form:

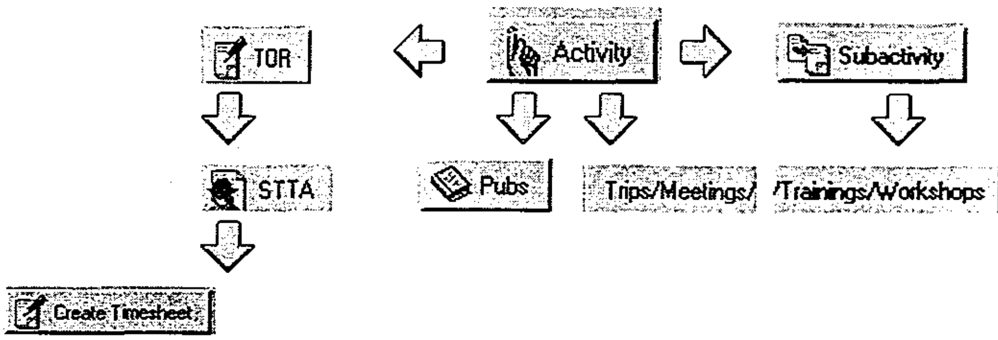
Activity Name	You can edit this field by just editing the form ONLY IF you have not composed any additional documents, if you have see USING MACROS
Work plan task (select 1 from list)	You can edit this field by just editing the form ONLY IF you have not composed any additional documents, if you have see USING MACROS
Activity Number	See button for assistance in how to number
Scheduled End-Date and Start Date	This can be edited easily by just editing the form
RDI Component (select multiple)	You can edit this field by just editing the form ONLY IF you have not composed any additional documents, if you have see USING MACROS
Staff Responsible (select multiple)	Type ahead or drop-down box. This can be edited easily by just editing the form
Policy Area (select one)	This can be edited easily by just editing the form
Product (select multiple)	This is a dynamic list which you can add to. It will be continuously updated.
Activity Deliverable	This should be completed. Typically is a report
Is Benchmark?	The default is No. Please select one of the other choices of relevant.
Benchmark – Using buttons	Use one of the buttons to enter the Benchmark. Presently, the Traunche III button looks up to all of the Benchmarks entered into the MVE system. The Trauche IV button looks up into the RDI TAMIS. Presently there are no Benchmarks specified. If you have one that is agreed upon and want to enter you can select IV from the Traunche field and type in the Benchmark. It will be available for future users.

SECOND STEP(S)

Once you have the Activity form entered you can begin entering all other forms, such as trip reports, meeting reports, and comments. These forms are easy to use (see the form table for brief descriptions).

Forms to compose while highlighting the Activity form are indicated with an arrow from the

Activity Form. Forms that should be completed composed on a dependent of the Activity form are also shown:



TECHNICAL ASSISTANCE

The TOR form leads to........ the STTA form

- You should complete this form around the start-date of the activity. This form is important for getting approvals for STTAs.
- The status "Draft" is the default. The status "Edit" means that you are ready for people to edit. The status "Final" means that the SOW is final and ready for submission.
- When the TOR is final you can move to the next step N.B. If you cannot finalize the TOR and really need to get moving on the STTA, you can compose the STTA form. However, any changes made in the activity form which should be in the STTA would need to be manually copied and pasted.

The STTA form leads to ..... getting the STTA you need

- All short-term advisors MUST have an individual scope of work. The form should be completed with the information for which approval is being requested. For DAI STTAs, this scope of work will be included in the advisors the employment agreement!
- When approval is received, the approval sections at the top of the form will be completed and any adjustments to the period of performance or level of effort must be completed. For DAI STTAs, the home office will use this information to generate the employment agreement.

Tracking STTA Level of Effort

- A STTA timesheet is composed per position. This will track the level of effort for the individual for quarterly report.

The Publications Form for Technical Assistance

- For any activity for which a report is a deliverable during project implementation the responsible technical advisor should compose the Publication Form (from any of the 1. Activities views except for the By Status). The form should be completed for all information availalble except for the publication date.

- When the report is final, the electronic document should be forwarded to Heba (this can be done by attaching it to the TAMIS form)
- Heba will publish the document, complete the publish date in the form and store the electronic copy of the reports in the TAMIS publication form.

- There are several views for viewing RDI publication. These include:
  View #1: Includes all publications sorted by report type
  View #2: Includes all publications in series number order (to be used with the quarterly report)
  View #4: Matrix to track distribution. Includes all final publications in series number order (Buttons automate the process for marking sent)
  View #5: Sorts out those publications , policy briefs, and newsletters which are pending. (uses date and not status field)

The Publications Form
for Public Awareness

- The form is used also for newsletters and policy briefs. See activities under work plan task area number 5.
- There are several views for viewing RDI newsletters and policy briefs. These include:
  View #1: Includes all publications sorted by report type
  View #3: Includes Policy Briefs and newsletters only.

TRAINING AND WORKSHOPS

Subactivity Form
to be completed First

- The Subactivity Form is used to track public awareness and training activities

Workshop form

- As soon as a workshop is known, a workshop form should be completed.
- The basic information should be entered into the form by either the technical leader of the workshop or the workshop coordinator.

By completing the workshop early in the process, all of the workshop documents can be stored and easily found and the training calendar used.

It is hoped that in the future invitations can be created in the system based on a template and faxed electronically through a mail merge with the APRP Contacts database.

