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

Updated September 2010

This procedure is released by the ICT-KM Program and 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.

The MTP data transferred by the Centers and CPs using EasyMTP 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.

Note for 2010 submission: submission of 2011-2013 MTPs is voluntary: since no review is planned, the quality and completeness of the data relies solely with the Centers and Programs. Availability of financial data from FIS may vary by Center. Due to the lack of one common deadline for all Centers and CPs, MTP documents and data are becoming available from September 2010. Check CGMap regularly as data becomes available.

http://cgmap.cgiar.org

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

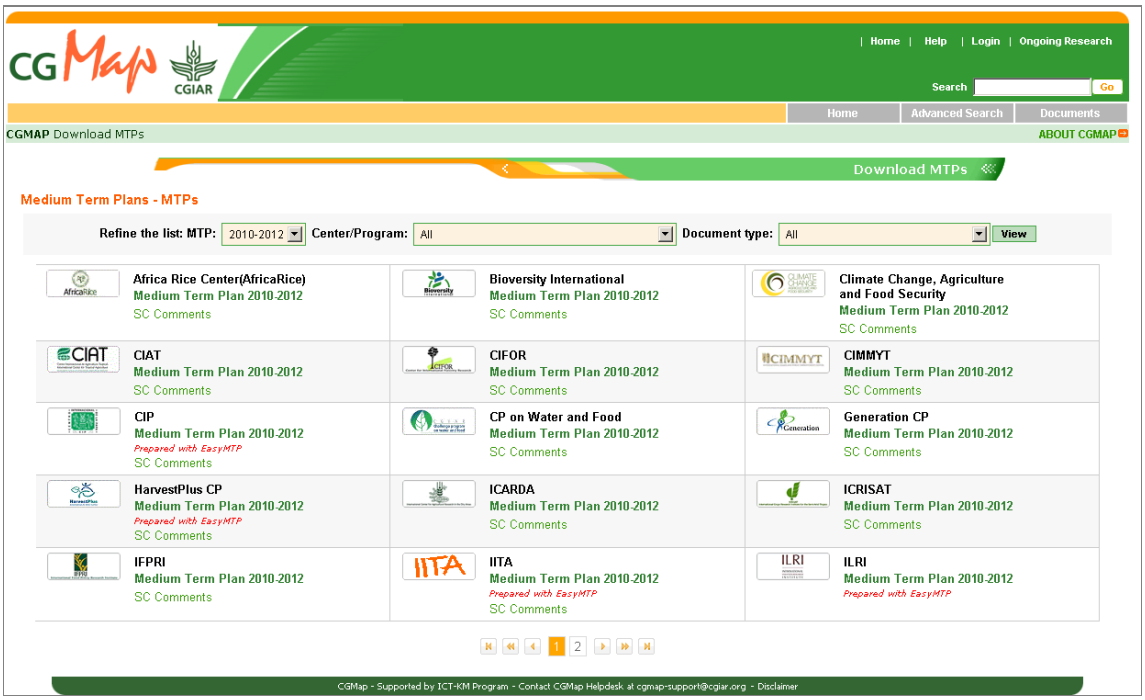
Step 1	Upload of the MTP data to CGMap

See Annex I for instructions on how to upload the MTP narrative data from EasyMTP.

NOTE: financial tables for the Financing Plan of the MTP are to be submitted via FIS.

Step 2	Assembly of the completed MTP document and financing plan for Center/CP review
When	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	The CGMap support team manually assembles the narratives and financing plans for each Center/CP into a working document. See **Annex II** for the detailed formatting policy, procedure and standards.
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 2011-2013
When	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
Where	CGMap
How	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. The Center/CP focal point is notified via email to log into CGMap and download the assembled document for review before submission to CGMap. 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. Non-satisfactory reviews are notified to cgmap-support@cgiar.org and are handled on a case-by-case basis. See **Annex III** for the detailed review policy and procedure
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.



