SEP Evaluation Expert Quick Guide

SEP Evaluation

16 December 2020

European Commission

Preface

Purpose and Scope

The purpose of this guide is to offer a usable and quick reference to the European Commission's Evaluation tool functionalities and to assist Proposal Evaluators (Experts) with their online evaluation process in the scope of specific Calls for Proposals ('Calls').

Intended Audience

Proposal Evaluators (Experts) registered in EMI/EMPP and having tasks assigned in the European Commission's Evaluation tool (SEP).

Links and Resources

Detailed how-to procedures and instructional video presentations on the usage of the SEP Evaluation tool are available on the following location under 'Expert Evaluation of Proposals':

https://webgate.ec.europa.eu/funding/display/ECResearchGMS/Experts

Information on EU Login is available here:https://webgate.ec.europa.eu/funding/display/ECResearchGMS/How+to+authenticate+with+EU+Login

Contact

For technical issues regarding SEP applications, please contact the IT Helpdesk team:

- By email EC-FUNDING-TENDER-SERVICE-DESK@ec.europa.eu
- By phone: **+32 2 29 92222**

Opening hours: **8:00 - 18:00** (**Monday** to **Friday**)

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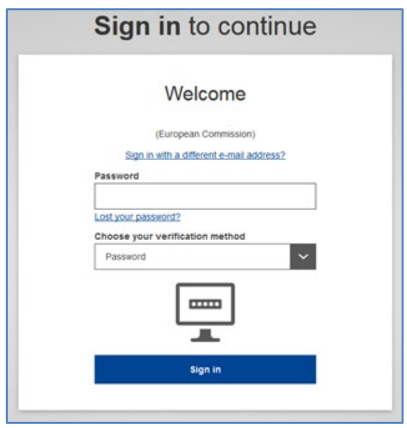
Logging to the Evaluation Tool

The EU login page

When you attempt to login to the Evaluation Tool, your identity is checked by the EU login system (The European Commission's Authentication Service), which is widely used to securely authenticate users in most of the European Commission's electronic systems. The Evaluation Tool uses the same EU Login account that you have used to register as an Expert in the Funding & Tenders Portal.

- To login click on the link in the Evaluation Invitation email from the EU. You will be prompted to authenticate through EU Login. Enter your email, click **Next** and then enter your password:



- Click the arrow beside the Password field and select the authentication method you require from the drop-down menu. In this example, we use "Password". EU Login supports a variety of verification methods. Using a password is the simplest one. Other verification methods involve using additional devices that can provide more security.
- Enter your password in the **Password** field.
- Click **Sign in**. The Evaluation Tool screen will appear.

For more information about logging in to the evaluation IT tool and password requirements, see https://webgate.ec.europa.eu/funding/display/ECResearchGMS/How+to+authenticate+with+EU+Login.

User Interface and functionalities

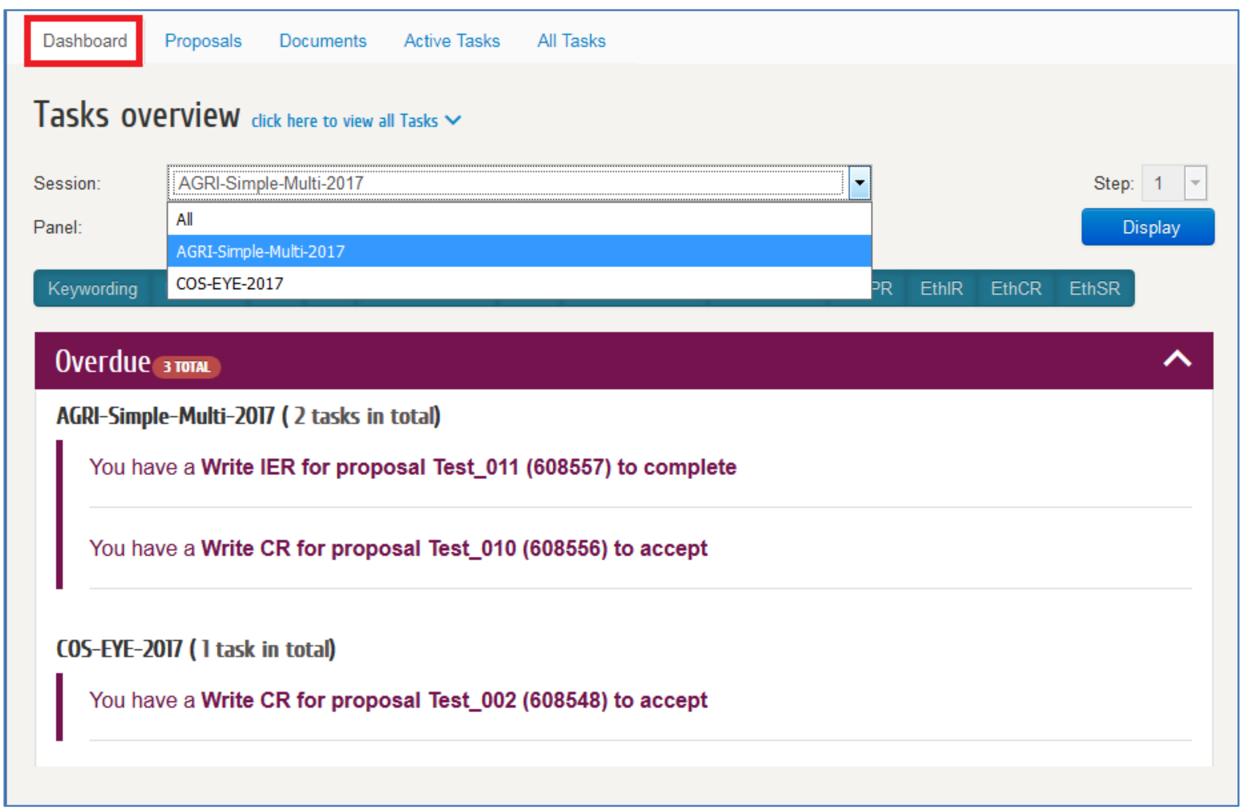
The Dashboard page

To make it easier for you to manage your assigned tasks, the Dashboard shows all of them in an organized manner.

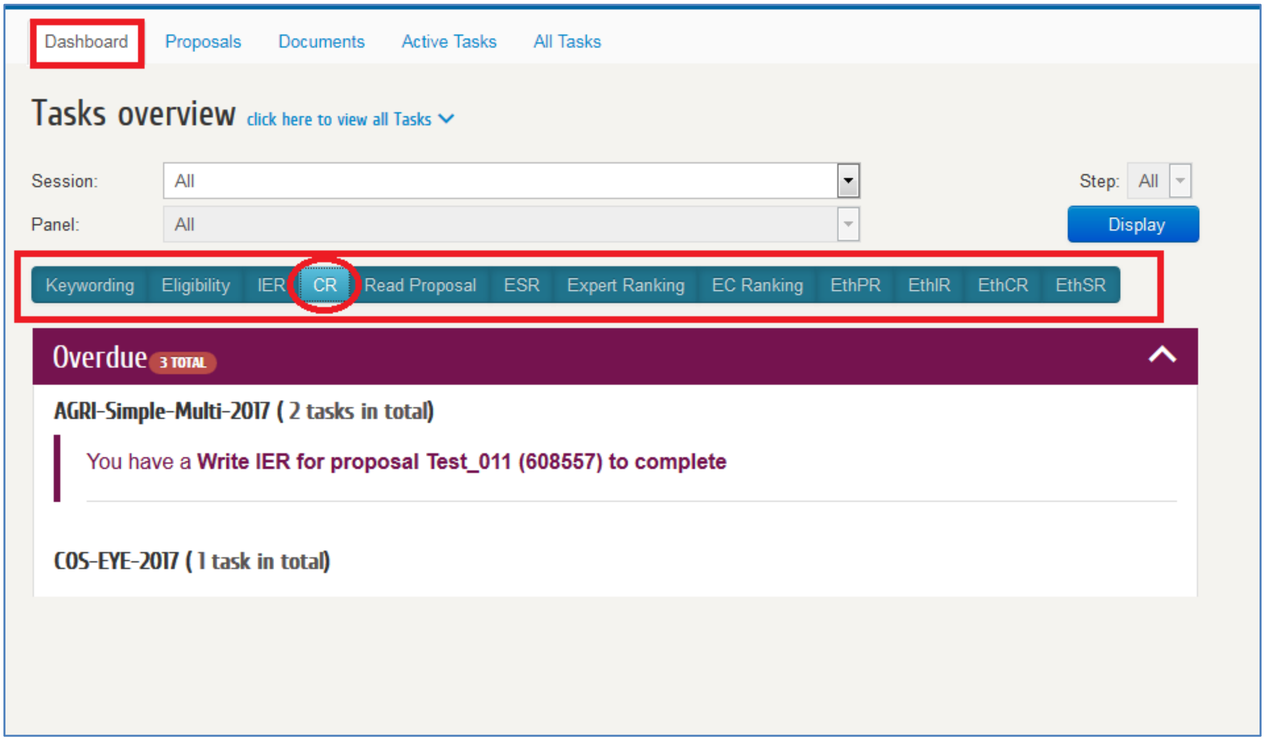
The left side shows the number of active tasks on the top, and those tasks you did not accept at the bottom. To accept the tasks click on the tasks to access the proposal details.

