

# Managing Agricultural Research for Learning and Outcomes (MARLO)

## **INTRODUCTION TO MARLO**

**Updated Oct, 2018**

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# 1. INTRODUCTION

## 1.1 WHAT IS MARLO?

Welcome to **MARLO** - **M**anaging **A**gricultural **R**esearch for **L**earning and **O**utcomes. MARLO is an online platform designed to assist CRPs, Platforms and Centers in planning, monitoring, reporting on, and evaluating their research portfolios and their contributions to outcomes.

MARLO is the result of joint work by several CRPs to improve a tool developed by CCAFS in Phase 1 and adapt it to the needs of the CRPs in Phase 2.

## 1.2. PURPOSE OF THIS DOCUMENT

This document is an introductory guide for MARLO users. It is not intended as a detailed user guide. The roles and responsibilities of the different MARLO users vary by CRP, Platforms, Centers and are not covered in this document. Contact your Management Unit for more detailed guidance as needed.

## 1.3. KEY MARLO CONCEPTS

In MARLO, a **project** is a body of research<sup>1</sup> to which corresponds a set of deliverables. MARLO is designed to monitor and evaluate the CRP portfolio at the **project level**.

Each research project belongs to at least one **flagship** (major structural component of a CRP) or **module** (major structural component of a Platform), and at least one **cluster** (smaller aggregation unit within a flagship/module).

Each project is funded through a collection of Window 1-2, Window 3, and bilateral funds (some projects can also be funded through Center funds). In MARLO, each W1-2 allocation or W3/bilateral grant is called a **funding source**. The deliverables of a project are associated with one or several funding source(s).

In MARLO, **impact pathways** describe the relationships between key outputs, outcomes/milestones, and the CGIAR sub-Intermediate Development Outcomes (sub-IDOs). The **deliverables** of a project (i.e., tangible, specific products to be delivered in a certain year, such as a publication or a database) are mapped to **key outputs** (i.e., aggregated statements of products to be delivered, worded in general terms without a reference to a timeframe), which in turn are mapped to a flagship's/module's **outcomes** (i.e., applications of outputs resulting in a change in policy/program/investment). Outcomes are supposed to be reached in 2022, which is the end of Phase 2 of the CRPs. For each outcome, a set of annual **milestones** are defined for years between 2017 and 2021 to reflect progress toward outcomes. Each outcome contributes to one or more **sub-IDOs**.

*Note: Impact pathways are defined at flagship/cluster level. This process happens before information can be entered at project level, and is not covered in this document.*

MARLO is used at planning stage and at reporting stage. Planning usually occurs in the period November-January and consists in entering updated information about project plans for the coming year. Reporting occurs in the first quarter of a year and consists in entering updated information about achievements of the past year. The processes of updating MARLO at planning and reporting stages are referred to as **planning cycle** and **reporting cycle**.

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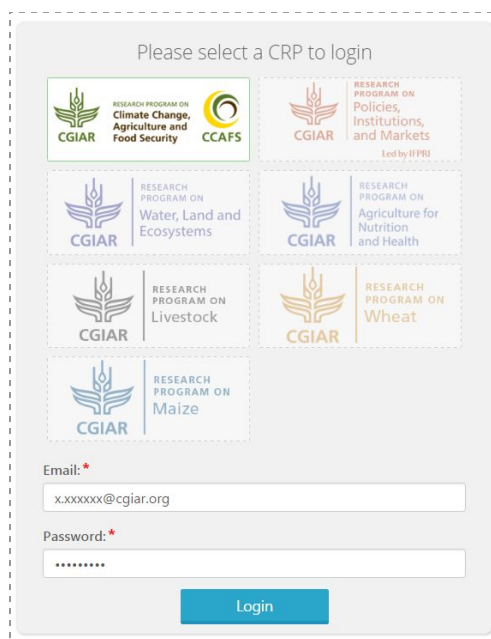
<sup>1</sup> MARLO also includes a small number of “management projects” managed by the CRPs’ Program Management Units.

