GTRN
Global Technical Resource Network

Steps to Request Technical Assistance through GTRN
Integrated Programming (Consultancy)

Updated: 21 Jan 2013

Link to GTRN system: http://gtrn.wvcentral.org

All Users create a GTRN Account:

On the GTRN website - http://gtrn.wvcentral.org , click on 'Register for a GTRN account' as shown. On the following screen, fill in the details requested making sure to provide all fields marked with a '*'. A GTRN account would instantly be created and notification sent to you along with log in details.
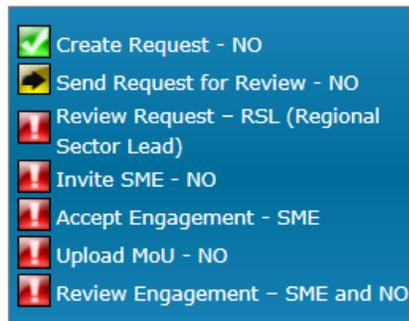
Register for a GTRN account

Step 1: Create request and select preferred SME:

Usually it is the representative of the National Office (National Office Lead or one associated with the programme) who logs onto the GTRN system and selects "Create a Request for Integrated Programming' under the Get an SME section.

Create a Request for Integrated Programming

Provide as much detail as possible in the request. Refer to the tips on the right hand side of the Request form (Hover over tips will be provided in future) for more details on filling the form. Click on 'Save and Continue'.

On the next screen (notice tabs across the top) select the expertise required and then click on 'Add Selected Expertise to Request'. The system will suggest SME candidates for the engagement. You may also add any SMEs to the list using their email address. Click on 'Select' for the SME(s) preferred under the last column. You can select preference ranking then click on 'Send Request for Regional Sector Leader Review'. Note that the Regional Sector Leader Review will become optional starting Feb'13. Following which, it is at the discretion of the creator to send for review. However, the regional sector lead is always informed of the request creation via email whether review is required or not.

- ✅ Create Request - NO
- ↪ Send Request for Review - NO
- ❗ Review Request – RSL (Regional Sector Lead)
- ❗ Invite SME - NO
- ❗ Accept Engagement - SME
- ❗ Upload MoU - NO
- ❗ Review Engagement – SME and NO

Step 2: Region Reviews (Optional Step):

The Regional Sector Leader (RSL) for the particular region (and sector) will receive notification to review the request. The notification will specify if the RSL reviews is required to move to inviting SME. Review the request in detail and provide feedback to the creator. He/She can then complete the review by clicking on appropriate button.

Step 3: NO Invites SME:

Notification email is sent to the requestor when Regional Sector Lead has completed their review (if Regional Sector Lead was required to review).The requester then invites their selected SME from the list of preferred candidates, checking availability and rate of the SME. Invitation is sent by clicking on 'Invite SME' under the Functions column. Once done, an email template is displayed on the next screen. The email can be personalized as required and is then sent by clicking on 'Send'. Make sure that the links in the email template (in blue) are left intact. Once the email is sent, a green checkmark appears next to the SME that has been invited on the SME Selection tab.

Preferred Candidates (3 Selections are Recommended)
Users who are highlighted in blue are external consultants.

Selection	Pref.	Invited	First	Last	Sector	Availability	Conflict	Rate	Functions
GTRN Admin	▼		Tom	Smith	DME, Design - Validated [Practitioner, Trainer / Facilitator, Strategist]	Current Availability Not Set	No conflicts		Invite SME
					Food Programming, Operations and Management - Validated				Profile
									Remove

Step 4: SME Responds:

The SME is sent a notification with details of the request/engagement. He/she must click on the link on the received email and specify whether or not they accept the engagement. The engagement request will also be listed on the SME's dashboard in GTRN and the choice can be specified by clicking 'Yes' or 'No' on the acceptance page. If 'No' is chosen, a reason should be specified. If declined, the requestor is notified to select another SME.

Step 5: NO/SME attaches MoU/Budget (This step is optional starting Feb '13):

Once the SME accepts, the requester and SME develop the Memorandum of Understanding (MoU) for the engagement together. They may choose to exchange information directly (for example over email/telephone) at this point. Once the MoU is finalized, it is uploaded under the 'MoU & Reviews' tab of the request. A template MoU has been provided as a reference on this page. Complete the details of the budget on the 'Budget' tab. Each expense is filled in one at a time and saved by clicking on 'Add Expense'. Any comments can be added by typing it in and clicking on 'Save Comment'.

Step 6: NO/SME submits review:

Once the engagement has been completed in the field (and any associated desk work), both the NO (or request creator) and SME are required to provide a review of the engagement. This will be stored on system and will be used as input for improving the quality of future engagements. The link to the review can be found on the dashboard. When both reviews have been filled in, the request workflow is then complete. NOTE: The requester review (receiving office) is sent to the SME's manager and is not directly accessible by the SME.

| TOR Details | SME Selection | MoU & Reviews | Budget | History | Administer Request |

(1) NO creates request and select SME(s) -> (2) Region reviews (optional) -> (3) NO invites SME -> (4) SME Responds -> (5) NO/SME attaches MoU/Budget (optional) -> (6) NO/SME submit review