Online Expert Evaluation Tool (OEET) Expert User Manual

- Recording the assessments of projects, proposals and reports -

Version 2.0
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1 Introduction

1.1 Document scope

This manual describes **technically** how the Online Expert Evaluation Tool (OEET) is to be used by experts to record the assessments carried out for EACEA, EAC and the **Erasmus+ National Agencies**. However, it does not cover the aspects of expert user account creation and accessing the tool for the first time. This is covered in the sister document, 'OEET Connection guide for experts'.

The manual does not provide guidance on how to assess a project. Such guidance is provided in the [Guide for experts](#) published in http://ec.europa.eu/programmes/erasmus-plus/index_en.htm and by the National Agency responsible of the assessment exercise.

1.2 Purpose of the tool

OEET is a web-based application used by experts to record their evaluations of the applications and of the project reports that have been assigned to them by the entity that hired them. The term 'project' is used generically throughout this manual to signify both, applications and project reports.

The three main activities performed in the tool are:

- Assessment: the tool allows up to 3 experts to record and submit their scores and comments;

- Consolidation: the tool allows 1 expert – the nominated lead expert – to record and submit a consolidated assessment.

- Editing: the tool allows an expert with the role of editor to proofread and improve the linguistic quality of the commentary found in consolidated assessments.

1.3 Technical requirements

Any commercially available browser may be used to connect to and work in the tool.

1.4 Support

Should you encounter any problems when using OEET, please contact your National Agency.

For technical support with ECAS account setup or ECAS login issues, please consult in the first place the document 'OEET Connection guide for experts'. If after consulting this document you are still encountering technical problems, please contact a member of the programme team who will advise you which IT Helpdesk to contact.

1.5 Menu layout and content

Screenshots for projects from various programmes and actions have been used as examples in this manual. Since the layout and content of the screens varies from programme to programme and action to action, you may see different options and different screen layouts for your selected programme/action.

2 Getting started

2.1 Process overview

Here is a high-level summary of how the tool is used to record the results of an assessment. It reflects the standard scenario where there are two or three experts involved. (If you are an editor, please consult the alternative process overview found in section 7.1 of this User Manual.)

- Navigate to the tool's webpage using the following link https://eacea.ec.europa.eu/assessment/.

- Follow the account login prompts that appear on-screen.

- On the opening screen of OEET, select the programme code for the programme you are assigned to work on.

- The Project List page displays, showing the projects that have been allocated to you for assessment. The list indicates whether you are Expert 1 (EXP1), Expert 2 (EXP2) or Expert3 (EXP3).

- You assess your projects, one by one, recording your scores and providing your commentary.

- Once you have finished an assessment you endorse and validate it by submitting it.

- You may also be required by your National Agency to print and sign a copy of the submitted assessment.

- Once the assessments for a project have been submitted by both Expert 1 and Expert 2, and when required, also by Expert 3, a member of the National Agency staff generates a consolidated assessment record, identifies one of the experts as the lead expert and assigns the project to the lead expert. That expert will then find the project in their Project List, this time bearing the role type CONS for 'Consolidation'.

- The lead expert performs the consolidation assessment, the aim of which is to consolidate the two individual assessments i.e. to produce one set of scores and one set of comments.

- Once the consolidation is complete, the lead expert endorses and validates it by submitting it.

2.2 Menus and navigation

As a general rule, avoid using the browser's menu options (nevertheless see also the guidance contained in section 2.3 on printing):
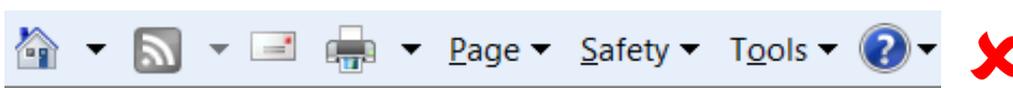
Do **NOT** use your browser's backwards and forwards navigation buttons:

<u>Please note:</u>
If you use your browser's navigation buttons to move from one section to another you will lose data that has not been saved!