## 2. USING MARLO








### 2.1 HOW TO LOGIN

Go to MARLO: <https://marlo.cgiar.org/>. Please note that MARLO works best with Chrome and Firefox; please use one of these browsers if possible.

Select the CRP, Platform or Center. Enter your CGIAR credentials (full CGIAR e-mail address and password). If you do not have a CGIAR email address, login credentials will be sent to you.



Please select a CRP to login

 RESEARCH PROGRAM ON Climate Change, Agriculture and Food Security CCAFS	 RESEARCH PROGRAM ON Policies, Institutions, and Markets Led by IFPRI
 RESEARCH PROGRAM ON Water, Land and Ecosystems	 RESEARCH PROGRAM ON Agriculture for Nutrition and Health
 RESEARCH PROGRAM ON Livestock	 RESEARCH PROGRAM ON Wheat
 RESEARCH PROGRAM ON Maize	

Email: \*

Password: \*

Login

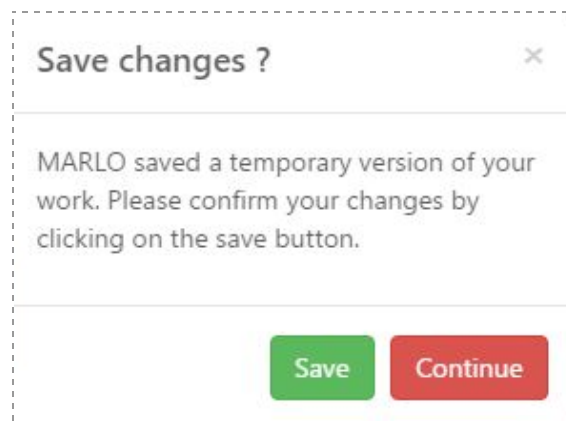
### 2.2 IMPORTANT TIPS BEFORE STARTING

#### Saving changes

Click the 'Save' button before moving to another section.

If you change section without clicking on the 'Save' button, MARLO asks whether you want to confirm the changes you have made before leaving that section.

In order to prevent loss of data, MARLO is equipped with an auto-save function which automatically saves information every 7 seconds. When this happens, a notification appears at the top of the screen ("Draft Saved"). Information saved through this function remains as draft and is not available in other sections. Therefore, do not move to another section without clicking on 'Save'.



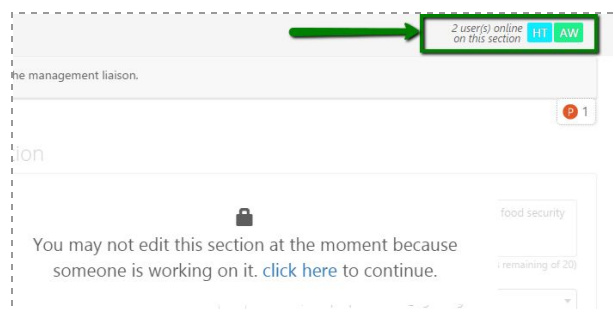
Save changes ?

MARLO saved a temporary version of your work. Please confirm your changes by clicking on the save button.

Save Continue

## Multiple users working simultaneously

Only one user at a time can edit a given section in MARLO. When someone else is editing a section, a message appears and the initials of the current users appear at the top of the screen.




## 2.3 ENTERING AND VIEWING INFORMATION ABOUT FUNDING SOURCES

Only certain MARLO users have permission to add and edit funding sources. Check the email you received from MARLO upon creation of your MARLO profile to see which tasks are accessible to you. Generally, funding sources are entered before information about projects is entered.

To add or edit funding sources, click on 'Funding sources' in the top menu.

Click on 'Add funding source' at the bottom of the page and fill in the required fields.

