Frequently Asked Questions (FAQs)

The following Q&A is based on the questions asked at the SYNCHRO deep dive training and SynchrO helpdesk. We have grouped them under the following headings:

1. Transition - Users
2. Roles & Responsibilities – Super-Users
3. Roles & Responsibilities – Project Owners
4. Process - PIT
5. Process - PIB
6. Process - Agency Proposal
7. Process - Project Evaluation
8. Process - Legal Approvals
9. Process - Waivers
10. Process - Procurement and Tenders
11. Confidentiality and User Access
12. Non-Kantar Agencies
13. Fieldwork Agencies
14. Reporting & Cost Visibility
15. Future SYNCHRO Changes
16. SYNCHRO Costs
17. Version Control
18. Other

1. Transition – Users

Do we need to prepare a list of End Market users now? When do they need to be set-up?

End Market Super-Users will need to identify End Market users for SYNCHRO. These users will be from SPI, Product, Marketing, Legal, Procurement etc. Each user will need to complete an Excel Form. This is a BAT IT/Legal requirement. We will need Super-Users to manage this process and ensure that Forms are sent to assistance@batinsights.com .

After go-live how will someone get access to SYNCHRO?

You can use the "Wish You Were Here" functionality to invite someone to request access. They will be sent a link to PRISM where they can find and complete the Excel Form and send this to assistance@batinsights.com. It is also possible for someone to directly go to PRISM to find the Excel Form.

Who approves a new user's access to SYNCHRO and the level of access they should receive?

The relevant super-user will be able to approve new access rights. For agency teams this should be directed to the agency super user who will then request access via their BAT counterpart. For BAT staff access at end market level will be approved by the end market super user. For above market requests these will have to be approved by Tim Carey.

2. Roles & Responsibilities – Super-Users

Is it possible to have more than one Super-User?

There needs to be at least one Super-User per End Market. There is no maximum number, but only the larger End Markets should need more than one Super-User.

Can only a SPI Super-User create a Project (eg PIT)?

No – any SPI user can do this.

3. Roles & Responsibilities – Project Owners

Can SPI also be a Project Owner?

Yes – this is likely to be the case for certain research projects eg GCS. It is possible to set up the same person as the Project Owner and the SPI Stakeholder.

Is it possible to select more than one Project Owner? Eg for a KLT/TRACK?

No – the project owner in SYNCHRO should be the person with the budget to pay for the research. This should be one named person.

4. Process – PIT

Who can create/edit a PIT?

We recommend that SPI create a PIT to ensure this first important document is correctly created.

Can we delete a PIT? For example we have accidentally duplicated it or we are planning not to do the research anymore.

You will need to request SYNCHRO Admin to delete a PIT. It is possible, but not part of the functionality for a normal user. You would request this if for example you had a duplicate. There is the option to hold or cancel a project within the PIT process stage and this should meet the majority of needs.

If I do not know the exact methodology for my project can I say this? Or do I have to pick a methodology?

It is possible to select "I don't know yet".

5. Process – PIB

Who can create/edit a PIB?

A lot of the PIB content will come directly from the PIT. It will not need re-keying.

SPI and the Project Owner should jointly write the rest of the PIB. Usually the Project Owner would complete four sections only: Business Question, Research Objectives, Action Standards and Stimuli Material, (plus Product Specification – for Product Test research only). SPI would complete the rest.

SPI ultimately have responsibility for the final PIB before it is sent to the Agency(s).

Can SPI edit/change what the Project Owner has written?

Yes – ultimately it is SPI which sends the final PIB to the Agency(s). It is SPI who needs to ensure it is fit for purpose. However we would suggest that you speak to the Project Owner about any changes you make!

Who has to sign-off the PIB?

The only approval required is from Legal (which is done offline). Other stakeholders are included in the PIB for information – not for sign-off. Ultimately SPI will agree with the Project Owner when the PIB is ready to be sent to the agency.

Will it be obvious which sections of the PIB that Project Owner needs to complete?

At the moment all sections are shown equally – dependent on feedback after launch this functionality may be considered. However, the sections that the project owner should complete are the same as within existing processes i.e. Business Question, Research Objectives, Action Standards and Stimuli Material.