In order not to lose data, use one of the following navigation methods, both of which invoke an automatic save of the section you are leaving:

- the tool's *Previous* and *Next* buttons…

- and the section menu which provides links to the different sections of the assessment…

GENERAL

APPLICATION AND ANNEXES

AWARD CRITERIA

COMMENTS

TYPOLOGY QUESTIONS

ASSESSMENT VALIDATION

Please note:

- This menu varies according to the programme/action being worked on;

- Use the links to move from section to section.

2.3   Printing

You can print your assessment at any time, even before submission, using the print button:

When you request a print, depending on your browser settings, the assessment either

- opens in PDF format in a new browser tab or

- pops up in a new window in your PDF viewer e.g. Adobe Reader.

You may be obliged to save the PDF assessment and open it before you can print it.

Use either the PDF print button or the browser's print button to print the document. Once printed, you may close the browser tab or the PDF window that popped up.

When you print your assessment prior to submission, the word "DRAFT" will appear as a watermark on the printout.

Printout BEFORE submission   **Printout AFTER submission**

Please note: if you are required to print and sign your assessments, it must the **submitted version** that you use for this. Versions bearing the DRAFT watermark, even signed ones, will not be accepted.

3   Logging in to OEET

3.1   ECAS authentication

Access to OEET is authenticated through ECAS – the **E**uropean **C**ommission **A**uthentication **S**ervice. Experts must have an ECAS account in order to be able to connect to the tool and it must have been **validated** for use with OEET.

If you have an ECAS account, have already validated it for use with OEET and are familiar with the ECAS login procedure, please click on the following link to access the tool:

https://eacea.ec.europa.eu/assessment/

If you do not have an ECAS account, or, if you have an ECAS account but have not yet validated it for use with OEET, please consult the document 'OEET Connection guide for experts' which contains instructions on how to proceed.

3.2   Programme list & project list

Following successful ECAS authentication, you are directed to OEET.

The landing page contains a list displaying the programme(s) and action(s) that you have been engaged to work on:

If you see a header with an empty screen, it means you haven't yet been assigned to any programme. In this scenario, please contact your National Agency.

Select the 'Assessment List' of the programme you have been assigned to work on. You will arrive at a project list containing the projects allocated to you for evaluation. The list of projects allocated to you is displayed, sorted by project reference number

Please check carefully that this list corresponds to the projects you have received. In case of a mismatch, notify your National Agency immediately.

If there is a requirement to assess the projects in a particular order this will be communicated to you by your National Agency.

Click on an *Assess* button in order to start assessing a project.

3.3   Logging out

There is a *Logout* button located on the top right of the screen. Alternatively, simply close the browser tab or the whole browser to end the online session. Make sure you perform a save of your assessment before ending your session.

4   Assessment

Before beginning your assessment, here are some general recommendations:

- Write your commentary **OFFLINE** using a word processor package such as Microsoft Word, then copy/paste your completed text into the tool. This method enables you to take advantage of the spellchecker and character count functions that are present in word processor packages. It also minimises the risk of data loss through system timeout, network issues or local computer crash. Many of the text boxes have character limits so if you use the copy/paste method, be sure to check that your **complete** text has been successfully pasted.

- **Bytes v. characters**. The text you enter in comments fields is counted in bytes rather than characters. In most cases, 1 character = 1 byte (this includes spaces) but special characters such as those bearing accents can take up more than 1 byte.
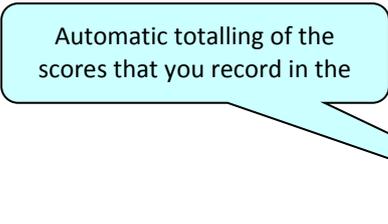
> Automatic totalling of the scores that you record in the

- **SAVE** your data **frequently**, particularly if you are writing commentary directly into a text box. Changing section invokes an automatic save but staying in the same section does not.

- Submit your assessments **as each one is finished**. Please do not wait until they have all been finished to submit them all together. Although programme staff can read your assessments as soon as they have been entered into the tool, they are only deemed to be finished and can only be taken into consideration once they have been **submitted**.

4.1   General section

Clicking on the *Assess* link for a project opens the assessment on the *General* section.

Example of General screen:

This section contains the general data of the project and, for some programmes, the Decision fields:

The section menu allows you to navigate between the different sections of the assessment or to return to the list of projects allocated to you (via the *Project List* link). **The menu content, its order and the section labels vary according to the programme / action that is under assessment.**

4.2   Application and annexes

The project documents required for the assessment are found in this section.