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HomeImpact PathwaysProjectsFunding SourcesSummaries

Hector Tobonh.t.tobon@cgiar.orgLogout

Funding Sources1 user(s) online on this section HT

Show  entriesSearch:

Funding Source information							Actions
ID	Title	Budget type	Finance Code	Status	Institutions	Donor	Remove
FS401	(A&T) Alive & Thrive Phase 1 and 2	Bilateral	Not defined	On-going	IFPRI	FHI360 - Durham, North Carolina, United States	
FS402	(MoreMilk) Assessing the Health and Nutrition Impacts of Market-Based Agriculture Interventions to Improve the Dairy...	W3	Not defined	On-going	IFPRI	BMGF - Bill & Melinda Gates Foundation - Seattle, United States	
FS404	(ARENA) Advancing Research on Nutrition and Agriculture	W3	Not defined	On-going	IFPRI	BMGF - Bill & Melinda Gates Foundation - Seattle, United States	
FS405	(GAAP2) Gender , Agriculture and Assets Program - Phase Two Pro-WEAI	W3	Not defined	On-going	IFPRI	BMGF - Bill & Melinda Gates Foundation - Seattle, United States	
FS407	(INDEX Phd) International Dietary Data Expansion Project	Bilateral	Not defined	On-going	IFPRI	Tufts University - Boston, Massachusetts, United States	
FS409	(JEEVKA) JEEKIKA-Multisectoral Convergence: Building a Model for Better Nutrition Outcomes in Bihar	Bilateral	Not defined	On-going	IFPRI	The World Bank - Washington, United States	
FS410	(JIGI) Mali Jigisemejiri Impact Evaluation	Bilateral	Not defined	On-going	IFPRI	Government of Mali - Bamako, Mali	

Add Funding Source

## Editing a funding source

To find a funding source, enter part of the funding source title or the funding source ID in the Search field. In addition, the table of funding sources can be sorted (click on the header of the column you want to use for sorting).

Open the funding source by clicking on its title or ID.

## Assigning a funding source to a project

This is done as part of entering information about a project (see Section 2.4).

A funding source budget can be assigned entirely to a project or split between several projects. Once the funding source has been assigned to a project, the project and the amount of the funding source budget allocated to this project appear at the bottom of the funding source window, as well as the funding source budget that remains available to allocate to other projects.

## Viewing a funding source

Click on 'Funding sources' in the top menu.

To find a funding source, enter part of the funding source title or the funding source ID in the Search field. In addition, the table of funding sources can be sorted (click on the header of the column you want to use for sorting).

Open the funding source by clicking on its title or ID.

General information

Title: \*

Climate Services for Agriculture: Empowering Farmers to Manage Risk and Adapt to a Changing Climate in Rwanda

Summary:

The project seeks to provide climate services and support their use for agricultural planning and food security management. Objectives are to: (a) provide decision-relevant climate information and advisories to farmers across Rwanda's 30 districts, and empower and guide their use; (2) develop climate services that support government and institutional agricultural and food security decision-makers to use climate information to respond to climate-related risks and build the resilience of farmers; (3) develop the capacity of Meteo-Rwanda to design, deliver and incorporate user feedback into a growing suite of weather and climate information products and services tailored to the needs of agricultural and food security decision-makers; and (4) develop a national climate services governance structure that ensures sustained co-production, assessment and improvement of climate service for agriculture and food security, and facilitates effective dialog between the key agencies involved.

(13 words remaining of 150)

Start Date: \*

2015-10-01

End Date: \*

2019-10-31

Finance Code:

G124

Upload contract / proposal:

Select a file No file chosen

Agreement Status:

On-going

Funding Window:

W3

Lead Partner(s): \*

ICRAF - World Agroforestry Centre

CIAT - Centro Internacional de Agricultura Tropical

ILRI - International Livestock Research Institute

Select an option...