Does the SYNCHRO brief template replace all previous standard briefing templates?

Yes.

Is there a maximum file size for attachments?

Yes – 50 MB. If you anticipate that this is not sufficient then please contact Tim Carey.

6. Process – Agency Proposal

Once a Proposal has been completed by an Agency will I receive and email confirming this has happened or will I have to keep looking in SYNCHRO?

You will receive an email confirming it is ready to review in SYNCHRO

Will the Project Owner also directly receive the Agency Proposal?

No. SPI need to ensure the proposal is fine and then sends the final proposal to the Project Owner

7. Process – Project Evaluation

Will the Project Evaluation replace the 6 monthly Agency evaluation process?

No, but the project evaluation scores from all projects in that 6 month period should be used to inform the overall Agency Evaluation.

8.Process – Legal Approvals

Will legal be able to provide approvals directly in SYNCHRO (for the PIB, Project Specs and Final Report)? If not why not, surely this would be a more efficient process?

Global Legal have advised that Legal approvals cannot be given directly in SYNCHRO. SPI will need to get Legal approvals offline (eg via email).

It is possible to print out the Project documents (eg to Word/PDF) which can be sent to Legal. Legal can approve these via an email confirmation. It is possible to attached this email in the "Other Comments" section of the PIB/Project Specs. In SYNCHRO SPI will need to check a box to highlight that Legal Approval has been given and to give the name of the Legal person. The project cannot progress to the next stage without this Legal approval being obtained.

Will Legal have access to SYNCHRO?

Yes – Legal can have access to SYNCHRO. They can view projects but they cannot approve them directly in SYNCHRO. Legal approval must be given off-line. This is a Legal requirement not a SPI/SYNCHRO requirement.

Which documents in SYNCHRO require Legal Approval?

The Project Brief (PIB), each of the Project Specs individually (eg Screener, Questionnaire etc) and the Final Project Report.

In some markets for some standard research Legal Approval will not be required and you can check a box to highlight this. Contact your End Market Legal to confirm which types of projects these would be.

Do Legal contact have to approve the brief or just be aware of it (viewing only)?

They have to be aware of the brief in the system. Off line they should approve the brief. This approach was at the request of global legal who do not want approval rights within SynchrO.

9.<u>Process - Waivers</u>

What if I do not want to do a research as per the NPI protocol? Do I need to get a Waiver in SYNCHRO for that?

No – NPI waivers are handled at the IPSG. These waivers would not go through SYNCHRO. Take a look at the Waiver Slide in the Train the Trainer materials for more information.

What if I do not want to do other Research, eg a GCS? Do I need a Waiver in SYNCHRO for that?

Yes – You can click on the "Waiver" button on the SYNCHRO home screen and follow the instructions to create a waiver. You request this type of waiver when you plan not to raise a PIT. Your Waiver request will be handled by one of a number of people and you should receive feedback within 1 week.

How do I request a methodology waiver? For example I am doing some research but I want to use a smaller sample size as I am struggling to recruit the right number of people?

This is a methodology waiver. You can do this at the PIB stage. Click on the Request a Waiver button and follow the instructions. You will need to explain why you need a waiver. You will get a response back within 1 week.

If I request a Methodology Waiver will this hold up my project? Do I have to wait before I can send the PIB to the Agency?

This will not hold up your project. You can send a PIB to the agency even if a Methodology Waiver is pending. The agency will see that the Waiver is pending and will be able to see the details of the Waiver request. This will allow the Agency to get on and prepare their proposal without delay.

What is the difference between the Waiver button on the SYNCHRO homepage and the Waiver section in the PIB?

The Waiver button on the homepage is to request a waiver to <u>not</u> do certain research (eg GCS).The Waiver section in the PIB is to request a Methodology Waiver where you want to do something non-standard (eg smaller sample size).

Take a look at the Waiver Slide in the Train the Trainer materials for more information.

Who is responsible for Waivers in Globe House, Taina?

We are looking to expand the number of people who can grant waivers so as to increase the speed of processing them. Taina will be one of the approvers.

