OPSYS Track 1 Results and Monitoring | User testing 1

User testing period: 31/10/17 - 30/11/2017

Contents

Section 1. Introduction

The User Testing 1 was conducted between the 31/10/2017 to the 30/11/2017 to test the first functionalities available in OPSYS, which mainly focused on Track 1 – Results & Monitoring.

The test was open to all EUDs and HQ units and about 100 users participated. Pilot users (i.e. belonging to the following EUDs/HQ units: Bosnia-Herzegovina; Brazil; Burkina Faso; Georgia; Malawi; Morocco; Pakistan; Peru; Thailand/China/India; Turkey; Ukraine; DEVCO A 02; DEVCO A 04; DEVCO C 01; DEVCO D 03; DEVCO E 02; FPI.2; FPI.4 and appointed FPI users in EUDs) connected with their EU login; all other users connected with one of the 18 dummy logins (ex. w0501060).

Section 2. Overview of the feedbacks

Over 400 qualitative comments were collected between the online survey comments and detailed feedbacks from e-mails and face-to-face meetings. After further elaboration (e.g. removal of duplicates, grouping or split of comments with multiple recommendation into several ones), 295 feedbacks were retained.

As shown by the table below, the highest number of comments concerned the logframe management – main focus of the testing. A large number of feedbacks were also given on horizontal issues and on business entities management.

Categories	Number of feedbacks
Logframe management	72
Horizontal issues (e.g. MyWorkplace)	49
Interventions (e.g. programme and projects) management	45
Indicators management	41
Reporting	38
Review and approve logframe	22
Change Management activities	8
Monitoring	7
Other	13
Grand Total	**295**

Section 3. Answers to the feedbacks

While the test phase focused mostly on Track 1 functionalities, many feedbacks referred the functionalities under the other tracks or transversal issues. As OPSYS is a large and very complex programme, the division in tracks is necessary, but we understand that it can be confusing: for this reason, under each topic, you will find to which track it belongs. Here below you will find the Business Manager for each track.

Track	**Business Manager / Team Leader**
Track 1 – Results and Monitoring	Lucile PETITPIERRE
Track 2 – Contracts Management	Loïc ELIES
Track 3 – Programming, Action and Decision	Iason FOSCOLOS & Laurent DIHO
Transversal issues (xT)	Elio VOCI
User Experience (UX)	Alexis GAYRAUD
Change Management	Veronique LENA

In section 4 you will find the timeline for the development of functionalities addressed here below.

Results & Monitoring

Track 1

Sustainable Development Goals (SDGs) should be integrated in the system.

The need to include SDGs in Opsys emerged strongly from the test phase. The analysis is ongoing on how to include them in the system.
The following options are under investigation: 1) tag the SDGs (and other Flagship policies such as 5Ps, General policy objectives or Rio markers, etc.) at intervention level. *The analysis is ongoing under Track 3*; 2) Access to the list of SDGs when searching for an indicator.

What other types of disaggregation will be implemented?

We asked users what disaggregation they would need in the system: age; geographical disaggregation: regions/district/provinces/Country/cantonal; type of services: SME / Large business / NGO / academics/government; disability; social (disadvantaged, non-disadvantaged groups), urban/city, etc.

It will be further discussed and analyzed what to include or not in the system, and/or whether to provide a "custom" disaggregation function.

Risk management should be integrated in the system.

This need has been noted and will be analysed.

There should be monitoring features that capture the everyday work of OMs (phone calls, events, etc.)

This need has been noted and will be analysed.

There should be functions that permit to improve the visibility and communication

This need has been noted and will be analysed.

There should a function to capture and share lessons learnt

This need has been noted and will be analysed.

It would useful if implementing partners could submit their progress report directly in the system.

The large majority of users agree with this option. This need has been noted and will be developed.

It would useful to attach the source of verification (i.e. a file) when encoding a value in the logframe.

This function is foreseen and will be implemented when technically possible.

It would very relevant to track the changes that are done in the logframe (when, by who, etc).

This function is foreseen, the analysis on how to implement it is ongoing.

The visualization of the logframe is not clear, plus it would be useful to be able to visualize it as the classic matrix.