The right side of the screen displayed all assigned tasks by due date and by session. Clicking on the task will also take you to the proposal details screen.

Use the drop-down menus on the top to display only tasks associated to a specific session or panel. Confirm your selection by clicking on the **Display** button:



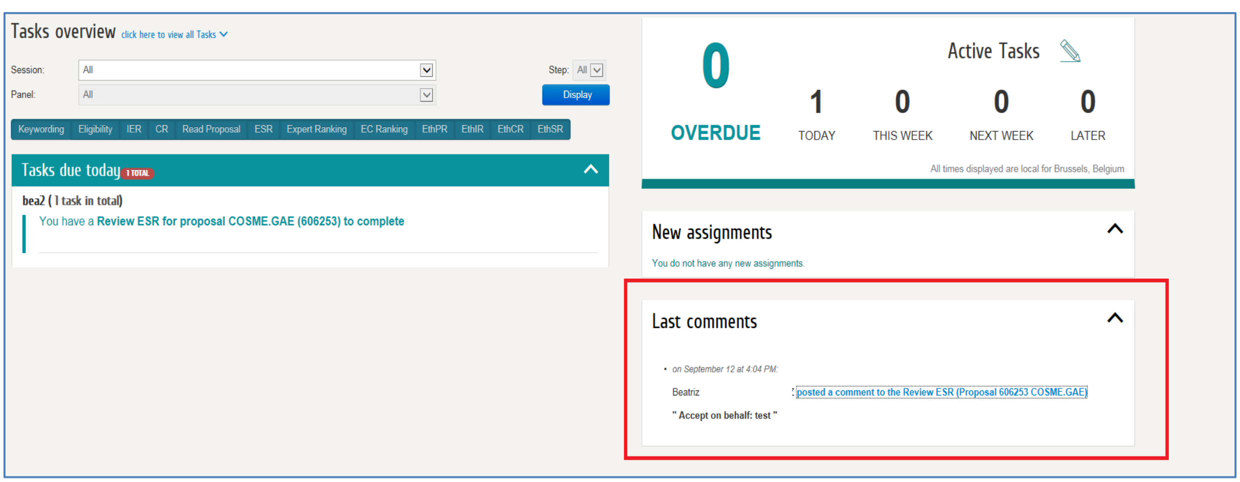
You can also display only specific task types. Click on the task type you wish to hide.



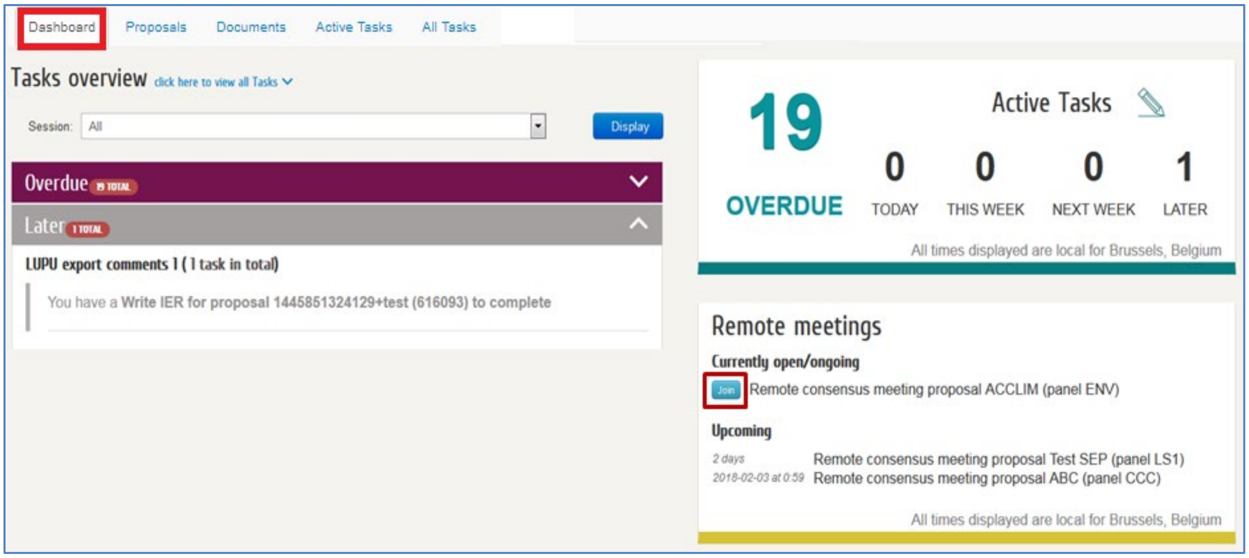
To clear the filter, click again on the hidden task type of click on **Display**.

The new assignments which need to be accepted are displayed on the right side, as well as an overview of amount of tasks by due date.

You can see new comments in accepted tasks, if applicable. They display below **New assignments**:

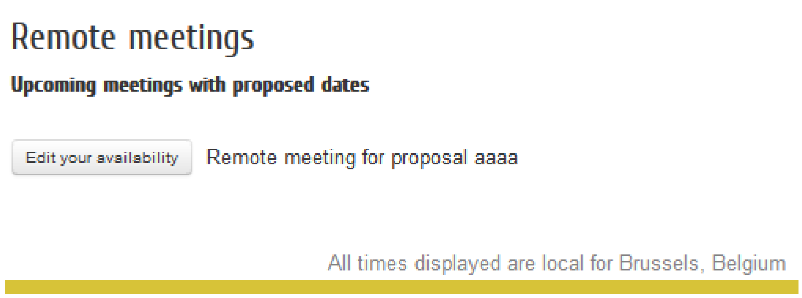


The expert dashboard also includes a Remote Consensus Meetings area that displays both the currently open/ongoing meetings and the Upcoming ones. The status of an Upcoming meeting changes to currently open/ongoing ten minutes before the scheduled meeting time. The **Join** button also will be displayed 10 minutes before the meeting starts.

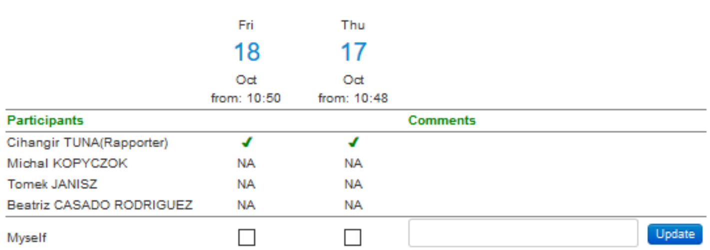


Clicking on the **Join** button will launch the meeting using WebEx. Check the section about connecting to WebEx at the end of this manual.

