



Upload, Review and Submission procedure for MTPs submitted to Science Council via EasyMTP

Updated June 2009

This procedure is released jointly by Science Council Secretariat and the ICT-KM Program. It explains the sequence of steps needed, roles involved and functionalities to be utilized in order for the Centers and Challenge Programs (CP) using EasyMTP to submit their MTP data to CGMap and for Science Council review.

While providing material for Science Council review, the MTP data transferred by the Centers and CPs using EasyMTP at the same time populates CGMap, the system providing access to the research project plans the CGIAR Centers and CPs publish in their MTPs. CGMap allows users to search, browse and download project information in the MTPs.

For more information about CGMap, please contact the CGMap support team at cgmap-support@cgiar.org

Step 1	Upload of the MTP data to CGMap
When	Between 11 and 15 June 2009 included
Who	Centers and CPs, in particular the person in charge of the final quality control, and with authority to submit the MTP (holding Project Office role in EasyMTP)
Where	EasyMTP at the Center or hosted version
Preparatory tasks	<p>1. IT focal point installs EasyMTP SP2 Patch 4 and SP2 Patch 4 Update (new reports and clean XML for upload).</p> <p>2. EasyMTP Project Office (PO) users review the content in detail, verify that what they are going to submit is actually included in the database by running reports off the EasyMTP content from the Reports tab, make any needed changes to content and formatting in the system.</p> <p>3. By June 10, CGMap Support Team verifies the name of the person for each Center and CP who will be in charge of the final review and submission in CGMap (see Step 3 below).</p>
How	<p>When the MTP content is finalized, the PO user in charge of final quality control and with authority to submit the MTP, logs into EasyMTP, goes to Upload MTP and by following the steps outlined in Annex I, uploads the MTP data to CGMap.</p> <p>See Annex I for details of how to upload the MTP data from EasyMTP.</p>
Outcome	<p>The MTP data is transferred from EasyMTP to a dedicated folder in CGMap. Time and date of successful transfer are automatically recorded in the folder.</p> <p>The CGMap support team is alerted and starts the manual assembly of the complete MTP document (Step 2), as soon as also the financing plan become available in FIS.</p>

NOTE: financial tables for the Financing Plan of the MTP are to be submitted via FIS as usual by the same deadline (June 15).

Step 2	Assembly of the completed MTP document and financing plan for Center/CP review
When	By 18 June 2009, starting from when the uploaded MTP data and the financing plan become available in CGMap and FIS
Who	CGMap Support team
Where	CGMap; manual process
How	<p>The CGMap support team manually assembles the narratives and financing plans for each Center/CP into a working document for Science Council reviewers.</p> <p>See Annex II for the detailed formatting policy, procedure and standards.</p>
Outcome	The assembled MTP and financing plan document is uploaded to CGMap in a password-protected area for each Center/CP.

Step 3	Centers'/CP's review of assembled MTP and financing plan document, and official submission of MTP 2010-2012
When	By 19 June starting from CGMap support's notification of complete MTP document availability in CGMap
Who	Center/CP focal points, in particular the person identified for the final quality control and submission whose name has been verified by CGMap support team (see Preparatory Tasks in Step 1 above)
Where	CGMap
How	<p>Once the manual assembly of the MTP and financing plan document is completed, the assembled document is made available to the Center/CP focal point for download in a password-protected area of CGMap.</p> <p>The Center/CP focal point is notified via email to log into CGMap and download the assembled document for review before submission to Science Council.</p> <p>If the review of the document is satisfactory, the focal point logs into CGMap and clicks the Submit button to confirm that the assembled document represents an integral view of the MTP data submitted via EasyMTP.</p> <p>Non-satisfactory reviews are notified to cgmap-support@cgiar.org and are handled on a case-by-case basis.</p> <p>See Annex III for the detailed review policy and procedure</p>
Outcome	After clicking the Submit button, the assembled MTP and financing plan document becomes available as a Word document (*.doc) in the public Download MTPs area of CGMap, where Science Council reviewers can download it.