The visualization of the logframe will be revised taking into consideration all the feedbacks collected, with the idea of providing an additional visualization to show the matrix.

It would be useful to export/print the logframe as well as the indicator page.

This function is foreseen, the analysis on how to implement it is ongoing.

My workplace

I would like to customize My Workplace

What you saw in the testing is the view foreseen for Operational Managers. In the coming releases, it is foreseen to customize MyWorkplace depending on the profile of the users (Contract and finance, Head of Cooperation, Head of Section, etc.). Furthermore, it will be possible to further customize it by adding, moving and removing the different widgets according to what it is relevant for the user. *The UX team is in charge of the visualization (see below).*

Several comments focus on the widgets presented in MyWorkplace.

- **My Portfolio**: see reply below.
- **My Portfolio status**: in MyPortfolio status, you can see the current status of the interventions listed in My Portfolio. It was under construction during the test phase: what you saw was only a graphic example.
    i. **Results aggregation**: this chart will show the status of the intervention based on the logframe. The aggregation rule behind the cart is still under analysis. Several users suggested that it might not be relevant to aggregate different levels of results at portfolio level. *The analysis is still ongoing under Track 1.*
    ii. **EU contribution**: this chart will show of the EU Contribution that has been Committed, Contracted and Under Preparation. *The analysis is still ongoing under Track 3.*
    iii. **Contracted**: this chart will show the status of the EU contribution that has been Contracted, Paid or that is Under Preparation for the payment. *The analysis is still ongoing under Track 2.*
- **My tasks**: this widget was still under construction during the test phase. It will show all the tasks that you have been assign to or that you have assigned to your colleagues, the tasks of your unit/delegation, as well as your to-do list besides the tasks.

- **Main indicators**: this widget was still under construction during the test phase. It will show the main indicators of your interventions. *The analysis is still ongoing under Track 1.*
- **Sectors**: see reply below.

I would like to customize My Portfolio (widget)

UX team for visualization

All tracks for contents

My Portofolio shows a snapshot of the interventions you or your unit/delegation are managing, with few key information and quick access to the intervention pages.

My Portfolio shows the list of interventions you are in charge of, while My Department Portfolio shows the list of interventions your unit/delegation is in charge of. For the moment and during the test phase, these two lists are mutually excluding: users can see either one or the other. During the test phase, users connecting with personal login from a pilot unit/delegation, would see My Portfolio if their interventions were used for the test, or My Department Portfolio if their colleagues' interventions were used for test. Users connecting with dummy users (ex.w0501060) would only see My Department Portfolio.

In the future, users will be able to choose whether to see their own portfolio or their unit/delegation. Eventually, users will be also able to create a customize list of interventions they wish to see: for example, Budget Support colleagues will be able to flag and show only Budget Support programmes; or thematic colleagues will be able to flag and show only interventions in their sector.

My Portfolio does not show the totality of the information available on the interventions: it is meant to be a preview (providing only key info) and serves as shortcut to the interventions page, where you can visualize the rest of information. If you want to perform a search and look for a list of interventions according to specific criteria, you will be able to use the search tool.

Furthermore, in My Portfolio page (accessible by clicking on My Portfolio widget) you will have an extended and more complete overview of the portfolio. According to the majority of the users, the intervention reference and the person in charge are the most wanted information to be added.

As mentioned above, for the moment this visualization is based on Operational Managers. Together with the rest of My Workplace, additional visualizations will be analysed to respond to other roles' needs.

As explained below, the embedded guidance will help you to navigate through the system.

I would like to see and manage the forecasting.

This need has been noted and will be analysed by Track 3 and Transversal issues (XT).

Entity page (Intervention page)

UX team for visualization

All tracks for contents

As for My Workplace, the entity page will be customizable: you will be able to add, remove and move the widgets on the page.

Among the feedbacks, several users suggested to add relevant communication material and links to external websites. Additionally, the timeline will be revised as many feedbacks focus on that.

Contracts pages are still not available in OPSYS, thus you only find a link to CRIS.

Search and reporting

xT in coordination with all Tracks

Search

Many feedbacks concerned the search function. First of all, a clarification is needed: what you tested is a *CRIS search*, i.e. a search tool developed outside OPSYS to allow a more flexible search in CRIS only. This search does not search in OPSYS for the moment. It was included in the testing because it serves as prototype for the search that will be developed in OPSYS. Therefore, all the feedbacks collected will be used in this sense.