Some meetings are sent with different proposed time slots, and depending on which slots are mostly selected by most of the evaluators, a final meeting will be scheduled. When this is the case, you will see the meeting on your dashboard; click on the **Edit your availability** button to see the different options:



Select the time slots that fit you better, you can also leave messages.



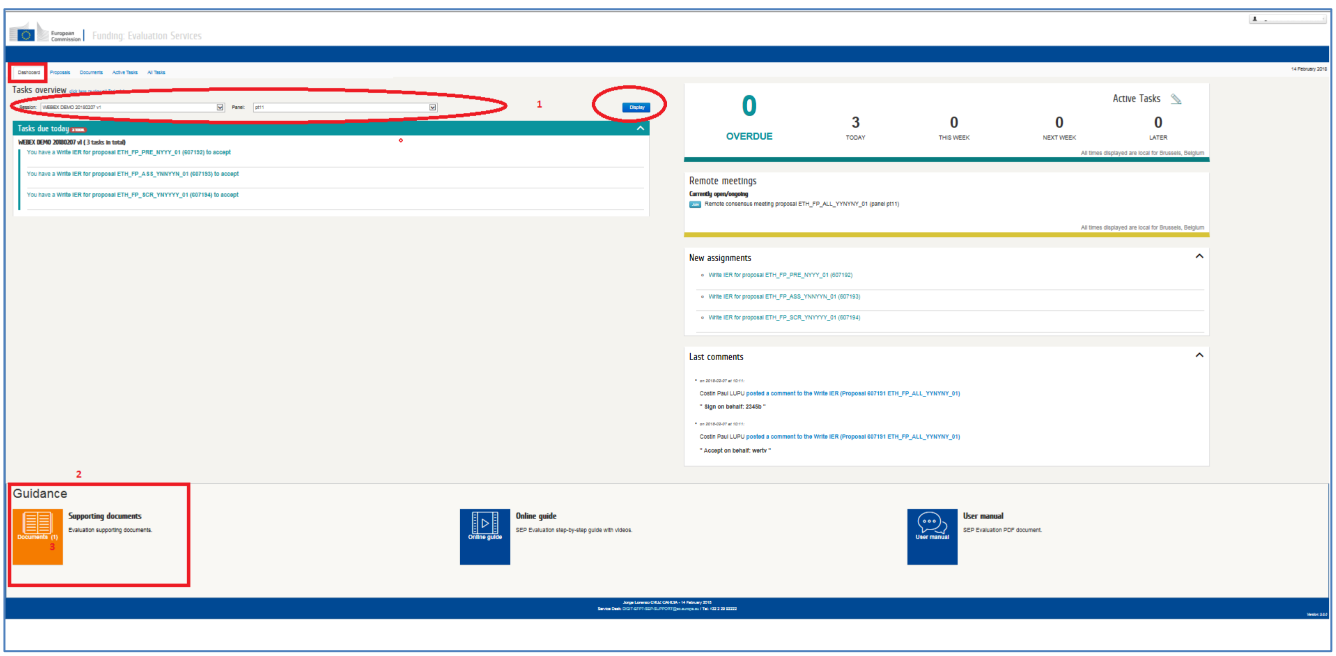
If it is not possible to attend during any of the slots, simply click on the Update button (comments are optional) without selecting any of the slots.

	Fri 18 Oct from: 10:50	Thu 17 Oct from: 10:48	
Participants			**Comments**
Cihangir TUNA(Rapporter)	✓	✓	
Michal KOPYCZOK	✗	✓	
Tomek JANISZ	✗	✗	I am availlble all day on the 16th and again on the 21st
Beatriz CASADO RODRIGUEZ	✓	✗	
Myself	☐	☐	Update

Later, the Rapporteur will propose a final meeting based on the selections of the evaluators, and you will be notified via email of this new meeting, as well as it will appear on your Dashboard.

Another feature accessible from the Dashboard is also access to the briefing documents of a session. To do so, select the session and the panel and click on **Display** (1).

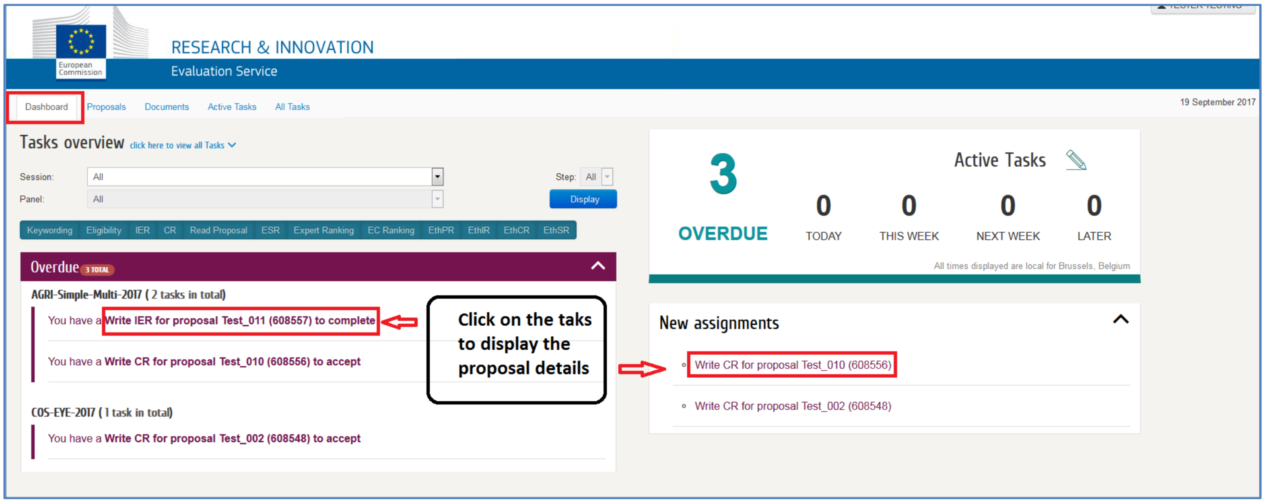
Then, click on the Supporting Documents icon at the bottom (2). The amount of available documents is indicated in the icon itself (3).