The screenshot shows the CGMap website interface. At the top, there is a navigation bar with the CGMap logo and links for Home, Help, and Login. Below this is a search bar and several menu items: Search CGIAR, Download MTPs (highlighted), Browse MTPs, Search Projects, Search Outputs, and Projects by country. The main content area is titled 'Medium Term Plans - MTPs' and features a filter section with dropdown menus for 'Refine the list: MTP:' (set to 2009-2011), 'Center/Program:' (set to All), and 'Document type:' (set to All). A 'View' button is also present. The main content is a grid of 15 entries, each with a logo, center name, MTP title, and status. The entries are: Africa Rice Center (WARDA), Bioversity International, CIAT, CIMMYT, CIP, Generation CP, HarvestPlus CP, ICARDA, ICRISAT, IFPRI, IITA, ILRI, IRRI, and IWMI. Each entry includes the text 'Medium Term Plan 2009-2011' and 'Prepared with EasyMTP'. At the bottom of the grid, there are navigation arrows and a page number '2'. The footer contains the text: 'CGMap - Supported by ICT4M Program - Contact: CGMap Helpdesk at cgmap-support@cgiar.org - Disclaimer'.

After 19 June, the submitted documents become available for download from the Download MTPs area of CGMap for public access. Science Council reviewers will be directed to this area for download. Center/CP staff can download the document for further formatting and layout improvement for their own purposes other than Science Council review.

The MTP database submitted via EasyMTP is transferred to the CGMap database. Date stamp certifies that the submission is official and that the version available in CGMap (both as document and as database) represents the reference version of the Center/CP MTP for the 2010-2012 period.

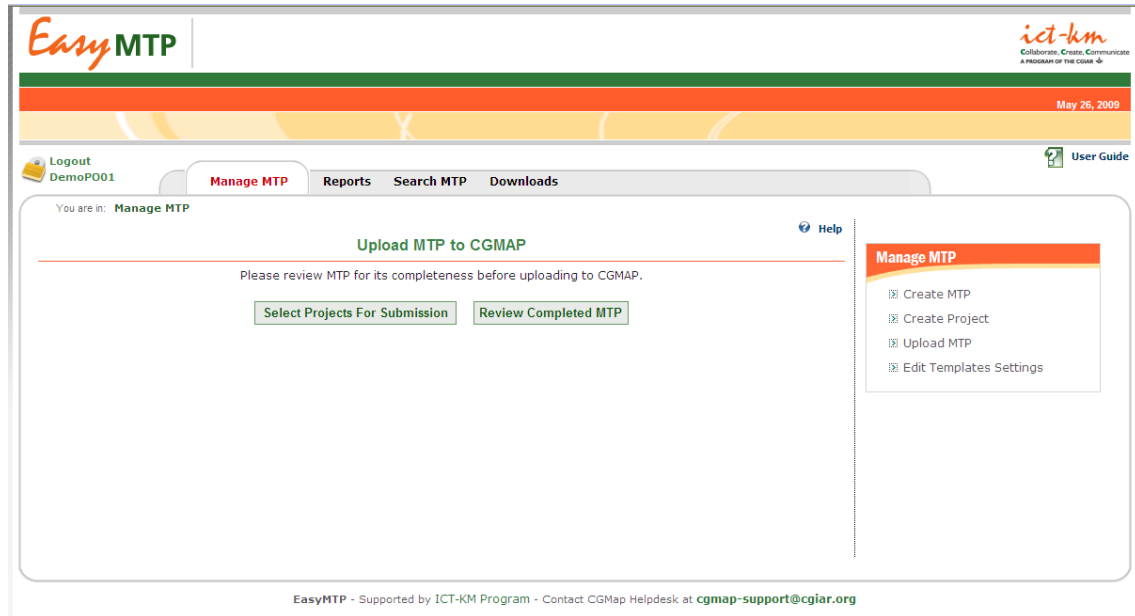
Update of CGMap database starts:

- The MTP databases are transferred to the CGMap database where projects and outputs can be searched and analysed;
- MTP documents are converted to PDF as individual sections for the Browse MTPs area and indexed in the Google Custom Search Engine to be retrieved via Search CGIAR;
- Project fact sheets are generated by aggregating information from EasyMTP and FIS and become searchable via Search Projects;
- Maps are updated for Projects by country.