Usually there are several approvers for a Waiver (Marketing, SPI, Brand). Who do we include in SYNCHRO?

SPI will be responsible for approving Waivers in SYNCHRO. You may need to inform other Stakeholders that you are requesting it, but they are not part of the approval process.

Some of the Waivers happen outside of SYNCHRO and the approval process is detailed in the Waiver Slide in the Train the Trainer materials for more information.

10. Process - Procurement & Tenders

Will procurement have to be notified of every research project?

No. It is optional in SYNCHRO to include a Procurement stakeholder at the PIB stage where you need the involvement of Procurement.

How does the competitive tender process work in SYNCHRO?

You can select up to 3 agencies to bid for a research project. Each will receive the PIB and will be able to provide you with a proposal. They will not see who the other agencies are that have been included in the tender. They will not see our Cost Estimate nor any detail of the proposals coming back from the other agencies.

11. Confidentiality and User Access

Which projects will a user be able to see in SYNCHRO?

This will depend on your geographical responsibility. If you only work for one End Market then you will only be able to see projects for that End Market. If you have above Market responsibility then you will have access to the projects for the Markets you are responsible for. If you are Global SPI you will have access to all projects.

What if my project is highly confidential? Is it possible to restrict access to a small number of people?

This functionality will be delivered after go-live. It will only apply for a handful of projects. If there is specific need to restrict access for a confidential project prior to the functionality being available then please contact Tim Carey.

What is the reason we can't change the current project status?

Only a project owner has ability to change the status of a project. You can also request assistance@batinsights.com, to do it for you, copying your project owner on the email request.

12. Non-Kantar Agencies

I often use non-Kantar agencies and/or Kantar is not in my market. Will my local agencies be given access to SYNCHRO?

For the initial rollout we will be setting up our Kantar Agencies in SYNCHRO. If you have a local non- Kantar agency that you do a lot of research with then they can also be set-up to have access to SYNCHRO.

If my non-Kantar agency does not have access to SYNCHRO does this mean I cannot use them?

You can use non-Kantar agencies. If they do not have access to SYNCHRO then you (SPI) will need to manage their process steps in SYNCHRO. For example you would need to load their research proposal, project specs and the final report. This should not be an onerous task.

Which agencies will have access to SYNCHRO? IMRB, TNS, Nielson?

Initially Kantar agencies will be given access to SYNCHRO. At a later stage others (such as Nielsen) may be added. Local non-Kantar agencies can be added if they do a lot of research projects for BAT.

How many agencies can I request a proposal from in a tender process?

You can request a proposal from up to 3 agencies.

13. Fieldwork Agencies

Do fieldwork agencies have access to SYNCHRO or only Coordinating Agencies?

Only coordinating agencies will have access to SYNCHRO and the coordinating agency will still be responsible for managing the fieldwork agency – as per current process fieldwork costs will not be shared between competitor organisations.

Most of the contacts from the coordinating/ fieldwork agencies are not yet in the system. How shall we proceed?

Assuming that all the contacts are Kantar business (as currently only Kantar has access to SynchrO), please send this to Global Agency Super Users for clarity. If no access was requested then ask the Global Agency Super Users to cascade the access request to the end market team. If these are not a Kantar agency then please use the process follow as defined in 'Appendix (II)' at the end of bottom of the document.

Which agency will need to upload information? Field work agency or just the Reporting agency (IMRB)?

The agency that was sent the brief and the one you receive the proposal from is the agency that can upload.

In some projects, we have fieldwork agency & coordinating agency. Does all the projects go for an approval to the coordinating agency & so it is their responsibility to provide all details or does fieldwork agency has any responsibility?

Where ever possible we should be asking the coordinating agency to manage all details (except cost) - that way quality controls and project management are responsibility of coordinating agency.

If a user have two PO numbers (for coordination agency and FW agency), so user will enter which PO number, as system have only one field for PO number.

The functionality to include a PO number has been added for end market ease of use to search for projects. The PO numbers are not required by the system itself. With this in mind I would suggest either leaving this blank - or alternatively using the large of the two POs.