Secondly, in OPSYS it will be possible to perform a free search (i.e. typing text that will search in all fields, as for the CRIS search just mentioned), as well as a structured search, i.e. search by field such as "Operational Managers", "EUD in charge", etc.

The following feedbacks emerged strongly from the users and will be analysed:

- Export function at all stages of the search
- for the free text search, review the filters and simplify/clarify their use and visualization

Reporting and aggregation

During the test phase, you only saw the "input side" of the system, i.e. you encoded information but could not retrieve it/export it. We want to reassure that all data that is encoded will serve to create relevant output, such as reports. The analysis of these functions is foreseen.

I would like to see all interventions in one sector / I would like to see what happens in a country for this sector / I would like to aggregate results by sector

Several users underlined the importance of having a system that allows sector visualization across the system. This is one of the objectives of OPSYS. The following functions will be analyzed:

- Search and export by the sector (and/or country) – see above
- Customize portfolio by sector (and/or country) – see above
- Aggregation by sector (and/or country) – see above

Tags

To provide flexibility and accuracy for searching and reporting, it is under consideration the development of a system of structured tagging, which would allow users to tag their interventions using pre-defined lists. It could be the list of SDGs, or sectors that are not covered by the DAC sectors or the cross-cutting issues such as gender.

DAC sectors

Several users pointed out that they would prefer to have the DAC code together with the DAC sector name. This will be implemented immediately for the search indicator function and requested for the rest of the system.

Furthermore, users asked to be able to see the breakdown of the DAC sector (from general to specific) in the search indicator screen. This will be requested as well.

Interventions (i.e. projects and programmes) and terminology

xT

Interventions (i.e. projects and programmes) & Terminology

Understandably, many users asked clarifications on the terminology used in the system and in the scenario. We did not provide any guidance on it because the terminology and the data model to be used in Opsys are still under discussion, thus what you saw during the test might be changed. This includes terms such as "intervention" (which is the term proposed in "Better regulations") and the operational entities (Programme, Project, Horizonal, Multi-Project) and their components (Project, Horizontal, Other), as well as the related structure/hierarchy that influence both the operational and the financial management (e.g. where to create the logframe and how to split the budget).

For the testing phase, we prepared the portfolio, tagging projects and programmes according to this temporary terminology, which maybe did not make sense for you. Once the system is in production, users will be able to create their own portfolio according to what makes sense for them.

The work on the data model and on the terminology should be concluded by the end of Q1 2018.

Once again, a comprehensive user support will be provided to accompany the users.

Data quality

Until OPSYS is in full production and CRIS phases out, the data displayed in OPSYS is drawn from CRIS. Unfortunately, a part of the data in CRIS is of poor quality (wrong GESTOPE, no link to MIPs, etc). Thus, the data displayed in OPSYS will be wrong as well. For this reason, it is crucial that users correct the data in CRIS as soon as possible, in order to transfer to OPSYS only data that have been quality checked. Don't hesitate to check and correct your own projects. One very significant issue is that misuse (or the lack of use) of Project/Measure, which is the direct link to OPSYS: please make sure that the CRIS decision has been split in P/M (if relevant) and that Operational Manager of the P/M is updated.

Budget Support

xT

Many users underlined that the specificities of the Budget Support should be taken in consideration in the system (e.g. fix vs variable tranches and disbursement conditions; management of disbursement dossiers). To ensure that this is the case, a BS working group operating at DEVCO and NEAR level has been set up and will work across tracks, in order to cover the entire cycle of the programme, from planning to payments to evaluation.

Integration with other systems

Opsys will gradually integrate or interoperate or phase out the other systems that are in use at the moment, such as ROM module, Prospect, Pador, etc. It will be the single entry point, where you will perform all the tasks foreseen in those systems.

Methodological guidance and technical help

Change management

Many of the feedbacks collected concerned clarifications on the business process and methodology for results and monitoring, as well as on technical guidance on the system.

