

CGXchange Technical Report 2006-2008

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Executive Summary

CGXchange was born from the need expressed by the ICT-KM program advisory group to have a 'home' for CGIAR staff. An electronic place where CGIAR staff worldwide could find information they needed, when they needed it. A system's intranet, one that could also support the intranet needs of centers and build on them. In insights, we may have been ahead of our times. We firmly believe the CGIAR needs a solid common ground to communicate and collaborate, and the reform process is confirming this need. But at the time CGXchange was conceived, the times were not ripe. Still CGXchange targeted the promotion and technical facilitation of online collaboration within the CGIAR and between the CGIAR and its partners. Progress has been slow but steady. In July 2007, a Project Coordinator was hired. Promotion and demonstration of the CGXchange tools are ongoing. The positioning of the BEA Aqualogic platform as the tool of choice for Centers' Intranet needs to be reassessed, and more emphasis put on CGIAR-wide unique initiatives for system integration, primarily represented by the sustainable development of CGMap, a CGIAR-wide application that allows easy access to information on research plans (as well as analysis thereof) pertaining to the CGIAR Centers and Challenge Programs over time.

Activities by Project Objective

Although progress has been slower than expected, a problem that was addressed by the appointment of the CGXchange Project Coordinator in 2007, CGXchange has always had clearly defined objectives. Activities for the three years (2006, 2007 and 2008) are detailed in this report objective by objective.

2006

Objective: Develop and implement a sound marketing strategy and plan

- **CGXchange Workshop**

The ICT-KM Program held a workshop bringing together representatives from 12 Centers to discuss their respective Centers' intranet platforms and how CGXchange can play a role in the future intranet. The Learning, Review and Planning Workshop for CGXchange and Plumtree was held at Bioversity International, Rome, from 28 February to 3 March 2006.

During the workshop, the Program harnessed an opportunity to build on experiences to improve the way we do business. The workshop explored those things that worked and those things that could have

been done differently, not just as far as CGXchange is concerned but also within the individual intranets of the participating Centers. At the end of the four-day event, representatives from the 12 participating Centers had shared their experiences on designing and implementing intranet platforms, and had contributed to the design and documentation of CGXchange, covering pertinent areas like Content and Marketing, Technical Requirements, Training, etc. They also came away with a better understanding of how to apply the Plumtree platform (the portal technology behind CGXchange) after attending several in-depth sessions with the Plumtree consultant.

Objective: Ensure CGXchange is operational around the clock, 365 days a year

- **Maintenance and Technical Support**

The continual upgrade, maintenance and development of CGXchange were imperative to the future success of the project. Funds during this period were mainly allocated for upgrade/maintenance as well as to cover the salaries of two part time technical staff to troubleshoot CGXchange problems, assist CGIAR staff with related needs, and support communities by configuring workspaces and performing related administrative and technical tasks.

Day-to-day technical upgrades and maintenance were undertaken by a part-time technical assistant, while larger technical issues were addressed by expert consultants.

2007

Objective: Ensure CGXchange is operational around the clock, 365 days a year

- **Maintenance and technical Support**

The main cost incurred was for maintenance of the platform at CGNET, and the renewal of the technical support agreement with the software vendor. As for personnel, a part-time technical assistant performed routine administrative tasks. Since July, two fulltime staff (the Project Coordinator and the Technical Assistant) have been employed.

Objective: Assist Centers to use the BEA Aqualogic platform for their respective Intranet needs

- **Portal Installation at IWMI**

In January, the platform was installed at IWMI to allow the Center's staff to evaluate the platform in-depth in view of a planned redesign and migration of their intranet. IWMI eventually decided to adopt a

different platform for their intranet, because of the low priority assigned to this project by Center management.

- **Setup and Launch of the Alliance of the CGIAR Centers Community**

In April, work was begun to create a community for the members of the Alliance of the CGIAR Centers. The Alliance is currently using CGXchange as its intranet space, with shared document repositories, and active discussions. The CGXchange team provides technical and training support to the Alliance Office staff and the subscribed members.

Objective: Develop the CGXchange technical platform to guarantee functionality of critical applications

- **Performance Optimization**

Two BEA consultancies were established to optimize the CGXchange login time, which proved to be particularly slow from a number of Centers, in particular those who had not replicated their domain controllers at CGNET. The problem was successfully solved in September, without altering the architecture of Active Directory and putting any special requirement on Centers.

- **Administration of Dgroups and Wikis**

The CGXchange toolkit also includes discussion lists on DGroups and wikis, provided through the Tikiwiki platform. During 2007, 49 DGroups were created, 17 of which were established using the form on CGXchange (Collaboration Tools > Request a DGroups). Over the year, five new wikis were created (list of existing wikis at <http://wiki.cgiar.org/>)

Objective: Develop and implement a sound marketing strategy and plan

- **Ongoing Promotion and Awareness Raising**

During the last six months of 2007, several demo projects were created and demonstrated to potential targets groups, both inside Centers and among System Office Units. This activity has not led to new adopters of the platform, for several reasons. Most potential user groups are already very familiar with MS Sharepoint, which integrates seamlessly with common Microsoft desktop applications. Others just do not feel confident enough in their position to introduce new ways of conducting projects. This latter reason has been reported on a couple of occasions.

Resistance to change regarding the way projects are conducted and the way information is shared during projects is the main obstacle

encountered in proving to staff the benefits of adopting at least the collaboration, out-of-the-box features provided by the system.

