

*Annual Progress Report*

ICT-KM electronic-publishing project

**Reporting period:** March 15, 2005–March 15, 2006

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For the project core team: Michael Devlin, IWMI (to June 2005); Edith Hesse, CIAT (to May 2005); Jennie Drew, IPGRI (to March 2005); Anthony Collins, CIP.

**Target Audience:** CIO's office, IPGRI management, project team members and

their immediate stakeholders, and all stakeholders in the CGIAR e-publishing process.

## EXECUTIVE SUMMARY

Following a successful initial Assessment Phase (Mar-Dec 2004), the ICT-KM e-publishing project proceeding to the Development/Implementation phase (beginning Jan 2005). Initial tests of a prototype system showed great promise for the eCMS system as a platform supporting e-publishing in the CG system. However, subsequent progress has been slow and hampered by delays in development of the contracts with the main supplier and problems in pilot testing. A one-year extension of the project is needed to complete delivery of the planned system.

**Financial highlights.** The project financial disbursements are running behind schedule, as a result of the delays in delivery of the system and consequent lack of roll-out to additional centres. Major expenditures during the reporting period were limited to a total of £15 000 paid to Konnect Soft for the delivery of the prototype eCMS, US\$ 49 383 paid to date to Konnect Soft for the development and delivery of the pilot beta testing system, and the costs of a CIP staff member to travel to Italy to work with IPGRI on further testing of the system. Funds still available to the project amount to US\$ 165 170. These funds will be focused primarily on the piloting/implementation of the eCMS in CG centres, and on other activities needed to implement the publishing standards (DTDs and vocabularies) that relate directly to this project.

**Learning highlights.** Four key lessons were learned during this phase. First, losing more than half of your core project team seriously impedes progress, and requires investment of large amounts of time to bring new members up to speed. Second, having the project coordinator in one centre and the project budget in a second centre is a recipe for sclerosis, with confusion and uncertainty about roles, responsibilities and process for expenditure of funds. Third, when dealing with technical projects like this one, there is a danger of getting wrapped up in the technicalities (especially when faced with many problems to solve) and overlook the need for communication among the team and with its constituencies. Fourth, there is no substitute for face-to-face interaction with team members in getting things done; virtual teams working across time zones are fine in theory but not when the team needs to interact in depth.

**Shortcomings and challenges.** Major problems faced by the project during the past year include the loss of two key members of the original core team, including the project coordinator, the loss of one of the original core participating centres during the initial testing phase, and the competing demands on the time of project team members from their 'day jobs'. Together these resulted in less time than necessary being available to dedicate to the project, especially at crucial junctures (e.g. review and negotiation of the software contract, testing) and pressure on the remaining core team members.

These pressures contributed to the infrequency of communication from the project core team to its constituencies. The project core team will need to improve communication about the project and its achievements if it is to gain the buy-in necessary for successful adoption of the eCMS.

## 2. Project performance

### 2.1 Progress of the e-publishing project

The e-publishing project is behind its original planned progress. This is largely due to delays in development and signing of the contract for development and delivery of the e-publishing software platform with the chosen supplier.

In March 2005, a **contract was signed with Konnect Soft (KS)**, a company specialising in electronic publishing support systems, to develop a prototype e-publishing software platform (eCMS) and support testing of the system in CGIAR centres. Unfortunately, this coincided with the departure from IPGRI of Jennie Drew, a key member of the core e-publishing project team.

During April, CIAT, CIP, IFPRI, IPGRI and IWMI sent Konnect Soft examples of the type of content that they wish to be able to publish using the eCMS system, for KS to upload to the prototype system.

#### Prototype test

KS delivered the **test prototype** at the beginning of May, and conducted online briefing sessions with teams from each of the five test centres. KS also delivered a **PowerPoint 'demo'** of the system, which was distributed to all CG centres. Michael Devlin and Paul Neate sent e-mails to 'publishers' at all the centres, briefing them about the test and 'demo' and encouraging their participation. These e-mails were followed up by telephone calls to discuss the project and how the centres could contribute by reviewing the demo. The centres were given two weeks to test or review the demo, with feedback requested on specific questions regarding the usability and usefulness of the system in support of information dissemination from the centres. The centres were encouraged to involve multidisciplinary teams in this assessment, with publishers, information managers, editors, information technology and Web specialists.

Responses were received from three of the 'hands-on' test centres (CIP, IPGRI and IWMI) and from six 'demo' centres (CIFOR, CIMMYT, ICARDA, ICRISAT, IRRI and WorldFish). These **responses were highly positive and in favour of pursuing further development and adoption of the system.**

#### Decision meeting

The results of the prototype test were presented at the **C4D decision meeting** held at IPGRI at the end of May 2005. Representatives of KS attended the meeting and presented the eCMS system, demonstrating its capabilities to the C4D participants and answering questions on the system.

The meeting recognised the work that the e-publishing project had done on the CGIAR metadata application profile, and encouraged the other C4D projects to consider adopting it. Luz Marina Alvare, IFPRI, was tasked with identifying a 'metadata champion' to pursue the testing and adoption of the metadata standard.