As soon as focal points complete the submission, the submitted documents become available for download from the Download MTPs area of CGMap for public access. Center/CP staff can download the document for further formatting and layout improvement for their own purposes.

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 2011-2013 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.
- **New**: database exports will be produced in XML format for reuse in other Web sites and applications. Maps by Center/CP are generated for embedding and reuse.

Important note on 2011-2013 MTPs:
Considering the voluntary nature of MTP submission, please note the following conditions:

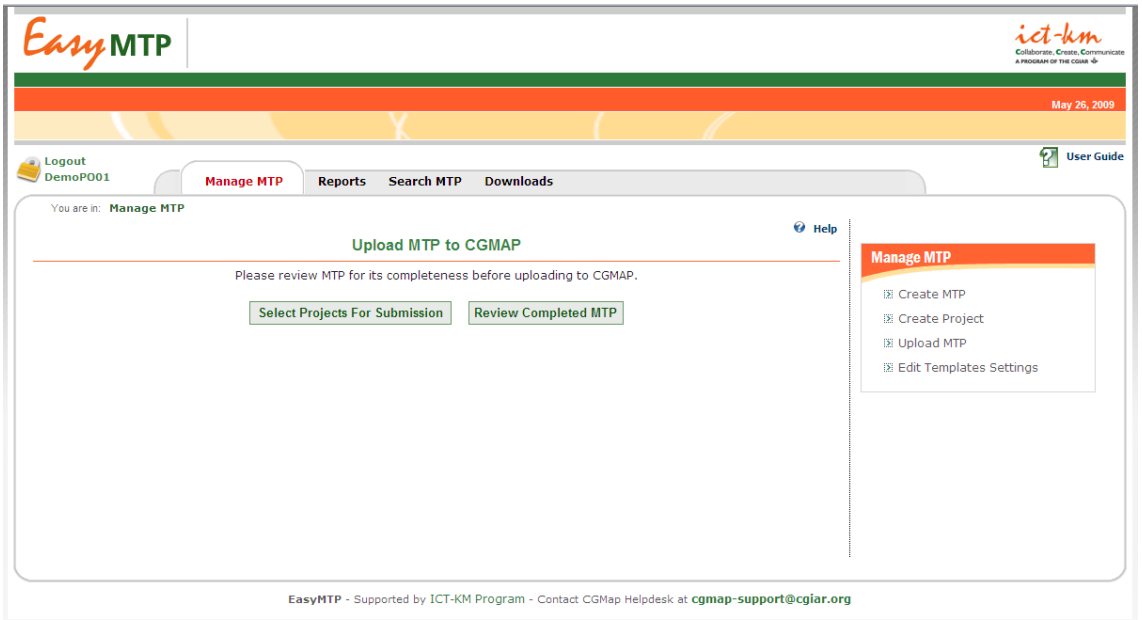
- **For the Centers that have uploaded both narrative and financial information**: the full MTP document will be assembled, data made available online: project fact sheets will be complete. Projects and outputs will be retrievable via the Advanced search using the criteria based on FIS data;
- **For the Centers that have uploaded the narrative but are *not submitting* the financial information to FIS**: the MTP document without the financing plan chapter

will be made available for review and submission. The database will be made available online in CGMap, but no financial data will be included or displayed in the project fact sheets, nor will it be retrievable in the Advanced Search using the criteria based on FIS data.