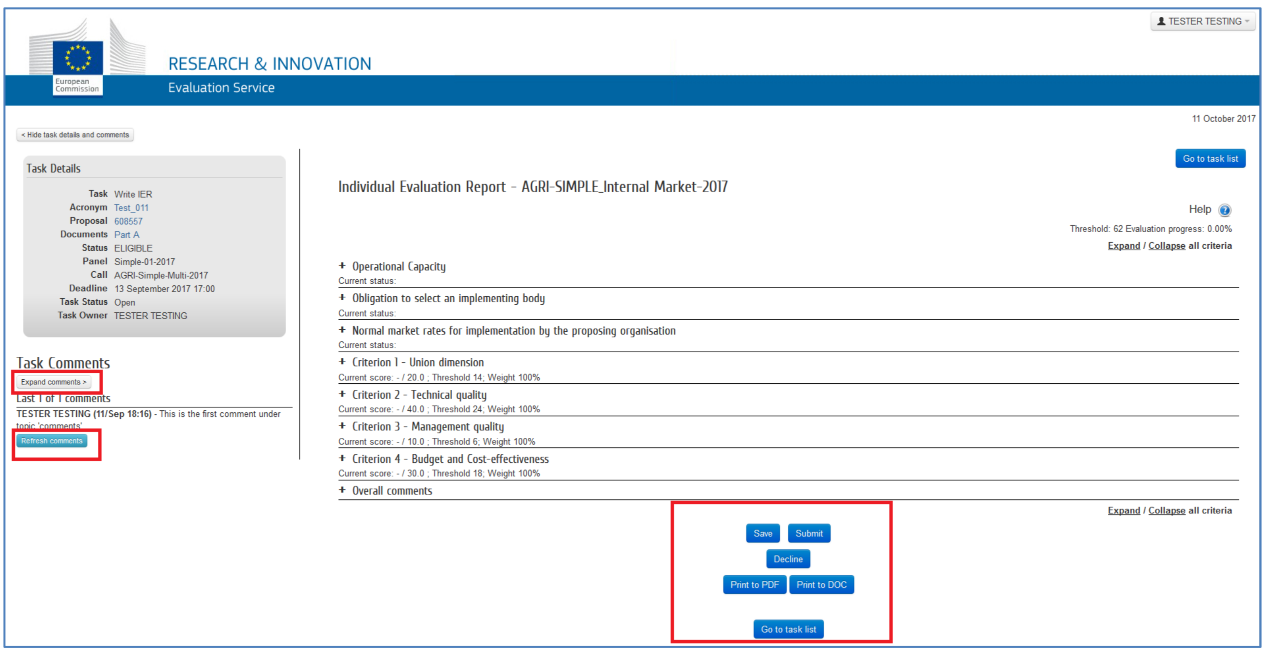
Managing tasks from the Dashboard

You can access the **Proposals Details** screen from the Dashboard in order to take an action on your assigned task.

To accept a proposal, click on the task name to open the **Proposal Details** screen:

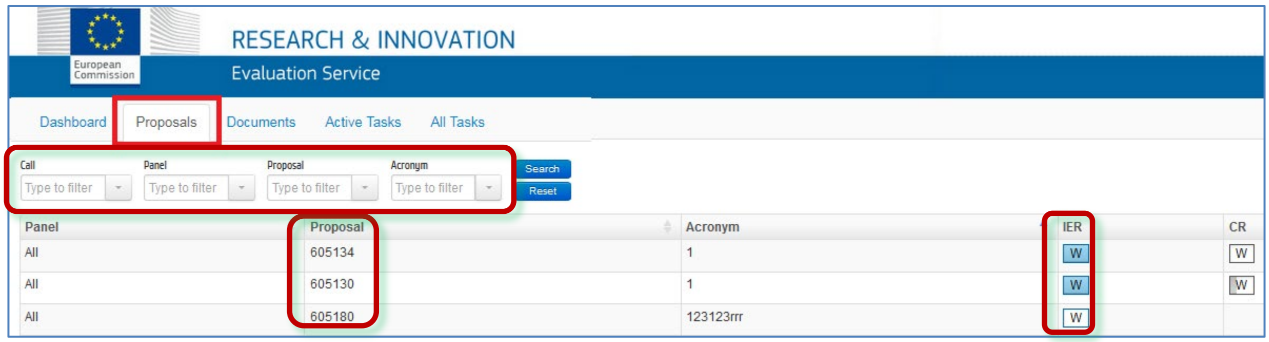


When displaying the task details, you can accept the task, work on it and reject it, among other possibilities.



The Proposals page

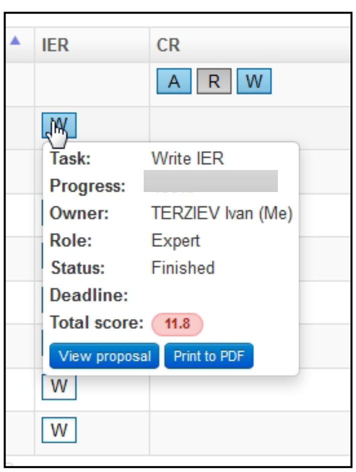
In the **Proposals** page you can view the proposals that have at least one task allocated to you. You can filter by Call, panel, Proposal or Acronym and sort by clicking on the column's arrows.

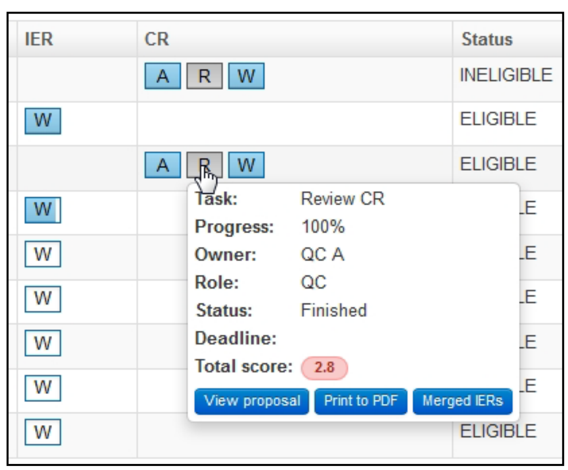


The page provides a visual representation of the task's status:

- Icon squares with Task Acronyms: W = **W**rite; R = **R**eview; A = **A**pprove; F = **F**inalize.
- Icon squares Task box Colours: Blue = you own the task; Grey = someone else owns the task.
- Square completely filled in = task submitted.
- Square partially filled in = task in progress.
- Square completely white = task not yet started.

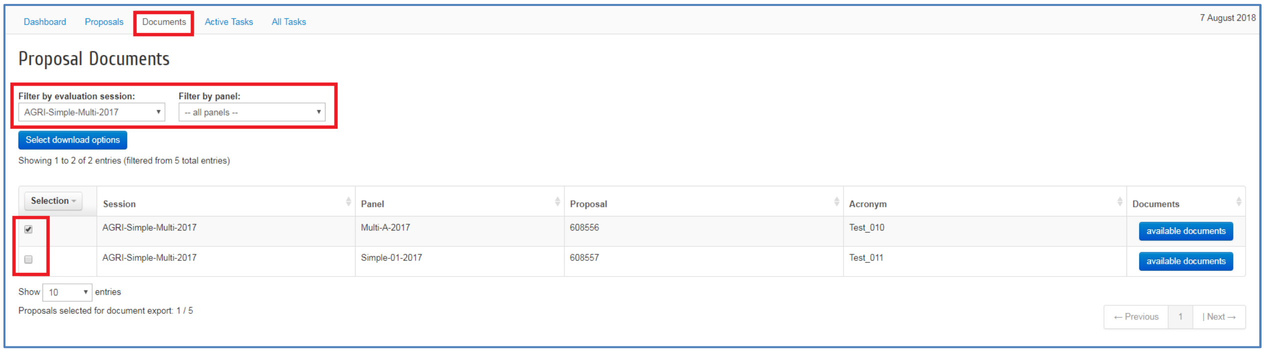
If you click on the icon squares, the system will open the corresponding task page. Hovering over the squares opens a pop-up window with summary information and buttons for actions you can perform.



