

Content Harvesting Protocol

For the Project

eGovernment Portal

Version : 1.0

Written By : Estarta Solutions



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Changes

Version	Date	By	Revised by	Changes
0.1	28.7.02	Mosab Sayyed	-	Created
0.2	15.8.02	Mosab Sayyed	IQC firms	Detailed Digital Transformation section.
0.3	08.8.02	Mosab Sayyed	-	Made changes to Digital Transformation section based on feedback from IQC.

Document Status

Released by

Position	Name	Date	Signature

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1 Introduction

This document defines the protocol to be used for the Content Harvesting to be performed for the eGovernment Portal. The intention is to outline and define a clear process to follow for this phase. This process handles preparation before the visits, conducting the visit and activities to be performed after the visit. An important aspect of the visit is to ensure the visit is successful. A successful visit is defined as leaving with the right and complete information. If this is not possible, an Escalation Process to be applied on the spot is provided. The document also provides some hints and tips on the Environment and People in the government and how to best deal with them to ensure effective meetings.

This document will also help Team Leaders orient their team members properly before the visits in a standard manner.

This document is for limited distribution amongst the teams involved in the harvesting, their Team Leaders, client team and AMIR. The document should not be distributed to people outside the categories mentioned above.

The sections are as follows:

- 1- Preparing for the Visit.
- 2- Conducting the Meeting.
- 3- Escalation Process
- 4- Post Visit Activities.
- 5- Environment & People to Expect.

2 Preparing for the Visit

A key success factor to the visits is being prepared. The following activities should be conducted to ensure the right level of preparation is done:

2.1 Research your Ministry/Agency

Do your homework before going to the visit. The following are recommended items to perform:

- Obtain GoJ Organizational Chart. Go into the details as possible including the dependencies available at this point.
- 1 copy of full “Directory of Services” should be available at each firm. Read the one relating to your ministry/agency.
- List of all GoJ websites should be available to all team members. Try to visit them and evaluate what they have.
- Each member should do his/her homework one day prior to each visit.
- All team members should read and comprehend the Master Vision Document as well as go through fast visits to a couple of outbound government websites included in the Research section.

2.2 Schedule the Visit

Before the actual visit, the Team leader needs to call the ministry/agency’s Liaison Officer and schedules the meeting. Use these best practices to schedule your visits effectively:

- Schedule your visits on a weekly basis. Meaning, schedule the whole week in advance.
- Do the schedule on Tuesdays/Wednesdays:
 - So you can start your visits on Sunday
 - To allow for confirmations from Liaison Officers on availability of people.
- Know the list of agencies and priorities for G2B in order to schedule them first.
- Start working on the list; make calls and schedule appointments.
- Try to get the Liaison Officer to be comfortable with you. Be cheerful and chat with him.
- Inform the Liaison Officer what to expect:
 - Questionnaire filled out.
 - Type of people to be available for the visit. Identify names during call if possible.
 - Clear list of our requirements.
- To ensure people will be there, let the Liaison Officer get back to you with confirmation.
- **Important:** During the call, the Team Leader needs to try to get as much information as possible during the call (departments, services, make sure that questionnaire is filled out, ...etc.)
- If meeting not possible in suggested time move to the next visit and retry after certain time.
- Communicate schedule to the team on a weekly basis.
- A pre-meeting for each team is recommended to agree on logistics and details.

2.3 Have the Right Tools

- Each member should make sure to be equipped with a notepad, pen and badges.
- An official document from MoICT is very helpful to have by each member in case requested by agency staff.
- Forms to fill out should be at hand always. Do not go without them.
- General information form will be handled by Team Leader.
- Visit report available during visit.

2.4 30 second Pitch

Expect to be asked about the portal and the objective of your visit. Time is essential. To save time, rehearse your “30 seconds” pitch to explain. Consult your Team Leader on this.

- A brief scope document to be used as an intro (reference) to all visits by all members.
- Info on e-Gov. and portal for team members to digest before visits.

2.5 Assemble Team

- Assume all the team members are available; if one of the team members is sick or has his own urgent excuse he should inform the Team Leader to arrange for a backup.
- A backup person at each IQC firm should be always in the loop and ready to fill the place of absent people.
- Visits should start at 9:00 AM and the team members should meet at 8:30 AM to prepare for the visit.

