

Summary of the EVAL Release 1.1

Release date 07/12/2016

With release 1.1, several improvements have been brought to the EVAL module. Please find below a description of the major changes, which are further detailed in the user manual.

1. Access

- a) Access to the **search function** of the EVAL module is granted to DG DEVCO and DG NEAR staff. Access for internal consultation will be extended to all EC staff through their internal ECAS account in an upcoming release.
- b) External users (evaluation contractors and external reference group members) are not allowed to perform any search in the module. They can access the evaluations of which they are stakeholders through the page "MY EVAL".

The access to the EVAL module for **Evaluation Contractors, Team Leaders, and Experts** is limited as follows:

- They have access to the module only if they have ongoing evaluations in status *Implementation*.
- In the "My EVAL" page, they can see all their evaluations (except the ones in Contract phase) but they can only click on evaluations that are in status *Implementation*.
- The link in the "General" tab to related reports is clickable and the users can download documents.

The access to the EVAL module for **external Reference Group Members** is limited as follows:

- They have access to the module only if they have ongoing evaluations in status *ToR, Contract, or Implementation*.
- In the "My EVAL" page, they can see all their evaluations (except the ones in status *Planned*) but they can only click on evaluations that are in status *ToR, Contract, or Implementation*.
- The link in the "General" tab to related reports is clickable and the users can download documents.

2. Evaluation stakeholders

- a) Evaluation stakeholders can be modified at any phase of the evaluation:

- A new "Add/Change" button has been added for the "**Head of Unit / Head of Cooperation**" and "**Head of Section**" fields which are pre-filled; when clicking on this button, a pick list allows selection from all the users having the same UNIT/EUD as the Evaluation Manager (EM). In case the selected user does not have the required permissions, a notification is sent on "Save" to EVAL administrators, in order to grant permissions to the user.
 - Internal and external **Reference Group Members** are now visually differentiated. Internal and external members are marked with (INT) and (EXT) respectively, and the two groups are separated by a line.
 - The **Evaluation Correspondent** field, which is pre-filled, can now be edited; the pick list includes members of the Evaluation Correspondent lists of DG DEVCO and DG NEAR.
 - When adding / changing the **International Aid and Cooperation Officer** and the **Thematic Correspondent**, the selected user (from a pick list containing all internal staff) receives the corresponding rights automatically.
 - It is now possible to add up to 5 (five) **functional mailboxes** by clicking on the "Add" button. Note that at least one functional mailbox is compulsory.
- b) In the same evaluation, the reference group member, the evaluation contractor, evaluation team leader and evaluation experts cannot be assigned any other role.
- c) Pick lists for stakeholders have been enhanced to be based on name, surname, as well as ECAS details. The selection pop-up can be enlarged to display the user details on one single row.

3. Next Planned Date

When the user clicks on the "Next phase" button and the deadline of the following phase is between 10 and 20 days ahead, a warning message is displayed. If the deadline of the following phase is in 10 days or less, a blocking message is displayed and the user is requested to modify the evaluation schedule.

4. Document management

- a) The "Accept / Send back" box is expanded by default when the Evaluation Manager is required to accept/send back a report, as soon as a document is selected. In order to accept or reject a document, remember to select it first.
- b) It is now possible to accept or reject documents one by one, even when multiple mandatory documents are needed (e.g. in the Synthesis phase).

- c) Executive Summary, QAG, Response of the services (Follow-up), and Follow-up after one year cannot be submitted unless all mandatory fields are filled in. Mandatory fields are marked with an asterisk.

5. Quality Assessment Grid

The Quality Assessment Grid form has been simplified as follows:

- a) Evaluation Managers are requested to provide a rating at the level of criteria instead of sub-criteria;
- b) Comments at criteria level are compulsory only in case criteria are rated as "very weak" or "excellent"; the comment on the overall quality of the report is mandatory.

6. Evaluation dates

The evaluation *Start date*, *End date* and *Contract signature date* can be planned or actual. Planned dates are encoded by users as they create a new evaluation. Actual dates are retrieved from CRIS once the evaluation contract is signed and the contract information is entered in the EVAL module.

Tooltips are displayed for the "Planned date" and "Actual date" fields.

7. Search function

The Search functionality has been enhanced:

- a) The search is character case insensitive;
- b) Sections and fields inside sections are joined with the "and" operator (all criteria for which values are entered are taken into account when filtering results);
- c) Fields belonging to the same attribute are joined with "or" operator (e.g. evaluation title).

8. Notifications

The "Receive notifications" option is ticked by default when users connect to EVAL. If a user does not wish to receive notifications from the EVAL module, they have to deselect this option – go to "My Notifications" tab in the EVAL module.