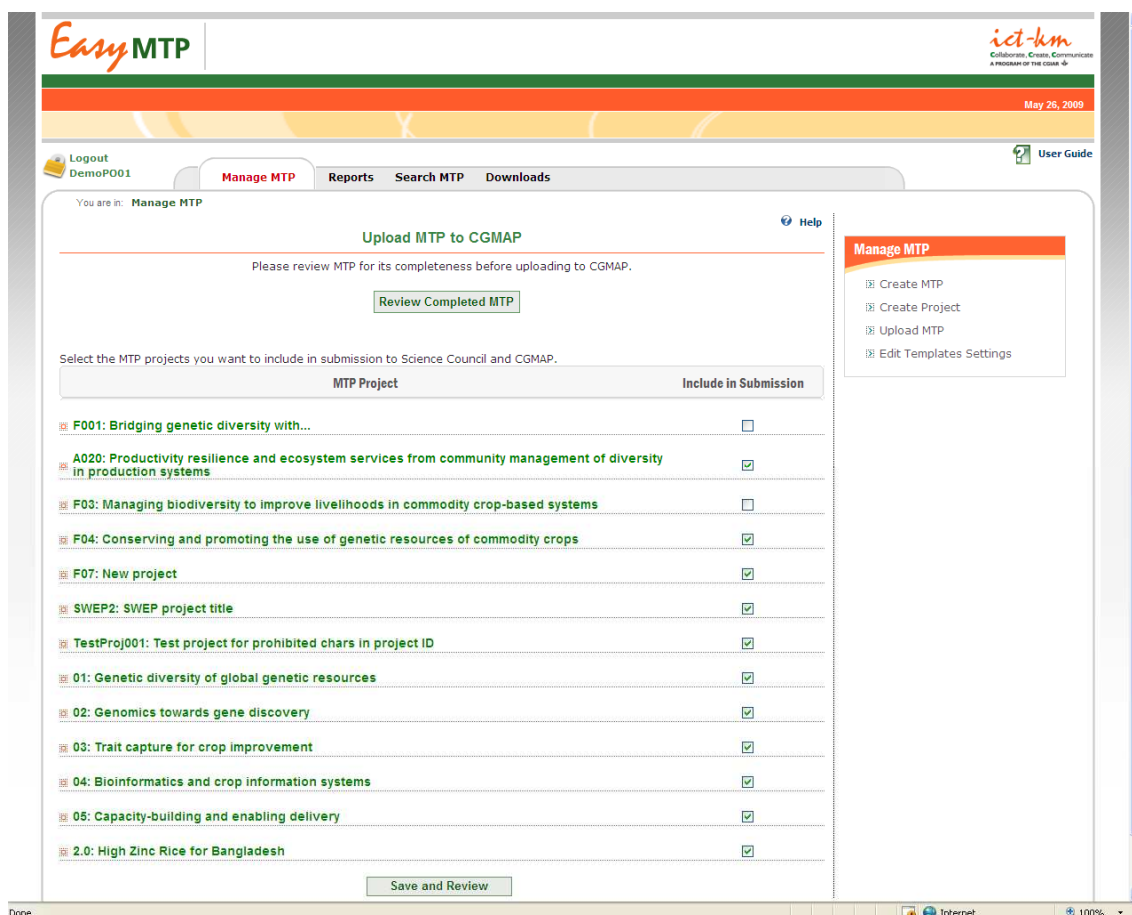
Annex I

How to upload the MTP narrative data from EasyMTP

1. From **Manage MTP** (available only to Project Office role) click on **Upload MTP** in the right hand menu. This screen will appear.



