

## 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;

Add an Evaluation manager
✕

Please select a user

Last name	First name	EU Login	Email address	Unit/Delegation
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
BAZAIRI	Abdellah	bazaiaab	Abdellah.BAZAIRI@ext.ec.europa.eu	DEVCO R 04
PAPACHRISTOPOULOU	Amalia	papacam	Amalia.PAPACHRISTOPOULOU@ext.ec.europa.eu	DEVCO R 04
MASALAGIU	Ana	masaana	Ana.MASALAGIU@ec.europa.eu	DEVCO E 03
CANEA	Ana Sorina	caneaan	Ana-Sorina.CANEA@ec.europa.eu	NEAR A 04
ALFIERI	Andrea	alfiand	Andrea.ALFIERI@ec.europa.eu	DEVCO DG 05

⏪ ⏩ 1 2 3 4 5 6 7 8 9 10 ... ⏪ ⏩
5 items per page
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Add selected user

- 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:

Recommendations from Executive Summary				Response of the services	
n°	Recommendation	To whom?	Importance / Priority	Agreed?	Justification and actions to be taken

#### 4. IMPROVED DATA QUALITY

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

— Create new evaluation —

Evaluation title\*

Level of evaluation\*

Type of evaluation\*

Managed by\*

**EUD/Unit in charge**

- 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.

— Evaluation data —

Evaluation Title\*

**Evaluation Budget\***

Language\*

**Start date of activities\***

**End date of activities\***

Geographical Scope

DAC Sector Code covered (retrieved from CRIS)

Complementary Keywords

#### 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.

Methodology Tips

You can comment on a methodology tip if you want to report a specific task for record on this evaluation

Tips	Read	REPORT ISSUE	Comments
Upon reception of the Inception report, check if the main points to be covered include better described methodology, approach to evaluation questions and evaluation <a href="#">criteria</a> , and the results and impacts identified through the reconstruction of the intervention logic.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	I need assistance to assess the quality of the methodology... <input type="text"/>
You shall call a meeting with the reference group member(s) to present the report. You should collect all comments and send them to the evaluation team.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
At the reception of the revised Inception report you shall check whether Reference Group members' comments have been incorporated or whether specific answers were given to justify their rejection by the contractor. Then you should approve the report in the module.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Should you need further assistance you can consult our <a href="#">methodological approach</a> / the information available <a href="#">on the intranet of DG NEAR</a> . You can also contact the Evaluation Correspondent in your EUD / Directorate, or: <a href="#">the Evaluation Support Service</a> (for evaluations managed by DG DEVCO) / <a href="#">NEAR Eval Monitoring</a> (for evaluations managed by DG NEAR).	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

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):

Evaluation data	
Evaluation Reference	<input type="text"/> Search using the EVAL reference, e.g.: 2017-M-1. You can also enter part of the reference, e.g. -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":

Quality Assessment Grid (QAG)						
You have not filled all the fields of your webform. If you rated a criteria Very weak or Excellent, an observation and Judgement is required. The general comment is also required. It is not possible to submit unless all fields are filled in !						
The rating criteria is described below:						
<ul style="list-style-type: none"> <li>• <b>Very Weak</b> - criteria mostly not fulfilled or absent</li> <li>• <b>Weak</b> - criteria partially fulfilled</li> <li>• <b>Good</b> - criteria mostly fulfilled</li> <li>• <b>Very Good</b> - criteria entirely fulfilled</li> <li>• <b>Excellent</b> - criteria entirely fulfilled in a clear and original way</li> </ul>						
In relation to the criteria and sub-criteria below, the evaluation report is: *	Very Weak	Weak	Good	Very Good	Excellent	Observations and Judgement
<ul style="list-style-type: none"> <li>• Are the conclusions coherent and logically linked to the findings?</li> <li>• Does the report draw overall conclusions on each of the five DAC criteria?</li> <li>• Are conclusions free of personal or partisan considerations?</li> </ul>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<b>7. Useful recommendations*</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<ul style="list-style-type: none"> <li>• Are the recommendations consistent with the conclusions?</li> <li>• Are recommendations operational, realistic and sufficiently explicit to provide guidelines for taking action?</li> <li>• Are the recommendations drafted for the different target stakeholders of the evaluation?</li> <li>• When necessary, have the recommendations been clustered and prioritised?</li> </ul>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Test
<b>8. Clear report*</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<ul style="list-style-type: none"> <li>• Does the report include a relevant and concise executive summary?</li> <li>• Is the report well structured and adapted to its various audiences?</li> <li>• Are specialised concepts clearly defined and not used more than necessary? Is there a list of acronyms?</li> <li>• Is the length of the various chapters and annexes well balanced?</li> </ul>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Considering the 8 previous criteria what is the overall quality of the report?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	General comment*

Fields marked with asterisk (\*) are mandatory

- 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.