From here you can download, save or print the application or report form and its attachments.

Click on a *Download* button to bring up the option to open or save the document. Depending on the size of the attachments and the trafic in the central services the refreshing of this page may need up to 1 minute.

4.3   Award criteria

This section contains the award criteria to be evaluated by you. Each criterion has to be given a score and, depending on the Programme / action that is under assessment, a supporting comment may also be required.

Example of award criteria screen:

The total of the scores that you record is displayed in the *General* section of the assessment in the field *My Scoring*. Depending on the programme, it can appear in different format. One example:

You are expected to give comments on each award criterion and, in the comments, refer explicitly to the elements of analysis under the relevant criterion. The comments on each award criterion have to reflect and justify the score given for it.

As your comments will be used by National Agencies to provide feedback to applicants, you must pay particular attention to clarity, consistency and appropriate level of detail and draft the comments in the language requested by the National Agency.

4.4   Comments to applicant and to NA

Depending on the programme and Action there could be one or several sections "Comments".

The example below contains 3 "Comments" sections: Overall comments to the applicant, General comments to the NA and budget comments to the NA.

"Overall comments to the applicant" will be shared with the applicant (together with the comments on Award Criteria –see previous point-) in the feedback that the National Agency will provide. The other comments are exclusively to the National Agency.

Enter your comments in the free text box. Save your work on a regular basis.

4.5   Typology questions

This section contains a set of questions to be answered by you using checkboxes.

All questions are formulated in positive mode. If what is said in the question is true, please click the checkbox. If not true let the checkbox unclicked

Example Typology screen:

4.6   Expert decision (in *General* section)

For some programmes and actions there is a decision based on given rules that is located in the *General* section. Before submitting the assessement you have to select a value.

An example:

The *My Scoring* figure is calculated automatically based on the scores you have recorded in the *Award criteria* section of the assessment.

Perform a save after selecting your Decision(s).

If it is inactive, this means that the rating is automatically completed by the tool based on the scores you recorded in the *Scoring* section. The menu is greyed out when it is inactive.

4.7   Assessment validation

You will not be able to submit your assessment until all scores and mandatory comments have been recorded and saved.

Once you submit your assessment it becomes read-only i.e. the content is locked and cannot be modified. When you are ready to submit your assessment, navigate to the *Assessment validation* section:

Click on the *Submit* button and confirm the operation by clicking OK:
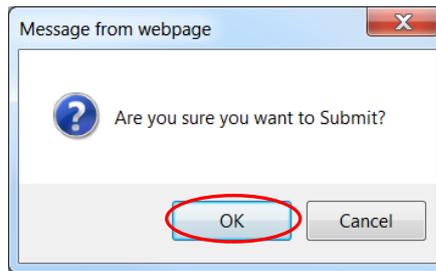
Following submission, a confirmation message appears in the box, a 'Submitted' datestamp is added and a 'Submitted' watermark is applied to the whole assessment:

And back on your project list the submission date and, where appropriate, the decision, are added:

Type	Project Reference	Assigned Projects	Decision	Organisation	Submission date (yyyy-MM-dd HH:mm:ss.SSS)	
EXP1	577592-MED-1-2013-2-BG-MEDIA-DEVDOC	Doc 2nd round	N	EACEA	2013-04-19 11:28:22.0	Assess
EXP1	578025-MED-1-2013-2-CY-MEDIA-DEVDOC	doc round 2		EACEA		Assess

4.8   Printing after submission

If you are required to sign a printed copy of your assessment, consult section 2.3 of this manual.

4.9   Modifying a submitted assessment

After submission, an assessment becomes read-only and cannot be modified.

If you wish to revise the assessment – for example if you have made a mistake or omitted some information – you must contact your National Agency. If the proposed changes are approved, the assessment will be reopened and you will be able to revise and resubmit it.

The reopened assessment will be identified as version 2 and will contain all the information you originally entered. The original submission date is cleared and the new version number is displayed on the *General* page:

5   Assess another project or switch programmes

Click on the *Project List* link in the section menu to return to the list of projects allocated to you and select another project for assessment.