It is foreseen that both methodological and technical support will be integrated in the system. The following components are currently under development:

- Contextual help in all screens: it will include quick tips to guide you in the system as well as definitions and explanations. For example, it will show you the definition of quantitative and qualitative indicators when you move the pointer on the fields.
- An online manual: it will include the detailed methodological guidance, integrating the technical instructions to perform the tasks in the system. It will encompass as well the business process.
- FAQs and glossary
- E-learning videos and other materials: the e-learning video will provide quick and easy explanation of the main procedures

Methodological and process contents will be provided by the relevant methodological units within the DG/service.

User experience (UX)

Improve User experience is a continuous process in Opsys. Screens will be progressively revised based on collected feedbacks. Opsys is following EU guidelines and principles that will be applied across all EU systems. Therefore, it has to be taken into consideration that some changes requested impacting general system behavior may not be implemented.

The first work on UX improvement will focus on Logframe visualization.

- Logframe: currently, what is shown in the indicator timeline is the baseline, the current value (if any), the next intermediary target, the final target.
    - Only the next intermediary target is shown, and not all intermediary targets.
- Indicators' page:
    - Source of Verification and comment for Current value not shown anywhere: as requested, the screen will be modified to show this information.
    - Chart: the second chart is unclear and will be removed

Translation

xT

The system is available in English and French. We will review the terms and their translation according to the feedback and the work above-mentioned on the terminology.

In the future, Opsys will be available also in Spanish and Portuguese.

Technical issues during the testing

All bugs are under revision.

There is no "Create a logframe" button on the intervention page. Why?

If there's no "Create a logframe" button, it means you or your EUD/HQ unit does not manage the intervention. The button is therefore not displayed if the intervention is not managed by your "Entity in charge". On My Workplace, you can see if you manage intervention is there's a small key next to it in MyPortfolio.

When I click on a contract / reference / other links, it opens a blank page.

OPSYS is still under construction; therefore several pages are still missing. Contracts pages are not yet available in OPSYS, thus the link goes directly to CRIS. If you were using a browser which was not IE and/or a dummy users, you might have ended on a blank page. This issue will be resolved before the first release.

I don't see any intervention in MyPortfolio / My Workplace is empty.

You probably connected with your personal EU login but you're not part of the pilot group. For this reason, no data are available. If you're not part of the pilot EUDs / HQ units, you have to connect using a dummy login.

I could not create a new entry.

This function was not available for the test phase.

I received a "Server error".

OPSYS is still under construction and some functions are yet to stabilize. This issue will be resolved before the first release.

When I selected a quantitative indicator, I could only chose percentage and not numeric.

If this happened after you chose an indicator to re-use, it could be that the indicator you selected was a quantitative-percentage one, and therefore it would only allow inserting a percentage.

If this happened when you created a new indicator, it was a bug and it will be resolved before the first release.

I clicked on "Approve logframe" but nothing happened.

It is normal, as this function was not yet functioning during the test phase. It will be available for the next user testing.

I searched MyPortfolio but it only searches in the title.

You probably searched in the filter field, which indeed it's a quick filter only for the information listed in MyPortfolio. A (separate) search function will be available to search in all relevant fields.

Feedbacks already under implementation

The following feedbacks were directly approved by the KUG and sent for implementation:

Feedback	Action	Delivery
"Create an indicator" is split in two screens, it's confusing and it's not possible to change title and description once it is saved	The following improvement are foreseen: - Merge in one single screen the creation of the indicator - Possibility to exit the procedure without encoding all information and save as draft	Testing phase 2 (February 2018)
Matching concept is confusing and too many pieces of information are requested	The matching will be simplified: - users can select the matching indicator - aggregation rule and matching value will be removed	As a short term solution, for testing phase 2 (February 2018) it will be hidden. It will be implemented by the end of Q2 2018
It would useful to number the results and indicator	An automatic numbering will be created for results and indicators. Furthermore, it will be possible to re-order (i.e. move up and down) the results as needed.	Testing phase 2 (February 2018)
It would be useful to have a list of default source of verification among which they can choose	Users will be suggested a list of default source of verification. They will be free to add a source of verification not listed.	Q1 2018
It is not necessary to define the exact date when adding a value (Baseline, targets or current value)	Users will be asked to encode a quarter (ex. Q2 2018) instead of exact dates.	Q1 2018
The following terms are not clear: - Result description - Result type - Configuration mode - Actual value	The terms are replaced by: - Result statement - Result level - Manage logframe - Current value	Testing phase 2 (February 2018)
The default Souce of Verification (SoV) encoded when creating an indicator should be automatically copied when we add a value	When adding a current value, the system will copy the SoV encoded at the creation of the indicator	Testing phase 2 (February 2018)
It seems it is possible to add an actual value with a future date; this should not be the case.	It will not be possible to add a value with a future date.	Testing phase 2 (February 2018)