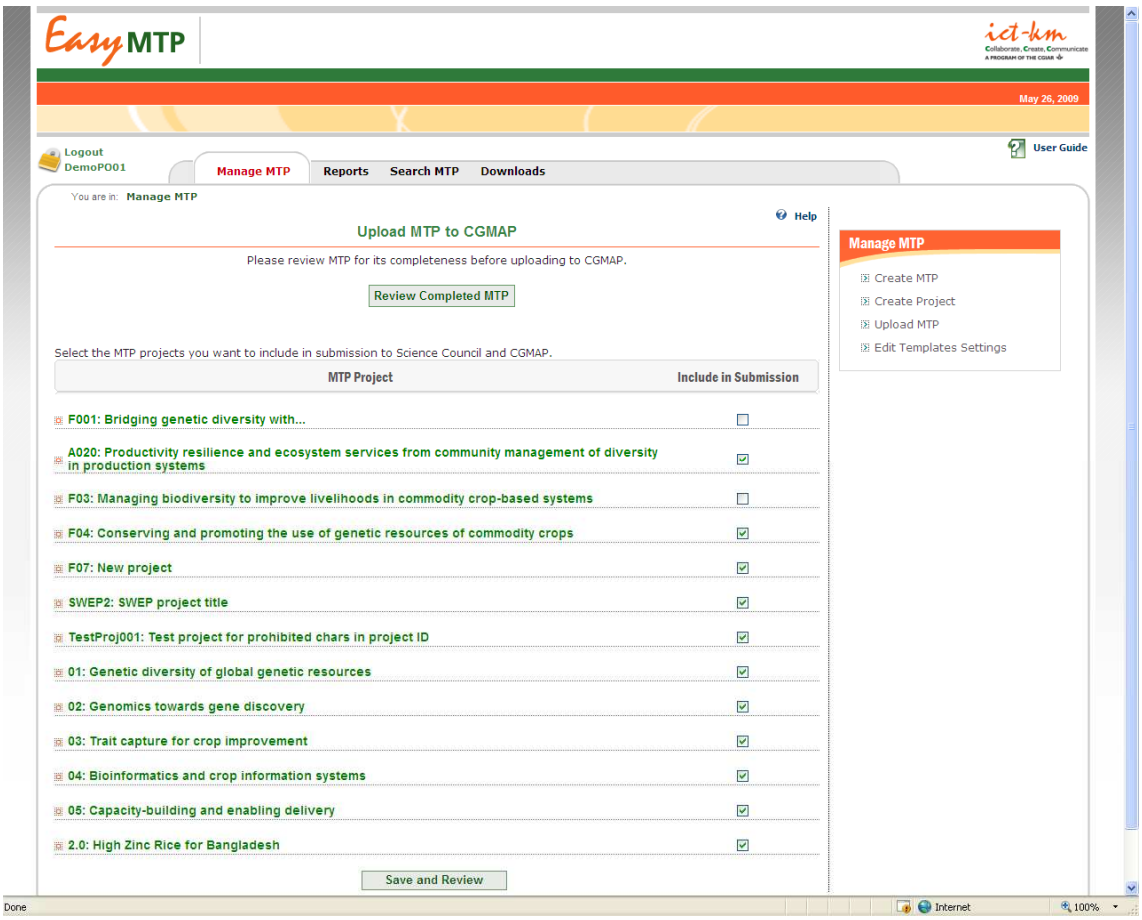
Annex I

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.