You can also return to the project list or return to the list of programmes using the 'breadcrumb' navigation trail:
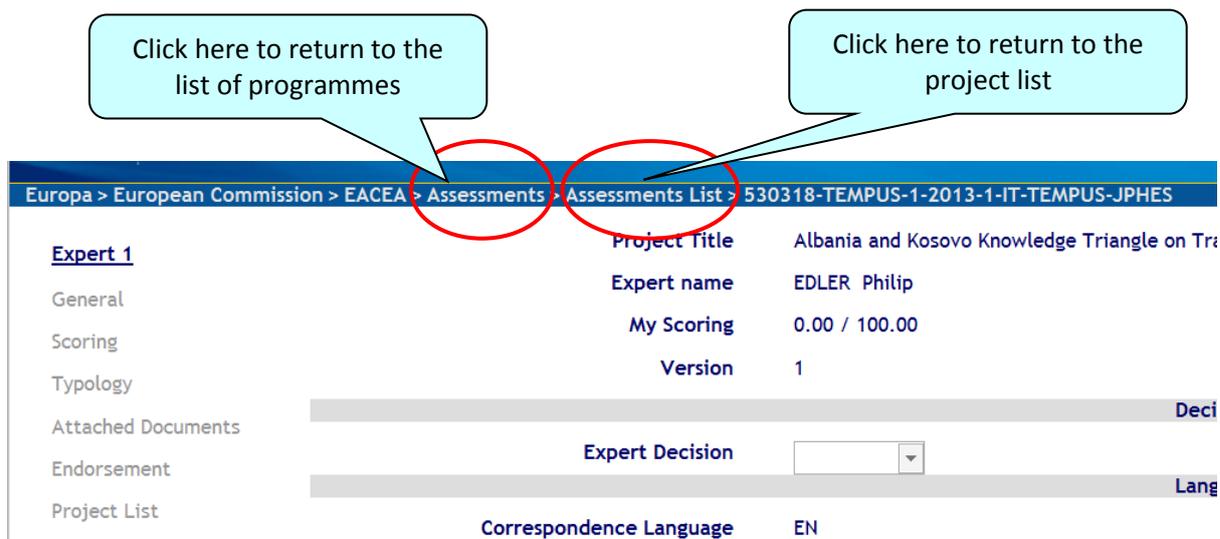
Please note! If you use the breadcrumb trail to navigate away from an assessment that you are working on you will **lose any unsaved data**. Therefore only use the breadcrumb trail when you have finished working on an assessment and saved all data or after you have just submitted an assessment. On the other hand, clicking on the *Project List* link in the section menu to navigate away from an assessment invokes an **automatic save** of the assessment in progress.

6 Consolidation

Projects that are assigned to you for consolidation bear the type code 'CONS':

Click on an *Assess* button to begin the consolidation:

Carrying out the consolidation

Because of the differences in the way the consolidation is carried out from programme to programme and action to action, this manual cannot provide consolidation advice that covers all possibilities. Where supplementary instructions are required, these will be provided directly by the National Agency.

Consequently, when completing the consolidation, you are advised to broadly follow the same approach that you followed for completing your individual assessment, but taking into account any supplementary advice or instructions.

From a technical point of view, the consolidated assessment works in the same way as the individual assessment so you may refer to sections 2 and 4 of this manual for advice on e.g. how to endorse and submit your consolidated assessment, how to print it, how to request the modification of a submitted consolidation, etc.

As with the individual assessment, if there is a *Decision* to provide, don't forget to return to the *General* section to record the decision before proceeding with the endorsement and submission.

<u>Some general points to note</u>:

- The lead expert should consult with the other expert so that the scores and the comments arrived at are approved by both parties.

- The consolidation function gives access to the original assessments of both experts (which remain in read-only mode so cannot be modified). These original assessments are accessed through the links at the top of all screens:

> Expert 1 > Expert 2 > Consolidation

    Click on the *Expert 1* link to open that expert's assessment. Click on the *Expert 2* link to open that expert's assessment. Click on the *Consolidation* link to return to the consolidated assessment.

- Depending on the programme, the scores, checkbox selections and comments from the original assessments may appear directly in the corresponding fields of the consolidated assessment. When they do appear, their presence, absence or value can also depend on the degree of concordance or variance between the original experts' markings.

