Preparing the MTP 2010-2012 with EasyMTP

This document provides you with practical instructions for the preparation of the 2010-2012 MTP in EasyMTP on the basis of:

- the existing MTP content base in the local and hosted EasyMTP systems for Centers and Challenge Programs;
- the Science Council guidelines;
- the requirements for project and output analysis in CGMap.

These instructions apply also to the Centers and Programs for which ICT-KM set up EasyMTP and entered the MTP content for inclusion in CGMap. Specific agreements will be made with these Centers and Programs individually in order to ensure that they can confidently work in EasyMTP.

Support provided by the EasyMTP/CGMap team

Since December 2008, the EasyMTP/CGMap team is no longer in the position of delivering the upgrades to EasyMTP that were illustrated at the AGM in Maputo, and resulting from two post-implementation surveys with the end users and the technical focal points.

In spite of the downsizing, the EasyMTP/CGMap team will provide the necessary support and guarantee that the process of updating your MTP runs smoothly.

What the team will deliver by June 2009 to ensure the timely submission of the revised MTP:

1. installation of hosted EasyMTP for CPWF, training sessions. We will contact the focal points to arrange a suitable schedule;
2. moving of CIP EasyMTP to the hosted environment;
3. the release of an upgrade of the reporting capabilities in EasyMTP, which will fix issues with special characters, include a standardized cover and table of contents, an optimized layout of logframe for printing, export to Word document format. This development is in progress and planned to be delivered to Centers by end of March. This does not affect your ability to start editing the MTP content, you can start when ready;
4. assembly of final report and financial tables for MTP document submission via CGMap;
5. continued assistance and training via the Helpdesk cgmap-support@cgiar.org

Practical instructions

MTP title
- If you are going to **update the structure and content** of the previous MTP, edit the title of the current MTP.

- This will allow you to modify the content of the current MTP database without creating a copy of it. This is a safe procedure as backups of the final 2009-2011 MTP databases are stored in our servers.

How to edit the MTP title: see Annex

- If you are going to **create the MTP content without reusing** the previous MTP, you can create a new MTP.

Important! Only users with the Project Office role in EasyMTP can edit the MTP title and create a new MTP.

Project overview and rationale
- The project overview and rationale is included in the MTP report for submission and is used in the CGMap Project Fact Sheets that you can retrieve via the Search by Project and the Projects by Country.

- Provide/edit the section content so that it can be read as a stand-alone overview of the project, outside of the document context. Avoid reference to other parts of the MTP report document.

Alignment to CGIAR priorities at project level
The Science Council Guidelines state:
"Centers/CPs are not requested to maintain or update this section"

- A narrative description of the project alignment is no longer required. However, this section is mandatory in the template and cannot be removed from the project content structure.

- Delete or maintain the content of the section. At the time of assembly, we will remove Alignment headings with no content below them.

Outputs description

Description
- Update if needed.

- Countries and priorities should not be included in the description narrative. If you have included them in the narrative, please remove them from the Description and update/validate the Countries and Priorities from the checklists in the relevant tabs.

- Output descriptions are included in the results of the CGMap Search by Output:

- Be as concise as possible and edit the description so that it can be read as a stand-alone overview of the output, outside of the document context.

- If two or more outputs have the same description text, add the same description text in all relevant outputs; do not include text such as: see Output 3

Alignment to CGIAR priorities by output (checklist)
The Science Guidelines state:
> "Indicate preferably one priority area or non-priority activity".

- This suggests a possible reduction in number of the priorities checked for each output. The precision of the results from the CGMap Search by Output would benefit from this, whenever possible.

- Edit by checking/unchecking or just validate the priorities you checked in Outputs Description>tab: Priorities.

- Priorities by output are included in the MTP report, required by Science Council and used for output-level search in CGMap.

<p align="right">How to edit priorities by output: see Annex</p>

Countries of Planned Research
- Update or validate as needed.

- These are used for analysis in CGMap (Maps and Search by output) but are not required by Science Council. With the upgrade of the reporting functionality, they will be listed at the end of the default report generated from EasyMTP for your ease of verification. This list will be manually removed from the default report at the time of assembly and submission in June.

<p align="right">How to edit Countries of Planned Research: see Annex</p>

Elaboration of Partners' Roles
The Science Council guidelines state:
> "The list of partner organizations in the narrative should only include partnerships that involve a collaborative role in research and involve funding or other resource contributions to and by partners for participating in activities which are part of the CGIAR agenda. Other kinds of partners (such as recipients of research results, materials and training, partners in networks and partnerships established for future research collaboration) do not need to be listed in the MTP"

We **suggest** you break down the list of partners, *in Elaboration of partners' roles* and any Annex should you need to create long lists, by grouping them under the following types:
- ARI Advanced Research Institute (for research institutes in developed countries)
- NARI National Advanced Research Institute (for research institutes in developing countries with a national mandate)
- University (used also for Institutes and Departments of a university)
- NGO Non-governmental institution

- RO Regional Organization
- SRO Sub-Regional Organization
- Development Organization (UN and international organizations)
- IARC International Agricultural Research Centers (used for CG Centers and Programs primarily)
- Government (used for Ministries and governmental organizations and agencies)
- Private sector
- Private Foundations

The above types were developed in consultation with Science Council as part of a pilot cataloguing project aimed at creating a controlled list of partners' names for use in CGMap/EasyMTP and any Center-level systems if need be.