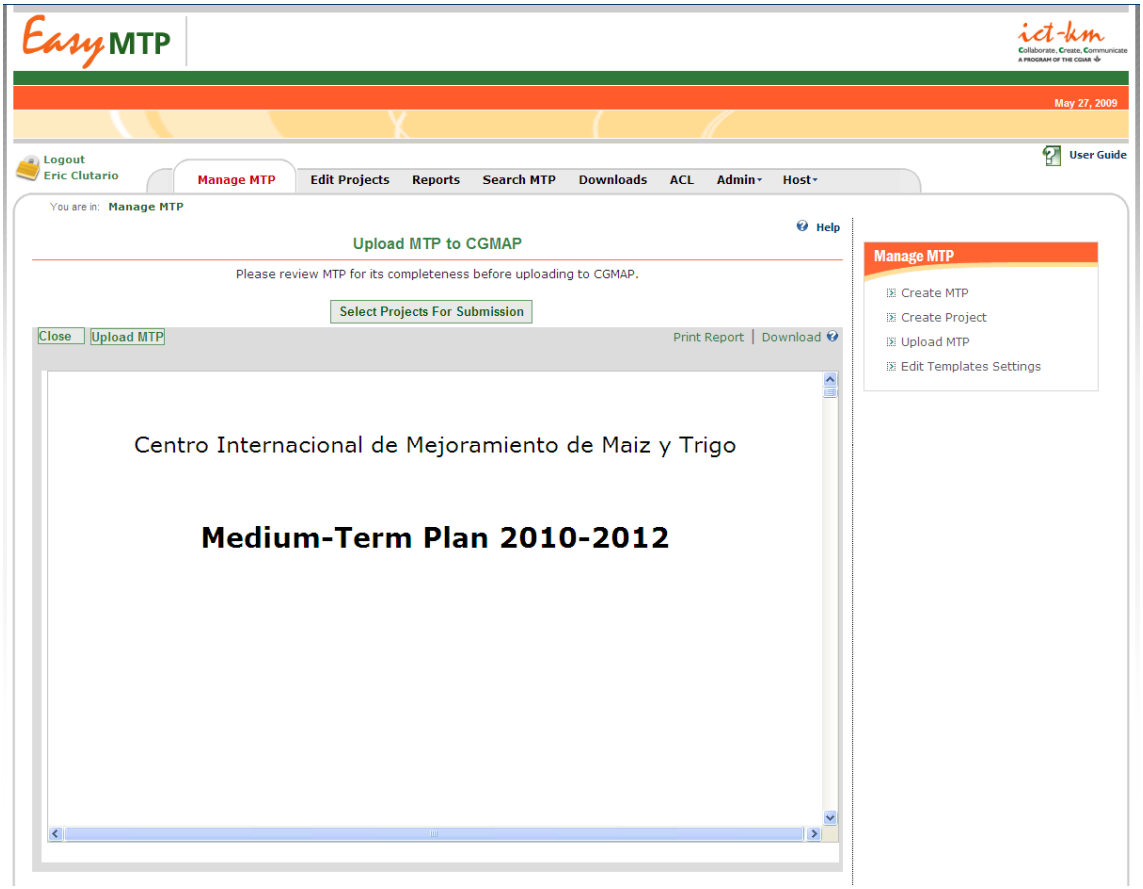


2. ***Optional step.*** A click on **Select Projects for Submission** button opens up this page. If your Center/CP has used EasyMTP also for internal planning of activities that are not to be submitted, or draft/test projects, you can de-select the ones that do not have to be included in the submission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