14. Reporting & Cost Visibility

Do we need to create PITs for all planned projects every QPR as per current MRTS?

There will not be a separate round of reporting for SYNCHRO. If all End Markets embrace SYNCHRO then all the projects should be included (in real time) and reporting can be taken directly from the system centrally without need for further data collections offline.

Can we extract the budget sum of all our projects like in MRTS?

Yes – this will be possible through one of the standard reports in SYNCHRO.

What should be included in the Total Cost figure for a project?

This should be the pure Research costs only – as it was in MRTS. It should exclude any masking, communication costs etc.

Can Marketing Finance have access to SYNCHRO or visibility of projects in SYNCHRO. It would be useful for them compiling costs for SOP forums and QPR.

It is possible for them to have access but given licence costs and system requirements for regular log ins (every 5 months) it may be more efficient to ask the SP&I Super User to email the system generated reports on a needs basis.

The Financials in SYNCHRO will not necessarily be fully aligned with the financial records. Is the audit community aware of this?

This situation already existed under MRTS and all users of the financial reports coming from SYNCHRO will also be made aware of this. To be clear the SYNCHRO system will not be used for financial auditing processes as all costs attributed to research must be contained within SAP – and a valid PO number obtained from SAP to commence projects. However full use of SYNCHRO and accuracy in recording costs will remove the need for ad hoc QPR requests and reporting.

15. Future SYNCHRO Changes

If one of my brands does not exist in the drop down list on the PIT can I request for it to be added?

If you are doing lots of research projects for that brand then you can request SYNCHRO Admin to add it to the Brand list. Alternatively just select "Other".

16. SYNCHRO Costs

What will be the cost of SYNCHRO for an End Market?

The cost is approximately GBP 30.00 per user per year. This will need to be budgeted and paid for in each End Market. Overall the cost should not be too large.

17. Version Control

What if someone prints off a document in SYNCHRO and thinks it is the final version and uses that. Eg sharing a PIB with someone? However the PIB is subsequently changed in SYNCHRO. How will SYNCHRO manage this problem?

It won't! This is exactly one of the biggest problems we have today. At least with SYNCHRO we always will know where to go to get the official and most up to date version of any Research Document. This is the key reason why SYNCHRO must be fully utilised and why agency partners have been asked to work directly with SYNCHRO.

18. Other

Where is the SYNCHRO server locater and which company is managing it?

The server is in Hamburg (Germany). Grail (part of Integreon) manages it.

In my market all documentation is in Spanish. Do we have to translate to English before we load onto SYNCHRO? This will have added costs!

The business language for BAT is English and usually all documentation in SYNCHRO should be in English. However if your End Market has been given a specific exclusion to this rule then you can load documentation in Spanish.

What kind of report and summary shall be uploaded if a project includes monthly update of a 'Retail Audit' database by Nielsen?

There is no need for Nielsen summaries to be uploaded unless they are specific projects or studies outside of monthly data.

If there are projects which were transferred from 2013 i.e. all of them were originally started in 2013, then

postponed and final reporting (as well as Field work) took place in 2014, should we enter the start date in 2013?

The answer is - when were they paid for? If in 2014 then 2014 - if in 2013 then 2013. If in doubt - how were the projects reported in MRTS?

Can we upload the final proposal ourselves or do we need the agency to upload them?

Proposals have to be uploaded by an agency if it is assigned to a Kantar agency. The only exception is for the projects transferred from MRTS, please refer to the 'Appendix (I)' for the process flow to setup such projects. If the project is run by a non-kantar agency (which are not on system currently), please refer to 'Appendix (II)' at the bottom of the document, to know the process flow to setup such projects.

Why can't Super-User see (or search for) my project in his dashboard?

This feature is currently being built and will be available within early next week. When this becomes available, you should get a separate communication.

In Japan, we usually gain our legal approvals through our local CORA team, who are in contact with our legal contacts. Now, for the purpose of Synchro, should we ask the legal contacts or our local CORA team as the legal stakeholder?

I would suggest keep same process as current.

We are actually completing project for 2014 which are almost all over, the agency evaluation is not so relevant. Its better do to the evaluation when the research is in progress. Moreover there are no guidelines about this stage in the document "user guide for MRTS project set up".