- Once the workshop has been held, the participant list should be entered, the number of participants and the workshop should be marked completed.

Training form

- This should follow the same protocols as above, except the training coordinator instead of the workshop coordinator is responsible for making sure the information is complete.

6. Printing Forms and Views

Printing in Lotus NOTES can be challenging. However, once you figure it out, it is relatively straightforward. Here are some tips for printing forms and views. Before you begin printing, however, it is necessary to select the paper size and orientation. To do so, select File, Print, Printer, Setup, Paper. You may be using A4 paper in your printer and will need to select it. You also need to select the orientation you wish: portrait or landscape. After you have selected the paper size and orientation, click the Apply button, then OK

NOTE: THE PAPER SIZE AND ORIENTATION WILL REMAIN AS IT IS NOW UNTIL YOU RESET IT. TO RESET, JUST FOLLOW THE ABOVE DIRECTIONS AND CHOOSE ANOTHER SETTING. THIS IS IMPORTANT BECAUSE MOST FORMS ARE PRINTED IN PORTRAIT ORIENTATION, AND MOST VIEWS ARE PRINTED IN LANDSCAPE ORIENTATION.

Forms

Printing forms is easier than printing views. NOTES allows you to set headers and footers for your forms or documents in several ways. You can read about using form headers and footers in the help guide. There are two ways to print a document:

1) Go into the document you wish to Print, select File, Print, OK

2) Go to a view that displays the document(s) you want to print and click in the left margin of the document. A check should appear. You can select multiple documents. Then select File, Print, OK. All the documents you have selected will print.

Views

You can also set headers for views. You will usually find that you will want to do this because it gives a title to your report. To set a header for the view you wish to print, you must select File, Database, Properties, and then the printer icon tab. Type in the header or footer as you wish it to appear, select the font size you want, and bold if you wish it to be so. Then click the X.

Now to print this view, go into the view you wish to print, select File, Print, and make sure you click the Print View button. Then click OK.

You may find that you will have to adjust the column sizes to get the printing exactly as you would like it to appear. This is easy to do. Just put your cursor on the column border at the top and the cursor will change to an arrow. Drag the cursor to make the column the size you want.

NOTE: THIS HEADER, SINCE IT IS A DATABASE HEADER, WILL NOW APPEAR ON EVERY DOCUMENT AND VIEW THAT YOU PRINT. THEREFORE, WHEN YOU FINISH PRINTING THE VIEW YOU WANT, YOU MUST REPEAT THE PROCEDURE ABOVE AND DELETE THE HEADER AND/OR FOOTER.

A Final Tip: Given these complexities, it is most efficient to schedule your printing to print all the forms at one time, with the headers you wish, and then switch to landscape mode and print the views, editing the header before printing each view.

---

7. Using Agents

Agents

- *1998 Achive selected document* will mark the Archive field in the form to 1998 and the

36

documents will be available in the Archive by year and all document views.

- *Change Activity Name.* This will prompt the user to enter the new Activity Name and run the agent on all selected documents to change the Activity Number field. This is required whenever changing activity names **after** depedent forms have been created, ie Activity TORs, etc.

- *Change Activity Number.* This will prompt the user to enter the new Activity Number and run the agent on all selected documents to change the Activity Number field. This is required whenever changing activity names **after** depedent forms have been created, ie Activity TORs, etc.

- *Change Policy Area.* This will prompt the user with the list of policy area and run the agent on all of the selected documents changing the policy area as per the user selected value. This is for mass-changing of policy areas. Most forms do not have the policy area field.

- *Change Workplan Task.* This will prompt the user with the list of work plan tasks and run the agent on all of the selected documents changing the policy area as per the user selected value. This is for mass-changing of policy areas. This is required whenever changing activity names **after** depedent forms have been created, ie Activity TORs, etc.

- *Change Advisor.* This will prompt the user to enter the new Activity Number and run the agent on all selected documents to change the Activity Number field. This is required whenever changing activity names **after** depedent forms have been created, ie Activity TORs, etc.

- *Change RDI Component.* This will prompt the user with the list of work plan tasks and run the agent on all of the selected documents changing the policy area as per the user selected value. This is for mass-changing of policy areas. This is required whenever changing activity names **after** depedent forms have been created, ie Activity TORs, etc.

- *Other.* Under the Actions Menu, the Other will list all of the agents. This lists other Agents:

    - Change Publication Type (used during development)
    - Change Product. This will prompt the user to enter the new Activity Number and run the agent on all selected documents to change the Activity Number field.

37

ANNEX E

SYSTEM MAINTENANCE

System Maintenance

Issue	Schedule	Action
1.Not-Categorized	Weekly	Check all of the views for not-categorized documents
2. Replication Conflicts	N/A	If a Replication Conflict occurs, review both documents and make changes in the non-conflicted document and go to either Heba, Jane, or Max for assistance in deleting the conflict.
3. Completing Workshop Information	Monthly	Print-out Views to review for accuracy. 3. Training Module\1. List of Trainings 3. Workshop and Trainings by Month Complete all participant training numbers.
4. Completing Publication Information	Monthly	Print-out the pending publication view (5. Misc\1. Official Project\1. Publications\5. Pending) to confirm if any reports have been completed) Review distribution view to confirm all reports have been sent to DAI. DAI/B will take care of sending reports to CDIE.
5. STTA Level of Effort	Monthly (end of Month)	Print-out the 4. Reporting Module\2. Quarterly Reporting\5. STTA LOE

39