2. **Optional step.** A click on **Select Projects for Submission** button opens up this page. If your Center/CP has used EasyMTP also for internal planning of activities that are not to be submitted, or draft/test projects, you can de-select the ones that do not have to be included in the submission to CGMap and Science Council. If your Center is using EasyMTP only for MTP Projects for submission, you can skip this step.



By default all projects are selected (checked) thus included in the submission. To exclude a project, uncheck the checkbox and click the **Save and Review** button. This action will save the selected projects for submission and then open up the **Review Completed MTP** page screen (point 3. below).

3. If you click on **Review Completed MTP** from Upload MTP screen (point 1. above), you will be able to see a full report of the MTP narrative data.

EasyMTP

ict-km
Collaborate. Create. Communicate
A PROGRAM OF THE CGIAR

May 27, 2009

Logout
Eric Clutario

Manage MTP Edit Projects Reports Search MTP Downloads ACL Admin Host

You are in: Manage MTP

Upload MTP to CGMAP

Please review MTP for its completeness before uploading to CGMAP.

Select Projects For Submission

Close Upload MTP Print Report Download

Help

Manage MTP

- Create MTP
- Create Project
- Upload MTP
- Edit Templates Settings

Centro Internacional de Mejoramiento de Maiz y Trigo

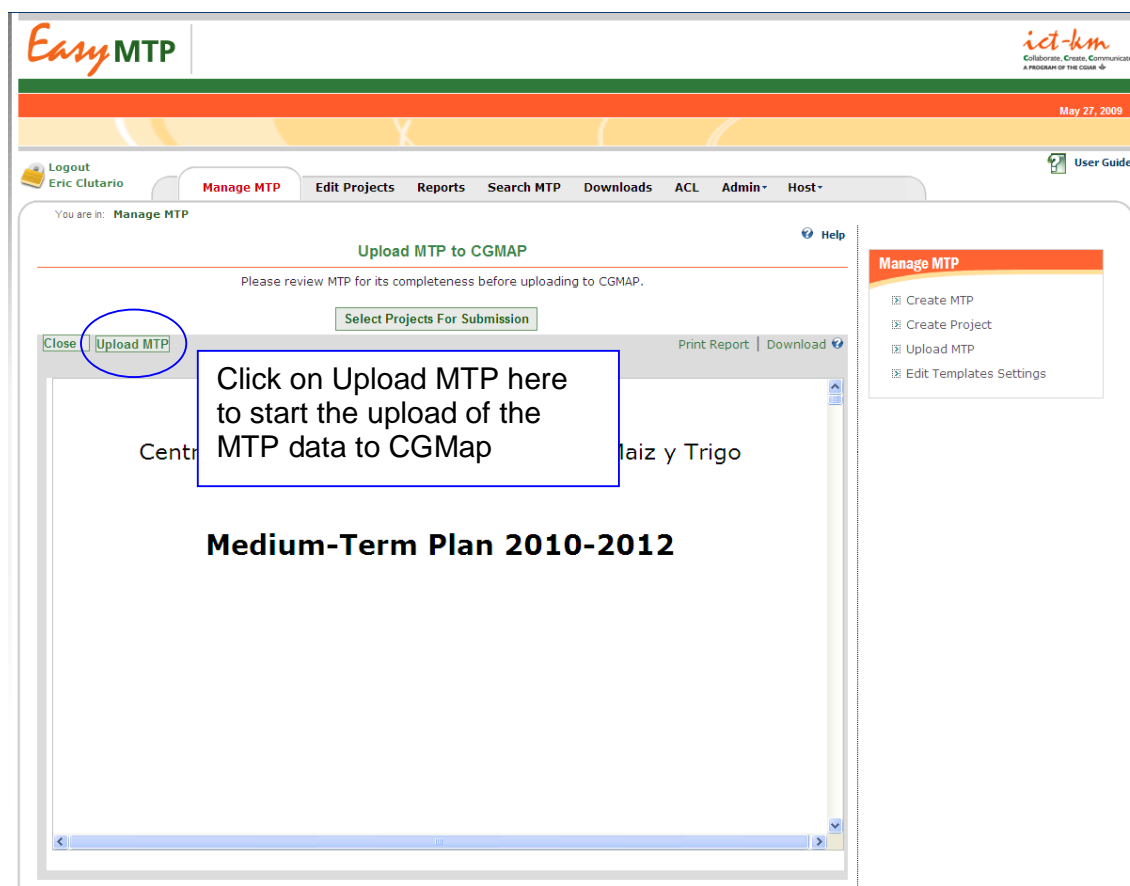
Medium-Term Plan 2010-2012

Print or download the report to review it and check that all you want to submit is included.

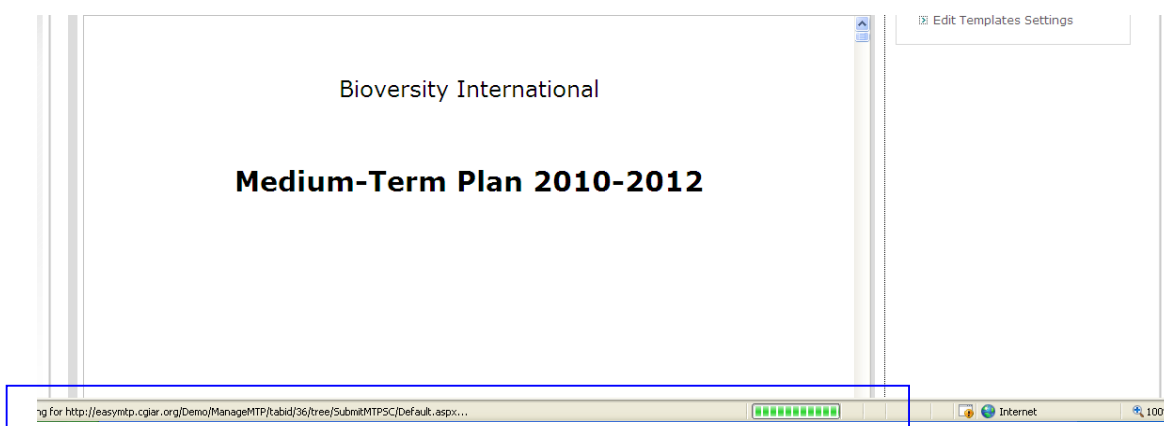
Recommendation: view the full MTP report frequently during the final editing stages of the MTP content entry. This will give you a precise idea of the content integrity and formatting.

If the report shows the correct data, proceed to 4. below. If it does not, click on Close back to screen 1.

4. When you are satisfied with the content you view in the report, click on **Upload MTP** on the report viewer grey bar:

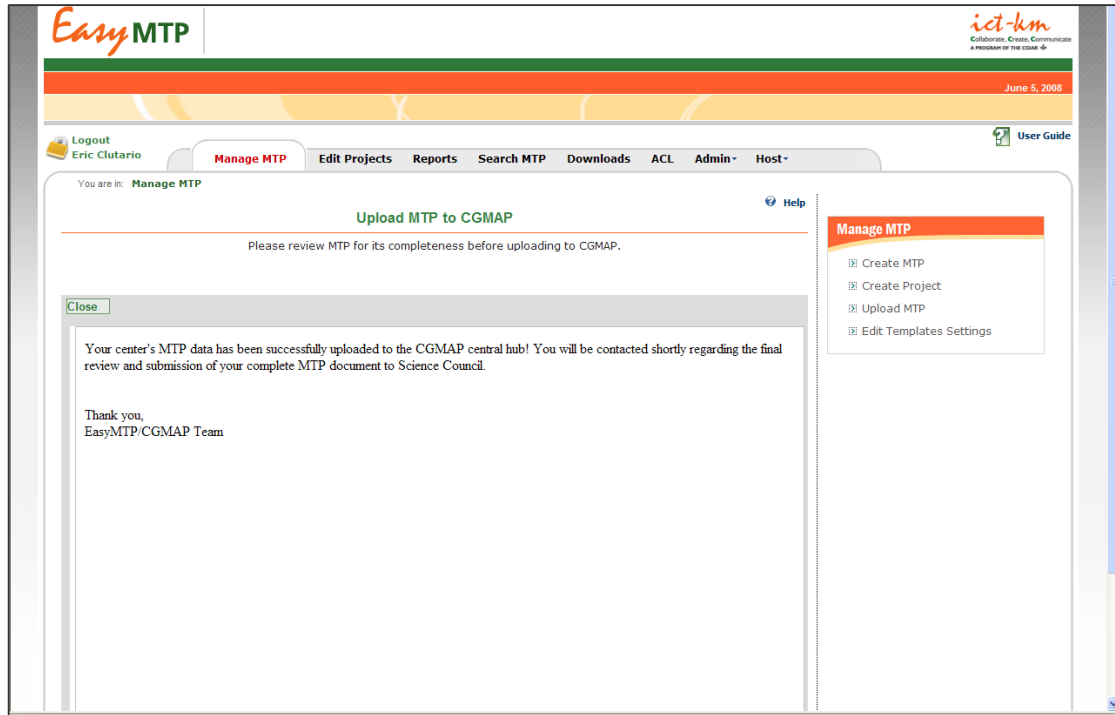


The upload process takes place in the background: please wait patiently until the next screen appears. This process may take a few minutes.



Tip: monitor the transfer by looking at the upload meter in the bottom bar of your browser

In the background, data is extracted, transferred to CGMap, sent to cgm-support@cgiar.org for notification and reference.



Status is displayed on the screen on successful completion of the transfer.

The EasyMTP database will NOT be locked after the upload, i.e. content will still be editable by PO users, and subsequent uploads will be possible.

Please note that the upload from EasyMTP to CGMap is to be achieved between 11 and 15 June.

Any request for re-upload within or after the 15 June deadline has to be discussed with the CGMap support team. Contact cgmap-support@cgiar.org

Annex II

Assembly of the MTP narrative and financial tables: formatting procedure, policy and standards.

The CGMap support team assembles the MTP narratives (obtained into CGMap via the upload process started in EasyMTP) and the financial tables (obtained from FIS) into one completed MTP document for each Center and CP.

The manual assembly of the completed MTP and financing plan document is done for the sole purpose of providing a “document view” of the MTP data to Science Council reviewers, therefore enhancing the readability and usability of the information contained in the database in a linear fashion (i.e. from page 1 to page n).

This assembled document is made available to the originating Center for review in order to confirm content integrity, i.e. that the completed document, resulting from the manual assembly, is the integral version of the content in the uploaded database.

Centers benefit from the manual assembly by saving time on formatting the document before submission and by being able to download the completed document that, if desired, is ready to be formatted and laid out according to the Center's/CP's own visual identity standards after the submission.

New in 2009: the MTP report for upload and submission is exported in MS Word document format, with a cover, table of contents, standard formatting, horizontal layout of logframes. Moreover, the lists of countries are included by default as Annexes. This format incorporates a large number of the formatting standards manually applied in 2008 and supports content quality control by including all the data required for submission in CGMap¹.

Starting from this new type of report, the CGMap support team assembles and formats the document according to the following steps and standards:

1. The files are obtained as .doc files and are posted for reference to the Center/CP focal point account in CGMap.
2. The CGMap support team assembles the two documents into one and applies the following formatting standards:

Format Standard #1:	Paper size is LETTER (8.5" x 11").
Format Standard #2:	A standard footer will be provided
Format Standard #3:	Annexes with Countries of Planned Research and Potential Beneficiary Countries will be removed
Format Standard #4:	A new section with horizontal layout will be created for the Financing Plan tables.

