

# *USER'S MANUAL*



## ITTO Project Formulation Software Tool (ITTO ProTool)

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**INTERNATIONAL TROPICAL TIMBER ORGANIZATION**

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## I. INTRODUCTION

Project proponents are encouraged to use the ITTO Project Formulation Software Tool (ITTO ProTool, 2006) to facilitate formulation of proposals. It is a user-friendly package of tools that will assist the formulation process based on the “ITTO Manual for Project Formulation, Third Edition, 2008”. This manual for the ITTO ProTool provides guidance on operating the computerized tools to formulate a proposal.

The computerized tools will enable proponents to generate computerized outputs pertaining to the following aspects of project formulation:

- Creating the Problem Tree
- Creating the Objectives Tree
- Specifying the Outputs of each Objective
- Creating the Logical Framework Matrix
- Specifying the Activities of each Output
- Creating the Work Plan
- Identification of Inputs needed per Activity
- Creation of budget tables

In each of the steps mentioned above for project formulation, the ITTO ProTool will help create the required flowcharts, tables and figures and automatically paste them into a Word document that is already formatted according to ITTO’s Project Proposal formats.

For example, the software can automatically create all the required budget tables with just a click of a button. The proponent needs only to enter unit costs, budget component types and the year the budget is needed and the software will automatically create all the required budget tables in correct format with all the information consistent in all the required budget tables of ITTO. Text and data in each step of formulating a proposal is also linked and consistent to the later steps such that the latter software tools automatically use text/data entered from the previous steps.

The software was also created in such a way that it guides the proponent to follow the proper logic and steps in creating a proposal so that the final product would adhere better to ITTO’s proposal requirements, thus producing a high-quality project proposal.

Another time-saving feature of this software is that while going through the proper steps to formulate a project (which the project formulator will do anyway even if he/she will not use this software), it is saving the text and data being entered into the system so that it can be used to create all the tables and flowcharts needed in an ITTO Project proposal. Once the project formulator is done with all the steps in the software, he/she just needs to press a button to automatically put together all the above mentioned parts of the proposal into one Microsoft Word document that is already properly formatted according to ITTO’s standard format for a project proposal.

The ITTO ProTool is created using Visual Basic for Applications and can operate in different Microsoft Windows versions. The application softwares used are: Microsoft Word and Microsoft Excel.

**NOTE**

The software generates only the above mentioned parts of the project proposal. The project formulator needs to elaborate the full text of the other sections of the proposal (e.g. Part 1 Project Context, Part 2 Project Rationale, Parts 3.2 Implementation Approaches, 3.5 Assumptions, Risks, Sustainability and Part 4 Implementation Arrangements). Before starting to use the ProTool program, the project formulator should carry out the necessary data collection and analytical work as well as stakeholder identification and consultation and the environmental social assessment of the project as explained in the “ITTO Manual for Project Formulation.”

Therefore this software cannot be used alone as it is. It is only a tool to help in formulating a project and creating the document. It is fully dependent on the “ITTO Manual for Project Formulation” thus it assumes that the user is already familiar with that manual and is using it as a main reference in creating a proposal.

## II. PROGRAM INSTALLATION

### SYSTEM REQUIREMENTS

As of today, the ITTO ProTool has been tested to work with the following software versions:

- Any computer that is running Microsoft Windows XP
- Microsoft Excel 2000, 2002, XP, 2003 and 2007
- Microsoft Word 2000, 2002, XP, 2003 and 2007

The software may perform normally under different Windows versions or different Excel and Word versions but we have not tested it yet on the other versions.

#### IMPORTANT!

Screen shots used in this manual may slightly differ from the screens you will actually see in your computer. This is because the screen shots used here come from different versions of the software (i.e. MS Office 2000, MS Office 2003 and MS Office 2007).

### INSTALLATION

Download the correct version of ITTO ProTool installer for your MS Office from ITTO's website. After downloading, you should get a Windows' setup file named **Setup\_ITTOProTool\_Ofc200x.exe** (or **Setup\_ITTOProTool\_Ofc2007.exe** for Office 2007).

#### IMPORTANT!

Before installing the software, you should first uninstall any old version of the software that is already installed in your computer. If you do not, the new installer will just overwrite the old version and you will have a mix of old and new versions installed in your computer. This may cause you to lose your work after working on it for some time.

To start installation, double-click on this setup file then follow the instructions on the setup wizard.

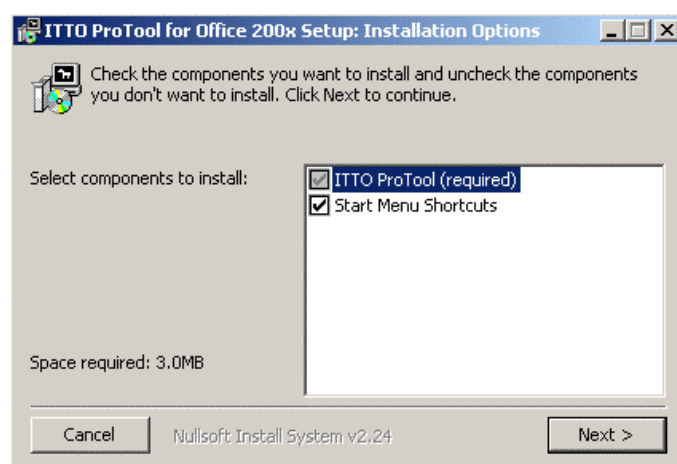


Figure 1. Installer setup wizard.

To follow the setup wizard, click on the “Next” button. On the next screen click “Install.” Once it says installation is completed, click on “Close” and that’s it! You have installed the ITTO ProTool. After finishing the setup wizard, you should have the ITTO ProTool software group showing in your Windows’ **START** menu. It is usually added to the bottom of your **START** menu.

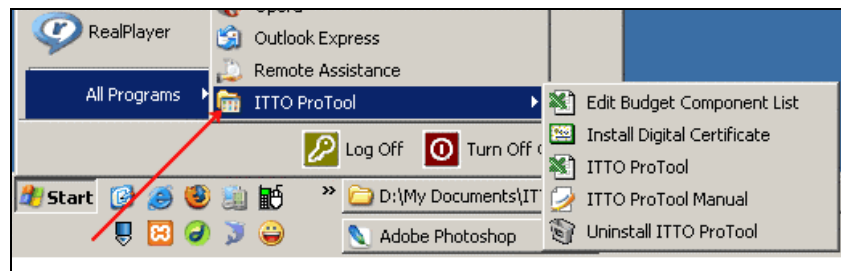


Figure 2. The ITTO ProTool software group.

## UNINSTALLING AN OLD VERSION

If you already have an old version of the software installed in your computer and you want to install a new version, make sure to uninstall the old version first. In case you have data you want saved in the previous version of the software, you should backup your previous software installation and keep it in a safe place before continuing. Click the “Cancel” button to stop installation of the new version and backup your copy first. You can use WinZip or any other compression utility to backup your previous copy of the software. When using WinZip, compress the folder named **ITTO ProTool** which is normally located in **c:\Program Files**. If it is not there then you may have installed the software in another part of your disk. Please browse that subdirectory where you installed the software and compress the folder named **ITTO ProTool** with WinZip to backup your old version along with your old data.

To uninstall the previous version, go to Windows’ **START** button, then select-click on **All Programs** → **ITTO ProTool** → **Uninstall ITTO ProTool**.

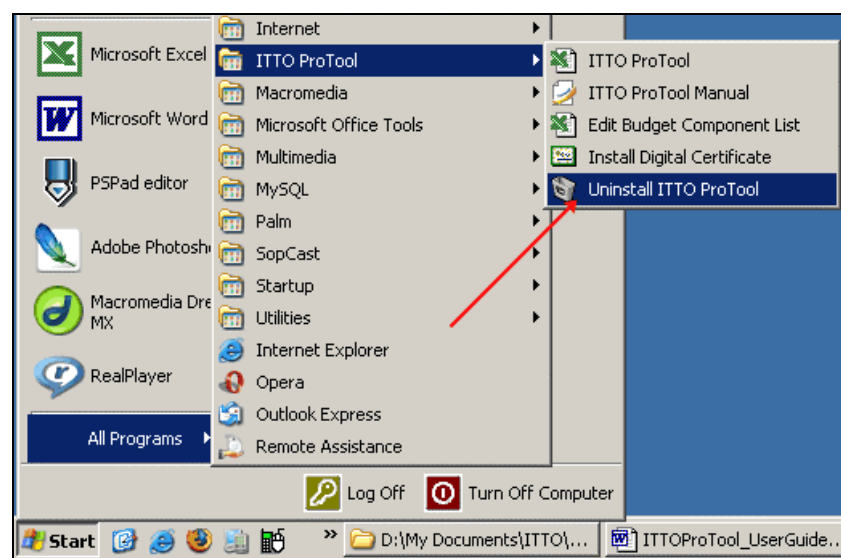


Figure 3. Uninstalling old version of ITTO ProTool.



After the previous version is uninstalled, you can now run the new installer. Follow the setup wizard screens to finish the installation of the new version.

## SOFTWARE SECURITY

The ITTO ProTool is a program (or macro) created in Microsoft Word and Excel. Microsoft applications like Word and Excel has a special security feature to protect users from rogue programs (or rogue macros, e.g. virus, worm) that it does not recognize. As such, we need to install the correct digital certificate to your computer so that your Microsoft Word/Excel programs will not think that the ITTO ProTool is a virus. The digital certificate authenticates the ITTO ProTool you are running as a genuine and safe macro.

To install the certificate for the ITTO ProTool, click the Windows' **START** button, then select-click on **All Programs → ITTO ProTool → Install Digital Certificate**. A new window will show up that looks like the following:

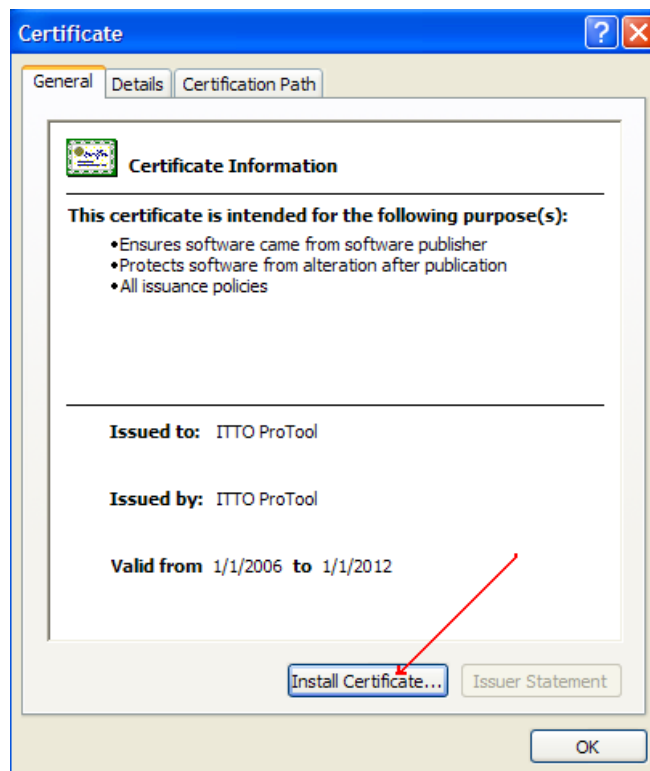
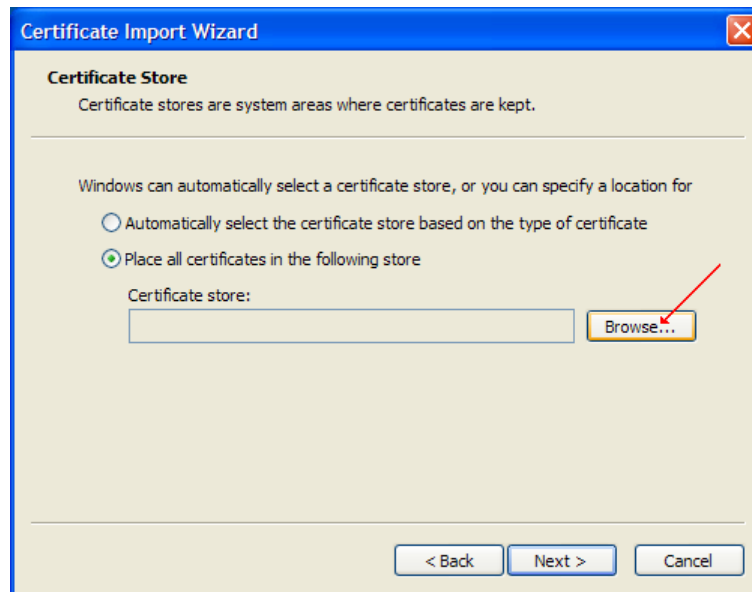


Figure 4. Installing the Digital Certificate.

Click on the “Install Certificate..” button and follow the install wizard that comes up. Click on the “Next” button until you see the following screen (for the Certificate Store):



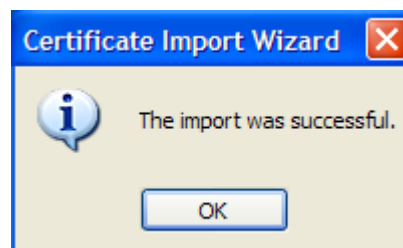
**Figure 5. Certificate Store screen.**

On this screen, you have to choose where to store the ITTO ProTool digital certificate. You have to store it under “Trusted Root Certification Authorities.” To do that, select the radio button labeled “Place all certificates in the following store.” Then click on the “Browse” button to show the screen that lists all the storage areas:



**Figure 6. Select Certificate Store screen.**

Click on “Trusted Root Certification Authorities” to select it, and then click on the “OK” button (for MS Office 2007, please look on the next page to select the proper store). Click “Next” on the Certificate Store screen and finally the “Finish” button at the end of the install wizard. This installs the ITTO ProTool digital certificate into your computer. You should see the following dialog box when the certificate is successfully installed:



**Figure 7. Successful Digital Certificate Installation.**

The first time you run the ITTO ProTool, you may encounter the “Enable”/”Disable” macros screen. It may look like the following screen:

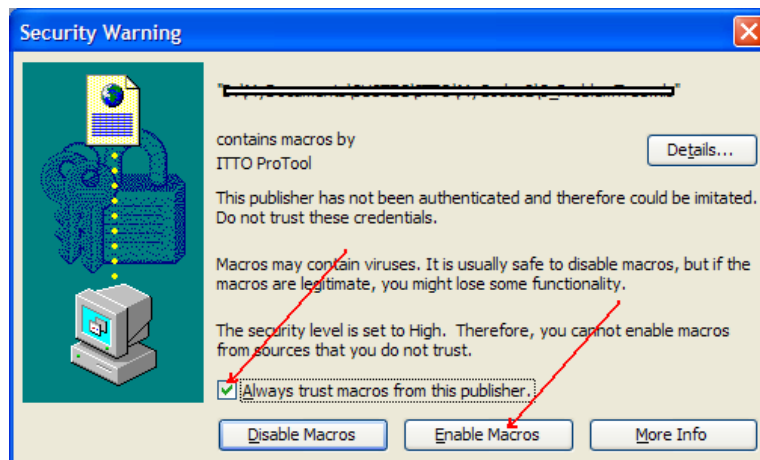


Figure 8. Security for macros in MS Office XP.

Make sure to tick the checkbox labeled “Always trust macros from this publisher.” Then click on the “Enable Macros” button. The next time you run the ITTO ProTool, you will not get this screen anymore. Thus you only have to install the Digital Certificate once after installing the ITTO ProTool in your computer.

