Menarid Workshop
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Launch of the Menarid Platform

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Background

- IFAD project document requested ICARDA develop and implement a web platform for Menarid based on Microsoft SharePoint
- Key elements within platform - ability to collaborate and share information
- The original IFAD plan requested a web platform with an enterprise quality - content management system capable of storing project documents for easy upload and distribution.

Recap :Capabilities and features

- Provides a single infrastructure
- Share documents with colleagues, manage projects and publish information with partners
- Powerful search engine
- Gives access to information in databases, reports and applications
- Rich set of collaboration tools on one platform makes it easier to manage and distribute information
- Easier to manage Content Management with compliance measures – document types, retention policies, automatic sorting

Benefits

- **Organize** and edit your documents quickly and easily. Documents can be arranged with any number of different criteria and collaborative editing.
- Includes **navigation** functions and the ability to search documents using a number of different methods.
- Applications programmable include making lists, databases, contact management, planning workflow, discussion forums, and scheduling alerts.

Overview - Data Management

- Data management – primary responsibility is with the researcher
- The supporting framework of guidance, tools and infrastructure and support staff responsibility is with the organisation /institution
- Establishing the roles and responsibilities of all parties involved is key to the successful data management and sharing

Original Requirements

- Metadata: add metadata to docs, key words, tagging for better organisation
- Rating a document by other users
- Rule based workflow
- Library and folder based retention
- Security and access control
- Permissions – role based

Menarid web site

Design and layout
- Basically 3 levels
- 1st level: Home page , document libraries, and about us
- 2nd level: Mini home page for a Country Profile or a Natural Resource Management
- 3rd level: Intervention or informational page specific to an item in 2nd level.

June meeting confirmed list of features

1. Shareable docs – with very open access to all Menarid stakeholders agreed. All grey and related docs should be available and viewable. >> Public and Restricted stakeholders, or can be restricted per project
2. Final published docs – controlled by team leader>> by using workflows for pages and docs. Simple flow contribution and approval
3. Agreed with compliance to data management standards – versioning, one master copy, validation etc>> Document management is platform core

June feature list

4. Security plan agreed – for access control >> Roles and users access controlled from within the platform – applied to sub site, folder or file
5. Strong emphasis on the ability to search whole web site >> Search , indexes , office documents and PDFs, plus the refine search ability by author or doc type

June feature list

6. Strong requirement for a contact list. Easy to use and controlled by information manager of project >> It is available, with project managers details and can be easily expanded. Populated performed by projects.

7. Interest in using RSS feeds from other 10 project web site. Requires standard template for this, as the source sites are very varied and could lead to a poor display >> An example of the GEF RSS feed on home page, others to be added

June feature list

8. Strong requirement for the front page to be feed by the document repository shown key words >> We need data! An example is show announcements

9. There was a great deal of discussion for M+E information to be display but no real agreement. This will evolve and be available later >> the concept of Dashboards is available in the platform. This potential could be very useful. This needs data such as APIs etc. The new coordinator needs to gather and compile this information.

June feature list

10. Design: 10 project websites in the front page at the top of the page. The user will drill down to projects. On the front page will be project feeds (need to know what info pushed here).>> Again this requires content to be ready with criteria to filter which data goes where. One of the tasks for the new coordinator is to establish guidelines and standards.

11. Document repository – will include categories :- learning and briefings, synthesis, grey technical docs (all project information docs), and associated data >> Documented repository exists already and is flexible enough to include categories. This to be refined by Michael Devlin

June feature list

12. Important our project places the GEF logo on the website>> This is located on the front page
13. Targets groups are very important. All of our information should be in a simple form to enhance the exchange of information in an informal way. Suggest a blog like feature would be useful. This would certainly add value to the portfolio>> We have a feature called discussions
14. We must not let language be a barrier to communication. Let each person write in their own language. Remember the target audience is us !>> Platform supports many languages – Arabic, French etc
15. Monitoring of usage – Site web analytics report,. Coordinator run regularly
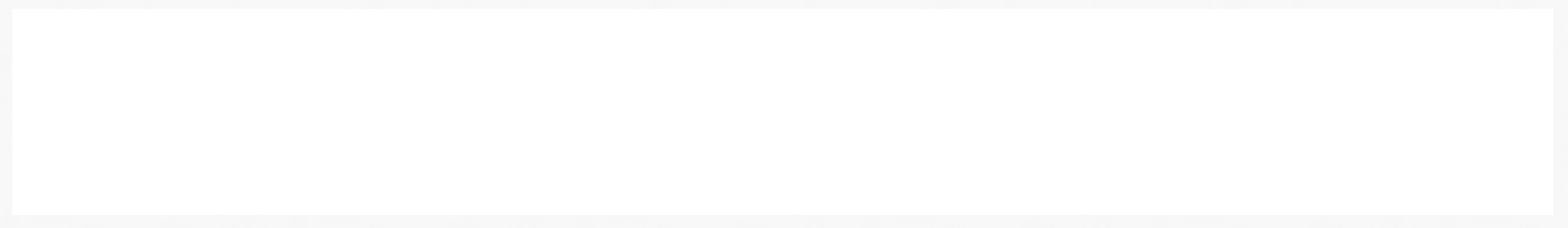
Its your website

- Take ownership
- *Participate*
- Share

Thank you !