3 Conducting the Meeting

Once you are in, please follow the guidelines below to ensure the meeting is conducted as smoothly as possible:

- Assemble the team and enter the Ministry/Agency together.
- Meet with Liaison Officer as a team representing the eGovernment Portal.
- Give the Liaison Officer an overview of the visit.
- Break up to gather information – how this is done is the responsibility of each team member.
- Once the team breaks up, each team member is responsible for gathering information for his track (Business, Citizen and Government).
- Keep the following in mind to accomplish your mission:
 - A form with set questions that are generic yet allow for specifics regarding each agency has been developed for each track. You will find them in **Appendix A**.
 - On the form make sure to fill out name, title department and agency of interviewee as well as the team member name, date and time of the interview. This information must be filled out on the spot or otherwise it will be forgotten.
 - First item to identify is the nature of the people the agency caters for to define the category of the service. Government people might not be able to distinguish between Business and Citizens in their services. Form includes a question to identify that; who are the people that visit the agency? (من هم المراجعين (وما طبيعتهم)). The more detailed answers we get the better we can define the category of the service.
 - The form is more of a way to capture the minutes of the visit. Include every piece of information collected.
 - Collect all relevant material and indicate it in form.
 - Form includes a follow-up list at the end. Follow ups are information that where not available at the time of the visit. Refer to Escalation Process next. **Follow ups are not recommended and are only to be referred to as a last resort.**
- Team Leader should gather the General Information (Questionnaire) and oversee the visit and ensures all the team members are getting the support they need.
- All team members should check with and report to leaders before leaving.
- Checkpoint with the team after the visit to verify visit success.
- At the end of the visit, the Team Leader thanks the Liaison Officer and his team, even if the visit was not successful.
- Team leader completes a checklist with each IQC Firm to help the Team Leader verify visit success.

4 Escalation Process

As a rule of thumb, you must not leave the ministry/agency without getting the information and content you need to ensure the success of the visit. In case you face difficulty follow the below process to escalate any issues you might face:

1. Try to solve the issue yourselves first in a diplomatic manner.
2. If you are not able to solve the issue, notify your Team Leader of the issue you have.
3. Even if you resolve the issue, notify your Team Leader.
4. Team leader tries to solve issue with related government personnel.
5. Team leader can involve Liaison Officer as he deems appropriate to help get the job done.
6. If still the issue is not resolvable, Team Leader calls Fadi Mari or Nour Bani.
7. The issue escalation must happen on the spot and NOT after the visit.
8. Document the issue in the visit report.

5 Post Visit Activities

The visit is only half of the work. The following activities are to be performed after each visit.

5.1 Daily Visit Report (Checklist)

The following visit report is filled out after each visit. This is a mandatory activity performed by the Team Leader in coordination with the team members.

The report will contain the following information:

Item	Value
Name of entity visited:	
Team Leader:	
Time & Date of visit:	
Overall Visit Status	(Red/Yellow/Green) Space for notes.
General Info. Status	(Red/Yellow/Green) Space for notes.
G2B Status	(Red/Yellow/Green) Space for notes.
G2C Status	(Red/Yellow/Green) Space for notes.
G2G Status	(Red/Yellow/Green) Space for notes.
Liaison Officer level of: <ul style="list-style-type: none"> ➤ Cooperation ➤ Knowledge ➤ Preparation 	(High/Medium/Low)
Notes:	(Anything to note about visits? People met, Content validity)

Definition of status':

- Red: Content not collected OR Collected but very low confidence level.
- Yellow: Success but needs follow up.
- Green: All content collected.

5.2 Processing your Visit Outcome

After the visit has been done, you need to file the results. **This is hardcopy filing.** Filing is done per track by each team member according to his company's focus (Business, Citizen or Government). In addition, the Team leader does the filing for the General Information as part of his filing for his track. This general information will need to be consolidated to Estarta.

The filing process should be as follows:

- 1- The results of your visit should be one of the following:
 - a. Open File. This means the visit was not complete and needs follow up to complete it.
 - b. Closed File (everything collected successfully).
- 2- In either case, a file is opened for the information. This is done as follows:
 - i. It is done per company's focus (Business, Citizen or Government).