#### For Office 2007 users:

You may encounter a blank spreadsheet when running the ITTO ProTool for the first time. Click on the “Options...” button. Illustration:

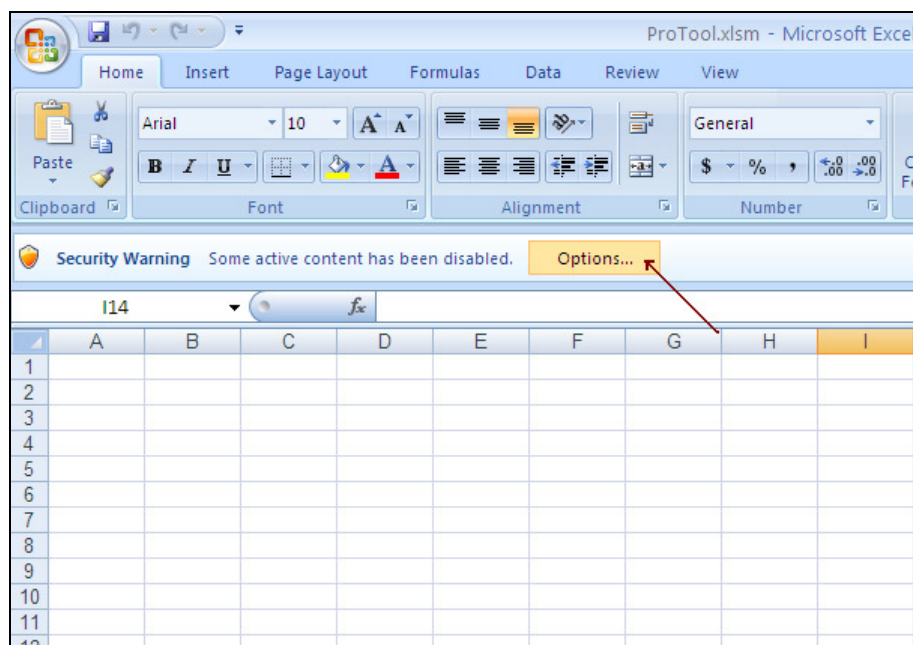


Figure 9. MS Office 2007 shows blank when running ProTool for the first time.

A “Security Alert” dialog box will appear. Make sure to click on the radio button labeled “Trust all documents from this publisher” to make your system accept ITTO ProTool as a safe software to run. Illustration:

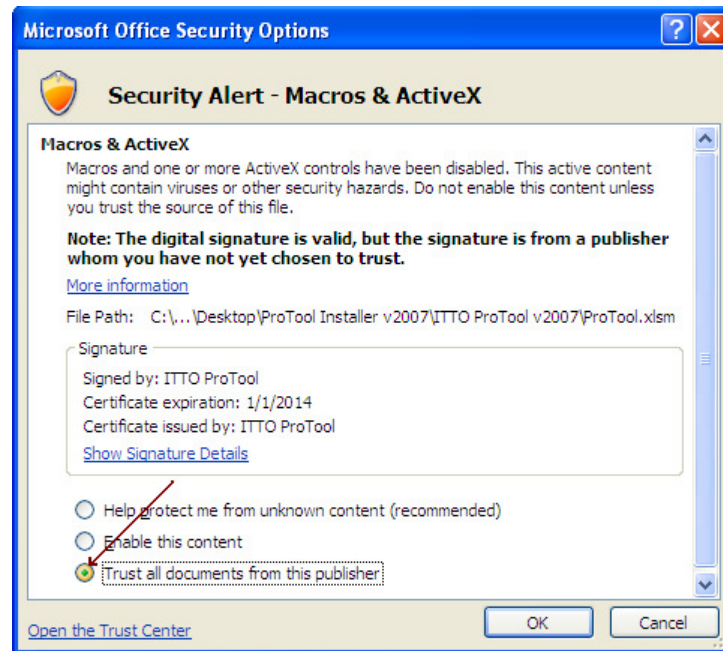


Figure 10. MS Office 2007 security alert dialog box.

Click “OK” and you’re done!

That’s enough talk about security, let us go on with the actual work. Go through the next sections and start enjoying the formulation of your project proposal!

### III. USING THE SOFTWARE

#### Running the ITTO ProTool

To start using the ITTO ProTool, just click on the Windows' **START** button, then select-click on **All Programs** → **ITTO ProTool** → **ITTO ProTool**. Illustration:



Figure 11. Running the ITTO ProTool.

This will open your Microsoft Excel application and load the ITTO ProTool software. You should see the welcome screen and then after a few seconds the Main Screen of the ITTO ProTool. It looks like a partial cycle of the project formulation process:

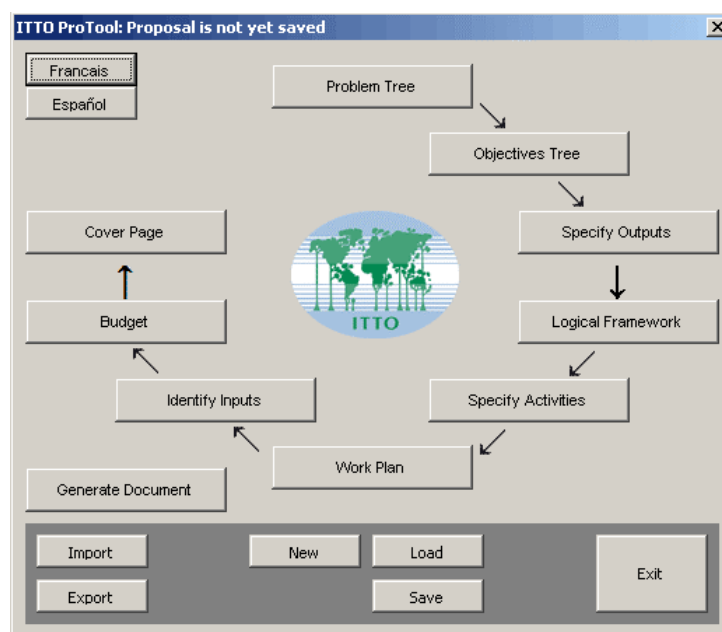
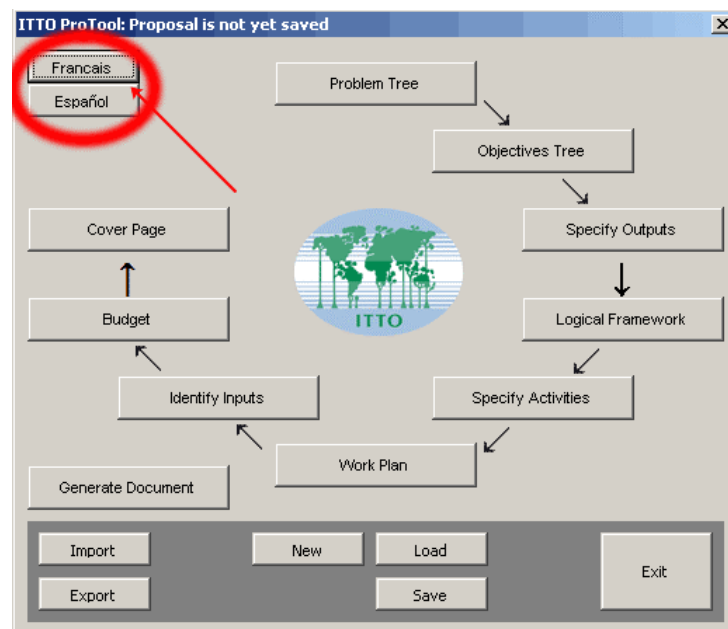


Figure 12. ITTO ProTool main screen.

This main screen will always be your jumping point through the successive steps in formulating a project proposal with ITTO.

## Setting the Language

The ITTO ProTool is available in three different languages namely: English, French and Spanish. It is set to English by default. To be able to run the ITTO ProTool in French or Spanish, just click on the appropriate language button found in the upper-left hand side of the ITTO ProTool Main Screen.



**Figure 13. The buttons from the ITTO ProTool Main Screen to change Language.**

Click the language you prefer and that's it! The software is now set to show text in your chosen language.

## Creating a PROBLEM TREE

After you have collected and analyzed the necessary background data including measures to ensure stakeholder participation and involvement as well as assessment of environmental, social and economic impacts of the the project, you can proceed to creating the “problem tree” of the project.

By the way, if you do not wish to use the ITTO ProTool to create the Problem Tree, you have the option to skip this step.

To start creating the problem tree, you have to run the “Problem Tree Module” of the ITTO ProTool. To do this, click on the “Problem Tree” button of the ITTO ProTool Main Screen.

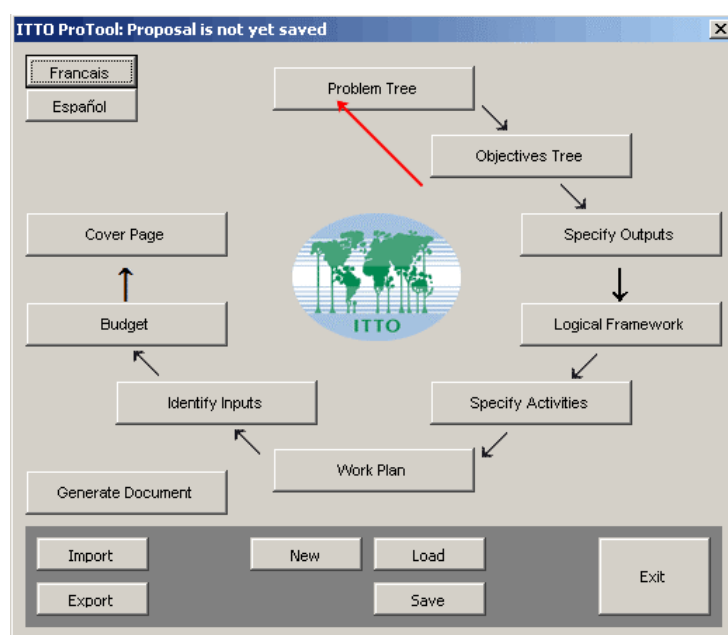


Figure 14. Running the Problem Tree Module.

This will show the title screen then after a few seconds, this title screen will disappear and you will be presented with an Excel spreadsheet.

### TIP

Before you start elaborating the problem tree of your project, you should draft it on paper to facilitate data input in the software.

The following text would describe by example how the “Problem Tree Module” works. For example, you wanted to make a problem-tree that looks like the following:

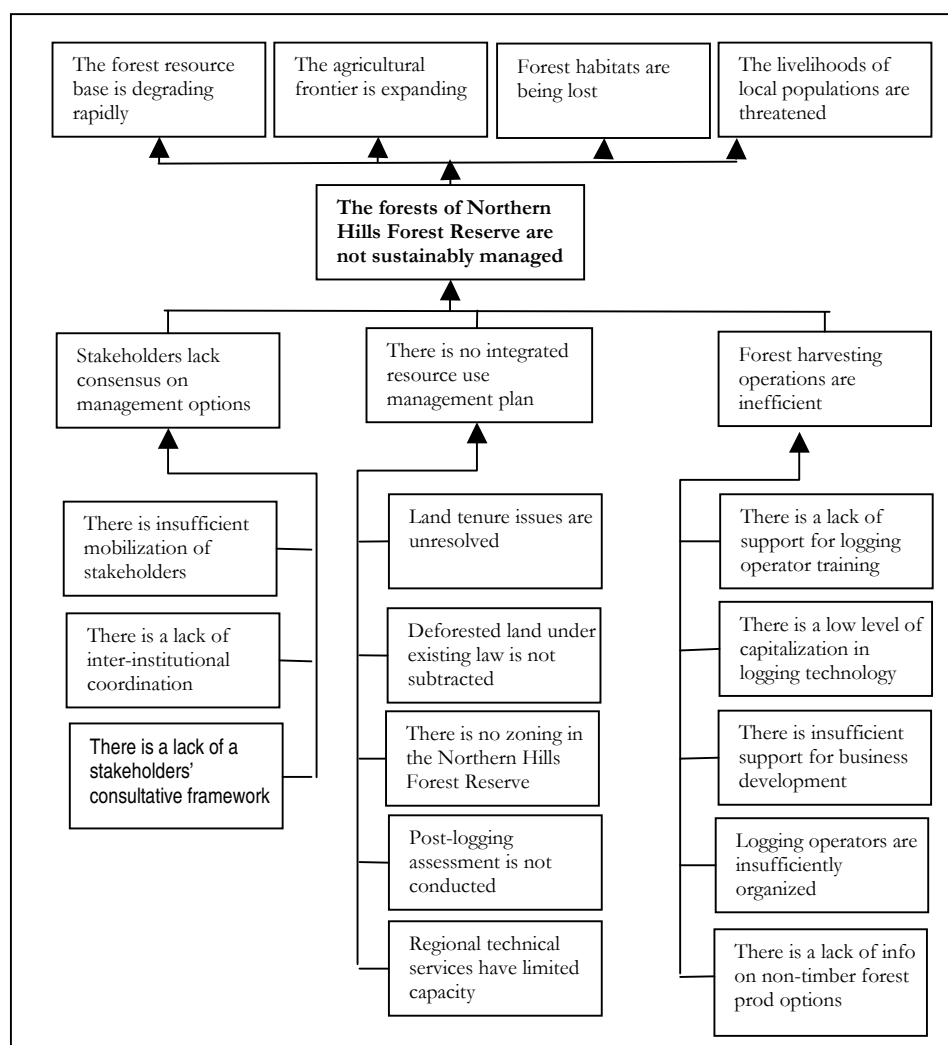


Figure 15. Final problem-tree.

To do this, you have to edit the blank spreadsheet such that it would look like the following:

D8					Start		Problem Tree	
= There is a lack of information on non-timber forest product options					Mark 'key problem'		Save	
	A	B	C	D	Generate Tree		Close Module	
1	The forest resource base is degrading rapidly	The agricultural frontier is expanding	Forest habitats are being lost	The livelihoods of local populations are threatened				
2	The forests of Northern Hills Forest Reserve are not sustainably managed							
3	Stakeholders lack consensus on management	There is no integrated resource use management		Forest harvesting operations are inefficient				
4	There is insufficient mobilization of stakeholders	Land tenure issues are unresolved		There is a lack of support for logging operator training				
5	There is a lack of inter-institutional coordination	Deforested land under existing law is not subtracted		There is a low level of capitalization in logging technology				
6	There is a lack of a stakeholders' consultative	There is no zoning in the Northern Hills Forest Reserve		There is insufficient support for business development				
7		Post-logging assessment is not conducted		Logging operators are insufficiently organized				
8		Regional technical services have limited capacity		There is a lack of information on non-timber forest product				

Figure 16. Edited Excel spreadsheet for the problem-tree.



**TIP**

Take note of the way the text are placed in the spreadsheet. We mimicked the placing of the text with how the final Problem Tree would look like. This is the best technique to make creation of the problem tree easier in the ProTool.

Next, it is important that the 'key problem' be identified before generating the Problem Tree flowchart. This is so that the 'key problem' will be automatically marked when the Problem Tree is generated. To do this, click the "Mark 'key problem'" button. A new input screen will pop-up as follows:

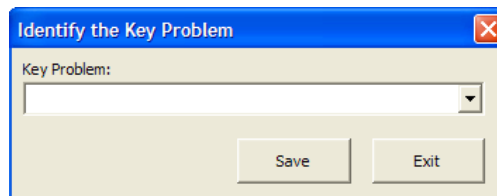


Figure 17. Input screen for the 'key problem.'

Click on the drop-down box and select-click on the problem text that you identified as the key problem.

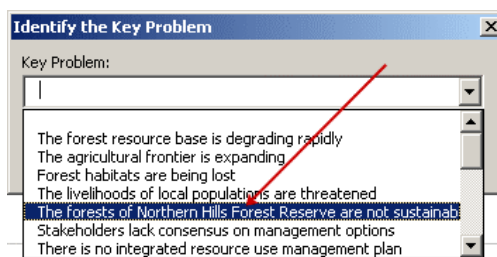


Figure 18. Selecting the 'key problem.'

Make sure to save your work by clicking on the "Save" button.

After this, click on the "Generate Tree" button in the "Start" floating-toolbar so that the ITTO ProTool will automatically create the flowchart (i.e. the problem-tree) for you. By the way, leaving the cursor on a button for awhile will show a help balloon which describes what the button will do when clicked. Illustration:

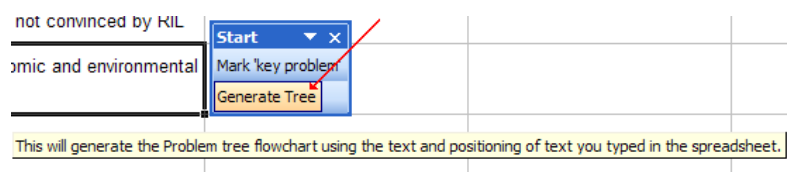


Figure 19. Button help balloon.

If you are using Excel 2007, the "Mark key problem" and "Generate Tree" buttons are hidden in the "Add-Ins" tab. Click the tab and you will see all the buttons.