- The next session will be demo of the platform by my IT colleague, Web Developer - Ahmad Al-Mously

TOPICS

- What is a collaboration platform
- Features
- Content Structure
- Content flow
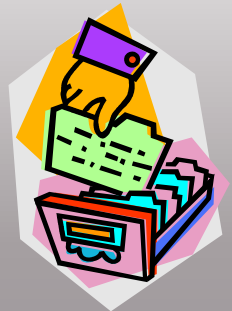- Approval workflow
- Live experience

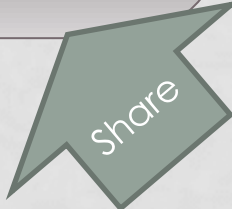# A collaboration Platform

Manage
- Review
- Approve

Share
- Reports
- Calendars
- Tasks
- Discussions

Dashboard

Deliverables

Tasks

Track

Store

Share

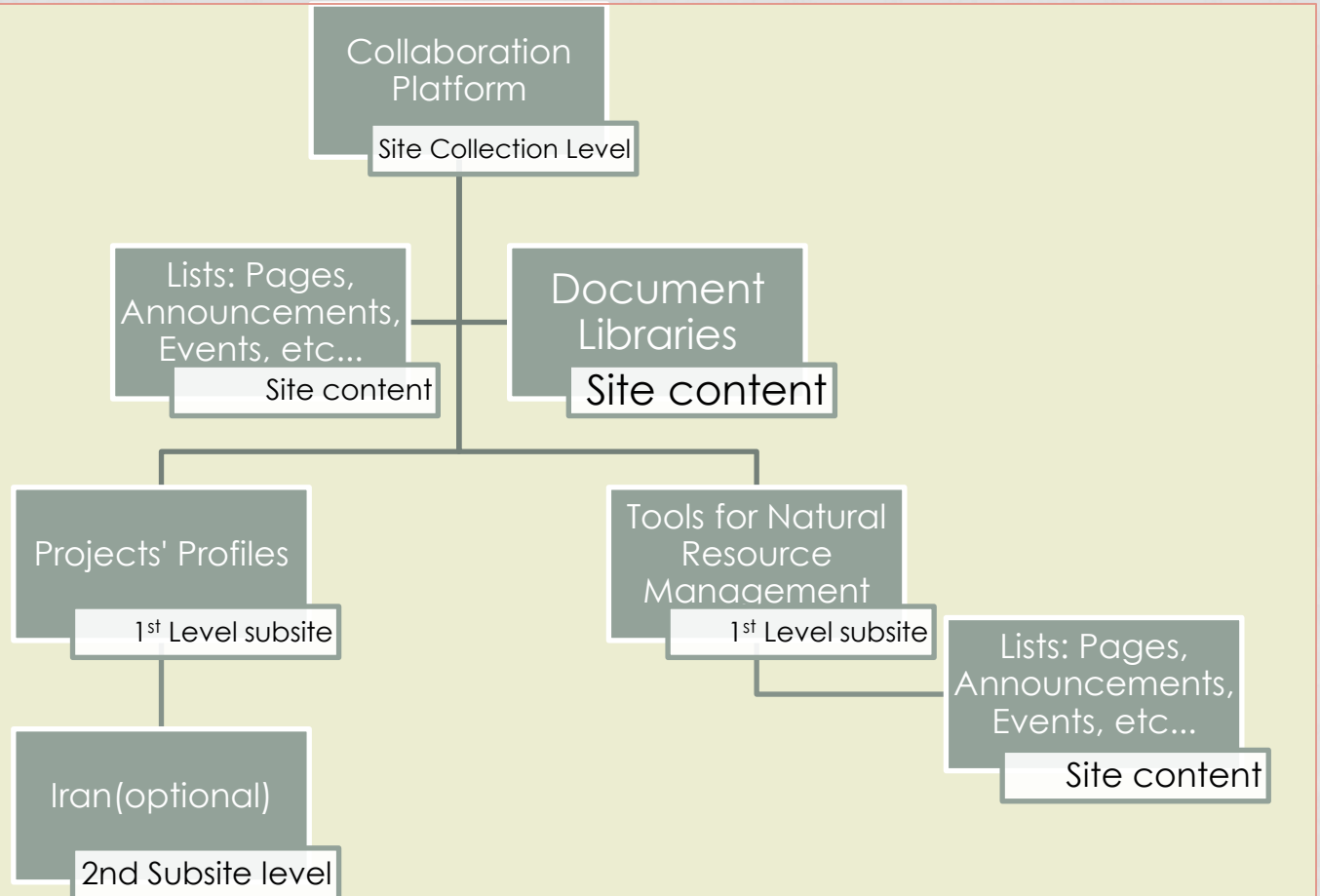Project Manager

Team Members

FEATURES

- Collaboration
  - Discussions
  - Survey
  - Tasks
  - Calendar
- Document Management
  - Sharing
  - Co-Authoring
  - Search
  - Versioning
  - Templates
  - Approval workflow
  - Integration and Web App