- ii. Actual hard copy files for each visit.
- iii. Content of folder (what to find in folder):
 1. Visit Report (This is also sent to Estarta and MoICT in the same day)
 2. Details Form (This is the form containing the minutes of the visit)
 3. Material Collected (Official government forms, Attachments, Brochures, booklets, Directory of Services etc..)
 4. General Information form (Mainly the Questionnaire.)

5.3 Tracking Visits

This task is done by the Team Leader on a daily basis to allow IQC firms project managers (also other Team Leaders) track the results from their staff working with other teams. This will happen to ensure that all firms can track their own sections of the portal. Tracking will be done using an Excel file on eroom.

Initially, the tracking information will be basic as follows:

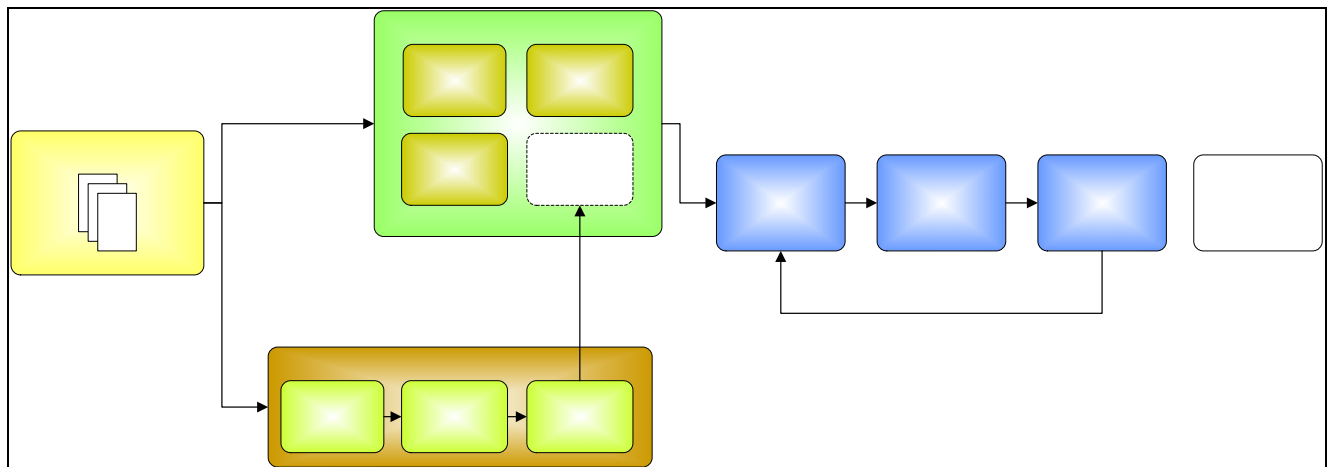
Name of Agency/Ministry	Status	General/G/B/C	Team Leader	Team Member
	Open			
	Closed			

Actions on file:

- Team Leader Inputs into File.
- Project Manager Tracks own section.
- Estarta to track General Information part.

5.4 Digital Transformation

The information will need to be converted into electronic format. Initially, the following tasks will be performed on the files.



5.4.1 Fast Track

5.4.1.1 Raw Data Entry

This is the bulk operation of direct transformation of the content collected into a pre-agreed upon electronic format.

Note: Excel is going to be used as the main tool for transformation. This is very important since this information will be dumped into the CMS system later on and Excel offers a structured manner of performing this task. Plus, most Data Entry people are familiar with Excel.

The following items need to be transformed:

1. **General Information Documents:** These will be obtained from two places mainly:
 - a. The "Questionnaire Document". Data will be keyed in to an Excel sheet creating one file for each ministry/agency.
 - b. The part from the minimal content for the site relating to the Introduction. This could be the vision/mission/goals or a basic introduction. This will depend on each visited ministry/agency but in general we will have a piece to introduce the ministry/agency in whatever manner they provide.
2. **Detailed Questionnaire:** Those are the "Detailed Questionnaire Documents" created by each company for their part for use in collecting information. Data will be keyed in to an Excel sheet creating one file for each ministry/agency. A template should be created by each company based on their respective Detailed Questionnaire.
3. **Forms:** These are the official forms collected from the ministries/agencies that are used in their work. The forms will need to be "recreated" using MS Word. Then they will need to be converted into PDF files. No template will be provided. **Action Item: Need to decide on the necessity to "recreate" forms received as images and are of good quality. Fadi Mari will get back to us on this piece in terms of legality.**