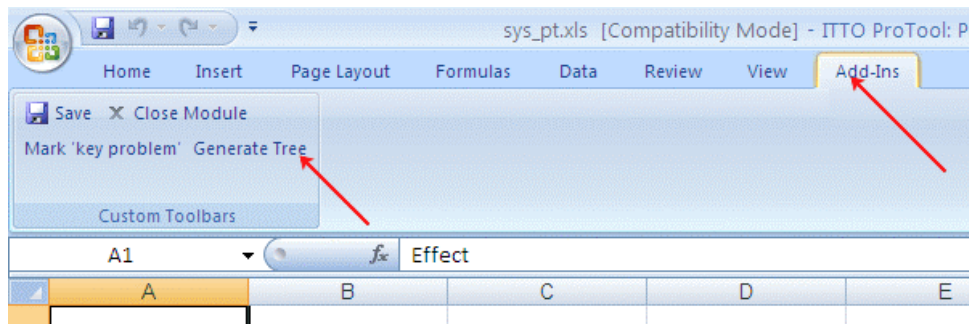


Figure 20. Excel 2007 hides the buttons and floating toolbars in the 'Add-Ins' tab.

After clicking “Generate Tree”, the automatically created Problem Tree will show up as follows:

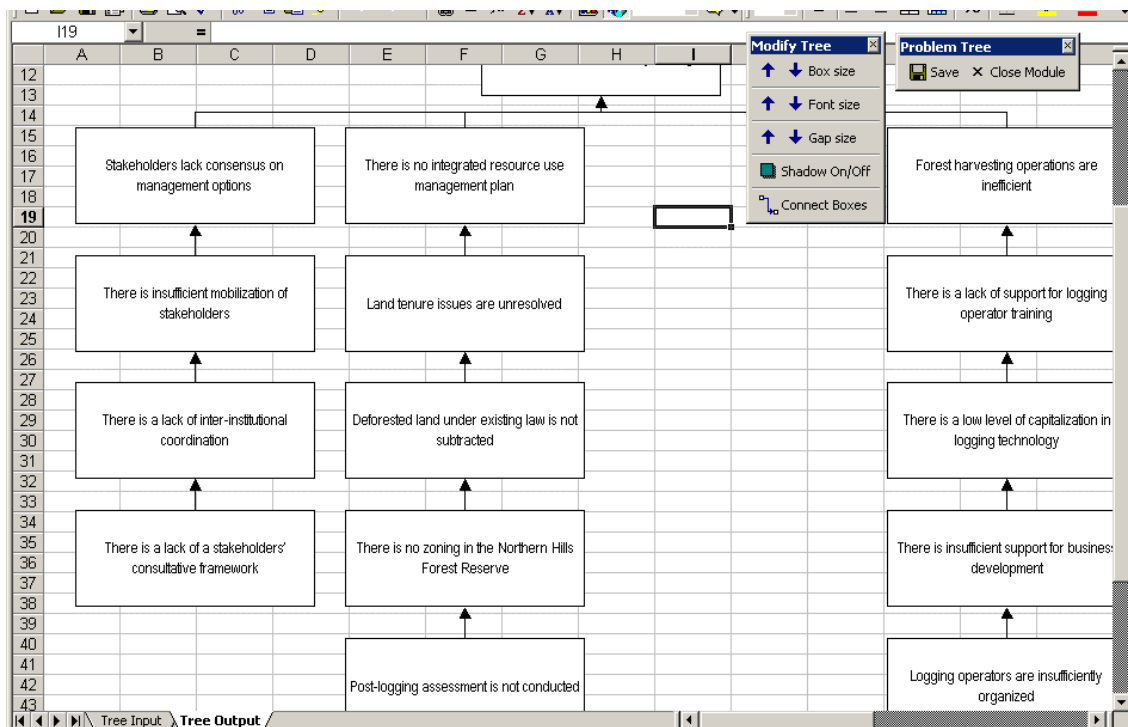


Figure 21. Generated problem tree.

Since the generated problem tree flowchart seems to have boxes that are too big for the contained text, you can easily adjust the box size by clicking on the “Down arrow” button labeled “Box size” in the “Modify” floating-toolbar at the bottom-right corner of the screen. Click it several times to get the desired box size.

If the output is not to your liking, you can also go back to the “Tree Input” worksheet and add/change your text, or rearrange the text to a more final problem tree. Just click on the “Generate Tree” button again to recreate a new problem tree.

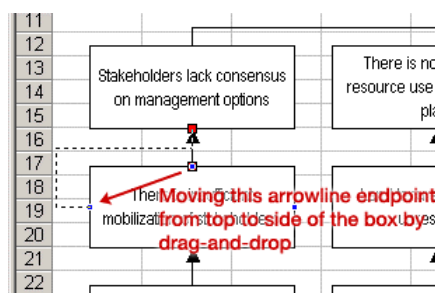
From this example output, we also need to move the boxes in the middle of the flowchart. Do this by drag-and-drop with the mouse or by selecting a box or boxes and using the cursor keys to move it. You can also change the size of each individual box by drag-and-drop in the edges of each box.

So select all the boxes in the middle of the Problem Tree, and move them into the middle so that they will be in the center of the whole diagram.

**IMPORTANT!**

Do re-generate the problem tree or change the box size, font size, gap size, Shadow On/Off **before** moving any boxes or arrowlines. This is because when you generate the problem tree again, or change the box size (for example), the position of the boxes and arrowlines will automatically go back to its original position when automatically created.

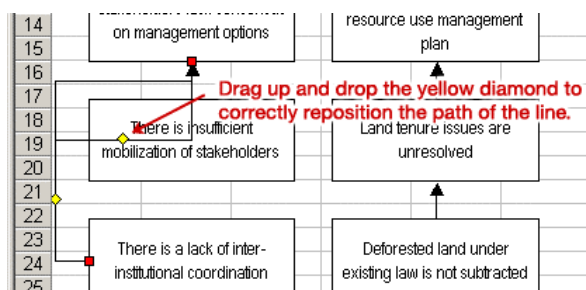
Next it is also obvious that the arrowlines are not correct. You can also easily fix this by clicking on an arrowline to select it. Then move the ends of the arrowlines to the side of each box (using drag-and-drop) to reposition where the arrowline starts and ends.



**Figure 22. Repositioning the arrowlines in each box by drag-and-drop.**

You have to do this for all the sub-causes such that they all point to their cause, just like in the final Problem Tree that we visualized.

Sometimes when you move the arrowlines to another side of a box, the line does not follow the path that we want. You can also drag-and-drop the path of the line so that it will be positioned correctly. Do this by clicking on the arrowline to select it. Then a yellow diamond should show up in the middle of the line. Drag-and-drop on that yellow diamond to move the line's path to the correct position.



**Figure 23. Moving the path of the arrowline to the correct position by drag-and-drop.**

All of these are standard Excel commands and features so if you are already familiar with Excel then these adjustments should be quite easy for you.

Once the problem tree is adjusted to your liking, you can save your work by clicking the “Save” button found on the floating toolbar (normally found on the upper-right part of the screen). To return to the main screen of ProTool, click on the “Close module” button.

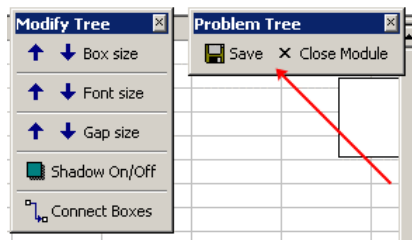


Figure 24. The Save and Close Module buttons in the floating toolbar.

Creating and editing the “Tree Input” spreadsheet for the “Problem Tree Module” is done using the normal Excel editing features to type/edit text, insert or delete rows/columns and to merge columns.

### IMPORTANT!

In the ‘Tree Input’ spreadsheet, please do not leave blank rows between the cells with text. This is not understandable by the program and may cause it to malfunction. If there are blank rows inbetween cells with text, just delete those blank rows or cells to erase the gap/s.

### TIP

When you start to create your own problem tree, you are starting with a preset blank problem tree with 4 causes connected to the key problem and 2 sub-causes for each cause. There are 4 immediate effects and 2 further effect for each of the immediate effects above the key problem. So what you can do is to type in your text in the appropriate spreadsheet cells. Delete any extra cells you do not need. Then pick your key problem and generate the tree! That's it!

### TIP

When working on the spreadsheet, if you need to move the text of a cell from one cell to another, just cut-and-paste the **text** of the cell, not the whole spreadsheet cell itself. You may encounter problems in cut-and-pasting the cell itself when the cell is a merged cell.

### TIP

Do not delete or change text in the generated problem tree. Go back to the spreadsheet to work on any changes then generate the tree again.

### TIP

When working on the generated problem tree, you can move a node (or several nodes) of the tree to center it on the page by drag-and-drop. First select the nodes you want to move, then drag-and-drop them. This is specially needed when you have more than 8 nodes side-by-side because the width of the whole tree will not fit on paper so you will need to move the nodes around.

When you try to change the size of the boxes or font or gap, the software will automatically readjust all the nodes back to its default positions. So it is recommended that you move the nodes when you are already finished with adjusting the box, gap and font sizes.

## Saving the Whole Proposal

Now would be a good time to save your whole proposal. This is recommended to be done very often even during making changes in any of the ProTool modules and of course before exiting the ITTO ProTool. Click on the “Save” button found in the ProTool Main Screen to save your whole proposal work.

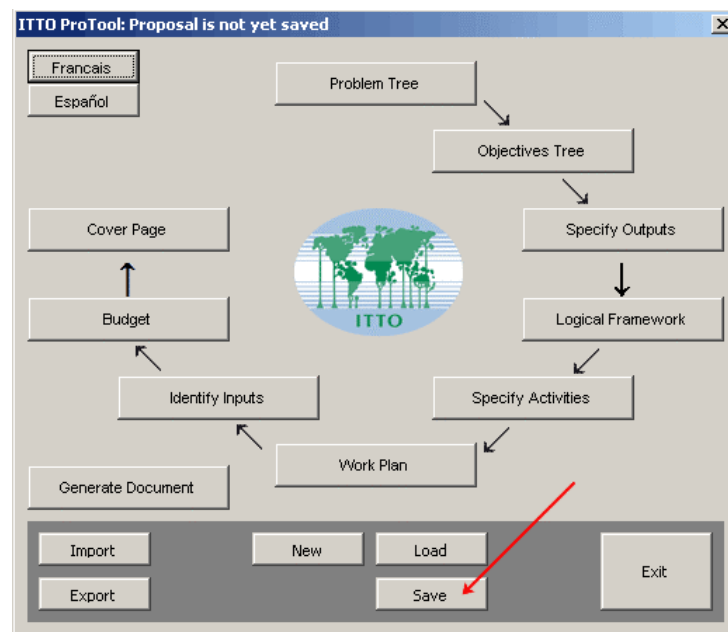


Figure 25. Saving the whole proposal.

If you want to save it under a new filename, type in the filename in the new screen that pops up.

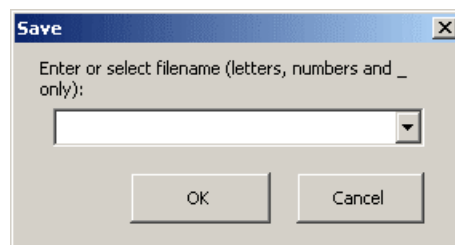


Figure 26. Screen to type in new filename or select old filename to save into.

If you want to save this under an already existing file (this will overwrite the existing file though), click on the drop-down list and select-click the filename you want to save it in.

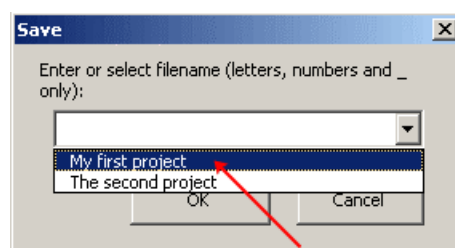


Figure 27. Selecting a previously saved filename.

## Creating an OBJECTIVES TREE

Once you have created the “Problem Tree”, you can now generate the “Objectives Tree.” By the way, in case you do not need the ITTO ProTool to create the Objectives Tree, you can skip this step.

To run the “Objectives Tree Module” of the ITTO ProTool, click on the “Objectives Tree” button in the ProTool’s Main Screen. This will show the title screen of the module and after a second, it will disappear and you will be presented with an Excel spreadsheet.

The following text would describe by example how the “Objectives Tree Module” works. The procedure in creating an objectives tree is similar to the procedure you learned in creating the problem tree in the previous section. For example, to make an objectives tree like the following:

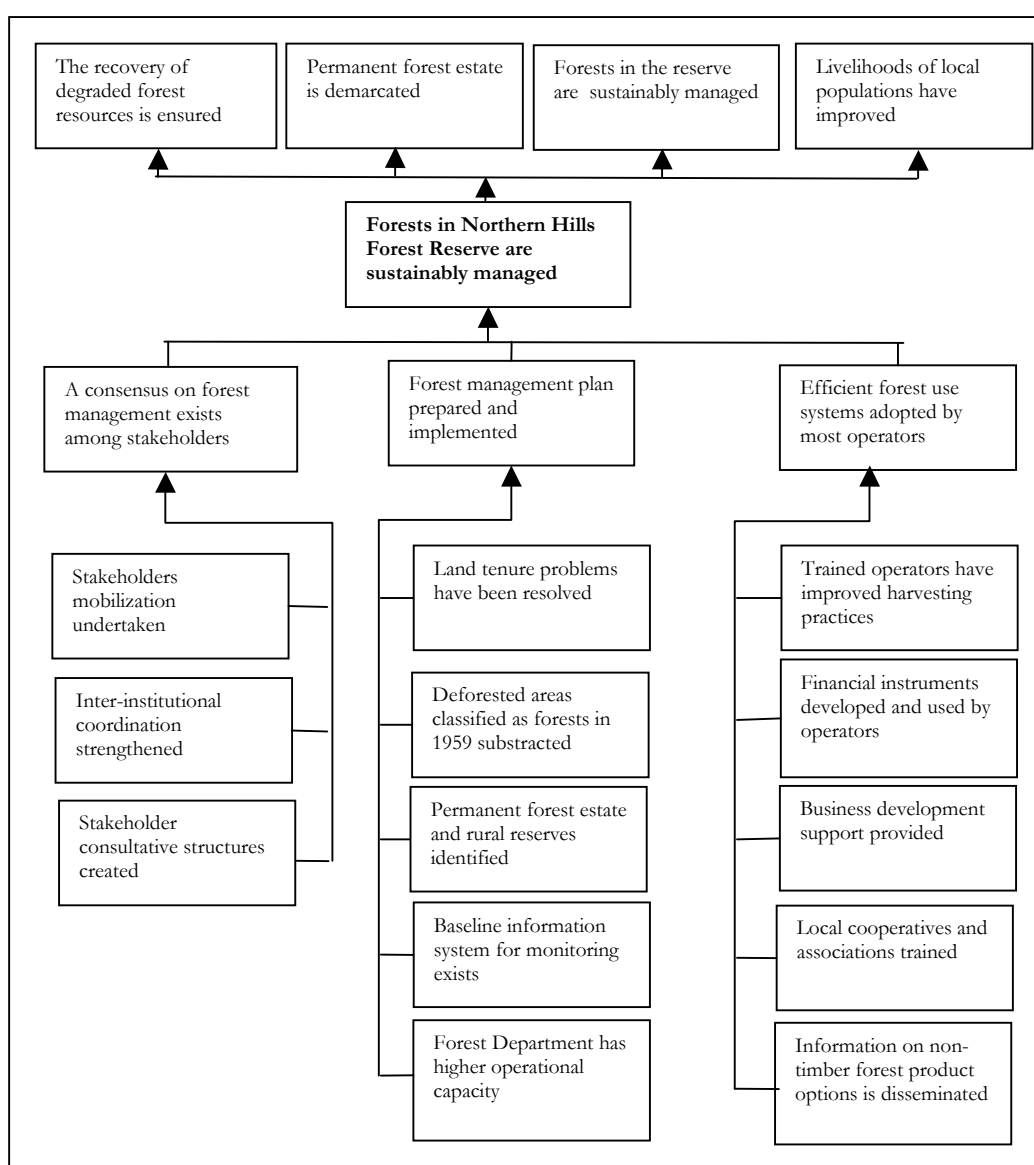


Figure 28. Objectives-Tree.