## Tips for working on funding sources

- Mandatory fields are indicated by asterisks (\*).
- When working on a funding source, the funding source ID appears in the top right corner of the screen. Hover your mouse over the funding source ID to see the full title of the funding source.

## 2.4 ENTERING AND VIEWING INFORMATION ABOUT PROJECTS

Only certain MARLO users have permission to add, edit, or submit projects. Check the email you received from MARLO upon creation of your MARLO profile to see which of these tasks are accessible to you.

### Adding a project

*Adding a project is done during the planning cycle.*

Click on 'Enter a new project' on the Home page, or click on 'Projects' in the top menu and then on 'Create a project' at the bottom of the page.

You will be prompted to add basic information about the project's **description, partners, and budget**. This step is called **Pre-setting** a project in MARLO, and it may be performed by different categories of users depending on the CRP.

The screenshot shows the 'Project Menu' on the left and the 'Project Description' form on the right. The 'Project Menu' has a 'General Information' section with three items: 'Description', 'Partners', and 'Budget', each with a green checkmark. Below this is a yellow box with text: 'All sections need to be completed (green check mark) for the Project Leader to be able to enter the project details.' The 'Project Description' form has fields for 'Project Title:', 'Management Liaison:', 'Management Liaison Contact Person:', 'Start Date:', 'End Date:', and 'Project Summary:'. The 'Project Title' field is empty. The 'Management Liaison' and 'Management Liaison Contact Person' fields are dropdown menus with 'Select an option...' text. The 'Start Date' and 'End Date' fields are date pickers. The 'Project Summary' field is empty.

The Project Menu on the left-hand side shows the sections that need to be completed (Description, Partners, Budget) for the project to become "ready for the project leader to complete".

The budget of a project is made up of the budgets (or part of the budgets) of the funding sources assigned to this project.

Once information has been entered about the project's description, partners, and budget, click 'Yes' next to the question 'Is the project ready for the Project Leader to complete?' If information is missing, you will be prompted to complete the missing fields before clicking 'Yes' again.

This screenshot shows the 'Project Menu' with the 'Description', 'Partners', and 'Budget' items each having a green checkmark. Below the menu is a question: 'Is the project ready for the Project Leader to complete?' with 'Yes' and 'No' buttons. The 'Yes' button is highlighted in red.



## Editing a project

*Editing a project occurs both during the planning cycle and during the reporting cycle. During the planning cycle, after a project is added, more details about what the project plans to accomplish in a given year are added. During the reporting cycle, updates are provided about the actual project accomplishments.*

Click on 'Update an ongoing project' on the Home page, or click on 'Projects' in the top menu.

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Hector Tobon h.tobon@cgiar.org Logout

Projects 2 user(s) online on this section WN HT

Please select the project you want to work on with regards to the current Planning cycle by clicking on the title. If you cannot find a project you expect to see, please contact the flagship leader.

Projects (With editing privileges)

Show  entries Search:

General Information				Total A4NH Budget (USD) 2017			Actions		
ID	Project title	Leader	Flagship(s) & Region(s)	W1/W2	W3	Bilateral	Action/Status	Summary	Remove
P328	<a href="#">New</a> Methods, metrics and tools for assessing and analyzing diet-food system linkages	BIOVERSITY	F1	US\$ 926,930.00	US\$ 0.00	US\$ 1,306,992.00	Submitted		
P329	<a href="#">New</a> Key leverage points for improving diets through food systems	BIOVERSITY	F1	US\$ 749,804.00	US\$ 0.00	US\$ 3,649,581.00	Submitted		
P330	<a href="#">New</a> Evidence base on the effectiveness and impacts of food systems interventions	IFPRI	F1	US\$ 1,333,846.00	US\$ 750,000.00	US\$ 3,558,917.00	Submitted		
P331	<a href="#">New</a> Policy process analysis and policy engagement	CIAT	F1	US\$ 546,355.00	US\$ 0.00	US\$ 977,119.00	Submitted		

To find a project, enter part of the project title or the project ID in the Search field. In addition, the table of projects can be sorted (click on the header of the column you want to use for sorting).