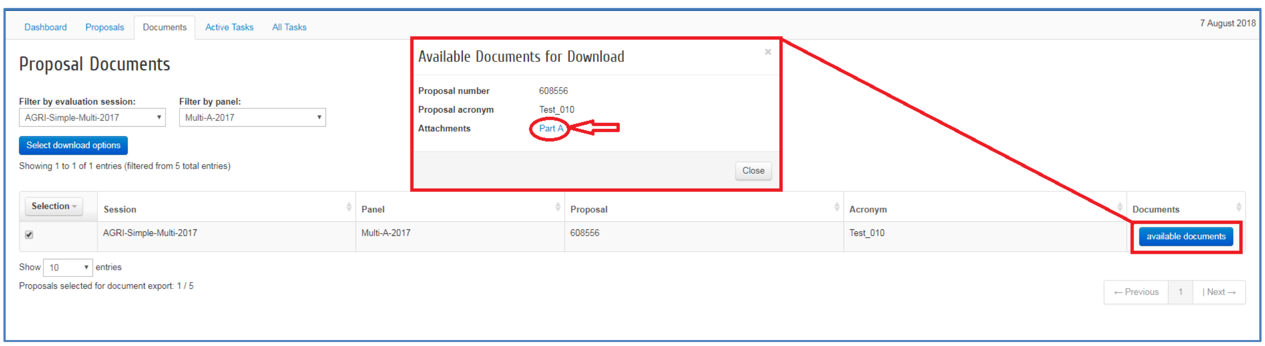


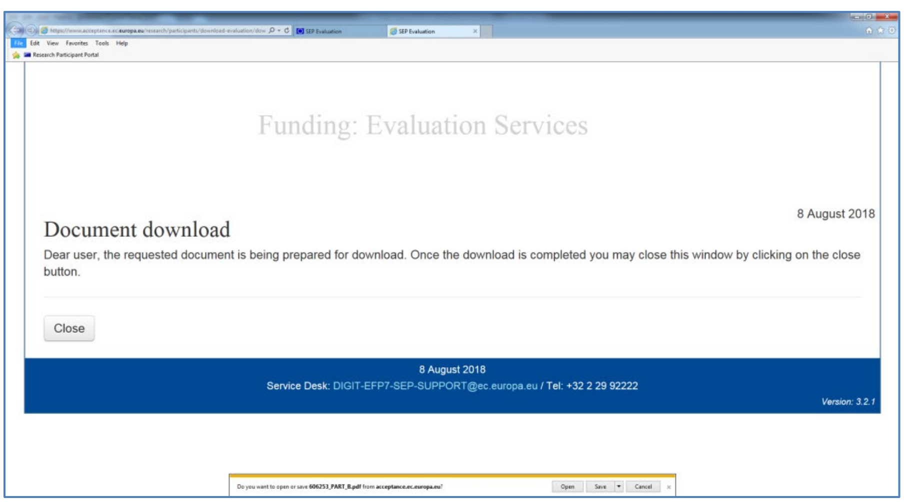
The Documents page

In the **Documents** page, you can select proposals for which you are part of the expert pool and download the documents of those proposals. If there are different panels, after selecting the evaluation session, a new filter field displays to select the panel.

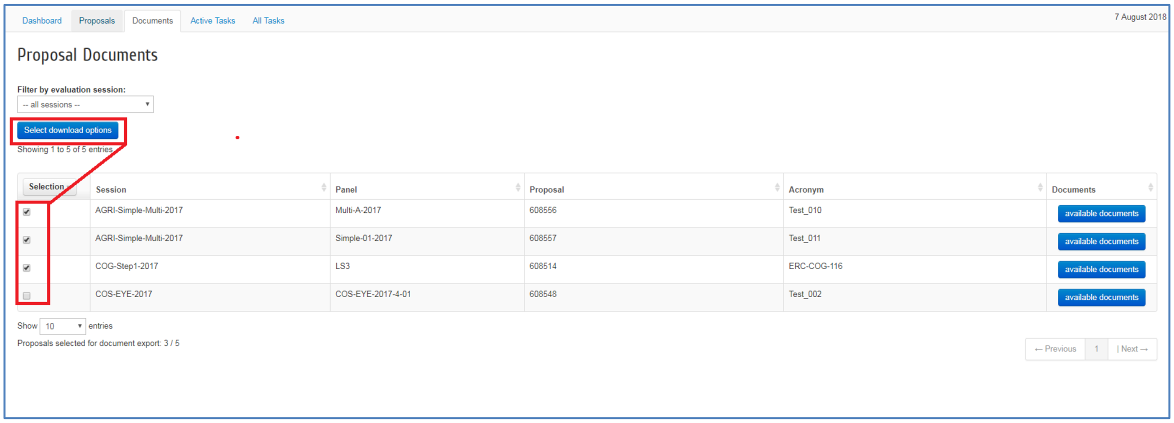


Click on the **available documents** button next to a specific proposal to display the documents for that proposal. You can click the link(s) under **attachments** in the pop-up window to download a concrete document. A download window opens in a new tab.

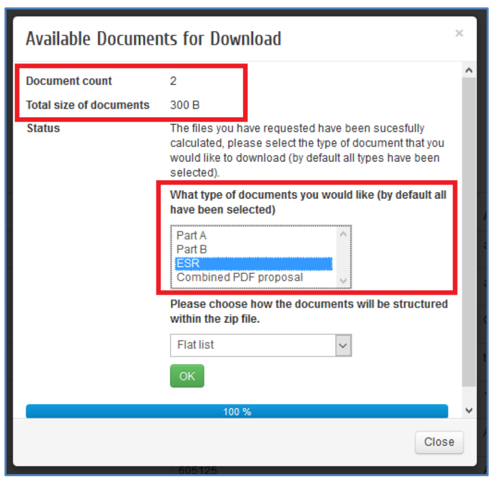




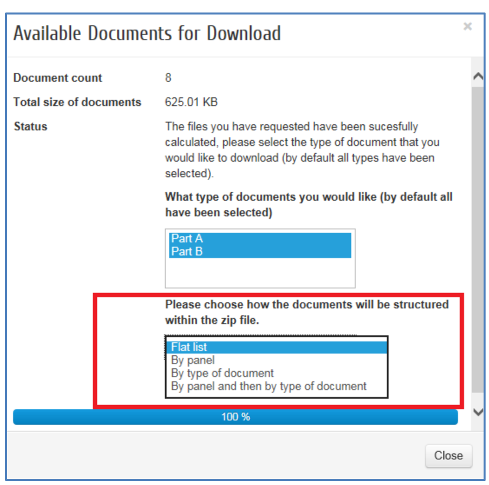
If you wish to download more than one document for a proposal, or the documents for different proposals, select the proposals and click on the Select download options button, instead.



The available documents are automatically selected; click the document type to be selected, i.e. click the Part B, for instance, to download only the Part B documents. To select different types, hold the **Ctrl** key while you click on the document types. The number of documents and the total size of the zip file are indicating on the top.



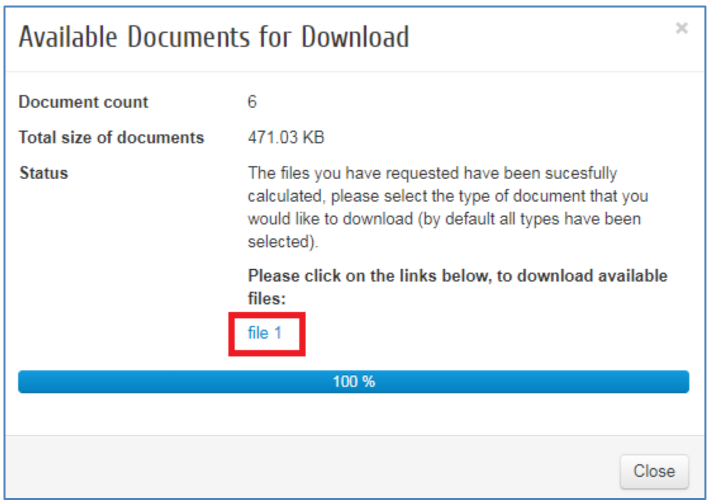
The documents will be downloaded in a zip file, click on the drop-down list to select how the content will be organized within the zip file.

