

Project Detail: CGXchange Next Phase - Content and Collaboration

CGXchange is one of the most concrete examples of a CGIAR “System-wide” service. While the basic technical infrastructure and content elements are in place, we now need to consolidate this. We must ensure that ongoing maintenance and management is provided, and that content providers are able to make their content available on a sustainable basis to those who need it. It is also necessary to have all Centers and Challenge Program onboard and to open CGXchange to our partners. We envisage CGXchange becoming an indispensable tool for most if not all CGIAR staff, as well as for partners (at least, with regard to open content).

There are several “critical mass” benefits relevant to the existence of CGXchange. The CGIAR is a more important player collectively than all the Centers acting individually. Working collectively will result in:

- increased ease of doing business with the CGIAR
- increased visibility
- partnerships that are more easily enabled and supported

A common platform helps internal staff feel part of something bigger, and there is also empowerment of staff through improved (and inexpensive) access to tools and content; plus it allows others outside the CGIAR to view and work with appropriate people, communities and projects within the CGIAR. The Project will contribute to bringing these benefits to the System as a whole, to individual Centers, Programs, Units and Communities of Practice, and also to CGIAR partners.

2.1 Objectives

The general objective of this Project is to make CGXchange fully and sustainably operational and an indispensable tool for most if not all CGIAR staff, as well as for CGIAR partners.

The specific objectives of this project are to:

- 1) ensure CGXchange is operational around the clock, 365 days a year;
- 2) develop the CGXchange technical platform to guarantee functionality of critical applications;
- 3) develop and implement a sound content management strategy;
- 4) develop and implement user security strategies and policies;
- 5) develop core “killer applications” so that they can be available on a sustainable basis (one such application covered in this document is the CG-PM Interface, now evolving into the MTP Analysis Program - MAP);
- 6) assist Centers so that they can use the BEA Aqualogic platform for their own respective intranet needs;
- 7) develop and implement guidelines for partners access;
- 8) develop and implement a sound marketing strategy and plan; and
- 9) monitor and evaluate use and usage of CGXchange and make appropriate platform and content revisions based on those results.

2.2 Project Governance and Personnel

Shortly after the CGXchange Project is approved, the CIO will identify a full-time Project Leader. This Project Leader will be hired for a two-year term, based at Bioversity International and reporting directly to the CIO. Project activities will be distributed across Centers as much as possible.

The leaders of the follow-up activities to the CGVlibrary (formerly VLS) and the Digital Content for Learning (formerly OLR) projects, together with the CGXchange Project Leader will be members of the CGXchange Project Management Team and will report to the CIO. One of the lessons learned from the 2004 Investment Plan was the need to have projects that are closely related implemented within a common governance framework. For this reason the formulation of the CGXchange Project Management Team will ensure that both technical and process integration occur to an optimum level.

2.3 System Implementation

The Project Team will:

- 10) Revisit information architecture through analysis of feedback/requirements from Centers
- 11) Prepare guidelines for information "contributors"
- 12) Obtain online feedback for the development team
- 13) Prepare and provide "standards" on the sharing of content: classification, metadata, and controlled vocabulary
- 14) Develop, at an early stage, clear definition of roles and responsibilities at the Center and System levels
- 15) Prepare security and access guidelines
- 16) Continually refine the specifications of core functionalities. These functionalities are:
 - Collaborative interactive services with scientists/partners and the public
 - Corporate tools and applications (single sign-on) integrated into the intranet/extranet
 - Content that is easily contributed by non-IT specialists (easy content management)
 - Online survey tools (internal/external)
 - System-wide search capabilities – multilingual and federated, with customizable metadata
 - Personalization
 - A centralized document repository
 - Automated publishing to the Internet
 - Monitoring and evaluation of usage, usability, usefulness
 - Staff directories and instant virtual groups
 - Localization (language)
 - CGIAR taxonomy for all objects
 - Integrated/synchronized information/content (managing the life cycle of all content)
- 17) Create a bank of reusable objects (portlets)
- 18) Integrate applications as required
- 19) Document experiences
- 20) The Project will provide support to Centers adopting BEA Aqualogic as their platform in terms of training, expertise, and the sharing of knowledge and applications.

2.4 Marketing

The Project Team will develop and implement a detailed marketing plan with the assistance of a consultant (or Center staff member). This plan will:

- 1) Differentiate and classify the target audiences, both internal and external
- 2) Identify champions for the target audience
- 3) Identify user needs and generate the necessary tools/services to satisfy those needs
- 4) Target users with announcements of new features as they become available; use case studies to promote their use; and use events/meetings to demonstrate and promote them
- 5) Track the '3 U's' – Use, Usage and Usability (analytics) by users/market segments using the guidelines developed by the Web Content and Usage project
- 6) Iteratively identify markets and then refine products
- 7) Identify and adopt a variety of innovative marketing channels for specific audiences (virus marketing)
- 8) Generically market CGXchange as the new way of doing things
- 9) Place the CGXchange logo on each Center's website.

2.5 Training

The Project Team will develop and implement a detailed training plan for the duration of the Project. This plan will initially include the following steps:

- 1) The core Project staff plus individual Center staff (3-5 at each Center) will take online Administrator (three days) and Collaboration (two days) training courses. Center staff will comprise trainers and IT specialists.
- 2) The core CGXchange team (or a consultant) will prepare an outline of a course to be given for Program Assistants within the Centers and within Programs
- 3) Newly-trained Core Center staff will deliver a half-day course to Program Assistants at each Center.
- 4) The core Center staff will implement a Help Desk at each Center. These Help desks will then form a virtual Community of Practice leading to an evolving FAQ.
- 5) The KM/S Project will maintain and develop norms and guidelines related to the use of collaborative tools and make these available through CGXchange.
- 6) A meeting of the CGXchange System developers from all the participating Centers will take place.
- 7) Training of System developers will be carried out through the BEA Aqualogic online video (basic five-day developer training, with an additional five days for special development, such as GUI customization).

2.6 Content/Applications Verification, Implementation and Support

The Project will revisit existing services, review the results of the March workshop and form focus groups and/or conduct further user studies to verify the most essential content and applications.

The start-up workshop will:

- Elaborate a precise plan for identifying new content/applications to be developed, along with the necessary rollout sequence;
- Provide examples of how a particular content or applications will be developed; and
- Describe how CoPs, Programs, units and information owners can utilize CGXchange for their own use.