MORE FEATURES ☺

- Information Dissemination
    - Announcements
    - RSS and Alerts
    - Wiki
    - Charts and Dashboard
- Offline files using Workspace
- Enhanced search
    - Thumbnails
    - Adverts
    - Refinements
- Management
    - Security: Users and Roles
    - Workflow
    - Recycle Bin
    - Web analytics

HIERARCHY

Collaboration Platform
Site Collection Level

Lists: Pages, Announcements, Events, etc...
Site content

Document Libraries
Site content

Projects' Profiles
1st Level subsite

Tools for Natural Resource Management
1st Level subsite

Lists: Pages, Announcements, Events, etc...
Site content

Iran(optional)
2nd Subsite level

CONTENT WORKFLOW

Restricted Access

Public Access Website

Collaboration Platform

Site Collection Level

Lists: Pages, Announcements, Events, etc...

Site content

Document Libraries

Site content

Projects' Profiles

1st Level subsite

Tools for Natural Resource Management

1st Level subsite

Iran(optional)

2nd Subsite level

Document Library

Site content

Website

Site Collection Level

Approved Lists

Site content

Published Documents

Site content

Filter + Aggregate

Filter

Filter + Aggregate

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APPROVAL AND PUBLISHING WORKFLOW

Author 1
Author 2
Author 3
Resubmit Modify
Approve

Contribute   Review   Publish
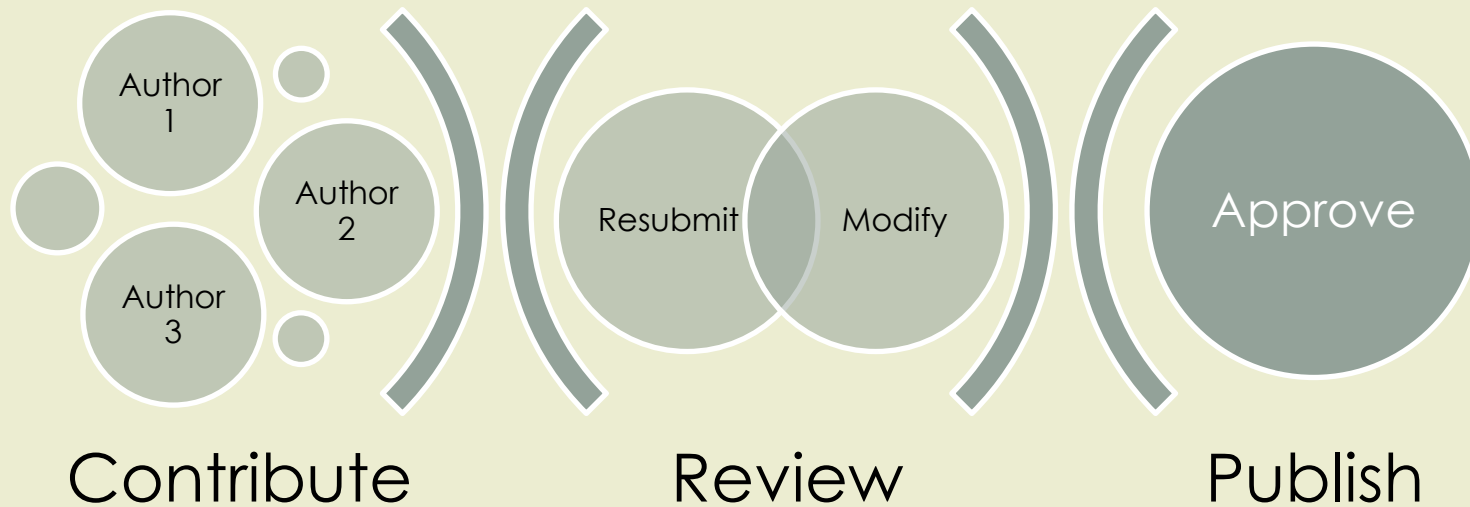
Progress

PRACTICAL COURSE

- Quick introduction to home page
  - Rotator
  - RSS
  - Announcements
- Content creation and Approval workflow
  - How to edit page and approve it
  - How enable approval for content
  - How to create site/page

PRACTICAL COURS CONT.

- Document Management
  - Co-Authoring(Excel or Word) + template
  - Versioning
  - Online document preview
  - Offline documents(SharePoint Workspace) and how it will show that there are unread changes
- Collaboration and Integration
  - Outlook Calendar
  - Tasks
  - Discussions
- Measurement
  - Dashboard
- Wiki
- A word on permissions
- A word on search /tagging
- Statistics
- Support browsers

WHAT IS NEXT

- Further modifications of the hierarchy and structure.
- Standards for content contribution.
- Identification of KPIs
- Training

- Please participate in the Survey

FAQ