In the indicator page, it is not clear what are the actual values as the type is not displayed in the value type column	The type for actual values (now current values) will be added	Testing phase 2 (February 2018)
It would be useful to present values and graphical representation for qualitative indicators	The analysis is ongoing.	Q2 2018
It would useful to add indicator code/identifier for core and corporate indicators	The code (ex. EU RF 20) will be added for core and corporate indicators.	Testing phase 2 (February 2018)
The "Search indicator" screen should be improved.	The following improvement are foreseen: - Automatic filter by result level - Automatic filter by DAC sector and possibility to drill down by sector - Sex disaggregation icon to identify indicators for which sex disaggregation is possible	Testing phase 2 (February 2018) for the first two elements. Q1 2018 for the sex disaggregation icon

Section 4. What's next?

Track 1

Opsys Track 1 should reach its Minimum Viable Product (MVP) and be ready for the pilot phase in production environment by June 2018. **The following functionalities for results management are foreseen to be available:**

Abbreviations

OM = Operational Manager (internal users)

IP = Implementing Partners (external users)

IM = Indicator Manager (internal users in charge of quality control)

QC = Quality Controller (external users in charge of quality control)

Category	Feature name	Description
Logframe management	OM configures and approves Logframe for Actions and operational entities	EC users set logframe periodicity, reuse results and indicators from MIPs, create and edit results, create and edit indicators, search indicators, create baseline and targets, reorder results and indicators.
	IP configures and submits Logframe	Implementing partners set logframe periodicity, reuse results and indicators from MIPs, create and edit results, create and edit indicators, search indicators, create baseline and targets, reorder results and indicators.
	OM manages Values	OMs add, edit and delete values in the logframe
	IP manages Values	IPs add, edit and delete values in the logframe
	OPSYS contains Logframe for ongoing MFF for Pilot EUDs/HQ units	The logframes of ongoing projects/programmes MFF 2014-2020 of pilot EUD/HQ units are uploaded in OPSYS through a separate application
	OPSYS displays Indicator page for OM and IP	OMs and IPs access the indicator's page, where all indicator's data are displayed
Review mechanism	OM reviews Logframe submitted by IP	OMs approve, reject, comment on logframe structure (e.g. interventon logic, results, indicators) through a review mode mechanism (interaction between OMs and IP through discussion thread).
	OM reviews Values submitted by IP	OMs approve, reject, comment on logframe values through a review mode mechanism (interaction between OMs and IP through discussion thread).
Indicator management	OPSYS allows search options of Core and corporate	Users can use search criteria and filters option suggestions to find an indicator
Reporting	OPSYS displays Traffic light related to Results on My Workplace	Automatic graphical visualization of traffic light based on the results of the logframe included in the portfolio is displayed in My Workplace
	OPSYS displays Traffic light related to Results on Logframe	Generate traffic light at indicator and logframe level based on their current achievement (current value against expected target). The system should display automatic color-codes and OMs can manually encode a scoring (pre-define scoring scale to be further detailed) based on progress from baseline towards milestones and targets and aggregate this information at Logframe level.