Edit the currently open Excel spreadsheet to create a table that looks like the following:

	A	B	C	D
1	The recovery of degraded forest resources is ensured	Permanent forest estate is demarcated	Forests in the reserve are sustainably managed	Livelihoods of local populations have improved
2	Forests in Northern Hills Forest Reserve are sustainably managed			
3	A consensus on forest management exists among stakeholders	Forest management plan prepared and implemented		Efficient forest use systems adopted by most operators
4	Stakeholders mobilization undertaken	Land tenure problems have been resolved		Trained operators have improved harvesting practices
5	Inter-institutional coordination strengthened	Deforested areas classified as forests in 1959 subtracted		Financial instruments developed and used by operators
6	Stakeholder consultative structures created	Permanent forest estate and rural reserves identified		Business development support provided
7		Baseline information system for monitoring exists		Local cooperatives and associations trained
8		Forest Department has higher operational capacity		Information on non-timber forest product options is disseminated

**Figure 29. MS Excel spreadsheet to create objectives tree.**

Same as when we created the spreadsheet for the Problem Tree in the previous section, we mimicked the position of the text boxes in the visualized Objectives Tree that we wanted.

Then click on the “Identify Objectives” button to identify which of the objectives you have entered should be the “Development Objective” and the “Specific Objective/s.” An ITTO project proposal is allowed a maximum of two specific objectives, but only one is preferred. It is important to do this step before generating the Objectives tree because you cannot move to the next steps if you forget to do this step.

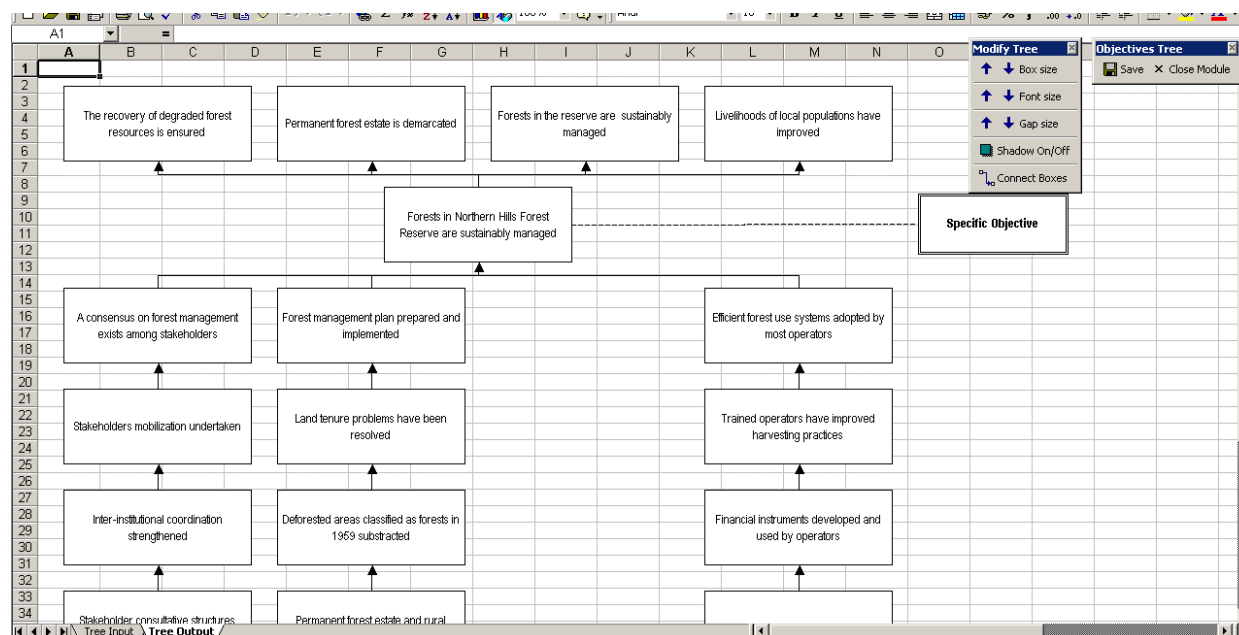
**Figure 30. Identify the Development and Specific Objectives.**

Just click on the drop-down box, select and click on the objective that you want for the “Development Objective” and the “Specific Objective,” then click on the “Save” button to save your selections.

In the example of the Objectives Tree above, the text for the Development Objective is not included in the spreadsheet we made so we can only choose the Specific Objective. Although you can type in your text for the Development Objective in the drop-down box provided so that the text can be saved in your file for future use in the other modules of ProTool.

After making your selections, finalize your work by clicking on the “Exit” button.

Now you can click on the “Generate Tree” button to automatically generate the “Objectives Tree.” After clicking, the generated tree will be shown on the screen as follows:



**Figure 31. Generated objectives tree.**

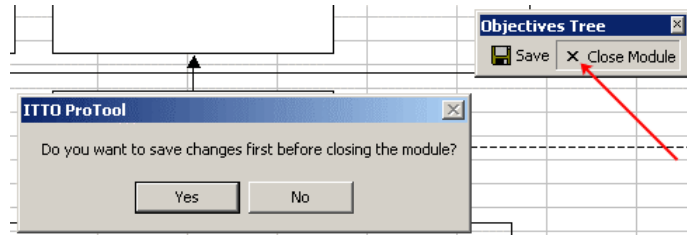
If the output is not to your liking, you can still go back to the “Tree Input” spreadsheet and add/change your text, or rearrange the text to a more final objectives tree. Just click on the “Generate Tree” button again to create your revised objectives tree. Also, just like in the “Problem Tree Module”, you can adjust the box sizes, font sizes and gap sizes of the flowchart by clicking on the appropriate buttons in the “Modify floating-toolbar” or by adjusting each individual box by drag-and-drop. You can also add shadows to your boxes by clicking on the “Shadow On/Off” button.

Same as in our Problem Tree example, the boxes here are too large so we have to adjust the box sizes. The line of textboxes in the center should also be moved to the middle of the diagram. Also the arrowlines of the Activities boxes should be moved to the side of the box and pointed to their corresponding Output box.

Alternatively, instead of creating your own input table of objectives from scratch, from the blank “Tree Input” spreadsheet you can click on the “Load Problems” button to place in the blank spreadsheet the “Problem Tree” text that you have created in the previous step. This will help facilitate your creation of the Objectives Tree by just reversing the Problem Tree’s statements to become positive statements, i.e. as objectives instead of problems (see Chapter II of ITTO Project Formulation Manual for more clarifications and examples of this).

Once your “Objectives Tree” is finalized, you should save your work by clicking the “Save” button found on the floating toolbar. In case you forget to save your work and immediately click the “Close Module” button, you will be asked to save your work anyway. Make sure to click the “Yes” button on the next dialog box that appears to save your work. If you do not want to save your work, click “No” on the dialog box that appears.





**Figure 32. Saving when accidentally clicking the “Close module” button.**

## Specifying the Outputs needed to attain the Specific Objective

After creating the Objectives Tree, you have to specify the outputs needed to attain your objective/s. Click on the “Specify Outputs” button in the Main Screen. This will load the “Specifying Outputs” module of the ITTO ProTool. Once loaded, it will show its title screen. After a second, it will disappear and show an Excel spreadsheet like the following:

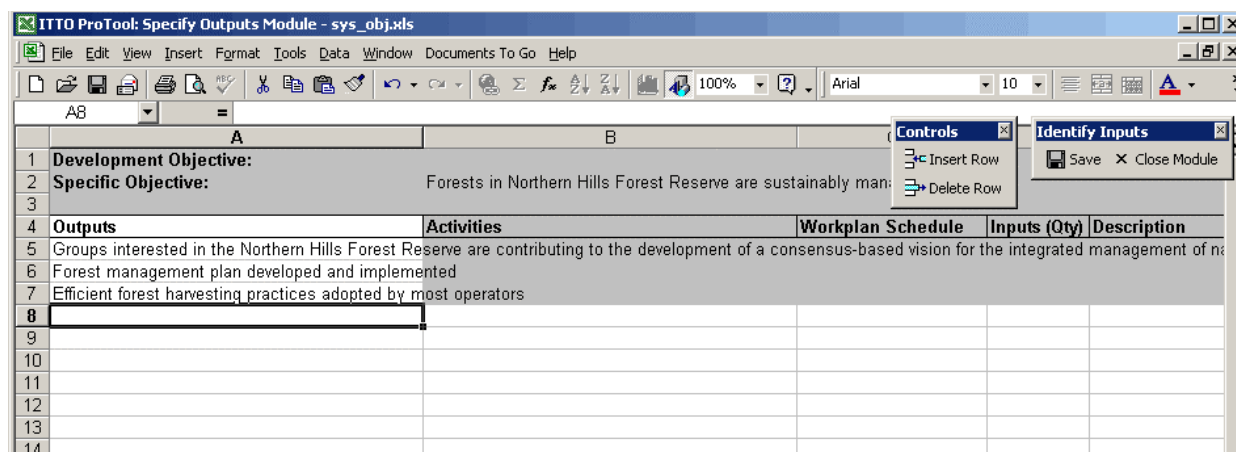


Figure 33. Data entry screen for specifying outputs.

Of course your spreadsheet would still be empty. The above figure was shown just to emphasize the shaded and non-shaded columns when you have filled up the spreadsheet.

The spreadsheet shows all the needed elements to build your proposal up to the budget tables. For now, you should only concentrate on the non-shaded column of the spreadsheet (the left-most column). This is the Outputs column.

Type in each row your output. Once done, save your work by clicking on the “Save” button found on the floating toolbar. To return to the main screen, click the “Close module” button.

In case you need to edit, delete or insert an output later, just enter the “Specify Outputs” module again, and edit the output text shown.

If you want to insert a new output, select the cell where you want it inserted, click on the “Insert row” button, and a new row will be inserted. Type in your new output text on the new row.

To delete an output, select it then click the “Delete row” button.

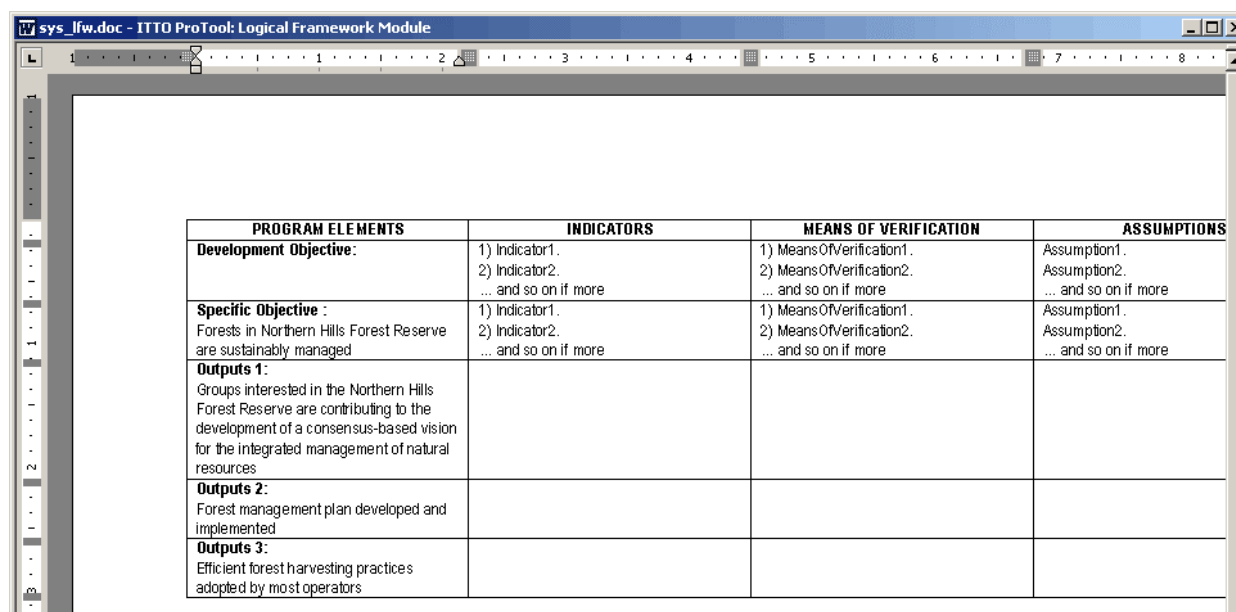
### NOTE

When you insert or delete an output, the whole row in the spreadsheet is affected, thus it affects any Activities, Workplan Schedule, Inputs and budget that you may have already entered previously. You should be aware of this that when you change any of these information, other information are being affected, thus you have to adjust the other information accordingly. This is because they are dependent upon each other.

## The Logical Framework Matrix

The next step is to draw the Logical Framework Matrix. By the way, if you do not want to create the Logical Framework Matrix using the ITTO ProTool, you may skip this step.

Click on the “Logical Framework” button in the Main Screen to load the “Logical Framework” module of the ITTO ProTool. Once loaded, it will show its title screen. After a few seconds, it will generate (or load) the “Logical Framework” matrix which contains the Objectives and the Outputs that you have specified in the previous steps.



The screenshot shows a window titled "sys\_lfw.doc - ITTO ProTool: Logical Framework Module". Inside the window is a table with four columns: PROGRAM ELEMENTS, INDICATORS, MEANS OF VERIFICATION, and ASSUMPTIONS. The table contains five rows of data, including Development Objectives, Specific Objectives, and various Outputs.

PROGRAM ELEMENTS	INDICATORS	MEANS OF VERIFICATION	ASSUMPTIONS
<b>Development Objective:</b>	1) Indicator1. 2) Indicator2. ... and so on if more	1) MeansOfVerification1. 2) MeansOfVerification2. ... and so on if more	Assumption1. Assumption2. ... and so on if more
<b>Specific Objective :</b> Forests in Northern Hills Forest Reserve are sustainably managed	1) Indicator1. 2) Indicator2. ... and so on if more	1) MeansOfVerification1. 2) MeansOfVerification2. ... and so on if more	Assumption1. Assumption2. ... and so on if more
<b>Outputs 1:</b> Groups interested in the Northern Hills Forest Reserve are contributing to the development of a consensus-based vision for the integrated management of natural resources			
<b>Outputs 2:</b> Forest management plan developed and implemented			
<b>Outputs 3:</b> Efficient forest harvesting practices adopted by most operators			

**Figure 34. Automatically generated LFW Matrix for logical checking and data entry.**

Note that we have not specified a Development Objective yet that is why it is blank in the example above. Remember that if you want your text for the Development Objective automatically inserted here, you should have typed it in the Objectives Tree module.

You can now complete the matrix by adding the text needed for the blank cells in this Microsoft Word table. Enter your text for the “Indicators,” “Means of Verification,” and “Assumptions.”

To save your work at anytime, click the “Save” button found in the floating toolbar.

You can come back to this matrix later to improve it as needed.

When done, just click on the “Close module” button.

If upon exiting you encounter the following screen:

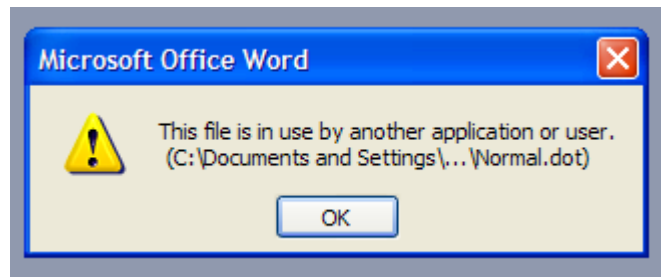


Figure 35. Screen indicating the need to save the Normal template of Word.

just click “OK” and select **Normal\_bak.dot** as the file to save into in the next screen. Illustration:

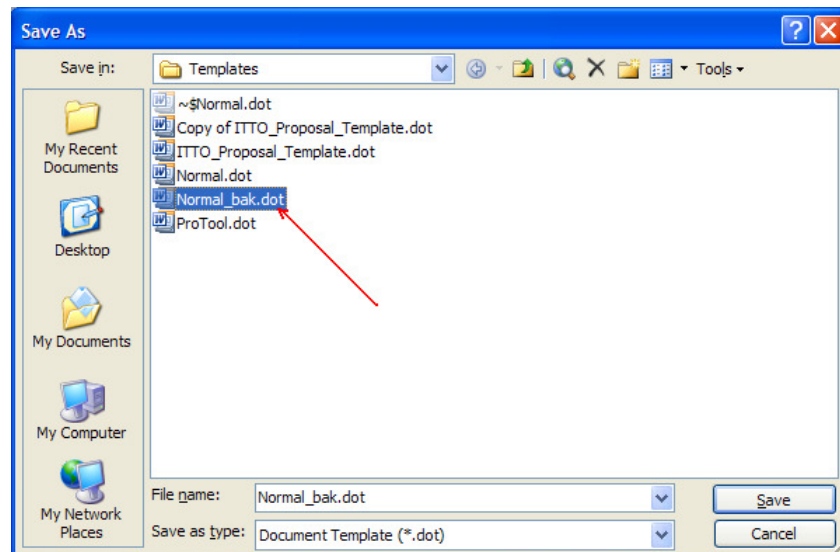


Figure 36. Save the Normal template as Normal\_bak.dot.