The agency evaluation can be completed at any point in time - during or after the project is finished. Therefore this step was not included in the MRTS document.

I would have information on quanti research projects particularly on trackers. What is the current process? Here in France, we have a tracker called "Key Launch Tracker", there is FDW (fieldwork) and we receive scorecards every month. Should I have to do an entry for every waves?
I would suggest setting this up as one project - start date is Jan and finish date Dec. With regards uploading a report - if there is an annual report produced upload this rather than score cards

This is an anti-illicit trade research and by the way a multi-client survey. We are not really owner on the research process. We only pay to have results. There are no documents such as: brief, proposal, stimuli...I am only able to create a pit. Is it possible to go forward in the Synchro process without attaching these kind of documents?

If the objectives, method etc., are not done by BAT I would assume that this should be treated as buying a report i.e., it is not a research project. If this is the case then no need to include in SynchrO. If it is slightly more involved then let's pick up separately.

For a monthly tracker, we update the stimulus every two months. I have updated the stimulus until August at the specs stage. If I pass this stage to go at reporting level, I would have no possibilities to go backward. Should I wait to have the entire range of stimuli (end of 2014) before going to reporting stage? Or could I go directly to reporting stage and send you the rest of stimulus for the upload?

I would suggest going straight to reporting stage and then include the final stimulus used at each stage in the final report i.e. not include in the main body of the project.

Since we have a different FW & Reporting agency, will we have to upload 2 different Contracts? And who is responsible for this upload?

No need to upload contracts... Only proposals... And the proposal should come from one coordinating agency. I'm not sure of the local specifics so may need some more info on this.

Some projects are not related to research projects but Retail Audit. However, the Nielsen has not heard about SynchrO at all and they don't have access to the system. POSM Customization is another analysis report for Nielsen Retail Audit, but this is contracted yearly basis, while Nielsen Retail Audit is for 3 years.

There is no need for the actual contract to be attached - only include the minimum information required for both these projects - costs and supplier name, methodology etc... No need for brief, specs, report

For continuous projects such as RA and BLM: What do we do in regards to presentation? Do we upload the last presentation that contains all waves/months by the end of the project? Iris summaries: should the agency provide them?

RA and BLM should be in SynchrO - one project for the whole year - at the end of the year upload as a presentation a report that covers the majority of the year... This assumes there will be some form of review for Co Plan or similar. As for the Iris summary - these should be prepared by the agency but signed off internally. Please refer to the 'Appendix (III)' at the bottom for the IRIS summary template

If for a certain project, the final cost is not yet known as the execution of some future steps is uncertain, then should an estimated value of the cost be filled in the project cost on SynchrO?

Yes, an estimated product cost should be provided on SynchrO. The project cost should be updated on SynchrO once the costs have been finalized.

Should the cost for databases creation like Batprobe (GCS database tool), CPSi payment, etc. be added on SynchrO?

These types of costs should not be on SynchrO. These should be budgeted via finance processes. SynchrO should contain research projects only.

Is SynchrO a budget tracking/planning purposes tool?

SynchrO is a research project tool and not a budget tracking tool. SynchrO will only contain costs relating to the research projects themselves. Budget tracking should be conducted via normal finance processes.

What type of studies should be uploaded on SynchrO?

All research i.e. consumer, trade, desk etc. should be uploaded on SynchrO.

If the budget of the projects listed on SynchrO does not come entirely from 'Research', but also from other departments like Brands, AIT, Trade, etc., then should only selective- departments' costs be put on SynchrO?

SynchrO should have the total cost of the project as it is being used (in part) to see how much is spent on research projects and what sort of projects were conducted irrespective of the budget holder.

If some research is planned for Q3/ Q4 2014, is it possible to include that research later on?

Yes, it is possible. However, if it is already included in QPR then it should be in SynchrO - at PIT stage.

If the Project Cost is approved at the 'Project Specs' stage, can it be changed in the later stages as additional costs can be incurred during the course of the project?