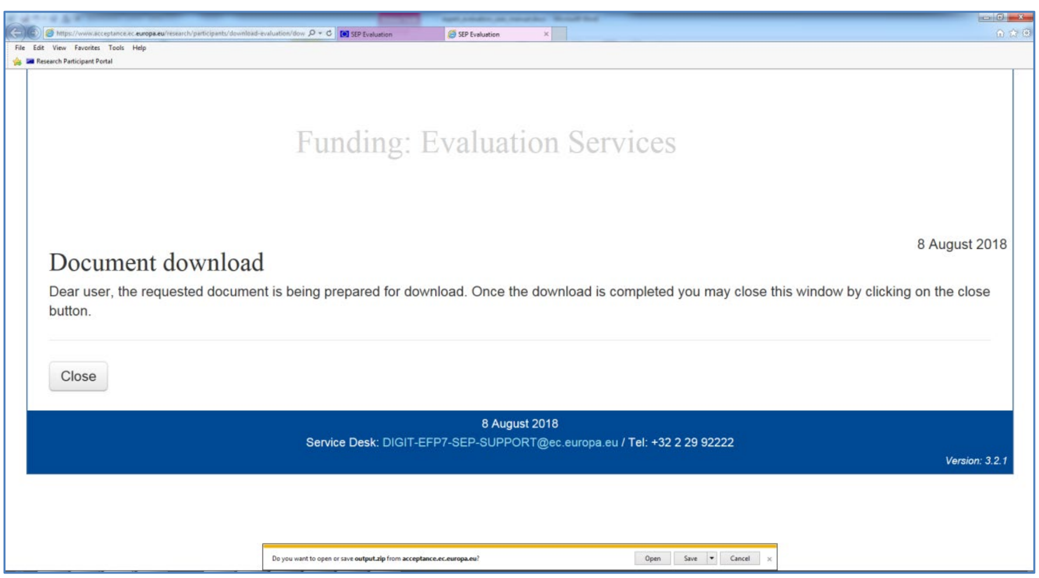


You can select one of these options:

- **Flat list:** the zip file contains a folder per evaluation session and all the corresponding files alphabetically ordered within.
- **By Panel:** the zip file contains a folder per evaluation session and a folder per panel inside the evaluation folder, and the corresponding documents within.
- **By Type of Document:** the zip file contains a folder per evaluation session and a folder per document type, i.e. type A, type B, with the corresponding documents within.
- **By Panel and then by Type of Document:** This option presents a folder per evaluation session in the zip file, and then by panel, containing a folder per type of document and the corresponding files within.

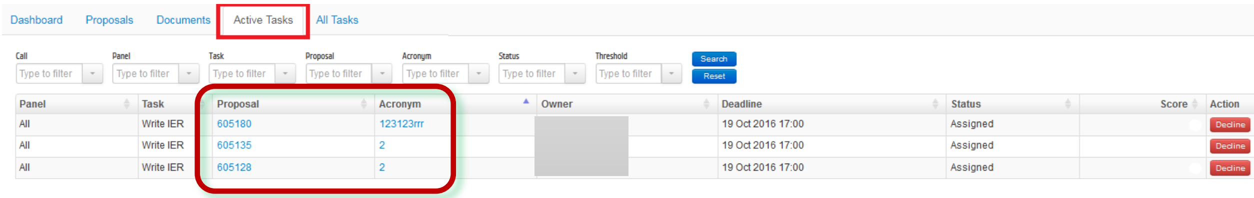
After selecting the options for the zip structure, click on OK. A new window will open. When completed, click on the hyperlink "file 1", this will open a new tab, which is just a confirmation of download. Check the downloaded file via your browser download functionality.



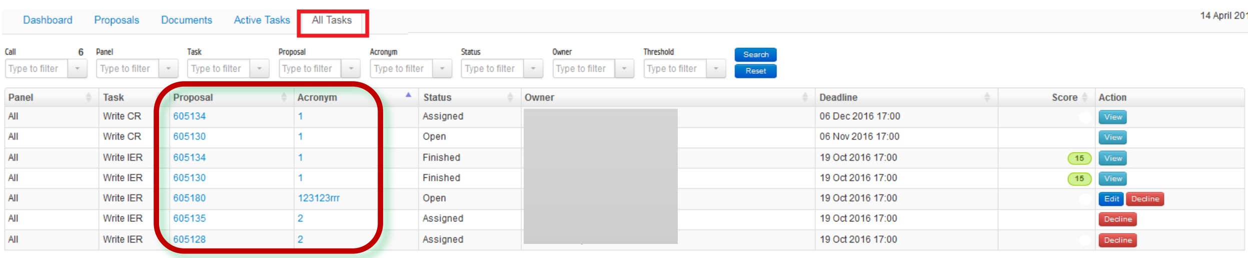


The Active Tasks and All tasks pages

The **Active Tasks** page is the default page that you arrive at when logging in to the evaluation tool. It displays tasks with status Assigned or Open that you are the owner of.



The **All Tasks** page displays all your tasks in the session, whether they are Assigned, Open, Finished or Cancelled. When you access the All Tasks page after you log in, the task list will be empty - you must filter to select a call, along with any other filters, and then click on Search.



When a task status is assigned, <u>you must first click on either the Proposals ID or Acronym to go to the Proposal Summary page and accept the task</u>.

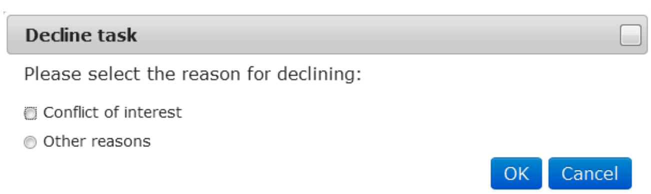
Navigate to task forms - *The Proposal and Acronym links*

Proposal	Acronym
605926	SygR1400240776746

These links take you to the **Proposal Summary** page

Navigation buttons - *The three button names and their functionalities*

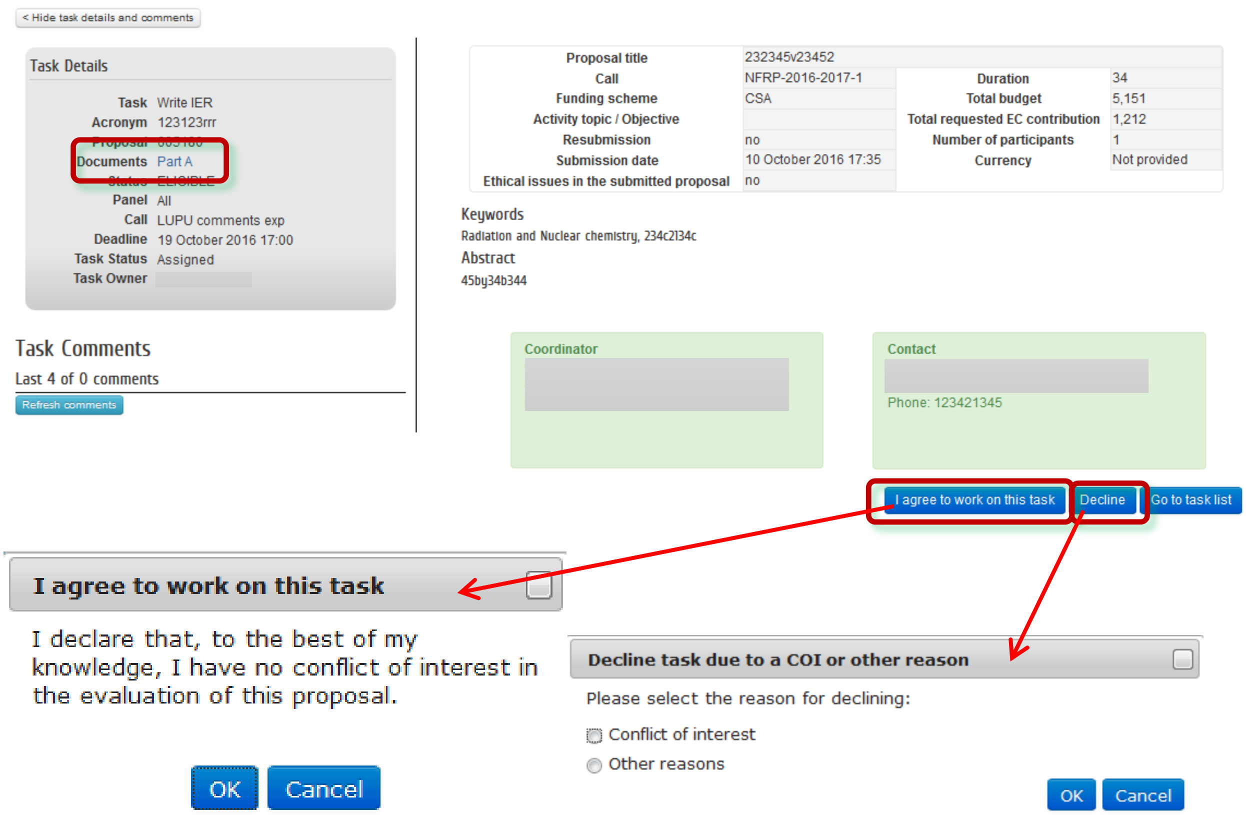
- View: A task is assigned to another task owner, but you can view it, and, if you are a Call or Panel Coordinator, you can work on it on behalf of the owner.
- Edit: You own this task and must work on it. It takes you to the Task **Form** page.
- Decline: (also in the task form page for a task that is Assigned, Open or Finished) A pop-up provides Conflict of Interest or Other reasons to select from