This will cause Word to ask you to replace the file or not. Choose to replace the file and you will be able to move on to the next step.

## Specifying the Activities that are needed to obtain the Outputs

Now that you have finished your logical framework matrix and checked its vertical logic, you should specify the activities needed to obtain your outputs. For this, you have to run the “Specify Activities” module. Click on the “Specify Activities” button in the Main Screen. This will automatically load the “Specify Activities” module. Once running, its title screen will show up. After a second, the module will show an Excel spreadsheet similar to the one you saw when you specified your Outputs earlier. Illustration:

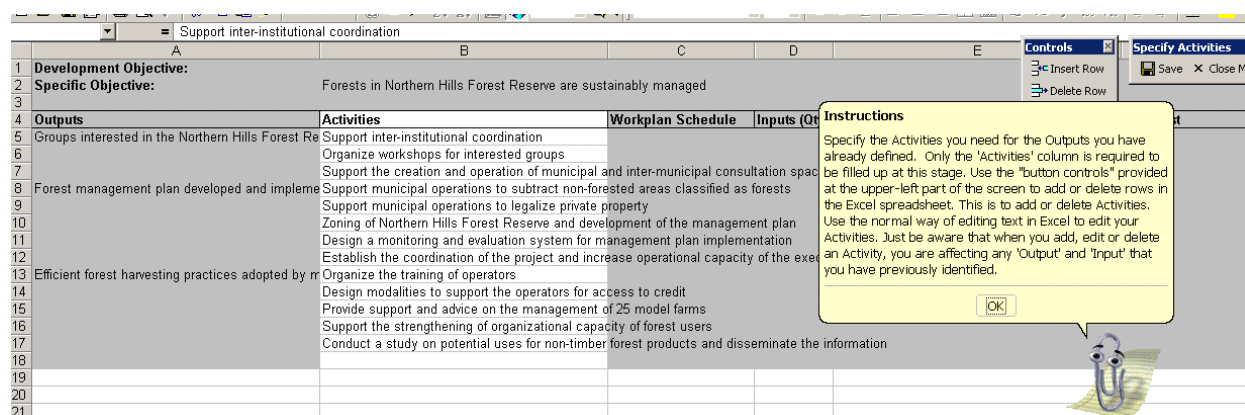


Figure 37. Data entry form for Activities.

Notice that the Outputs you specified earlier are found in the “Outputs” column. Now the unshaded area is the Activities column. You should enter your activities under each Output in this column. For example for activities under Output 1, enter them on the rows that are beside Output 1. Illustration:

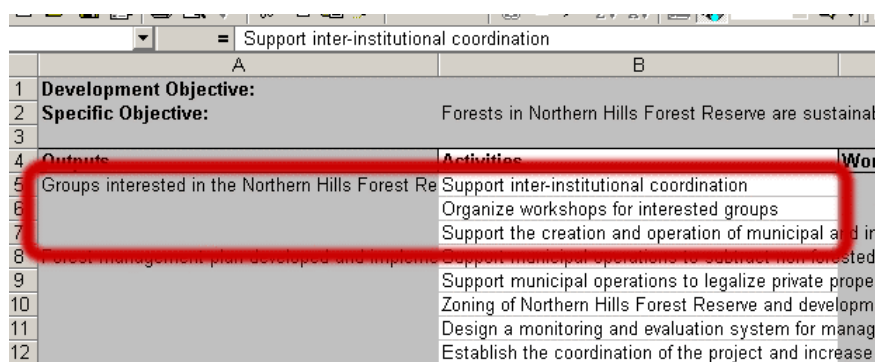


Figure 38. How to enter Activities for an Output.

In this example, ‘Support inter-institutional...’, ‘Organize workshops...’ and ‘Support the creation and...’ are all activities under Output 1 = ‘Groups interested in the...’.

To insert a new Activity, select the row where you want the new Activity placed then click the “Insert row” button found on the floating toolbar. A new blank row will show up where you can type in the new Activity information.

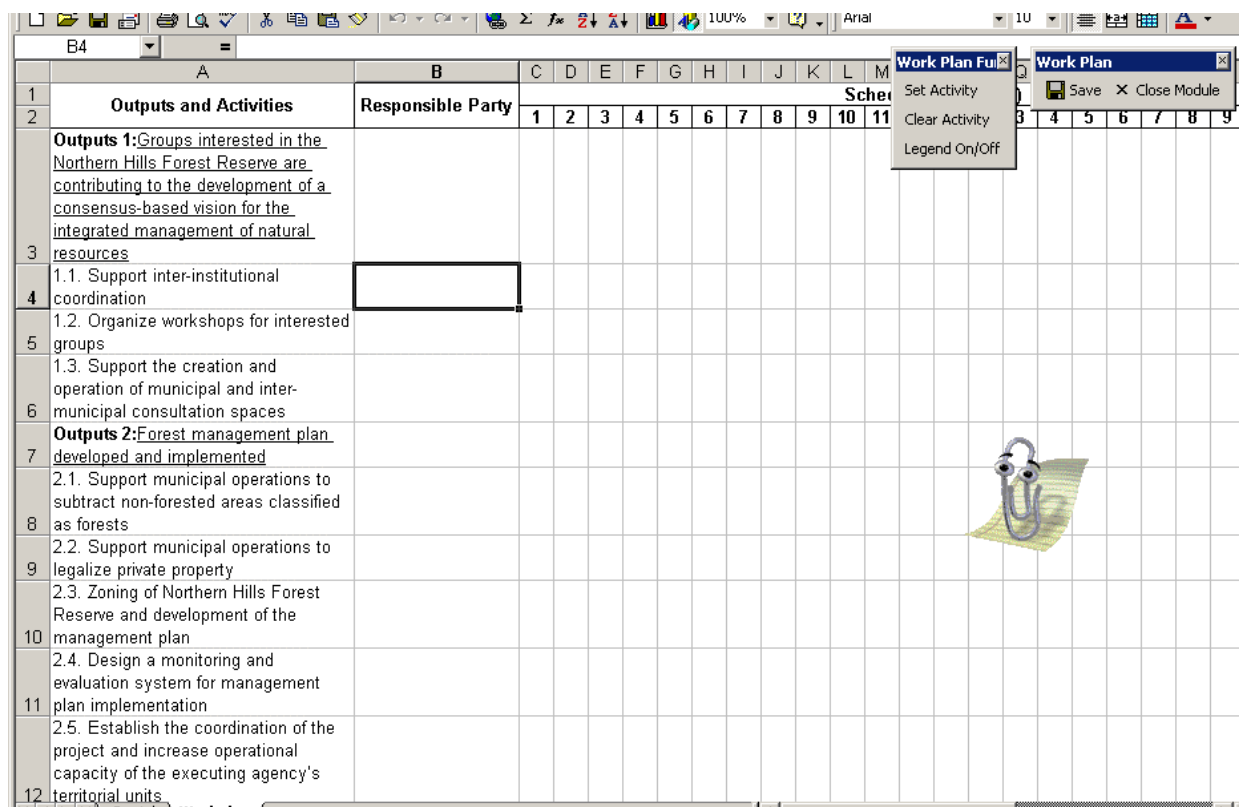
To delete an activity, select it then click the “Delete row” button.

Again take note that inserting or deleting activities affect the other information in the spreadsheet that depends on it. You can delete an Output that is beside the activity that you deleted. The reason is that all of these information are dependent upon each other thus changing one will affect the others.

After entering all the activities, you should save your work by clicking on the “Save” button. To return to the main screen, click on the “Close module” button.

## Creating the Work Plan

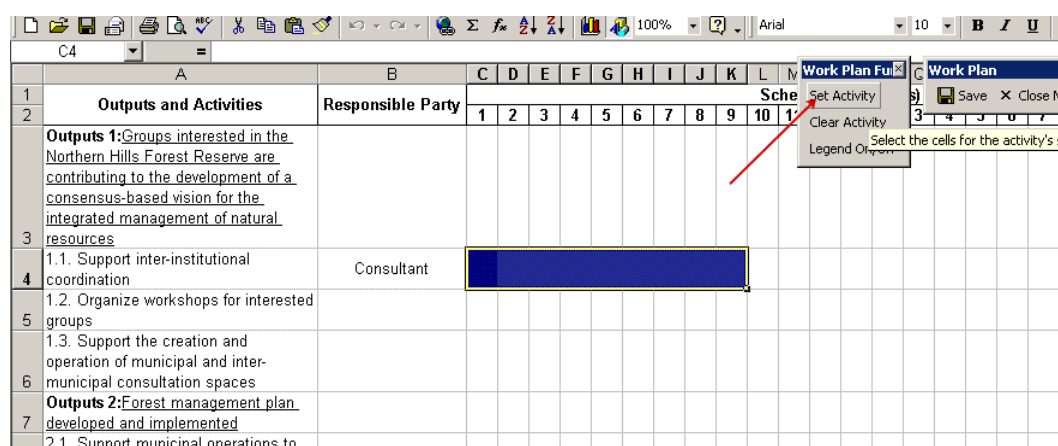
The next step is to prepare your Work Plan. To run the Work Plan module of the system, click on the “Work Plan” button in the main screen. After a second, the module will create the template for the Work Plan in an Excel spreadsheet. It contains all the text you have previously entered for Outputs and Activities. Illustration:



	A	B	C	D	E	F	G	H	I	J	K	L	M
	Outputs and Activities	Responsible Party	1	2	3	4	5	6	7	8	9	10	11
1	<b>Outputs 1:</b> Groups interested in the Northern Hills Forest Reserve are contributing to the development of a consensus-based vision for the integrated management of natural resources												
2													
3	1.1. Support inter-institutional coordination												
4	1.2. Organize workshops for interested groups												
5	1.3. Support the creation and operation of municipal and inter-municipal consultation spaces												
6	<b>Outputs 2:</b> Forest management plan developed and implemented												
7	2.1. Support municipal operations to subtract non-forested areas classified as forests												
8	2.2. Support municipal operations to legalize private property												
9	2.3. Zoning of Northern Hills Forest Reserve and development of the management plan												
10	2.4. Design a monitoring and evaluation system for management plan implementation												
11	2.5. Establish the coordination of the project and increase operational capacity of the executing agency's territorial units												
12													

Figure 39. Automatically generated Work Plan spreadsheet.

Type the responsible party in column B for each activity. For example, the responsible party for Activity 1.1 is **Consultant**, this needs to be typed in cell B4. If you want to mark Activity 1.1 for months 1 to 9, select the appropriate cells (i.e. cells C4 to K4), and then click on the “Set Activity” button to mark that activity to be executed on months 1 to 9. Illustration:



	A	B	C	D	E	F	G	H	I	J	K	L	M
	Outputs and Activities	Responsible Party	1	2	3	4	5	6	7	8	9	10	11
1	<b>Outputs 1:</b> Groups interested in the Northern Hills Forest Reserve are contributing to the development of a consensus-based vision for the integrated management of natural resources												
2													
3	1.1. Support inter-institutional coordination	Consultant											
4	1.2. Organize workshops for interested groups												
5	1.3. Support the creation and operation of municipal and inter-municipal consultation spaces												
6	<b>Outputs 2:</b> Forest management plan developed and implemented												
7	2.1. Support municipal operations to												

Figure 40. Marking the work plan to schedule an activity.

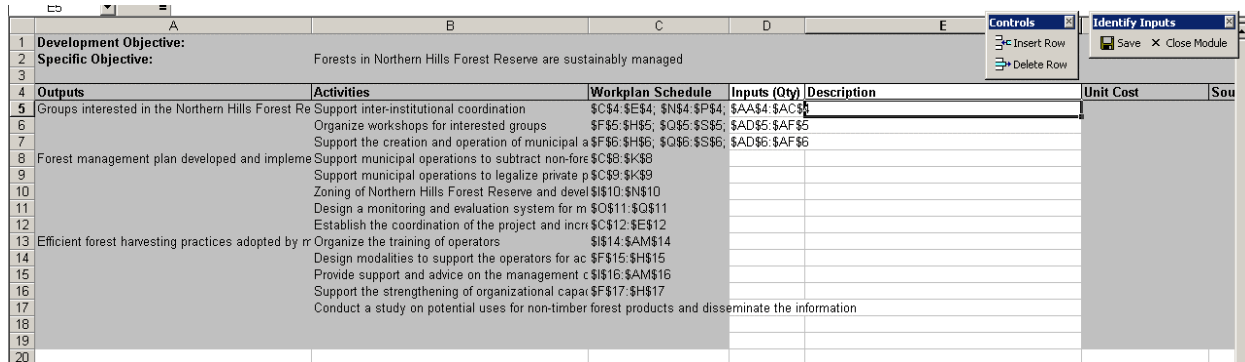
You do the same procedure to schedule all the other activities. You can also clear scheduled activities by selecting the shaded schedule and clicking on the “Clear Activity” button.

Once done, save your work by clicking on the “Save” button. To return to the main screen, click on the “Close Module” button. You can always come back to this module to edit and update your Work Plan at any time in the future.



## Identify the Needed Inputs per Activity

The next step is to specify the inputs needed for each activity. Click on the “Identify Inputs” button in the Main Screen to automatically open and run the “Identify Inputs” module. After a second, the Excel spreadsheet to enter your Inputs will show up. Illustration:



Outputs	Activities	Workplan Schedule	Inputs (Qty)	Description	Unit Cost	Source
Groups interested in the Northern Hills Forest Reserve	Support inter-institutional coordination	\$C\$4:\$E\$4; \$N\$4:\$P\$4;	\$AA\$4:\$AC\$4;			
	Organize workshops for interested groups	\$F\$5:\$H\$5; \$Q\$5:\$S\$5;	\$AD\$5:\$AF\$5;			
	Support the creation and operation of municipal a	\$F\$6:\$H\$6; \$Q\$6:\$S\$6;	\$AD\$6:\$AF\$6;			
Forest management plan developed and implemented	Support municipal operations to subtract non-fore	\$C\$8:\$K\$8;				
	Support municipal operations to legalize private p	\$C\$9:\$K\$9;				
	Zoning of Northern Hills Forest Reserve and devel	\$I\$10:\$N\$10;				
	Design a monitoring and evaluation system for m	\$O\$11:\$Q\$11;				
	Establish the coordination of the project and incre	\$C\$12:\$E\$12;				
Efficient forest harvesting practices adopted by m	Organize the training of operators	\$I\$14:\$AM\$14;				
	Design modalities to support the operators for ac	\$F\$15:\$H\$15;				
	Provide support and advice on the management c	\$I\$16:\$AM\$16;				
	Support the strengthening of organizational capac	\$F\$17:\$H\$17;				
	Conduct a study on potential uses for non-timber forest products and disseminate the information					

Figure 41. Data entry form for entering inputs of each activity.

This spreadsheet should be familiar to you already since it is the same spreadsheet used in entering the Outputs and Activities. Now you will use it to enter the Inputs for each activity you have already specified in the previous steps.

To enter Input information under a certain Activity, type the Qty and “Unit and Description” on the row beside that activity. Same style when you entered Activities under a certain Output.

To insert a new Input, select the row where you want it inserted then click the “Insert row” button found on the floating toolbar.

To delete an Input, select the cell of the Input you want to delete then click the “Delete row” button.

Again notice that inserting or deleting an Input affects the other information under Outputs, Activities, Workplan Schedule and Costs. They are all dependent of each other that is why you need to adjust these other information when you delete an Input.

When the Inputs have been specified for all Activities, save your work by clicking the “Save” button. To go back to the Main Screen, click the “Close module” button.

## Editing the Budget Components List

Before entering your budget's unit costs and cost descriptions, most likely you would want to change the entries in the budget component drop-down list. To do this, you have to exit the ITTO ProTool and run another Excel macro called "Edit Budget Component List." So it is recommended that you edit this list before working on your budget tables.

Click the Windows' **START** button, then select-click on **All Programs → ITTO ProTool → Edit Budget Component List**.

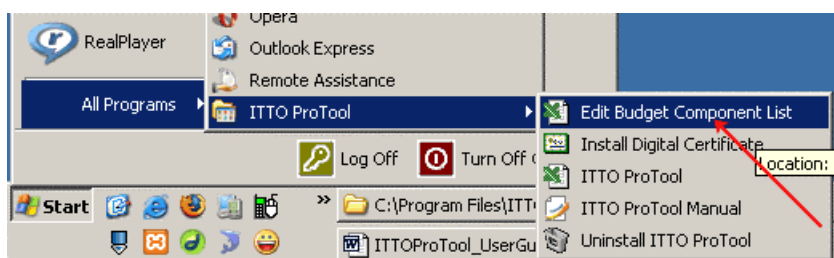


Figure 42. Running the Budget Component List editor.