Once the cost is approved at the 'Project Specs' stage, then the cost can only be changed by the System Administrator. The user can send the request to the System Administrator at assistance@batinsights.com and the project cost shall be changed after that.

Appendix (I)

User Guide for a MRTS Project Setup on SynchrO

Please follow 6 steps, as described below to complete a MRTS project in SynchrO. Kindly follow the order of the order of data input as stated in each step. Also, please take a note of instructions at/after specific stages (in red), as you will have to wait for a confirmation at certain stages from support helpdesk who will execute a part of process in a given stage from an agency perspective – the confirmation should come through within 24 business hours from the time you finish a part of process in a given stage. The email should come through from someone "XXXX@integreon.com"

Step 1 (PIT): Complete Full document - *please note that the person completing this should use his own name for both "Project Owner" and "SPI contact". This way the document can be self-approved and need not be sent for approvals to someone else*

Step 2 (PIB): Complete minimum data required i.e., as follows

- Input latest estimate of cost, Date Stimuli Available, and reporting requirements – *if date of stimuli is not known, please select any date with in the project start and end date*
- Attach brief and agency proposal documents to 'Other Comments' field
- Select Agency contact 1 as "MRTS Migration Agency" and Legal Contact as "MRTS Migration Legal" – *please ensure that no other stakeholders are put into the PIB to avoid the need for further approvals*
- Advise if legal approval is received on PIB and put in the Name of the legal approver in the text box. *If legal approval was not required, please select the option accordingly*
- Put "NA" in all the open text fields
- Once all the above mentioned details are filled, please hit "PIB Complete – Notify Agency(s)" button. This will open an email pop-up, please keep the email-id showing in it and add assistance@batinsights.com as comma separated in it and submit.

  Key thing to Note at this point*: The PIB stage is complete; however, to move ahead in process, please wait for an email confirmation stating that the proposal for the project is submitted, referred by the code of your particular project – the project code is a five digit number which can be located on the top of the PIB screen, next to the project name. Once you get it, please click on the link given in the email to reach to the proposal stage.*

Step 3 (Proposal): Once the proposal stage is reached, please click the following button

- "AWARD TO AGENCY" button

  Key thing to Note at this point*: To move ahead in process, please wait for an email confirmation stating that the project specs are updated, referred by the code of your particular project. Once you get it, please click on the link given in the email to reach to the project specs stage.*

Step 4 (Project Specs): Once the project specs stage is reached, please provide the following details/files on this stage:

- Click on the "CHANGE FIELDWORK / COST STATUS" which will open a pop-up. Please enter "Final Cost" and "Cost change Comments" – *can put "MRTS Project" in comments section*
- Attach all the available specs such as screener, QRE, Discussion guide, consumer contract and stimulus material to their respective fields
- Advise legal approval and the name of approver for all the specs on the right hand side – *if a particular legal approval is not relevant, just tick the box and write "NA" in the text box*
- Click on "Final Approval" button – a warning will come, please select OK. Later, an email pop-up will be shown, please keep the email-id showing in it and add assistance@batinsights.com as comma separated in it and submit.

  ***Key thing to Note at this point**: To move ahead in process, please wait for an email confirmation stating that report for the following project has been uploaded, referred by the code of your particular project. Once you get it, please click on the link given in the email to reach to the report stage.*

Step 5 (Report): Once the report stage is reached, please provide the following details/files on this stage:

- Attach Final Report and summary for IRIS
- Advice legal approval along with the approver name
- Click the "Approve" button – a warning will come, please select OK. Later, an email pop-up will be shown, please keep the email-id showing in it and add assistance@batinsights.com as comma separated in it and submit.
- Click "Upload to IRIS" and "Upload to C-PSI Database" buttons

  Step 6 (Project Evaluation): Complete agency Evaluation

This is it, the project is completed in SynchrO! *Should you face any issues related to the process or a confirmation is delayed, please write to assistance@batinsights.com.*

Appendix (II)

For Project where Agency Not on SynchrO

As communicated during initial user training **all** research projects for the **full year of 2014** (consumer, trade, desk, RMS etc.) need to be uploaded into SynchrO by 20th June. This is to ensure that a consolidated picture of our research projects and spend can be reviewed during the upcoming QPR process. All projects can be categorized into 2 groups:

- **Projects planned after 19th May** – At minimum a completed **PIT for all projects** till the end of the year is required
- **Projects either in progress or completed prior to the 19th May** – **Minimum information** in SynchrO

The process below guides you through the information needed to setup a new project where agency is not on SynchrO.