Grouping the partners' names by the types above would greatly help in cataloguing partners by types, when this project is resumed.

Output targets
The Science Council guidelines state:
> "Due to the transition in 2009 and 2010 to implementing research within a new Strategy and Results Framework, in the MTP 2010-2012 outputs targets are not mandatory for 2011 and 2012. Centers/CPs can use the MTP 2009-2011 as the base for the new MTP, leave the 2009 output targets for on-going research and update 2010 output targets as needed. Centers/CPs may provide output targets for 2011 and 2012 if they wish for their own planning purposes. Any output targets deferred from 2008 to 2009 or 2010 should be shown under the new target year: in this case, indicate in the text that they were carried over from 2008".

- Output targets are searchable as individual records in CGMap and will in the future be the basis of output target achievement monitoring: it is important to create as many output target entries for a specific year as actually planned for that particular year.

- Create as many output targets as needed for a specific year. Do not create one output target entry for a specific year, only to list multiple targets in the description.

- Remember to provide the **output target type** (for existing and newly created OTs): this data is used in the CGMap Search by Output and will be used for monitoring as well.
  How to add/edit the Output Target type: see Annex

- For the MTP 2010-2012 edit the output targets in the Logical Framework as follows:

  2008 OTs
  - delete the achieved/reported ones;
  - modify the year for the deferred ones, add the deferred note in the description.

  You should have no 2008 output targets at the end of this process.

  2009 OTs
  - leave in any OTs that are still relevant to ongoing research.

2010 OTs
- edit as needed

2011 OTs
- edit existing or create new OTs if relevant/needed
- delete OTs that you do not want to include in the submission

2012 OTs
- optional to create

Potential Beneficiary Countries
- Update or validate as needed.

- Provide them at the project or output level, at your discretion, from the Logical Framework page.

- These are used for analysis in CGMap but are not required by Science Council. With the upgrade of the reporting functionality, they will be listed at the end of the default report generated from EasyMTP for your ease of verification. This list will be manually removed from the default report at the time of assembly and submission in June.

How to edit Potential Beneficiary Countries: see Annex

CGMap Project Fact Sheets: how to refine the aggregation of the FIS financial tables to generate complete, valid Project Fact Sheets in CGMap

The Project Fact sheets in CGMap aggregate information from both the MTP database and the FIS project-level tables. If a FIS project is created at the same level of aggregation of the MTP project, it is then possible to generate the Project Fact Sheets with the correct association of MTP project and FIS tables, showing the real total project budget.

In order to be able to provide complete information in CGMap, the EasyMTP/CGMap team recommends to:
- create FIS project tables that match the MTP projects exactly (i.e. same level of aggregation of research work and financial resources);
- assign the same MTP project ID and title to the corresponding FIS project:

EasyMTP project ABC
=
FIS project ABC

Example:
EasyMTP project from IRRI: 1. Raising productivity in rainfed environments: attacking the roots of poverty
=
FIS project from IRRI: Program 1: Raising productivity in rainfed environments: attacking the roots of poverty

How to treat SWEP financial tables
Two options are possible:
a. provide one set of FIS financial tables for the SWEP for which your Center reports;

EasyMTP project SWEP xyz

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FIS project SWEP xyz

Example:

EasyMTP project from Africa Rice: SWEP: The Consortium for the Sustainable Development of Inland Valley Agro-ecosystems in Sub-Saharan Africa (IVC))

=

FIS project from Africa Rice: The Consortium for the Sustainable Development of Inland Valley Agro-ecosystems in Sub-Saharan Africa (IVC)

b. as per the guidelines, disaggregate the SWEP components of the MTP project into separate FIS financial tables, so that both the FIS project (Center resources) and the FIS SWEP financial tables can be aggregated to the corresponding MTP project and correctly represent the total project budget.

EasyMTP project xyz

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FIS project xyz + FIS project SWEP xyz

Example:

EasyMTP project from Bioversity: F04: Conserving and promoting the use of genetic resources of commodity crops

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FIS project tables from Bioversity: FIS F04 Conservation & use of GR of commodity crops + F04-SGRP Conservation & use of GR of commodity crops

When creating the project tables in FIS for SWEP components:
-   assign the same MTP project ID and title to the corresponding FIS project and add the acronym of the SWEP (as per the Bioversity example above)
-   in FIS, mark the SWEP related financial tables as with type **SWEP**

Finance Information System: How to mark tables as SWEP: see Annex