If the "Security screen" shows up, make sure to check the check box "Always trust macros from this source", and click "Enable macros" button. Then the following screen will show up.

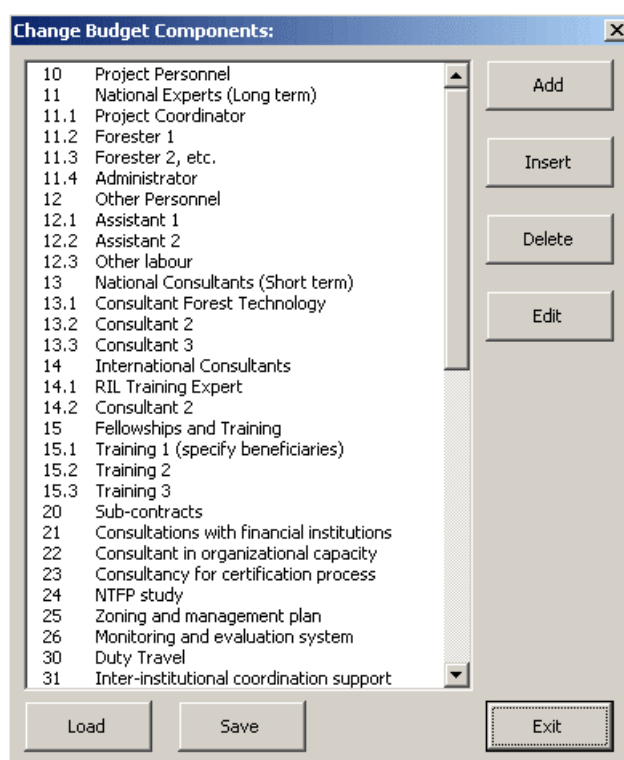
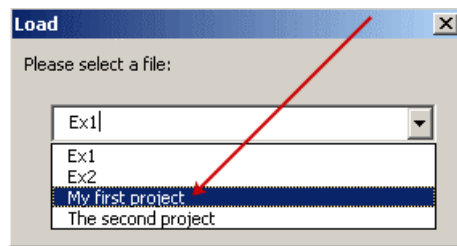


Figure 43. The Budget Component List editor.

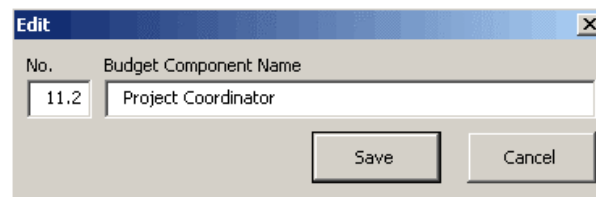
First you need to load the saved file from which you want to change the list of Budget Components. Let us say you saved your whole proposal under the name "My first project" and want to edit the list of its Budget Components, click on the "Load" button, then a load box would show up. Select

and click “My first project” and click on the “Load” button to load this proposal’s list of Budget Components for editing.



**Figure 44. Load screen to edit a proposal’s Budget Component list.**

To change any of the Budget Component names, click on it to select then click the “Edit” button. A new screen will appear where you can edit the name and item # of the selected Component.



**Figure 45. Edit screen for Budget Components.**

Once done editing, click on the “Save” button. To cancel your changes, click “Cancel.”

To insert a new Budget Component between the list, first select the Component where you want the new one to be squeezed in. Then click the “Insert” button. The new screen that shows up will look like the edit screen shown in Figure 45 except it is blank now. Type in the budget component # on the blank left text box, then type the name of the budget component on the blank right text box. Click “Save” to insert it on top of the selected Component.

To add a new Budget Component at the bottom of the list, click the “Add” button. A new screen will show up same as when Inserting. Type in the new Component’s details using the same procedure as when inserting. Click “Save” to add it in the bottom of the list.

To delete a Budget Component from the list, select the one you want to delete then click “Delete.”

To save all your work, click on the “Save” button. A new Save box will show up. Select the filename from the drop-down menu and click the “OK” button to save.

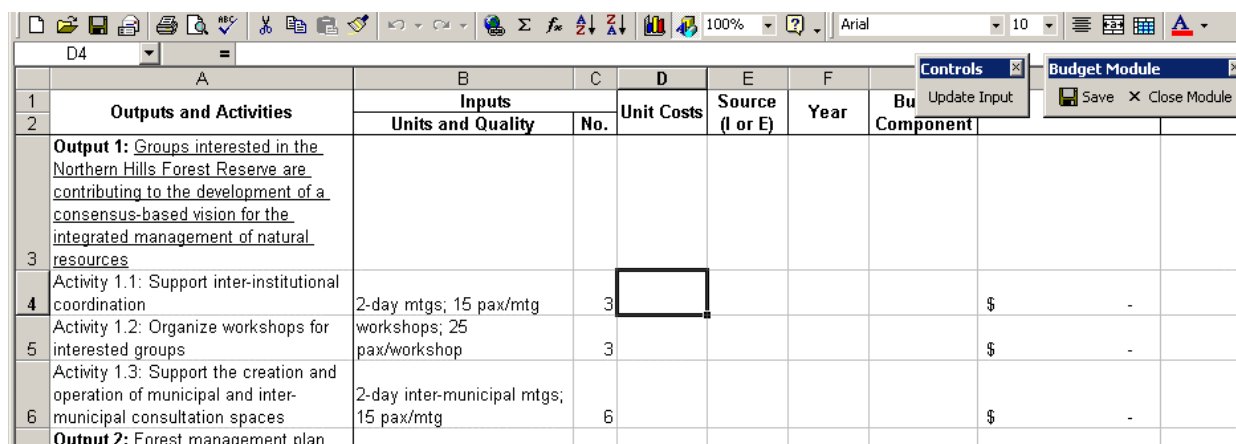
**TIP**

If you want to see a new Budget Component, it is recommended to edit first any of the Budget Components already listed that you will not use rather than adding or inserting a new one.

## Costing of Inputs per Activity and Budget Creation

Specification of costs for each input is done in the ITTO ProTool's "Budget Module" which automatically creates the budget table templates. You only need to fill up one budget table and it will automatically generate all the other required budget tables.

To start, click on the "Budget" button in the Main Screen of the ProTool. The automatically generated budget input table will show up in a few seconds. All the information on Outputs, Activities and Inputs that you have previously entered are automatically placed in the budget input table. Illustration:

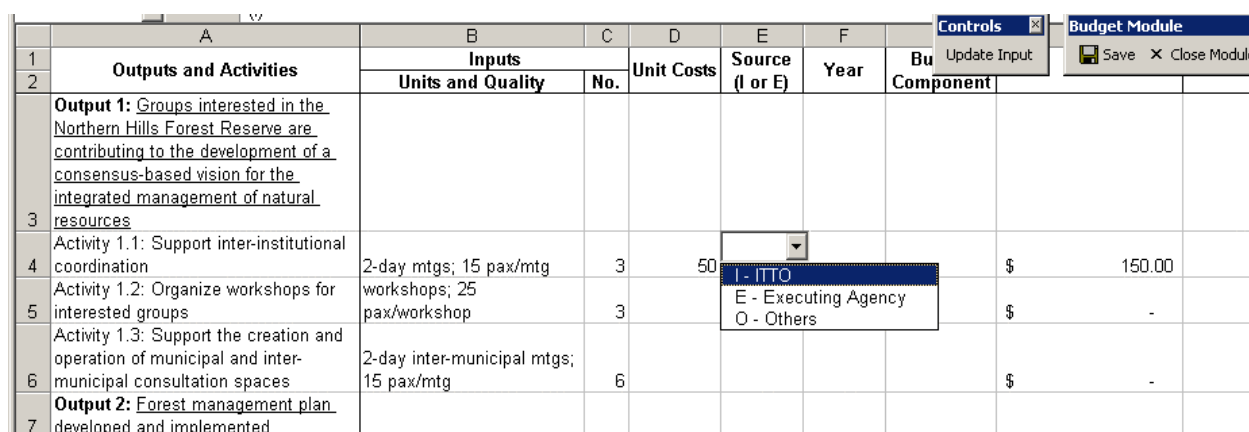


A		B		C	D	E	F	Controls	
Outputs and Activities		Inputs	No.	Unit Costs	Source (I or E)	Year	Bu	Update Input	Budget Module
		Units and Quality					Component		
Output 1: Groups interested in the Northern Hills Forest Reserve are contributing to the development of a consensus-based vision for the integrated management of natural resources									
Activity 1.1: Support inter-institutional coordination		2-day mtgs; 15 pax/mtg	3						
Activity 1.2: Organize workshops for interested groups		workshops; 25 pax/workshop	3						
Activity 1.3: Support the creation and operation of municipal and inter-municipal consultation spaces		2-day inter-municipal mtgs; 15 pax/mtg	6						
Output 2: Forest management plan									

Figure 46. The automatically generated Budget input table.

You should now enter data on Unit Cost, Source, Quarter-Year and Budget Component to allow the budget computations. For example, if you enter 50 as the Unit Cost for the 2-day meetings as support for inter-institutional coordination, the TOTAL column is automatically computed as 150 (= 3 x 50).

In the Source column, a drop-down menu will appear in each row. You need to select between three options: I (=ITTO), E (=Executing Agency) or O (=Others) from the menu.



A		B		C	D	E	F	Controls	
Outputs and Activities		Inputs	No.	Unit Costs	Source (I or E)	Year	Bu	Update Input	Budget Module
		Units and Quality					Component		
Output 1: Groups interested in the Northern Hills Forest Reserve are contributing to the development of a consensus-based vision for the integrated management of natural resources									
Activity 1.1: Support inter-institutional coordination		2-day mtgs; 15 pax/mtg	3	50	I - ITTO				
Activity 1.2: Organize workshops for interested groups		workshops; 25 pax/workshop	3		E - Executing Agency				
Activity 1.3: Support the creation and operation of municipal and inter-municipal consultation spaces		2-day inter-municipal mtgs; 15 pax/mtg	6		O - Others				
Output 2: Forest management plan developed and implemented									

Figure 47. Drop-down menu for the 'Source' column.

This is the same procedure is repeated for the Budget Component column where an appropriate budget component has to be selected for each input from the drop-down menu in each row of the column.

	A	B	C	D	E	F	G	H	I
1	Outputs and Activities	Inputs		Unit Costs	Source (I or E)	Year	Budget Component	TOTAL	
2		Units and Quality	No.						
3	Output 1: Groups interested in the Northern Hills Forest Reserve are contributing to the development of a consensus-based vision for the integrated management of natural resources								
4	Activity 1.1: Support inter-institutional coordination	2-day meetings; 15 pax/mtg	3	50 (I)		Y1		150.00	
5	Activity 1.2: Organize workshops for interested groups	workshops; 25 pax/workshop	3						
6	Activity 1.3: Support the creation and operation of municipal and inter-municipal consultation spaces	2-day inter-municipal meetings; 15pax/mtg	6						
7	Output 2: Forest management plan developed and implemented								

Figure 48. Drop-down menu for the 'Budget Component' column.

Use of these drop-down menus is necessary for compiling the various Budget Tables of the project proposal.

In case you want to add a new entry for Inputs, it can be made in this Module without going back to the Input Module. For example you want to add an Input after the 1st input of Activity 1.1 (in cell B4). Just select cell B5, then click on the “Update Input” button and a new entry screen will show up.

	A	B	C	D	E	F	G	H	I	J	Controls
1	Outputs and Activities	Inputs	No.	Unit Costs	Source (I or E)	Year	Budget Component	TOTAL			Update Input
2		Units and Quality									
3	Output 1: Groups interested in the Northern Hills Forest Reserve are contributing to the development of a consensus-based vision for the integrated management of natural resources										
4	Activity 1.1: Support inter-institutional coordination	2-day meetings; 15 pax/mtg	3	50 (I)		Y1	31 \$	150.00			
5	Activity 1.2: Organize workshops for interested groups	workshops; 25 pax/workshop	3								
6	Activity 1.3: Support the creation and operation of municipal and inter-municipal consultation spaces	2-day inter-municipal meetings; 15pax/mtg									
7	Output 2: Forest management plan developed and implemented										
8	Output 3: Efficient forest harvesting practices adopted by most operators										
9	Activity 3.5: Conduct a study on potential uses for non-timber forest products and disseminate the										

Figure 49. Updating inputs list through the Budget module.

From this entry screen, enter the quantity and unit/description of the new input you want to add, then click on the “Append” button. The new input will be inserted after the 1<sup>st</sup> input of Activity 1.1.

You can also edit and delete selected inputs in the budget table through this feature using the “Update Input” screen. Click on “Exit” to continue entering data in the budget table.

#### TIP

When you want to budget an item that spans over more than a year, you have to create one budget line for each year. For example, if you are hiring a Consultant for 5 contiguous work months but the schedule is such that s/he will use 3 work-months for the first year of the project and 2 work-months for the second year, you have to create 2 budget lines for the Consultant inputs. The first budget line will contain 3 work-

months for the Consultant for Year 1, and the second budget line will contain 2 work-months for the Consultant for Year 2. Illustration:

B5      = 3 x 2-day meetings; 15 pax/mtg								
	A	B	C	D	E	F	G	H
1	Outputs and Activities	Inputs	No.	Unit Costs	Source (I or E)	Year	Budget Component	TOTAL
2		Units and Quality						
3	Output 1: <u>Groups interested in the Northern Hills Forest Reserve are contributing to the development of a consensus-based vision for the integrated management of natural resources</u>							
4	Activity 1.1: Support inter-institutional coordination	3 x 2-day meetings; 15 pax/mtg	30	50 (I)	Y1		31 \$	1,500.00
5		3 x 2-day meetings; 15 pax/mtg	30	50 (I)	Y2		31 \$	1,500.00
6	Activity 1.2: Organize workshops for interested groups	workshops; 25 pax/workshop	3				\$	-
7	Activity 1.3: Support the creation and operation of municipal and inter-municipal consultation spaces	2-day inter-municipal meetings; 15pax/mtg	6				\$	-
	Output 2: Forest management plan							

Figure 50. Entering budget that goes over the next year.

Once you are finished entering the details in this spreadsheet, the other required budget tables are automatically created. You can view them by clicking on the various worksheet tabs (i.e. “Consolidated Annual”, “By Source” and “By Activity”) at the bottom of the Excel window.