Please note:

- Carefully read all comments in Red
- These comments explain key points that are required to enable the process
- At some points in the process you will be sending an email to an external contact (this contact is the company who have built SynchrO). You will have to wait for their response to move the project forward. This response will be received within 24 hours of the action made. The address of this response will come from “xxxxxx@integreon.com”
- Please follow the 6 steps in sequential order
- This process works same as a normal project - the only difference is that we are using a virtual agency called "Agency Not Using SynchrO"

Step 1 – Project Initiation Template (PIT)

- Complete the full document

Step 2 – Project Initiation Brief (PIB)

- Complete brief and attach agency proposal to ‘Other Comments’ field. Put relevant information in all open text fields
- Input cost estimate, date stimuli available and reporting requirements. All these fields are required to enable the system not for reporting
- Select the Agency contact 1 as “Agency Not Using SynchrO” and provide all other stakeholders such as legal, procurement, etc.,
- On the PIB confirm that legal approval is received and type the actual name in the text box of the person from Legal who approved the project. If legal approval is not required for the project then select the option accordingly

- When all steps above have been completed please click "PIB Complete – Notify Agency(s)" button.
- An email pop-up will open on screen. Please keep a mental note of the email ID showing (so that the response is not accidentally deleted from your in-box) and add ",assistance@batinsights.com". Please note the comma separation. Submit
- The PIB stage is now complete. However, to move ahead, please wait for an email confirmation stating that the proposal for the project is submitted referenced with the 5 digit project code. Once this email is received you can click on the link given in the email to move to the proposal stage.

Step 3 – Proposal

- When the proposal stage is reached the project owner needs to click the following button "Award To Agency" – if you are not the project owner, you have to request the respective person to complete the action
- Please note you will need to wait for an email confirmation stating that the project specs are updated, again referenced by the code of the particular project. Once you receive this email click on the link to go to the project specs stage

Step 4 – Project Specs

- At this stage please provide the information below – this is the key stage for ensuring we have information for planning
- Click on the "Change Fieldwork / Costs Status" which will open a pop-up. Please enter "Final Cost" and in "Cost Change Comments" please put the text 'Agency Not on SynchrO'
- Attach additional documents as required (e.g. screener, QRE, Discussion guide, contract etc).
- Ensure that the legal approvals boxes are ticked and input the name of the original approver of these documents. If legal approval is not needed then select the relevant box and enter 'NA' in the text field.
- Click the "Final Approval" button. A warning will come on screen – please select OK. An email pop-up will now show. Again keep a note of the email-ID showing and again add ",assistance@batinsights.com". Please note the comma separation. Submit
- Please note you will need to wait for an email confirmation stating that the report for the following project has been uploaded, again referenced by the code of the particular project. Once you receive this email click on the link to go to the report stage

Step 5 – Report

- Once the reporting stage is reached, please provide the following inputs below
- Attach the Full Report, Summary Report, and the Summary for IRIS
- Confirm that legal approval is received and type the actual name in the text box of the person from Legal who approved the project. If legal approval is not required for the project then select the option accordingly
- Click the "Approve" button. A warning will come, please select OK. An email pop-up will now show. Again keep a note of the email-ID showing and again add ",assistance@batinsights.com". Please note the comma separation. Submit
- Click "Upload to IRIS"
- The project is now fully in the system and the last step is to complete the agency evaluation

The project is now completed and the information required has been uploaded: PIT and brief completed, Final Costs inputted; a record of the agency proposal has been added; the final report is now saved; a copy of the IRIS summary is ready (and will now appear in the RKP); and the agency evaluation is complete.

Should you face any issues related to the process above or a confirmation is delayed please contact assistance@batinsights.com

Appendix (III)

Please find below the RKP Oracle Summary Template.

RKP Oracle Summary - Template