¹ For more details on the new reports, see <http://cgmap-helpdesk.cgxchange.org/cgmap-latest-news/easymtpupdatemay2009-newreports>

Format Standard #5: Page numbers will be included in the table of contents automatically generated by the .doc download

During the document assembly process, **the CGMap support team DOES NOT:**

- Proof-read the content. The content is scanned only for the purpose of identifying the pages in which section headers may get disconnected from the text on the following page.
- Resize tables and pictures within printable margins.

The resulting assembled document has portrait orientation (i.e. vertical layout) for the MTP overview and narrative sections, and landscape orientation (i.e. horizontal layout) for the logframes and financing plan tables.

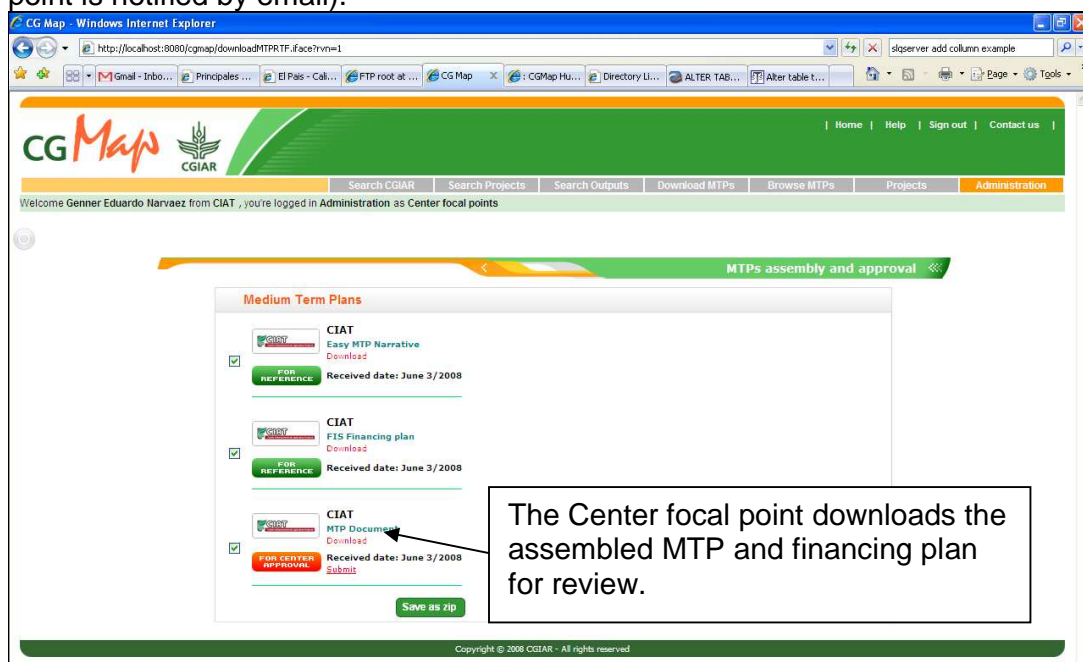
Annex III

Review policy and procedure

It is the Center's responsibility to:

- **upload the MTP overview and narratives in the final version intended for submission** (i.e. the content in EasyMTP is final);
- **generate a report out of EasyMTP that is:**
 - **integral in content,**
 - **fully printable (e.g. tables and pictures within printable margins).**

The CGMap support team makes the assembled and formatted document available in .DOC format for Center's review and approval in CGMap (the Center/CP focal point is notified by email).



The Center focal points logs into CGMap, download the assembled document in .DOC and reviews it.