Open the project by clicking on its title or ID.

At planning stage, after the project has been pre-set, more detailed information needs to be provided about the project's **location, contribution to outcomes, and deliverables** (see Project Menu on left-hand side). **Additional partners** that were not added during pre-setting can also be entered at this stage. Usually these steps are performed by the project leader.

## Submitting a project

Once all project information has been entered and the project is ready for review, click on 'Submit' on the left-hand side menu. The 'Submit' button does not appear if information is missing.

Budget

Budget by Partners ☒

Budget by CoAs ☒

Is the project ready for the Project Leader to complete?

Check for missing fields.

Submit



When a project is submitted, the users who have responsibility over this project receive an email from MARLO. The project summary (pdf) is attached to this email.

If a project is returned to the project leader, the user who is returning the project is prompted to explain why. The justification is included in an email from MARLO to the users who have responsibility over this project. Once the issues have been addressed and the project has been re-submitted, MARLO sends another email to the users who have responsibility over this project.

## Viewing a project

Click on 'Projects' in the top menu.

To find a project, enter part of the project title or the project ID in the Search field. In addition, the table of projects can be sorted (click on the header of the column you want to use for sorting).

Open the project by clicking on its title or ID. You can also click on the 'Summary' column in the table of projects to access a project summary including all the information entered on the project.

## Status of a project

Projects (With editing privileges)

Show  entries

Search:

General Information				Total CCAFS Budget (USD) 2017			Actions		
ID	Project title	Leader	Flagship(s) & Region(s)	W1/W2	W3	Bilateral	Action/Status	Summary	Remove
P1	(ICRISAT WA) Capacitating science-policy exchange platforms to mainstream climate change into national agricultural and... ..	ICRISAT	F1 F2 EA WA	US\$ 600,000.00	US\$ 0.00	US\$ 120,000.00	Ready for PL		
P2	(CIAT LAM) Relevant Climate Change Information meets Decision-Making to influence Policy and Institutions for Climate... ..	CIAT	F3 F1 F4 F2	US\$ 500,000.00	US\$ 0.00	US\$ 500,000.00	Ready for PL		
P6	(IITA-EA) Influencing and linking national and local level policies and institutions to adopt climate-resilient food... ..	IITA	F1 EA	US\$ 727,277.00	US\$ 0.00	US\$ 20,000.00	Ready for PL		
P7	(ILRI-EA/WA) Analyzing the science-policy-practice interface in climate change adaptation in East and West Africa 1, 2, 3	ILRI	F1 F4 EA WA	US\$ 200,000.00	US\$ 0.00	US\$ 0.00	Pre-setting		

The status of the project can be:

- **Pre-setting:** basic information about the project's description, partners, and budget should be entered;
- **Ready for PL:** more detailed information about the project's location, contribution to outcomes, deliverables, and in some cases partners, should be entered - usually by the project leader;
- **Submitted:** all project information has been entered and the project is ready for review (the review process depends on the CRP). A submitted project is not available for editing by the project leader until a new planning or reporting cycle begins, or until it is returned to the project leader following the review process.

## Tips for working on projects

- It is recommended to fill in project sections in the order that they appear in in the left-hand side Project Menu.
- Mandatory fields are indicated by asterisks (\*).

- When all mandatory fields in a project section have been completed, a green checkmark appears next to this section in the left-hand side Project Menu.
- You can check which sections are still incomplete by clicking on the 'Check' button at the bottom of the Project Menu.
- Upon clicking 'Save', a yellow flag appears next to the missing fields.
- When working on a project, the project ID appears in the top right corner of the screen. Hover your mouse over the project ID to see the full project title.

## 2.5 GENERATING SUMMARIES

Click on 'Summaries' in the top menu for access to various types of standard summaries (in pdf or Excel format) about the information entered in MARLO.