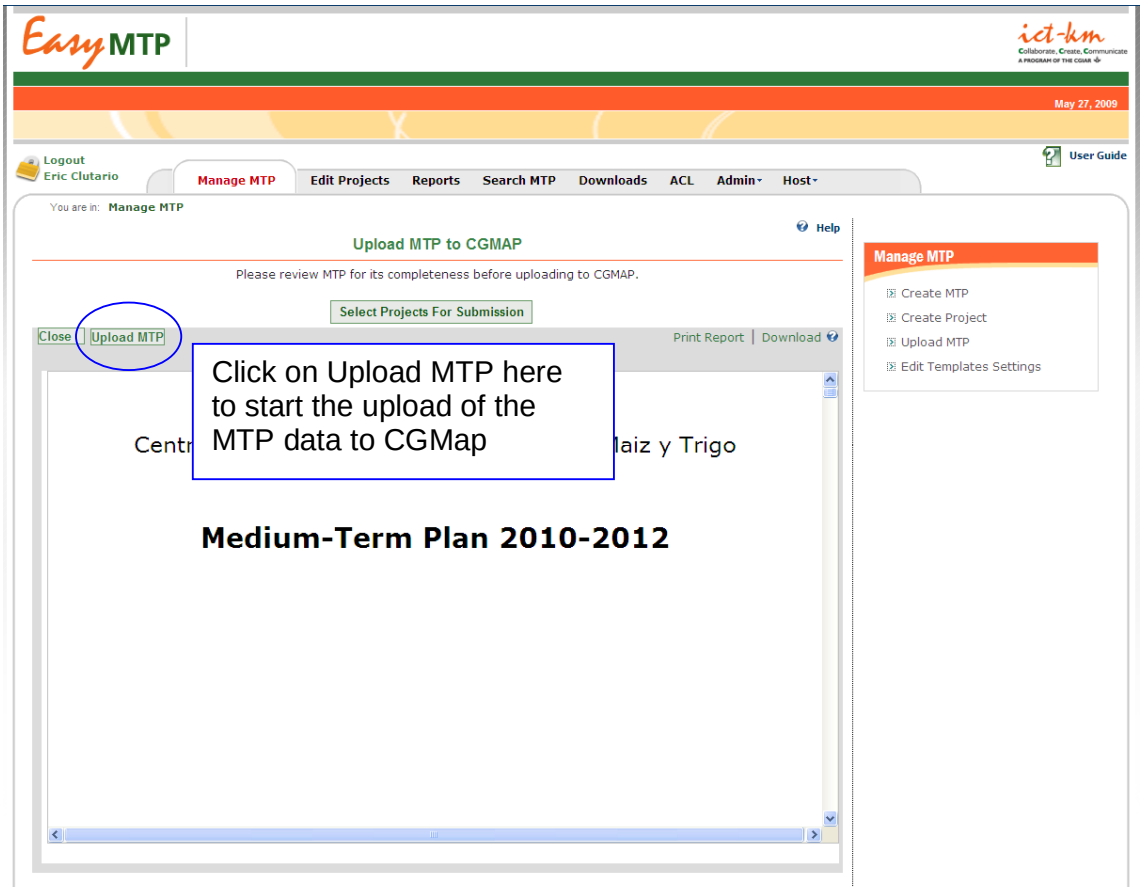


Print or download the report to review it and check that all you want to submit is included.

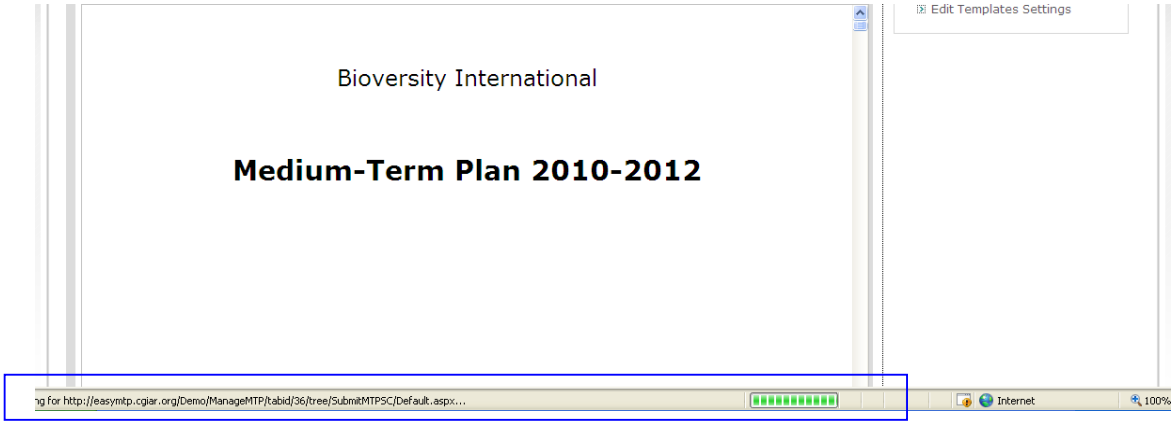
Recommendation: view the full MTP report frequently during the final editing stages of the MTP content entry. This will give you a precise idea of the content integrity and formatting.