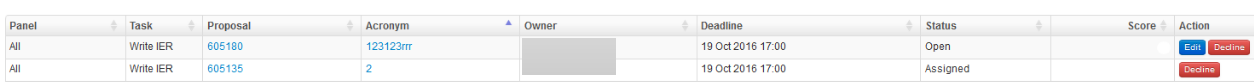
Selecting either option provides a list of additional choices and comments.

The Proposal Summary page

You will get to the Proposal Summary page where you can see the proposal abstract and consortium, download Part A, and agree to work on the task or decline.



When you click **OK** agreeing to work on the task, you are taken to the task page. Once a task has been accepted, the Active tasks page will display an Edit button next to the Decline button, which gives you direct access to the task page.



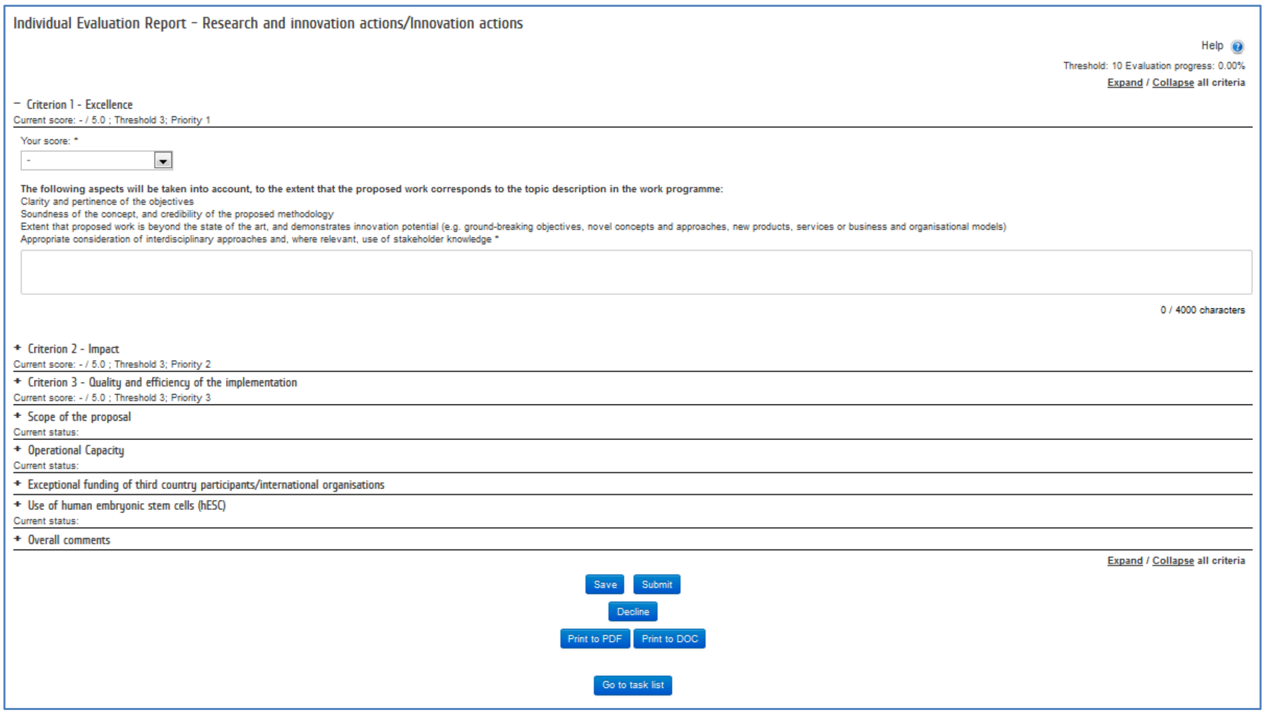
Panel	Task	Proposal	Acronym	Owner	Deadline	Status	Score	Action
All	Write IER	605180	123123rrr		19 Oct 2016 17:00	Open		Edit Decline
All	Write IER	605135	2		19 Oct 2016 17:00	Assigned		Decline

The Task page

The Task page comprises the online Evaluation Report form and the Task Details and Comments section. The system automatically saves the page every two minutes. Submitting a task saves and submits it at the same time.

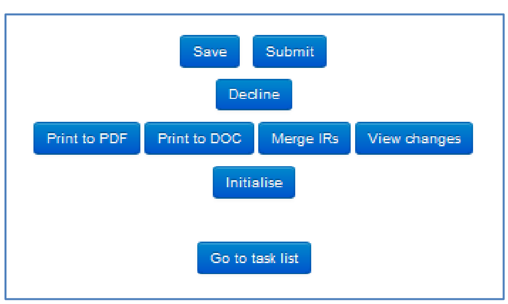
The online Evaluation Report form

The form is specific to each task (Individual Evaluation Report – IER; Consensus Report – CR; Evaluation Summary Report – ESR and includes the criteria and scoring from the respective work program templates), you can click on Expand / Collapse all criteria or on + to view or hide the criteria.

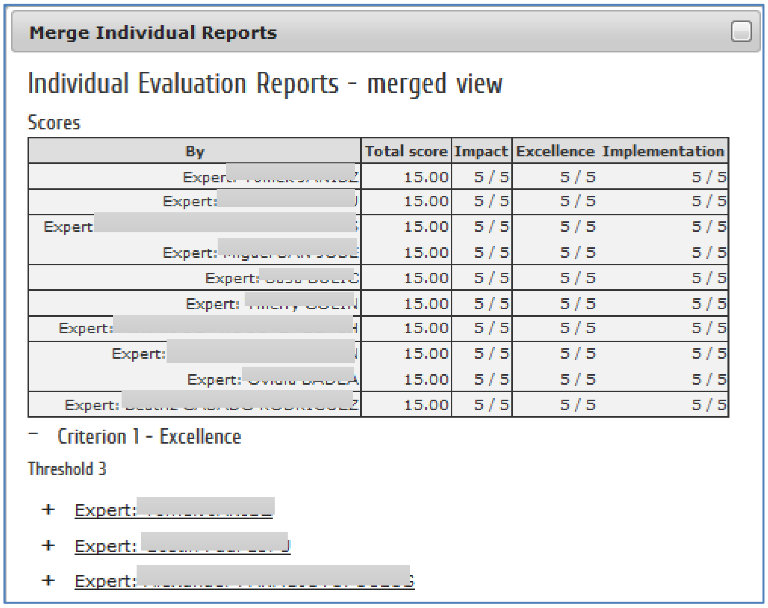


With the action buttons at the bottom of the IER page, the task owner can Save, Submit, Decline, or Print the Report to PDF or DOC.

With the action buttons at the bottom of the CR page, the task owner can Save, Submit, Decline, or Print the Report to PDF or DOC, Merge IERs, View Changes and Initialize the task.