## 2.6 EVALUATING PROJECTS

Project evaluation functionalities will be added to MARLO later.

# 4. SUPPORT FOR MARLO USERS

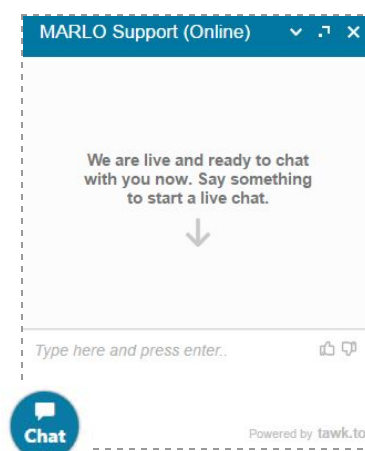
## 3.1 TECHNICAL SUPPORT

### Online support

Use the online support chat which is located at the bottom left of the screen. The chat is monitored by the technical team based at CIAT in Colombia during business hours. Messages sent by users through the chat outside business hours (Colombia time) will be answered via email.

### Email

[MARLOSupport@cgiar.org](mailto:MARLOSupport@cgiar.org)



## 3.2 FUNCTIONAL SUPPORT

### CRPs - CGIAR Research Programs

<b>A4NH</b>	Amanda Wyatt, <a href="mailto:a.wyatt@cgiar.org">a.wyatt@cgiar.org</a>
<b>CCAFS</b>	Tonya Schuetz, <a href="mailto:t.schuetz@cgiar.org">t.schuetz@cgiar.org</a> David Abreu, <a href="mailto:d.abreu@cgiar.org">d.abreu@cgiar.org</a>
<b>FTA</b>	Monika Kiczakajlo, <a href="mailto:m.kiczakajlo@cgiar.org">m.kiczakajlo@cgiar.org</a> Bethany Charlotte Davies <a href="mailto:b.cdavies@cgiar.org">b.cdavies@cgiar.org</a>
<b>Livestock</b>	Jane Poole, <a href="mailto:j.poole@cgiar.org">j.poole@cgiar.org</a> Helen Altshul, <a href="mailto:h.altshul@cgiar.org">h.altshul@cgiar.org</a>

<b>Maize</b>	Shaylyn Gaffney, <a href="mailto:s.gaffney@cgiar.org">s.gaffney@cgiar.org</a> Claudia Elisa Velasco, <a href="mailto:c.e.velasco@cgiar.org">c.e.velasco@cgiar.org</a>
<b>PIM</b>	Pascale Sabbagh, <a href="mailto:p.sabbagh@cgiar.org">p.sabbagh@cgiar.org</a> Frank Place, <a href="mailto:f.place@cgiar.org">f.place@cgiar.org</a>
<b>Rice</b>	Bas Bouman, <a href="mailto:b.bouman@irri.org">b.bouman@irri.org</a>
<b>Wheat</b>	Shaylyn Gaffney, <a href="mailto:s.gaffney@cgiar.org">s.gaffney@cgiar.org</a> Hamish Gordon Dunsford, <a href="mailto:h.dunsford@cgiar.org">h.dunsford@cgiar.org</a>
<b>WLE</b>	Emma Greatrix, <a href="mailto:e.greatrix@cgiar.org">e.greatrix@cgiar.org</a> Amanda Chang, <a href="mailto:a.chang@cgiar.org">a.chang@cgiar.org</a>

#### CGIAR Platforms

<b>BigData</b>	Mathilde Overduin, <a href="mailto:m.overduin@cgiar.org">m.overduin@cgiar.org</a>
<b>EiB</b>	Shaylyn Gaffney, <a href="mailto:s.gaffney@cgiar.org">s.gaffney@cgiar.org</a> Brenda Lizet Bautista, <a href="mailto:b.l.bautista@cgiar.org">b.l.bautista@cgiar.org</a>