If the report shows the correct data, proceed to 4. below. If it does not, click on Close to go 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:

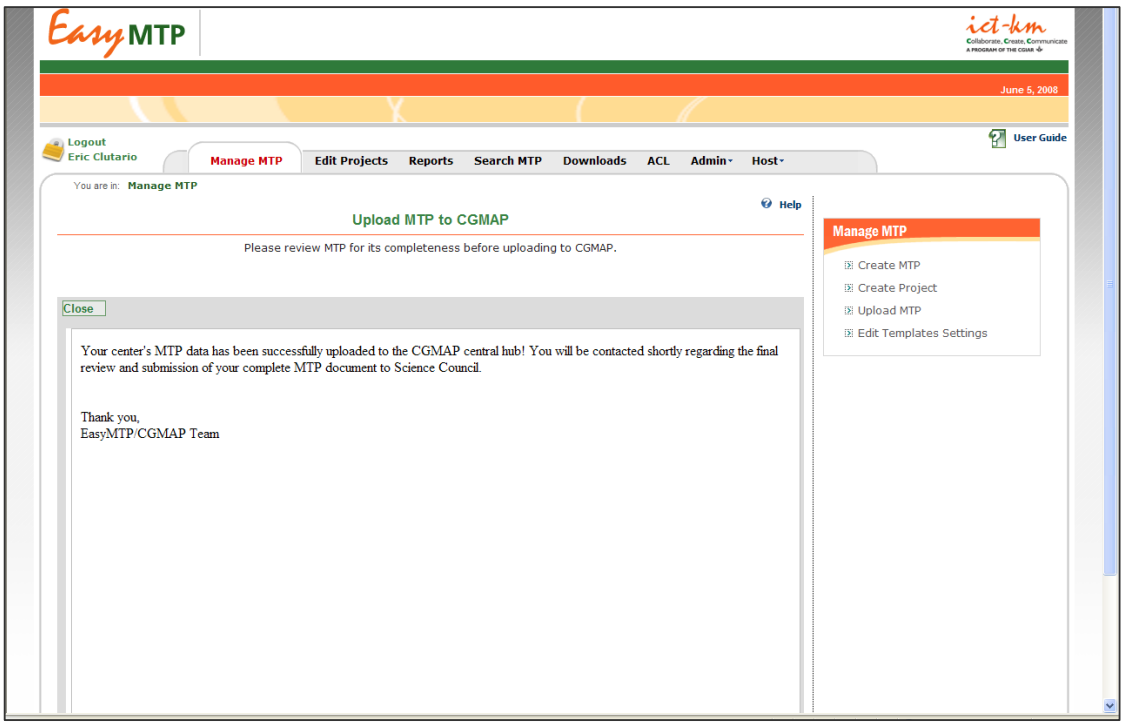


The upload process takes place in the background: please wait patiently until the next screen appears. This process may take a few minutes.



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 cgmap-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.

Any request for re-upload 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, 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.

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 CGMap.

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.
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