Access management	OM manages access of Lead-IP	OMs provide, update, and revoke access to lead-implementing partners to programme and projects in order to manage results.
	Lead-IP manages access of IP	Lead-Implementing partner provide, update, revoke access to implementing partners under his/her umbrella to programmes and projects in order to manage results.
Guidance, Help, support	OPSYS provides guidance and help related to Results on My Workplace	OPSYS provides static and contextual help functions such as auto-complete suggestions when entering a field, question mark guidance, reference to the user guides, tips, short e-learning explanations, FAQ etc.
Task and notifications	OPSYS generates Task related to Results on Task manager page for OM	OPSYS generates and manages specific tasks related to result management (create logframe, encode values, etc.)
	OPSYS generates Task related to Results on Task manager page for Lead-IP or IP	OPSYS generates and manages specific tasks related to result management (create logframe, encode values, etc.) for external users.
	OPSYS generates Notification related to Results on My Workplace	OPSYS generates notifications whenever an action occurred or is requested on project/programmes and their logframe for which an OM is in charge.
	OPSYS generates Notification related to Results for Lead-IP or IP	OPSYS generates notifications whenever an action occurred or is requested on project/programmes and their logframe for which an IP is in charge.
Horizontal	OPSYS supports French and English for Core and corporate indicators	System is available in French and English. Core and corporate indicators are available in the two languages.

Thus, all other functionalities will be analyzed and gradually implemented during 2018-2019 according to the priorities defined by the governance (KUG, DUG and PSC):

HIGHER PRIORITY (Target: 2018)		
Category	**Feature name**	**Description**
Logframe management	OM reports on Results on predefined frequency	Possibility to export/freeze the logframe on a predefined/ad-hoc frequency basis, depending on OM/IM needs for progress reports and/or result reporting
	OM/IP access all versions across time of Logframe	OMs and IP access all (frozen) versions across time of logframes and keep track of changes.
	OPSYS contains Logframe for ongoing MFF for all EUDs/HQ units	The logframes of ongoing projects/programmes MFF 2014-2020 of all EUD/HQ units are uploaded in OPSYS through a separate application
	OPSYS displays Logframe for IPA II	All information on results management encoded in MIS system is migrated to Opsys.
Review mechanism	IM/QC reviews Matching Relationships to Corporate Indicators	IMs and QCs validate the relationship between a customized (i.e. created by user) indicator and a corporate indicator in a dedicated management page.
	IM/QC reviews Matching Values	IMs and QCs validate and control a indicator values and related corporate indicator values in a dedicated management page
Indicator management	IM/QC manage list of Core and Corporate	IM and QC manage the lists of core and corporate indicators in a dedicated management page
	IM/QC review Customized Indicators	IM and QC quality control customized indicators in a dedicated management page.
Monitoring	OM follows-up Risks	OMs create and follow up on a risk matrix and mitigating measures.
	OM/IP upload document related to results management	OMs and IP upload key documents (such as progress/final reports, studies, site visits, minutes of programme/project steering committee, etc.) related to monitoring in the corporate document management system.
	OM/IP follows-up activities	OMs create Activities and monitor them with related indicators.