## Second phase work plan

This point was the conclusion of the first phase of the project, and an outline **work plan was drawn up for the second phase**, implementation of the eCMS. It also coincided with the departure of Michael Devlin, who had led the project as its coordinator since its conceptualisation.

The plan for the second phase called for:

- Setting up a new e-publishing project team (PN: 6 June 2005)
- Refining the CGIAR e-publishing specification, based on the feedback from the testing (PN: 6 June 2005)
- Developing a contract with Konnect Soft for development and delivery of a beta-testing system based on the CGIAR e-publishing specification (KS: 24 June 2005)
- Reviewing and negotiating the contract with KS (LTH: 8 July 2005)
- Sign contract (E. Porcari: 15 July 2005)
- Develop and deliver full prototype (KS: 31 August 2005)
- Implementation of the prototype in four centres (CIP, ICRISAT, IPGRI and IWMI) (September–December 2005)
- Demonstration of the system at AGM 2005 (December 2005)
- Sharing pilot implementation information with all centres (October–December 2005)
- Development of an implementation plan for roll-out to all interested centres (December 2005)

This plan proved too ambitious. While the first two steps were completed on time, and the initial draft contract was delivered at the end of June, the process of review, revision and subsequent legal review was not completed until the end of September. The causes of this delay were on both sides of the process, with slow responses from both the project team and from KS, and inexperience with the process of negotiating such contracts resulting in, for example, the engagement of legal review being overlooked until after a 'final' agreement had been reached with KS.

The process was complicated by the departure of the project coordinator in June and extended discussions about arrangements for management of the project.

As a result of the delays, work on the CGIAR prototype clashed with prior end-of-year commitments of KS to other clients, with the result that delivery of the full prototype was pushed back to the first quarter of 2006. This has had a number of knock-on consequences for the delivery of the project. In particular, it led to clashes in workload between project and institutional demands for the project coordinator and core staff in the run-up to AGM and the year end.

## AGM presentation

Given the crucial need to present the progress of the project at **AGM 2005**, an interim work plan was developed for **phased delivery of the system components**, with the initial goal of being able to demonstrate the delivery of two or three types of publication

from IPGRI and, it was hoped, from CIP in print and Web forms with different institutional identities. In the event, pressures of delivering institutional demands for AGM prevented CIP from participating fully in this phase.

During October and November, Paul Neate created a **Word template** based on the CGIAR Document Type Definition developed in phase 1 of the project, as the basis for importing structured Word documents into the eCMS. He also developed an Adobe **InDesign template** for a generic, multi-section, multi-chapter publication, with styles mapped to the DTD and Word template. IPGRI delivered to KS three multi-chapter publications as Word files using the Word template styles, and examples of types of Web pages that the project wanted to be able to deliver content to.

KS developed the platform to the point where it was possible to deliver content to the InDesign template and to a test Web site in time for AGM. However, given the lack of Internet connectivity at the AGM venue, the system was used instead to generate a series of screenshots that were then used as part of the **CIO's video presentation** on the ICT-KM program.

#### Alpha-testing prototype

Following delivery of the material for the AGM presentation, KS and the core e-publishing team developed a **further phased development plan** for delivery of the full eCMS system, with testing of Word import, workflow, editorial processing and hardcopy and Web delivery modules starting in mid-January 2006.

The **alpha testing prototype was delivered on 13 January 2006**, and testing started at CIP and IPGRI. Considerable feedback was provided to KS on problems experienced at IPGRI and at CIP. These primarily revolved around the system's apparent instability, problems with uploading content from IPGRI, the system's inability to deliver certain types of content to either hardcopy or Web and the inability of the system to deliver to any Web page other than the KS test site. Given the continuing problems with using the system, the project team decided to hold off on involving other centres in the testing programme.

In an effort to move the process ahead, the project decided to fund the participation of Paul Moncada, Web master at CIP, in the ICT-KM CGXchange project evaluation workshop at IPGRI and to pay for him to stay on for a further week to work with Paul Neate in testing and evaluating the eCMS system. KS were pressured to deliver a **beta testing version** of the eCMS, with the major problems identified in the February tests addressed.

The first two days of the testing week (6 and 7 March) were lost due to technical problems (the IPGRI IP address having been added to the list of 'banned' sites on the KS server), and continuing difficulties in loading content to the eCMS. CIP continued to be able to deliver content to the system and was not facing the same problems as the IPGRI test site. It was at this point that we discovered that the system appears to have problems operating with Windows XP Professional (which IPGRI is using but CIP is not,

still using Windows 2000). At the time of writing, KS are urgently addressing this crucial problem and the project team awaits further developments.

Nevertheless, the CIP team is convinced that publication of the CIP Annual Report 2005 is viable in the near future, as within the limits of using the Windows 2000 PC platform instead of Windows XP, all critical publishing functions are operational and available from the KS-hosted server using the prototype system.