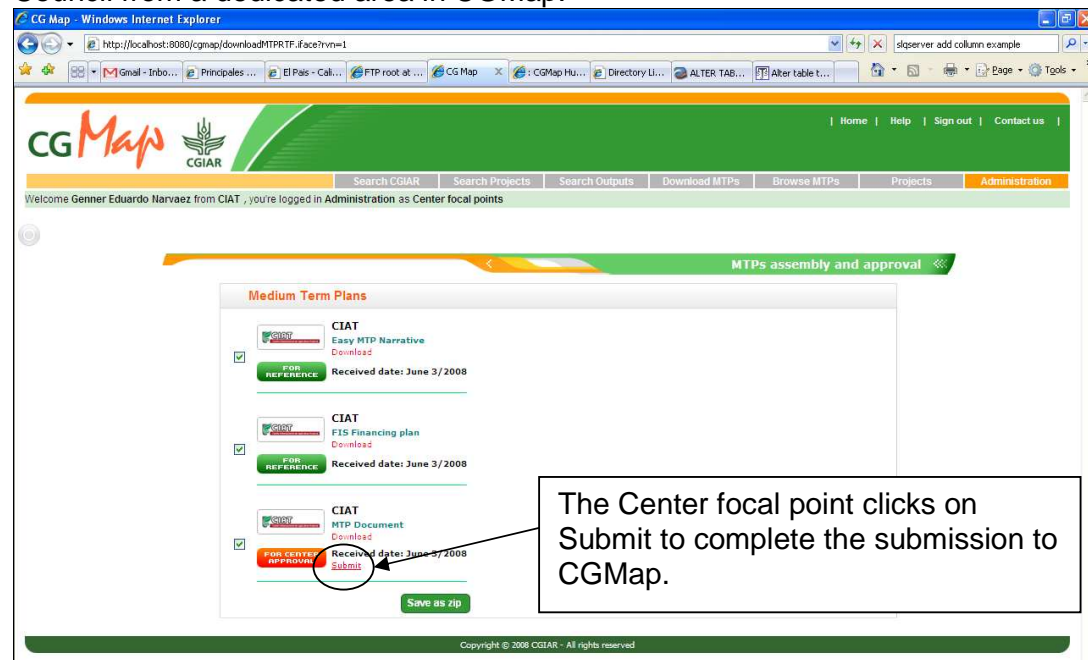
The purpose of the Center's review must **exclusively** aim to check:

- whether some content (e.g. paragraph, table, picture) is missing, i.e. that in the manual assembly process a piece of content was deleted/removed by mistake;
- spelling of Center/CP name and acronym in the footer (because added manually);
- whether page numbers in the table of contents reflect actual pagination.

If the total number of pages exceeds the 100 suggested by the SC guidelines, please do not edit the document to shorten it. The review is not intended for further editing and changes to the content of the MTP.

If the review is successful (i.e. content is integral and reflects the intended version for submission, spelling of Center's/CP name and acronym is correct, table of content is updated):

the Center/CP focal point logs into CGMap and submits the MTP to the Science Council from a dedicated area in CGMap.



On clicking the Submit button in CGMap, the Center/CP confirms that the content of the assembled document reflects the content of the MTP database, intended for submission.

The assembled MTP and financing plan document, in Word format, becomes available for download from the public Download MTPs area of CGMap (no login required to download the assembled document).

If the review is NOT successful (i.e. content is missing; spelling of Center's name and acronym is incorrect):

The Center contacts the CGMap support team (via email at cgmap-support@cgiar.org) with a detailed report of what is incorrect:

- if the spelling of Center's/CP's name and acronym is incorrect, the revision is applied to the assembled document;
- if substantial content is missing, changes are applied **ONLY IF** the document does not reflect the content of the database.

Case b. requires re-upload of the database from EasyMTP, hence the process has to be re-started from Step 1.

Special requests will be addressed on a case by case basis (e.g. major mistake in content not noticed before uploading; incomplete or faulty transmission of files to CGMap upload area).

No submission of documents by email is allowed to Centers that are using EasyMTP.