5.4.1.2 Validation

This task is recommended to be done by the Team member that obtained the information in the first place. The validation process takes place to:

- 1- Ensure that the data source and electronic copies match.
- 2- Proper format of template(s) is used in all documents.
- 3- File naming convention is provided. (Use the one provided by MoICT on eroom)

5.4.1.3 Upload process

All documents will be in a central repository so that all companies/teams can obtain access to their related information. A master folder will be created for each ministry/agency (by the Team Leader associated with it) which contains the subfolders Business, Citizen, and Government. Documents related to the General Information documents will be uploaded to the Main folder of its relating ministry/agency.

Each of the three subfolders will host the documents resulting from the following types:

- Service Information.
- Detailed Questionnaire.
- Forms.

This operation must follow a check that a folder/subfolder is not already existent in system before proceeding in creating a new one.

5.4.1.4 Translation

Content needs to be translated. This is mainly agreed upon for the Business and Citizens sections. A risk was identified relating to the updating of the content from the Content Managers after the site has been published. However, MoICT will handle managing this risk.

After content is translated, it is regarded as a "separate" piece of information. This is necessary to allow for the fact that some information is already available bilingual. Thus, the repository will assume two pieces of information available in Arabic (default) and English. The translation will be for the information not translated. Once they are translated, they fill the

5.4.2 Services Information Processing

This is information on the services of each Ministry/Agency. The information collected by each agency will need to be processed manually before being digitized. Two main actions need to be performed on this specific content:

- 1- Classify which content is for the B/C/G. This can be done manually whether on the hard or soft copies received. The manner is decided by each company. The main idea is to classify each piece of content so that the Data Entry people key in only the content needed.
- 2- Identify Cross-Government relations and services based on the perspective of B/C/G.
- 3- Re-arrange (as much as possible) the services information to fit into the following suggested format:
 - a. Required Documents
 - b. Stamps & Fees
 - c. Location of Service
 - d. Time expected to completion
 - e. Steps to Service Provision

Once this is done, the information is fed into the Raw Data Entry process to be handled like the other content collected.

5.4.3 Dump into CMS

This is a bulk operation that will be based on the structures defined in Excel. This will not be clear until the volume of content is more tangible. One idea is to create a program that will consolidate all the information in the Excel files and dump them into the database of the CMS, which would be structured in a close manner (if possible).

6 Environment & People to Expect

6.1 Environment

- Dressing. As formal as you can. Minimum wear business casual. Preferred suite. No T-Shirts.
- Not always a clean environment
- Always respect their time. Make him feel his time is valuable.
- They might get busy suddenly. Talk to Team Leader, suggest to come back later.
- Try to make friends with them. Treat him important, break the ice, drink the coffee, chat.
- Beware of Compliments (Male to Female and vice versa)
- You might not always find a place to sit down.
- Before smoking ask. If they smoke, live with it.
- Some rooms will be crowded.
- Some women do not shake hands of men. Expect it.
- Personal hygiene.
- Do not always rely on the bathrooms they have.
- Have your napkins with you.
- Have water with you. Drink between visits.
- Do not expect to find a meeting room.
- Always Smile!!

6.2 People

- Not all of the people will smile. Expect 50-50.
- Same for attitude.
- Knowledge. Do not to expect much, help him help you.
- Willingness to help. This is not an option for them. Educate them. If it is serious, use Escalation Process.
- **Information collection is a must despite everything.**
- Have confidence and manage them.
- Time Management. Minimize talk on personal issues. Try to escape, call Team Leader.
- Mobiles are always on silent or vibrator.
- Be comfortable sitting (not too much), respect personal space.
- Level of Knowledge. Will also vary.

7 Appendix A

Each firm has developed a specific form to be used for collecting information on each track of the portal (Business, Citizen and Government).

7.1 Business

Please refer to "[B Report.doc](#)" on eroom.

7.2 Citizen

Please refer to "[C Report.doc](#)" on eroom.

7.3 Government

Please refer to "[G Report.doc](#)" on eroom.