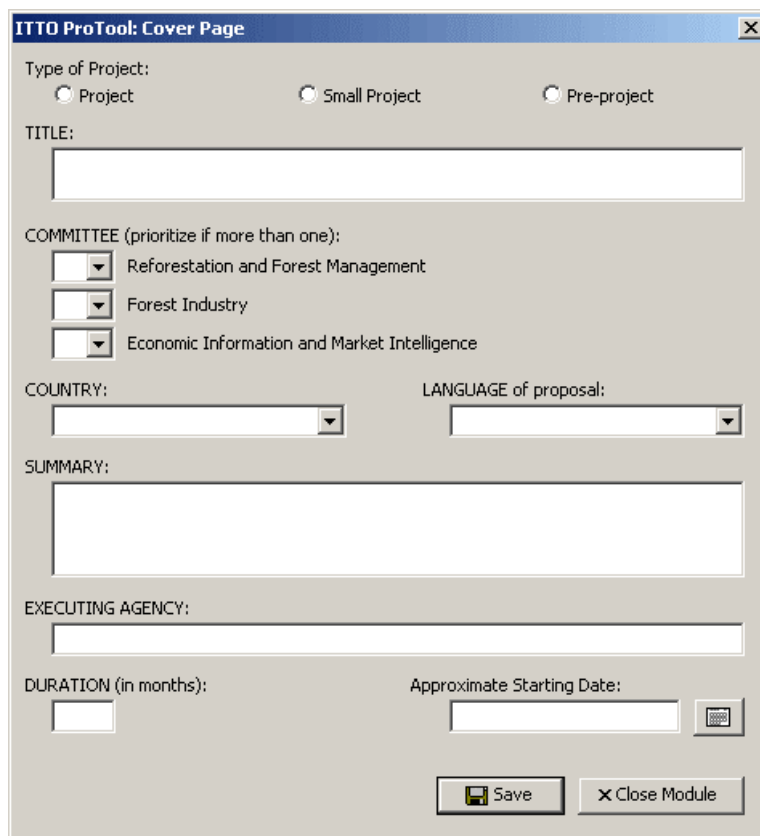
C49      =SUM(\$BK1503:\$BK2000)									
1	A	B	C	D	E	F	G		
2	<b>Consolidated Yearly Project Budget</b>								
3	(featuring Input and Unit Costs)								
4	<b>Budget Components</b>		<b>Input</b>	<b>Unit Costs</b>	<b>TOTAL</b>	<b>YEAR 1</b>	<b>YEAR 2</b>	<b>YEAR 3</b>	<b>YEAR 4</b>
39	33. Zoning and management plan	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
40									
41	39. Component Total	90	\$ 50.00	\$ 4,500.00	\$ 1,500.00	\$ 1,500.00	\$ 1,500.00	\$ -	\$ -
42	40. Capital Items								
43	41. Premises	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
44	42. Land	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
45	43. Vehicles	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
46	44. Capital Equipment	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
47	44.1. Computer Equipment (specify)	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
48	44.2. Forestry Equipment (specify)	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
49	44.3. Others	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
50									
51	49. Component Total	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
52	50. Consumable Items								
53	51. Raw materials	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
54	52. Spares	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
55	53. Utilities	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
56	54. Office Supplies	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
57									
58	59. Component Total	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
59	60. Miscellaneous								
60	61.1. Training of 200 users	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
61	61.2. Financial institution costs	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
62	61.3. Miscellaneous support to property management	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
63	61.4. Support in organizational capacity	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
64	61.5. Workshops for interested groups	75	\$ 65.00	\$ 4,875.00	\$ 1,625.00	\$ 1,625.00	\$ 1,625.00	\$ -	\$ -
65	61.6. Operation of consultation spaces	30	\$ 65.00	\$ 1,950.00	\$ 1,950.00	\$ -	\$ -	\$ -	\$ -
66									
67	69. Component Total	105	\$ 130.00	\$ 6,825.00	\$ 3,575.00	\$ 1,625.00	\$ 1,625.00	\$ -	\$ -

Figure 51. Clicking on the Excel worksheet tabs to preview various budget tables.

Save your work by clicking the “Save” button. Click the “Close Module” button to return to ProTool’s Main Screen.

## Cover Page Information

You are now ready to enter information for your proposal's cover page. To do so, click on the "Cover Page" button in the Main Screen. After a second, it will show the data entry screen for the cover page information. Illustration:



The screenshot shows a software window titled "ITTO ProTool: Cover Page". It contains several input fields and buttons. At the top, there are three radio buttons for "Type of Project": "Project", "Small Project", and "Pre-project". Below this is a "TITLE:" label followed by a text input box. Then, there is a "COMMITTEE (prioritize if more than one):" label followed by three dropdown menus with the options "Reforestation and Forest Management", "Forest Industry", and "Economic Information and Market Intelligence". Below these are two dropdown menus for "COUNTRY:" and "LANGUAGE of proposal:". A "SUMMARY:" label is followed by a large text input box. Below that is an "EXECUTING AGENCY:" label followed by a text input box. At the bottom, there are two input fields: "DURATION (in months):" and "Approximate Starting Date:". The "Approximate Starting Date:" field has a calendar icon to its right. At the very bottom, there are two buttons: "Save" and "Close Module".

**Figure 52. Cover page data entry screen.**

Enter the required information in the appropriate boxes as applicable. For country and language, you just need to choose from a given list in the drop-down box.

Once completed, save and exit this module by clicking on the "Save" button and the "Close module" button.

## Generating the Project Proposal Document

After finishing all the steps above, you can now use the “Generate Document” module of the ITTO ProTool to automatically paste in a Microsoft Word document all the final outputs of step 1 (i.e. Problem-Tree), step 2 (i.e. Objectives-Tree), step 6 (i.e. Logical Framework Matrix), step 10 (i.e. all the different Budget Spreadsheets) and step 8 (i.e. Work Plan).

### NOTE

You can also opt to manually cut-and-paste the generated outputs of each module into your own Word document, but if you want it automatically done, you can opt to use the “Generate Document” module.

To run the module, click on the “Generate Document” button in the lower-left corner of the ProTool’s Main Screen. After the title screen disappears, it will show you a flurry of screens which means the software is working on cutting and pasting all your previous work into a Word document which follows the Project Proposal format of ITTO.

When the software has finished all its cut-and-pasting, you will be presented with the final Word document for viewing. The following picture shows a sample Word document output shown in 25% zoom so you can see most of the pages generated from the ITTO ProTool’s modules.

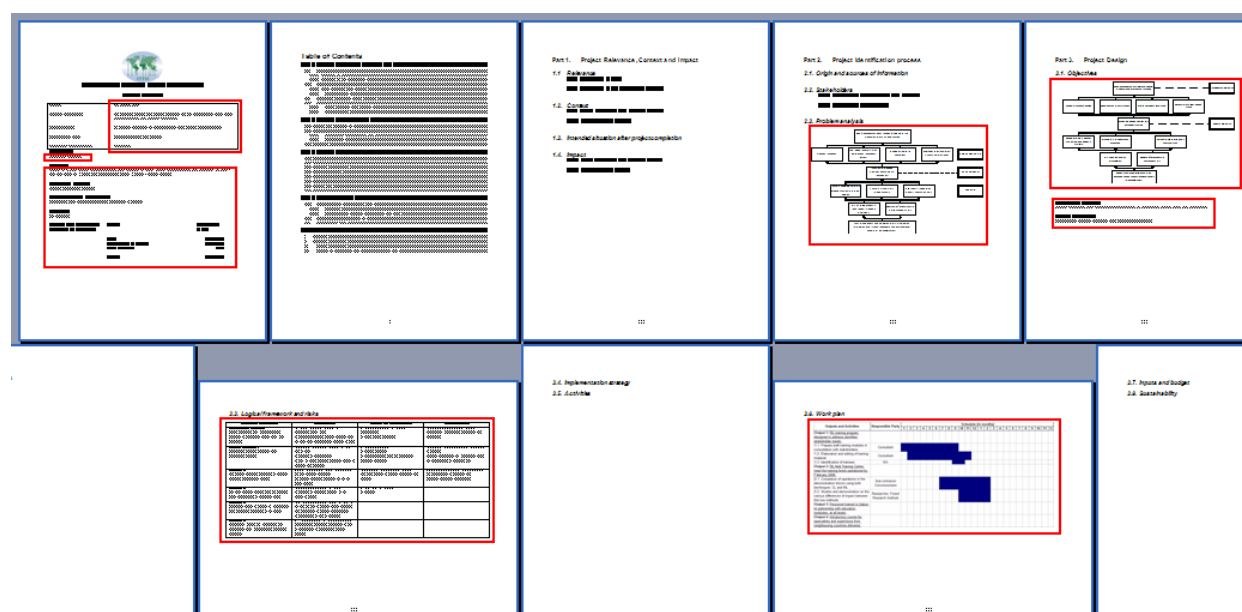
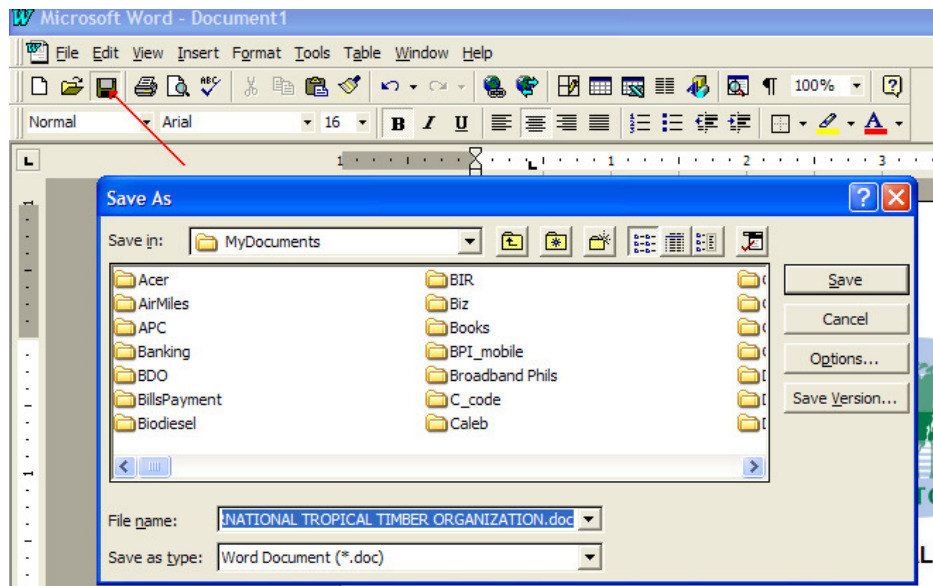


Figure 53. Sample output of the 'Document Embedding' module.

Boxed in red are the parts of the document which are pasted with information you have created using the ITTO ProTool. These are: the cover page, the “Problem Tree”, the “Objectives Tree”, the Logical Framework Matrix, the Work Plan and the Budget tables.

You can save the document by clicking on Microsoft Word’s “Save” button.





**Figure 54. Saving the automatically generated proposal document.**

Once finished browsing through the automatically generated proposal, you can exit from this MS Word document by clicking the “Exit” button from the Word application window, or click **File → Exit** from Word’s menu bar.

To edit any of the pasted charts or tables, you have to rerun the appropriate ProTool module and edit it from there. Then the Generate Document module has to be run again. For example, if there is something that needs to be changed in the Objectives Tree, then you should do the revision through the following steps:

1. Exit from the Generate Document module,
2. Rerun the Objectives Tree Generator module.
3. Edit the Objectives Tree and save,
4. Rerun the Generate Doc module

The newly edited Objectives Tree should now show up in the generated Word document.

To save this generated Word document, you should specify a filename. This file can be later edited like any other Word document. The text for the missing parts of the ITTO project proposal can now be inserted into the document. You can also cut-and-paste previously typed texts into this document.

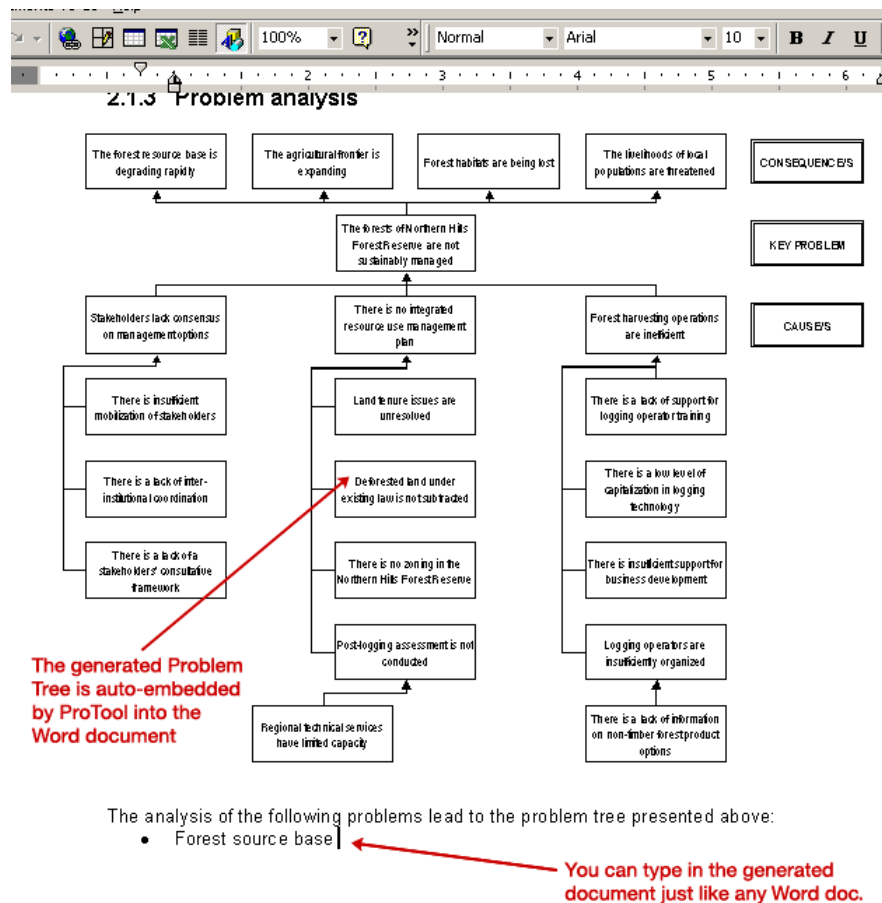


Figure 55. Adding text to the automatically generated proposal document.

Also, in case you want to track your changes in the Word document, you can do so by turning on Word's feature of Tracking Changes. To do this, on Word's main menu, click on "Tools" then select-click "Track Changes." Word will now start tracking all your changes.

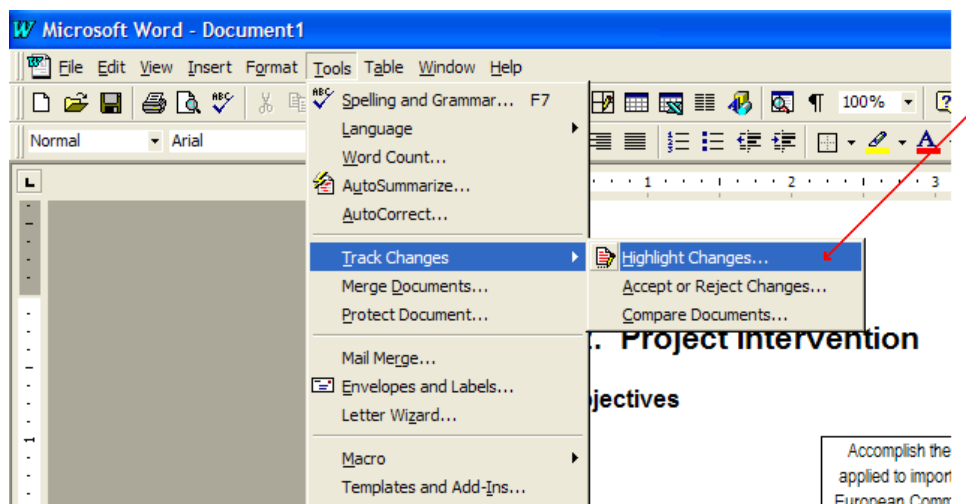


Figure 56. Turning on 'Track Changes.'

Now that 'Track Changes' is on, any text you change or add or delete will be highlighted. Illustration:

Increase the country level of exports of species X.

**Specific Objective:**

Accomplish the standard requirements applied to imports of wood boards by the European Community countries produced by wood processing industries, by year 2009

Edmund Revilla, 08/04/06 3:45 PM:  
Inserted

| Careful analysis-scrutiny of the obtained Problem Tree in the previous section has



**Figure 57. Example of a document change that is being tracked.**

You can turn off the tracking of changes by doing the same steps on how you turned it on.

For more information on tracking changes and how to use Microsoft Word, refer to your Microsoft Word User's Manual.

That's it! You have just used all the features of the ITTO ProTool. We hope that it made your proposal creation a lot easier, more consistent and accurate compared to doing it without the ITTO ProTool!

## Loading a Saved Proposal

If you are currently working on a proposal with the ProTool, save your proposal first before loading a new proposal. You will lose your work if you do not do so.

To load a previously saved proposal, click on the “Load” button found in the ProTool Main Screen.

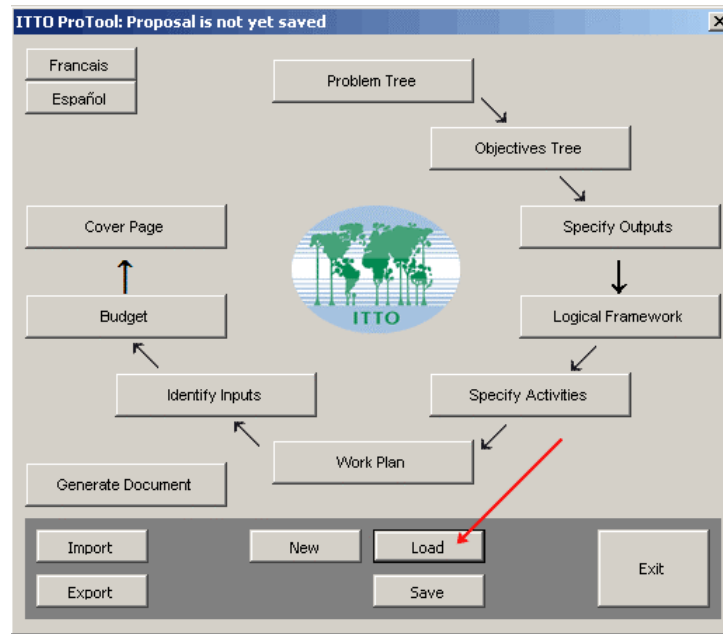


Figure 58. “Load” a saved proposal from the Main Screen.

