**Summary of the EVAL Release 1.4**
**Release date 13/12/2017**

Release 1.4 offers several major improvements for the users and a **simplification of selected screens and functionalities** based on the feedback provided by users.

Please find below a description of the changes. User guides are available in the DEVCO Application Knowledge Base (for internal users and contractors). An update of the e-learning videos will follow soon.

## 1. EASIER MANAGEMENT OF DATES AND DEADLINES

Evaluation managers can now enter **past dates** in the "New evaluation" tab, and in the "Evaluation schedule" within the "General tab". Note that in the "Evaluation schedule", dates must be sequential.
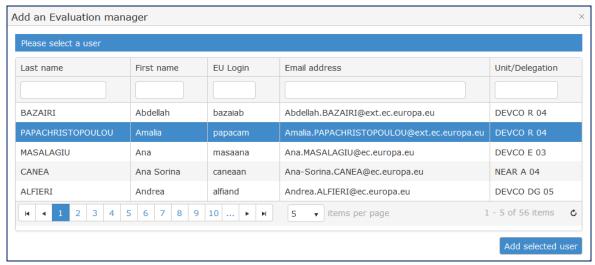
In addition, **deadlines for contractors are no longer blocking**:

- Evaluation managers are no longer requested to change the deadline in the system to allow the uploading of deliverables once the deadline has expired
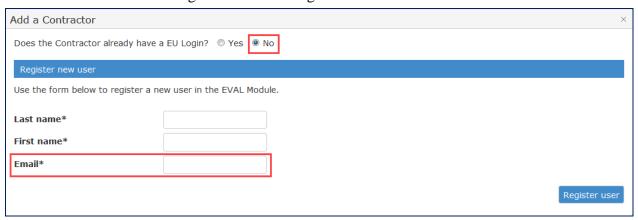- EVAL will track both planned and actual dates for monitoring purposes.

## 2. ENHANCED USER SELECTION IN THE STAKEHOLDERS TAB

Pop-ups for encoding evaluation stakeholders have been redesigned, and constraints were removed:

- The search is more responsive. Search fields include last name, first name, EU login, e-mail address or Unit/Delegation. Staff lists are always up-to-date;
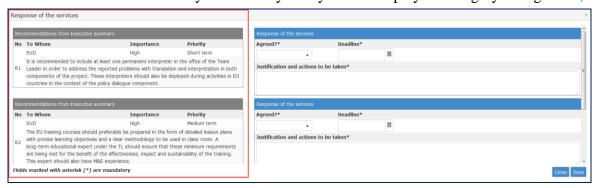
- It is possible to add external users who do not have a EU login account yet. They will receive an invitation to register a new EU login account.



## 3. IMPROVED WEB-FORMS AND PDFS

Web-forms for the "**Response of the services**" and "**Follow-up one year later**" have been simplified:

- The information automatically retrieved by the system is displayed on a grey background;



- In the "**Response of the services**" form, the Evaluation Manager needs to indicate whether each recommendation is agreed, not agreed or partially agreed; a deadline for implementation (if the recommendation was agreed or partially agreed), and justifications or actions to be taken;

- In the "**Follow-up one year later**" form, the Evaluation Manager needs to fill in only one field for each recommendation, indicating to which extent planned actions and tasks have been realised;

- In all the templates, we have introduced a colour code to distinguish the text drafted by the contractor and comments provided by the EC services. The former is displayed under light blue headings and the latter under blue ones:

## 4. IMPROVED DATA QUALITY

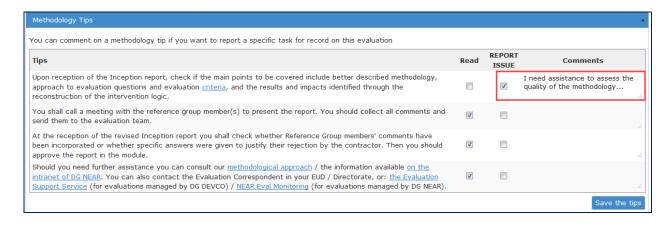- The EUD/Unit in charge field is now automatically filled in by the system:



- After retrieving the evaluation contract information from CRIS, the indicative budget and contract signature date entered at planning stage are automatically replaced with actual ones from CRIS.



## 5. IMPROVED SERVICE TO USERS

When an Evaluation Manager reports an issue with one of the steps outlined in the methodology tips, the system now sends a notification to the HQ evaluation services, who can offer methodological support if necessary.



If an evaluation is in a certain phase for more than one month, the Evaluation Manager, the backup, and the Evaluation Correspondent are reminded to log into the EVAL module and update the evaluation.

## 6. OTHER USER EXPERIENCE IMPROVEMENTS

## 6.1    QUICK ACCESS TO E-LEARNING VIDEOS AND USER GUIDE

You can now access relevant e-learning videos and user guides by clicking on the icons displayed on the top right of the tab you are editing.
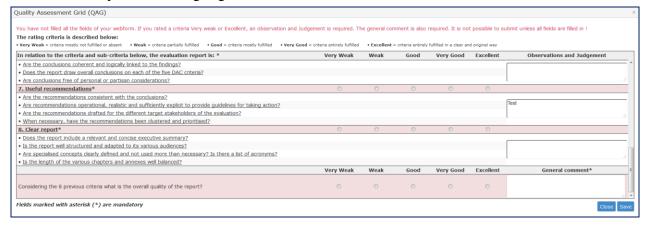


## 6.2    SEARCH OF AN EVALUATION BY REFERENCE NUMBER

Internal users can now search for an Evaluation using the "Evaluation Reference" number, by entering the full evaluation reference (e.g. 2017-M-1) or part of it (e.g. M-1):



## 6.3    OTHER IMPROVEMENTS

-   Non-essential confirmation and deadlines pop-ups have been removed.
-   In the Quality Assessment Grid on the final report (QAG) form, mandatory fields which are not correctly filled are highlighted in red when the user clicks on "Save":



-   When sharing documents with stakeholders through the EVAL module, the Evaluation Manager will receive a copy of the communication in his/her e-mail inbox.

## 7.    NOTIFICATION WHEN THE QAG IS FINALISED

For transparency, the Contractor, Team Leader and Expert(s) will receive a notification as soon as the QAG on the final report is finalised by the Evaluation Manager. The QAG pdf form is attached to the notification and is accessible via EVAL.