Notwithstanding the difficulties in successfully getting the system adopted, the promotion and demonstration activities shed light on some of the core cultural and behavioral factors that influence technology adoption. These findings are not discouraging per se, but are turning out to be very helpful in defining a positioning strategy for the BEA Aqualogic platform.

For example, projects that have external partners with no access to Intranet-based systems often have a compelling reason to adopt CGXchange.

The collaboration and information sharing features of the platform are mostly appreciated by seasoned users of Web technology (by this we do not mean people with IT skills), and by staff in positions that require them to manage document repositories, archive information, distribute information and manage projects on an ongoing basis. The sophisticated features of Aqualogic tend to be less appreciated by people who seldom need to access and share information. Email would prove more manageable and familiar for information exchange in these cases.

It was also observed that Aqualogic, as implemented in CGXchange, works off the principle that a user's need for collaboration can be satisfied through a Web interface. Although CGXchange can integrate with MS desktop applications like email, calendar and word processing, there is still the assumption that users work off the CGXchange interface primarily, and only use their local applications as a second choice. This is an opposite approach to the model most MS Office users are used to: starting from the local applications, and then sharing or "pushing" information to the publicly owned space.

In conclusion, it seems that competing with MS Sharepoint may be fruitless in the future, and that a successful unique positioning of CGXchange and its tools could stem only from covering the ground that no one single Center intranet can cover.

Objective: Develop and implement a sound content management strategy

- **Content Development**

On the content development side, a discussion space was launched on a publication about Websites and impact, the promotion of which is being planned.

- A dedicated area was opened and is maintained to inform CGIAR staff about the major milestones of the CGMap project, including a video on the desirable search features of CGMap, produced by CIAT (available from the home page of CGXchange via the navigation bar at *Research Projects*). CGMap is being designed and developed as one of the “core applications” that are unique to CGXchange, as it will allow the search and analysis of research project and related information across the CGIAR Centers.
- A test of a new standard for semantically-enhanced RSS feeds, and Agrifeeds developed by FAO, was conducted to assess the viability of the standard production of feeds to be aggregated in the CGXchange portal.

2008

Objective: Develop the CGXchange technical platform to guarantee functionality of critical applications

- In January, a BEA consultant was contracted to fix some aspects of the interface configuration, implement the *Save Password* functionality in order to resolve the issue of login timeout, and configure the Collaboration feature “*Ability to e-mail a Project*”.

Seminars and demonstrations of the system capabilities were offered to several groups in the CGIAR.

However, the decreasing number of users, the increased cost of the BEA Aqualogic technical support package, and a number of technical and environmental factors described below in *Lessons Learned*, have determined the decision to decommission CGXchange and the BEA Aqualogic platform.

Content is being exported, group administrators alerted, and the platform will be removed from its current online address by January 10, 2009.

Lessons Learned

The last two years have seen decreasing adoption of the portal concept and its underlying technology, due to many environmental factors and issues implicit to the software platform selected for the portal.

The plans to encourage the Centers to adopt a common platform for their intranets and shared information systems have encountered much resistance. The reality is that intranets are highly-sensitive endeavors that have to deal

with an extreme variety of requirements, needs and priorities inside organizations. In these situations, technology is the last factor in the equation.

However, it is necessary to distinguish two important factors at play in this situation: the concept of the portal platform has not encountered consensus, while the need for exchange and aggregation of information across Centers and units has remained unchanged. This has been one of the key factors in the achievements of CGMap.

CGMap started as the 'killer app' in CGXchange. Adoption so far has proven that it is a fertile ground for development.

Over the last year, while preserving its core objective of providing a 'house' for System stakeholders, CGXchange as a project has shifted its focus from an arena with excessive variability, to supporting a business imperative: the generation, submission, sharing and analysis of core information for the CGIAR research community.

This approach is ultimately enabling the Availability, Accessibility and Applicability, of CGIAR information products and data, thus maximizing their value and impact.

The structured information and data maintained and delivered through EasyMTP and CGMap must rely on a framework of standards that provides the common thread for defining, re-using, labeling, aggregating, and delivering structured and useful information.

CGMap has proven that when technology supports a core business process, adoption is more likely to occur and the need for information exchange will emerge.

The transition towards a new configuration of the CGIAR makes us wary of identifying right away an alternative platform to support the portal concept on which CGXchange was built. Strategically, we have decided to give priority to supporting a core area of work of the Centers and Programs and be ready to modify plans as necessary.

Activities Planned for 2009

Given the changed scenario described above and the dramatic fund reductions for 2009, it was decided to dismiss the BEA Aqualogic platform and invest the reduced funds in EasyMTP/CGMap.

Regarding collaboration technologies, a case study of the Google Apps suite or tools was conducted between June and September 2008, and has been very positively received and tested by 200 users across the System. The functionalities offered by Google Apps cover the majority of online

collaboration and information sharing requirements, while reducing setup and maintenance costs.

The ICT-KM Program plans to continue providing the Google Apps platform to meet the requirements of online collaboration and information sharing.

The strengths of Google Apps lie mainly in the low cost for setup and use (fees are paid annually per user, and there are no license purchasing, server setup or maintenance cost up front), large storage capacity, ease of use and speed. These, and other more technical aspects, make it the ideal alternative solution to continue supporting online collaboration while the CGIAR moves towards a new institutional configuration that may impact any major technology strategy in the future.