A new dialog box will pop up. Select from the drop-down list the filename of the proposal you want to load.

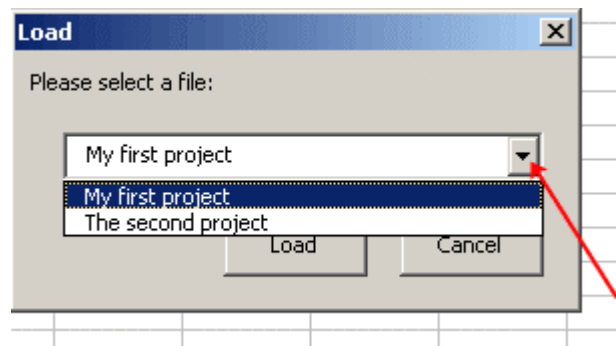
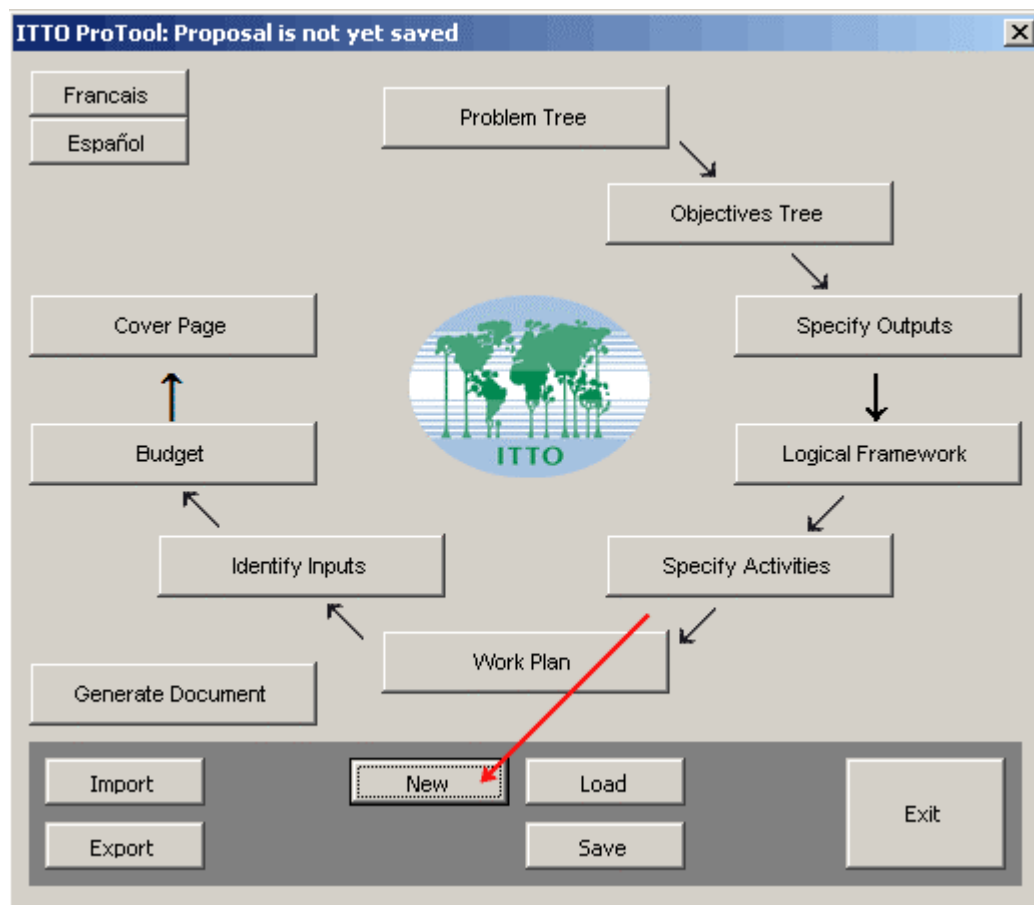


Figure 59. Loading a previously saved ProTool proposal.

## Creating another Proposal

After creating your first proposal using the ITTO ProTool, you may want to create another ITTO project proposal. To do so, click the “New” button found in the ProTool Main Screen.



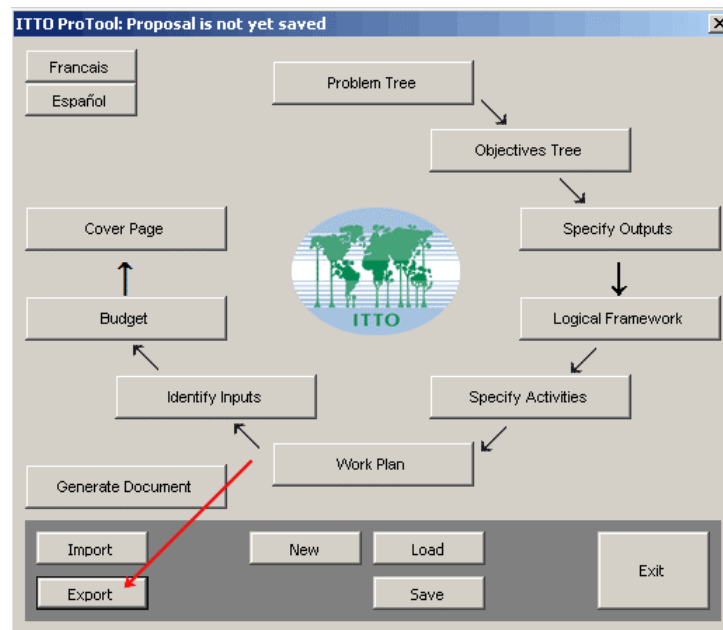
**Figure 60. “New” button to clear the ProTool workspace and start on a new proposal.**

You will see nothing happen but what actually happened was that all the information currently entered in all the modules of ProTool were cleared. You now have a fresh blank template for all the ProTool modules. So now you just go through all the steps again to start working on your new proposal and save it under a new filename.

## Exporting your Saved Proposals

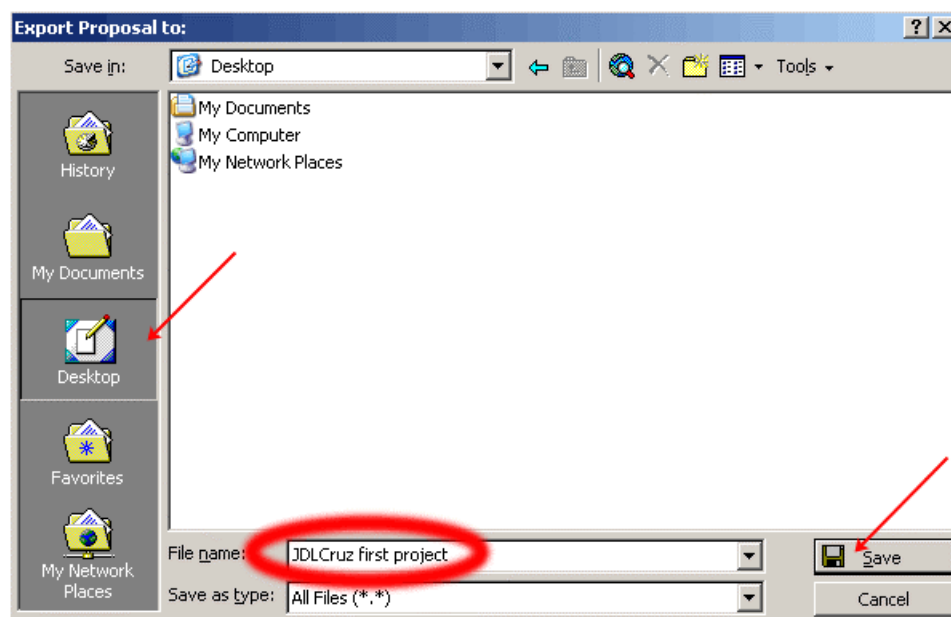
You can share your proposal with other people (who also has a copy of the ITTO ProTool) by exporting your proposal.

First load the saved proposal you want to export. Then click on the “Export” button found in the ProTool Main Screen and a familiar “Windows Save As” screen will show up.



**Figure 61. “Export” button to share your proposal with other colleagues.**

Navigate to the disk or folder where you want to save your proposal into (e.g. the Desktop), then type the proposal’s filename and click the “Save” button. That’s it!



**Figure 62. Exporting a proposal into your computer’s Desktop.**

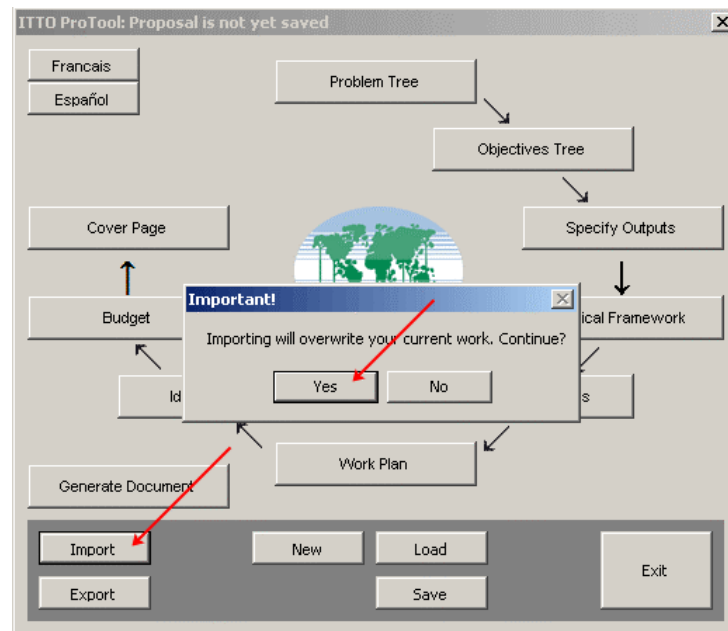
Your proposal is exported not as a single file but as a folder which contains several files. If you exported your proposal in your Windows Desktop, browse your Desktop and you will see your exported proposal as a Windows folder. You can then share this with other people by sending them this whole folder either by email or through a USB drive (by copying it into the USB drive).

For them to see or edit your proposal, they should run their copy of ITTO ProTool and “Import” the folder into their ProTool. The next section explains how to do this.

## Importing a Proposal

If you are currently working on a proposal with the ProTool, save your proposal first before importing a new proposal. You will lose your work if you do not do so.

To import a proposal (that was exported by someone else through the ITTO ProTool), click “Import” on the ProTool Main Screen. Click “Yes” on the dialog box that shows up.



A new box will appear which looks the same as the “Windows Open File” screen.

Find the exported ProTool folder, click on it to select it then click the “Open” button. This will open the folder and list one file with file extension name .ptf. Click on this file to select it and click the “Open” button to import this proposal.

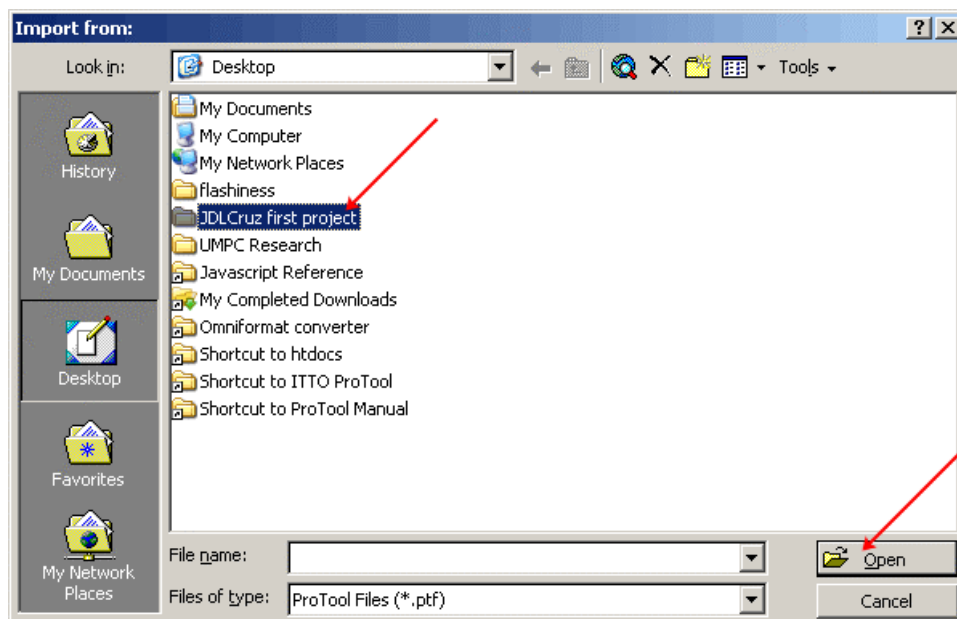


Figure 63. Import screen to import a proposal sent by someone else.

The proposal is now loaded in your ITTO ProTool. You can now check what is in the proposal by clicking on the module buttons (e.g. Problem Tree module, Objectives Tree module, etc.). You may do anything with like just like when editing your own proposal with the ProTool.



## IV. ANNEX

### Dos and Donts

Here is an initial list of dos and donts in terms of using the ITTO ProTool more effectively. It is not exhaustive but based on the experience of testers and users of the ProTool.

- DO save your proposal (by clicking the “Save” button in the ProTool main window) before pressing the “Exit” button to be sure all your work is saved. Saving your work while inside a module (e.g. Specify Outputs module) does not save your work in a file. It only saves your work in that particular module while you are running the ProTool software. Once you “Exit” the ProTool software, it will be gone.
- DO NOT use the standard menus of Excel and Word (e.g. File, Edit, View, Insert, Close button, etc.) unless specified in the User’s Guide. Always use the provided control buttons (e.g. Save, Close module, Insert row, Delete row, Update Input, etc.). You can use Ctrl-V to paste any copied text from other Excel or Word documents.
- DO NOT click on the X button which are always found in the upper-right hand corner of windows and forms. Just use the Close and/or Exit buttons that are provided to ensure proper saving of your data and cleanup of the system.
- You can move the button menus (e.g. Save-Close button menu) by doing a drag-and-drop.
- You can cut-and-paste text from other Excel and Word files into ITTO ProTool but you have to paste text into each cell of an Excel table, Word table or in the text-input-spaces in the forms. You cannot paste whole tables into any module of the ProTool.
- DO use the provided “Insert Row” button in the “Controls” menu when inserting a new OUTPUT in the Specify Output module (also in Specify Activities and Identify Inputs modules). *(The main reason is if you just insert a cell instead of a whole row, the format of the spreadsheet will get disorganized and previously entered data in the other columns will not be aligned anymore to its related information in the inserted cell).*
- DO use the provided “Delete Row” button in the “Controls” menu when deleting an OUTPUT in the Output module (also in Specify Activities and Identify Inputs modules).
- DO use Excel’s scroll bars to adequately view the spreadsheet cells you need to edit.
- You can skip the LFW module and fill it up on a later stage of creating your proposal. Or if you have already created your own in another Word document, you can just cut-and-paste it into the final generated Word document of the ProTool (Note: you cannot paste your LFW into the ProTool’s LFW module).
- The ‘Save’, ‘Close Module’ and Modify/Controls buttons will not work when editing text inside a box in the Problem/Objectives tree, or when editing text in a cell of the spreadsheet. For these buttons to work, you have to get out of “edit mode” by clicking on another cell in the spreadsheet, or pressing the ‘Esc’ or the ‘Enter’ key.

- When changing anything in the ‘Specify Outputs’ module, or ‘Specify Activities’ module, or ‘Identify Inputs’ module, your Workplan and Budget entries will be erased since they highly depend on the Outputs, Activities and Inputs you have previously listed. Since the Outputs, Activities and/or the Inputs has changed, the Workplan and Budget tables that were previously done are already invalid, thus erased.

Therefore it is highly suggested that before creating your workplan or budget tables, the outputs, activities and inputs has to be finalized.

- DO use the provided “Update Input” button to insert new Inputs (i.e. budget lines) into the Budget Module table.
- DO NOT use the normal Excel commands to insert or paste new Inputs (i.e. budget lines) into the Budget Module table.