- **When two or three scores are combined, the tool presents the average of all of them. If in a particular case the instructions are different (i.e. in the case of three scores take only into account for the average the score of the third expert and the score of the other expert closer to the third), please follow the specific instructions and overwrite the calculated average.**

- Scores, checkbox selections and comments that are 'inherited' from the original, individual assessments can be (and, sometimes, should be) overwritten.

- The project documents are still available to you in the *Attached Documents* section.

- **SAVE** your data **frequently**, particularly if you are writing commentary directly into a text box. Changing section invokes an automatic save but staying in the same section does not.

7 Editing

Once **ALL** the project assessments for a given action have been consolidated they can be assigned for editing. The purpose of the editing task is to proofread and, where necessary, improve the linguistic quality of the **comments** of the consolidated assessments. No changes can be made to the scoring, the checkbox flags, the decisions or any other content that is not classified as commentary. Only the consolidated assessments are edited. No individual assessments are ever edited.

The programme team assigns the consolidated project assessments of the action to an expert who has the role of editor.

7.1 Process overview

Here is a high-level summary of how the tool is used for editing:

- Navigate to the tool's webpage using the link provided by the programme team.

- Follow the account login prompts that appear on-screen.

- On the opening screen of OEET, select the programme code for the programme you are assigned to work on.

- The Project List page displays, showing the projects that have been allocated to you for editing. The projects will have the type code 'EDIT'.

- Open a project's assessment and edit all its comments fields, saving your work on a regular basis.

- Once you have finished editing the comments fields, endorse your work by submitting the edited project assessment.

- For some programmes, you may also be required to print and sign a copy of the edited and submitted project assessment.

7.2 Using OEET as an editor

The principles of using OEET for editing are the same as using it for project assessment. The basic functions are all carried out in the same way: logging on, navigation, sorting, filtering, saving, printing, endorsement and submission, etc.

Consequently, if you haven't yet read chapters 1-5 of this manual please read them before proceeding any further. You may of course disregard the guidance concerning the recording of scores, flagging of checkboxes and selection of decision ratings as this is not relevant to the tasks of an editor.

Once you are familiar with how the tool works, log on to the tool as described in chapter 3. Remember to consult the 'OEET Connection guide' if you don't yet have an ECAS account or if you haven't yet validated it for use.

Following successful ECAS authentication you are directed to OEET. The first page you'll come to is a programme list displaying the programme(s) and action(s) that you have been engaged to work on:

If you see a header with an empty screen, it means you have not yet been assigned to any programme. In this scenario, please contact the programme team that hired you.

Select the 'Assessment List' of the programme you have been assigned to work on. Following redirection, you will arrive at your project list i.e. the projects allocated to you for editing. The list of projects allocated to you for editing is displayed, sorted by the *Assigned Projects* column:

Click on an *Assess* button to start editing the project assessment.

The General page of the project displays:

Visit each of the project sections in turn, editing as necessary the comments that you find.

Points to note:

- **SAVE your work frequently**. The tool has no automatic save whilst you remain working in the same section. The auto-save is only invoked by moving from one section to another.

- If any guidance is required on how to complete your editing work, e.g. in which order to tackle your assigned projects, such guidance will be provided by your National Agency.

7.3   Endorsement & submission

Once you have finished editing a project, navigate to the *Assessment validation* section and submit your work. The simple steps are described in chapter 4.7 of this manual. Please note the following:

- You should only carry out the submission when you are sure you have edited ALL the comments fields that are present. This is because it's not possible to have an automated check mechanism as all the comments fields can potentially come prefilled with content.

- The endorsement section displays the submission details of the last expert evaluator's submission i.e. there will be already be a submission date and a 'successful submission' message displayed in the on-screen box . Pay no attention to these. When you perform your *own* submission a 'Submitted by editor' datestamp is added as well as a 'Submitted' watermark.

7.4   Printing after submission

If you are required to sign a printed copy of your assessment, consult section 2.3 of this manual.

7.5   Edit another project or switch programme

Click on the *Project List* link in the section menu to return to the list of projects allocated to you and select another project for editing.

See also chapter 5 of this manual for details of how to use the 'breadcrumb trail' to return to the project list or to the list of programmes.