## **2.2 Challenges, constraints and shortcomings**

- The loss of two key members of the core team considerably weakened the team just as it moved from phase 1 (assessment) to phase 2 (development and testing).
- The loss of one of the original test centres during the initial testing weakened the team still further.
- Pressures of the competing demands on the time of core team members from their 'day jobs' severely limited the time they could dedicate to the project.
- Demands from within the project focused team members, especially the project coordinator, to inwardly, with the result that communication with external constituencies suffered.

## **2.3 Changes made to project intentions**

The project has had to reassess work plans, deliverables and timelines at several points over the past year. Delays in signing the main contract for delivery of the eCMS platform have resulted in the need for an extension to the project to meet its original objectives.

## **2.4 Conclusions and future plans**

At this point, we await the delivery of a stable beta testing version of the eCMS that will allow the core project team at IPGRI and CIP to create, manage and deliver content using the system.

Given the difficulties experienced up to this point, the following steps and timeline are suggested:

- KS delivers stable, fully functional beta test version of the eCMS (end March 2006)
- Core team at IPGRI and CIP test the beta system fully and thoroughly (April-May 2006)
- Implementation at ICRISAT, IFPRI and IWMI, with training and assistance from core team and KS (May-June 2006)
- Evaluation of experiences at all five centres (July-August 2006)
- Roll-out to further CG centres (September 2006-March 2007)

## **3. Financial Report**

See attached Chart (FR-2005.xls).

## 4. Annexes

- E-publishing for the CGIAR: Konnect eCMS prototype
  - *PowerPoint 'demo' sent to CGIAR publishers, May 2005*
  - *CGIAR e-pub prototypeFINAL.ppt (available on request)*
- Implementing e-publishing at IWMI – testing and evaluation of a prototype
  - *Memo drawn up by Michael Devlin and circulated to all CGIAR publishers in advance of testing/demo of the eCMS. Outlines the purpose of the testing phase, the implications of the system and action needed.*
  - *IWMI e-pub memo.doc*
- Results of the testing and evaluation of the prototype CGIAR e-publishing system
  - *Memo to all those involved in testing the eCMS prototype and all observer centre representatives*
  - *e-pub phase 1 - prototype evaluation recap memo.doc*
- Testing the Konnect Soft eCMS e-publishing platform – September–November 2005
  - *Message to phase 2 project team and outgoing team members, August 2005*
  - *eCMS\_test\_memo.doc*
- CGIAR Konnect eCMS Pilot Implementation Requirement
  - *Functional requirements of the eCMS implementation for the CGIAR, based on feedback from the testing and evaluation of the prototype (June 2005)*
  - *CGIAR\_Pilot\_eCMS\_Requirements\_03a.doc*
- Outline Proposal for CGIAR: Supply of Konnect eCMS Pilot Electronic Content Management (July 2005)
  - *KS\_proposal\_cms\_pilot\_CGIAR\_03a.doc*
- Software Agreement between Konnect Soft Ltd and IPGRI Re: Konnect eCMS Pilot (September 2005)
  - *KS\_CGIAR\_agree\_cms\_04a\_cleaned.doc*
- CGIAR Pilot – Draft Outline Schedule (October 2005)
  - *Work plan for delivery of working version of eCMS pilot system with limited functionality for demonstration at CGIAR AGM 2005 (October 2005)*
  - *CGIAR\_pilot\_schedule\_02a.doc*
- E-publishing project input to CIO AGM video presentation
  - *PowerPoint slides and script demonstrating the application of the eCMS platform (November 2005)*
  - *AGM\_e-pub\_slides\_ET\_with\_script.ppt (available on request)*
- CGIAR Pilot – Draft Outline Schedule (December 2005)
  - *Work plan for delivery of alpha-testing version of eCMS pilot system with extended functionality for implementation by CIP and IPGRI in production of publications and Web pages*
  - *KS\_proposal\_cms\_pilot\_CGIAR\_03a.doc*
- ICT/KM E-publishing project work plans, February/March 2006
  - *E-publishing project team work plan for testing and roll-out of the eCMS system*
  - *EpubProjWorkplan.doc*
- Final budget report from IWMI (May 2005)
  - *Note: despite being labelled 'final' the actual amount received by IPGRI from IWMI on transfer of the funds was US\$ 226,081, not US\$ 204,110.64 as indicated on this report.*

*The different reflects the 'recovery' of unused funds under the line item 'External Consultants - Mark Faul - Bellanet'.*

- *Budget\_2005\_IWMI\_final.xls*
- Budget update on the Agreement between The International Water Management Institute (IWMI) and Bellanet International Secretariat (July 2004)
  - *Bellanet\_updated\_Budget\_12July2004.doc*
- Project financial report generated by IPGRI Corporate Services
  - *Note: the line item "Budget for year 2005" shows an expense of US\$ 56,400 against the project budget. This expense should have been charged to the ICT-KM Program budget, not the e-publishing project budget. The error will be rectified in the 2006 financial report. Hence, funds actually available to the project are US\$ 165,170, and not 108,770 as shown on the financial report.*
- *FR-2005.xls*