Reporting	OM/IP reports on progress related to Results and indicator	OMs and IPs report/comment on activities related to individual outputs/outcomes, as well as, on overall project and programme progress as part of their regular progress reporting.
	OPSYS generates printable format of Logframe	All key pages can be exported in excel or PDF format and are printer-friendly.
	OPSYS aggregates results data including Results & Monitoring information	Users generate standardized reports of Results data by project and programme, EUDs/HQ units, Sector, country, region, year, financing instrument; specifically for corporate indicators. This information should be retrieved from Datawarehouse (DWH).
Access management	IM manages access of Quality Control	QCs access through SEDIA to Programmes, projects and related logframe with the same functionalities that an Indicator Manager has.
Guidance, Help, support	OPSYS provides Guidance on Indicators	OPSYS provide specific guidance on indicators either through an attachment or directly in the system with contextual help.
Guidance, Help, support	OPSYS provides guidance and help related to Results for Lead-IP or IP	OPSYS provides static and contextual help functions such as auto-complete suggestions when entering a field, question mark guidance, reference to the user guides, tips, short e-learning explanations, FAQ etc. for external users.
LOWER PRIORITY (Target: 2019)		
Category	**Feature name**	**Description**
Logframe management	OM/IP manages Variable Tranche for Budget Support Logframe	System should support the follow-up of result information related to Budget support including Variable Tranche Indicators.
	IM configures and approves Logframe for MIP and Instrument	IMs configure and approve results and indicator and their values at instrument and MIP level.
Review mechanism	IM/QC reviews Matching Relationships to Other Matching Indicator	IMs and QCs validate the relationship between a customized (i.e. created by user) indicator and a other matching indicator in a dedicated management page.
Indicator management	IM/QC manage list of Other matching indicators	IM and QC manage the lists of other matching indicators in a dedicated management page
	IM manage disaggregation types for indicators	IM manage the type of disaggregation in a dedicated management page
Monitoring	OPSYS integrates ROM and evaluation modules	A direct link between Opsys pages and ROM and Evaluation modules (including request for ROM, evaluation, lessons learn, mitigation measures, etc.) is established.
	OM follows-up key events and milestones	OMs build their own monitoring plan to schedule key events and milestones of their Project or Programme (site visits, steering committees, ROM missions, and other Programme events, such as meetings, commissioning and closing events, evaluation and audit missions, etc.) and according to their specific needs and provide whenever needed a narrative report.
Reporting	OPSYS generates custom reports on Results and/or Indicators	Users generate customized reports of Results data by project and programme, EUDs/HQ units, Sector, country, region, year, financing instrument; specifically for corporate indicators. Enable the retrieval of this information from Datawarehouse (DWH).
	OPSYS displays main indicators on My Workplace	OMs follow on their workplace selected indicators from the logframes or aggregated information on the contribution of their projects or programme to Corporate indicators or other matching indicators
	OPSYS displays consolidated information on Indicators	OMs visualizes consolidated information on results and indicators.
	OPSYS generates Result KPI on EAMR	OPSYS displays the key performance indicators related to results for EAMR exercise through DWH
Horizontal	OPSYS supports Spanish and Portugese	System should be available in spanish and Portuguese. Core and corporate indicators should be made available in the two languages

The next milestone for Track 1 is the testing phase with a restricted number of implementing partners selected by the pilot delegations and HQ units, which is scheduled as follows:

What	***When***
Webinar to launch the test phase	*08/02/2018*
Test phase	*19/02/2018 – 02/03/2018*
Webinar to provide the first feedback on the test phase	*Mid-March*

Track 2

The development of Track 2 focus at the moment on the new framework contract Services for Implementation of External Aid, the first of the over 40 procedures that will be developed in OPSYS. A first testing phase with users is foreseen by June 2018.

On the 9^{th} February, Track 2 will carry out an important workshop to analyse the 40 contracting procedures used in the Relex family with members of the Domain User Group and senior users. The aim of the workshop is a categorization and shared understanding of the (families of) contracting procedures and an estimate of the workload

Track 3

The analysis of Track 3 has just started and first user groups have been organised to define the business requirements. During the first quarter of 2018, the focus will be on delivering a solution to visualize all business entities (e.g. instruments, actions, Annual Action Programmes, Programming Document) and on the navigation between these entities. This constitutes the step1 in the delivery process of OPSYS for Track 3.

The second delivery, step 2, will be to provide a solution for entering information in OPSYS relative to the Actions (in replacement of the CRIS Decision module) and the Annual Action Programme (or Measure).

Step 3 will focus on providing a module for capturing the Programming Documents and exploit their data in later phases of the Programme/Project Cycle Management.

The final step will then deliver a solution to support the Action design. This means that OPSYS should allow users to work on a collaborative basis to co-author documents and manage their process in the most clear and efficient way.

Workshop with pilot EUDs/HQ units – 1 and 2 March 2018

A 2-day workshop across tracks is organized back-to-back with the Cooperation Days: OMs and FCA officers from pilot EUDs and HQ units are invited to test, provide feedback and discuss priorities.

Cooperation Days – 5 to 9 March 2018

The following OPSYS activities are planned for the Cooperation Days:

- Working Group on "OPSYS: the way forward" (TBC)
- An OPSYS stand operating during the entire period to answer enquiries, provide demos and collect feedback

Contacts

Exchanges with users are key for the development of OPSYS, as this testing phase demonstrated.

Don't hesitate to contact us at DEVCO OPSYS USER SUPPORT & COMMUNICATION EuropeAid-OPSYS-USER-SUPPORT-COMMUNICATION@ec.europa.eu or to contact directly the business managers.

You can join our Capacity for dev group, where you can find all the latest information:

https://europa.eu/capacity4dev/opsys