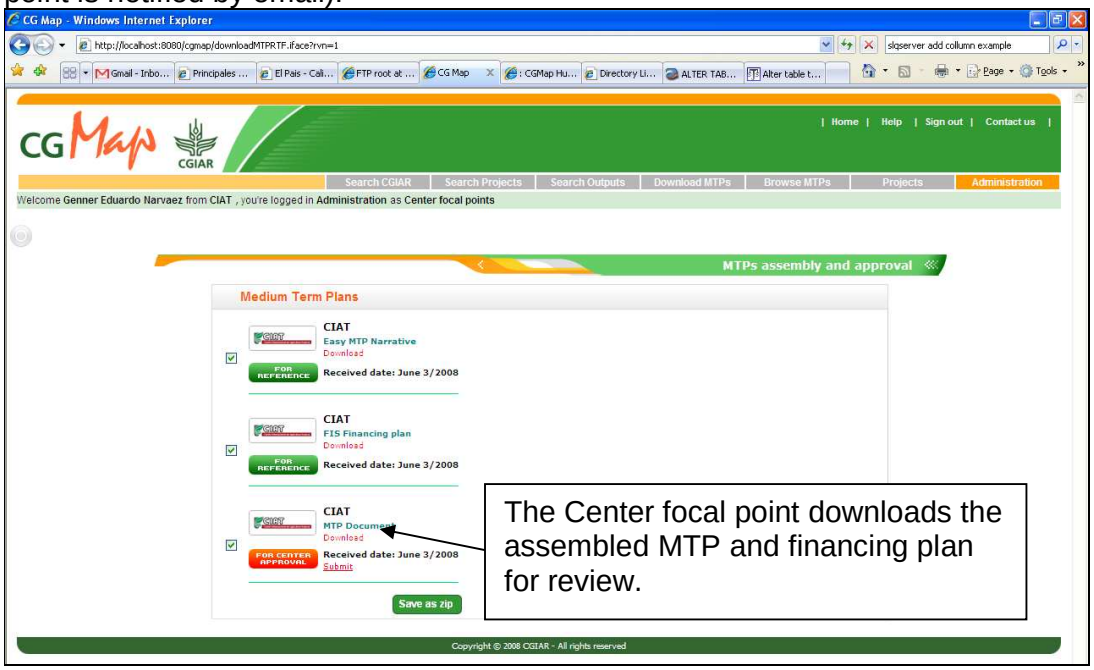
Review policy and procedure

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.

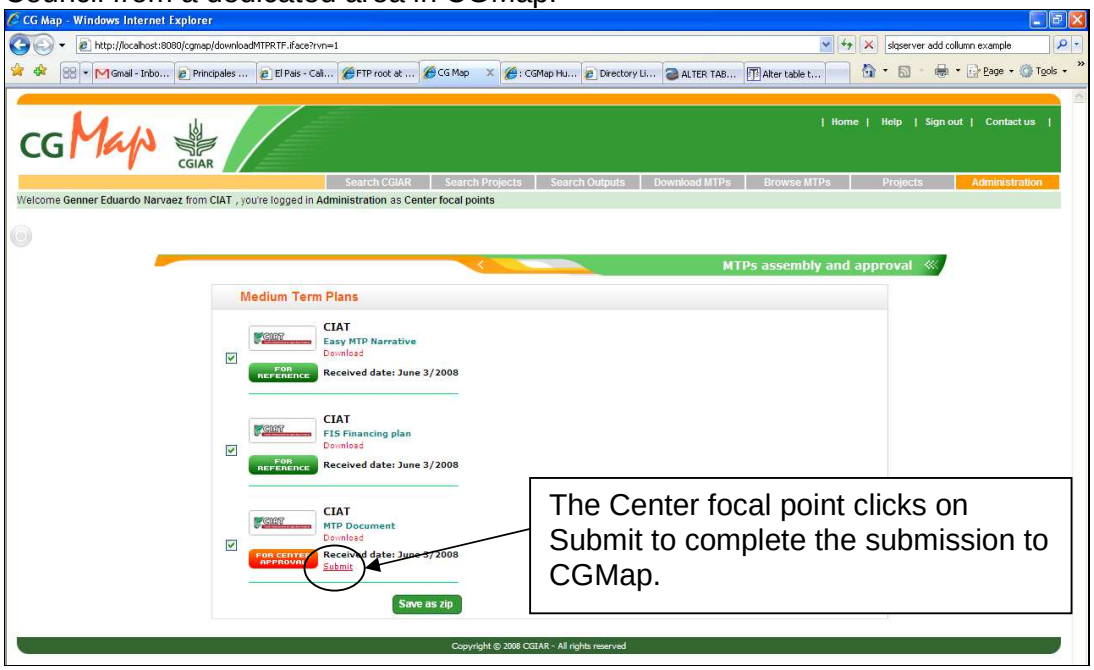
The purpose of the Center's review must **exclusively** aim to check:

- 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 100, 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:

a. if the spelling of Center's/CP's name and acronym is incorrect, the revision is applied to the assembled document;
b. 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.