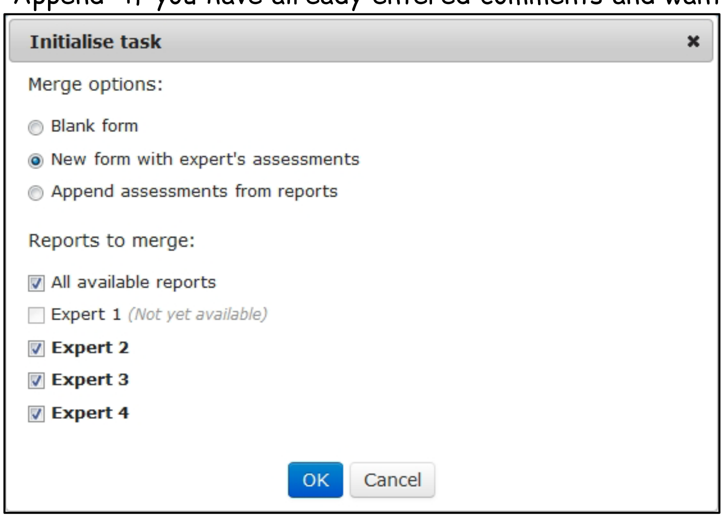


- Click Merge IERs to view all the IER scores and comments by expert.



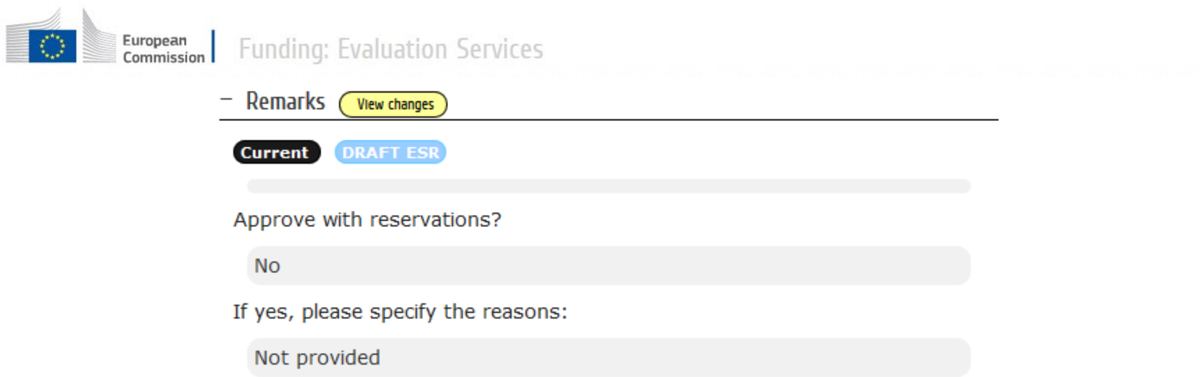
By	Total score	Impact	Excellence	Implementation
Expert:	15.00	5 / 5	5 / 5	5 / 5
Expert:	15.00	5 / 5	5 / 5	5 / 5
Expert	15.00	5 / 5	5 / 5	5 / 5
Expert:	15.00	5 / 5	5 / 5	5 / 5
Expert:	15.00	5 / 5	5 / 5	5 / 5
Expert:	15.00	5 / 5	5 / 5	5 / 5
Expert:	15.00	5 / 5	5 / 5	5 / 5
Expert:	15.00	5 / 5	5 / 5	5 / 5
Expert:	15.00	5 / 5	5 / 5	5 / 5
Expert:	15.00	5 / 5	5 / 5	5 / 5

- Click Initialise to start the CR task. A new popup will open where you can select which Reports to merge (all available ones or selected expert's ones) and how to merge them (use "Append" if you have already entered comments and want to now merge an expert's report).



- Click View changes to view the changes between current task and previous task criteria comments in a new popup window.

The View changes label indicates the criteria comments that have changes from the previous task.


European Commission | Funding: Evaluation Services

– Remarks View changes

Current DRAFT ESR

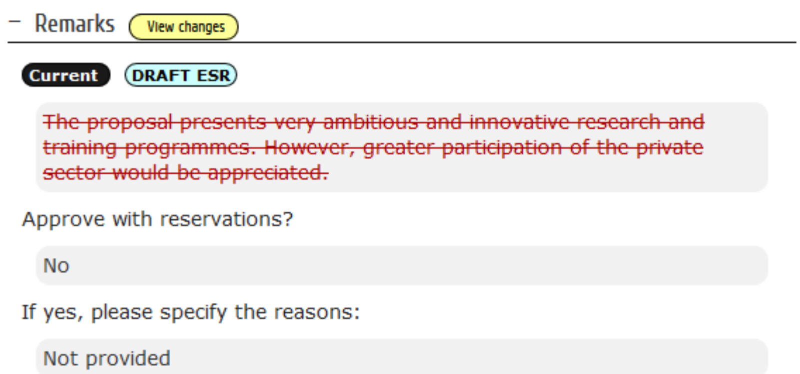
Approve with reservations?

No

If yes, please specify the reasons:

Not provided

Clicking on the blue label, which will read WRITE CR, DRAFT ESR or REVIEW ESR, displays the changes. Clicking on Current reverts to the current version.


– Remarks View changes

Current DRAFT ESR

~~The proposal presents very ambitious and innovative research and training programmes. However, greater participation of the private sector would be appreciated.~~

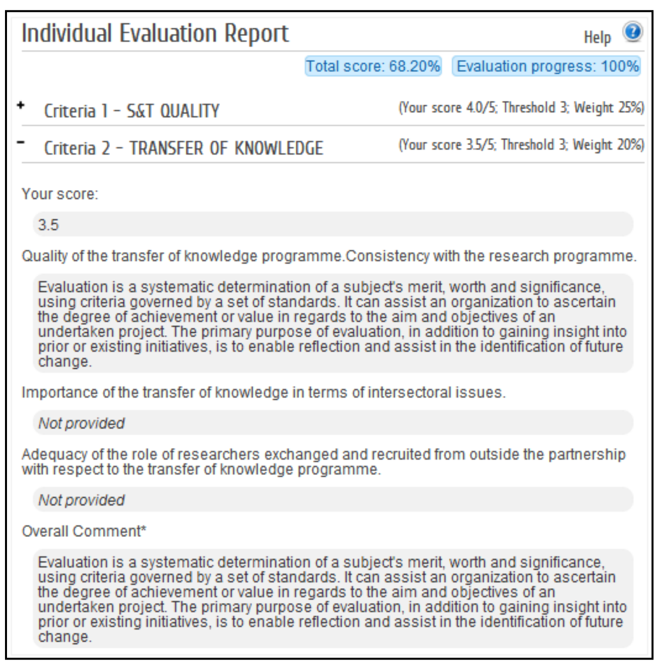
Approve with reservations?

No

If yes, please specify the reasons:

Not provided

IMPORTANT: After you submit the report, the Evaluation Report form will become read-only. You will still be able to read your assessment or to print it, but you will not be able to modify it.


Individual Evaluation Report Help

Total score: 68.20% Evaluation progress: 100%

\+ Criteria 1 - S&T QUALITY (Your score 4.0/5; Threshold 3; Weight 25%)

\- Criteria 2 - TRANSFER OF KNOWLEDGE (Your score 3.5/5; Threshold 3; Weight 20%)

Your score:

3.5

Quality of the transfer of knowledge programme.Consistency with the research programme.

Evaluation is a systematic determination of a subject's merit, worth and significance, using criteria governed by a set of standards. It can assist an organization to ascertain the degree of achievement or value in regards to the aim and objectives of an undertaken project. The primary purpose of evaluation, in addition to gaining insight into prior or existing initiatives, is to enable reflection and assist in the identification of future change.

Importance of the transfer of knowledge in terms of intersectoral issues.

Not provided

Adequacy of the role of researchers exchanged and recruited from outside the partnership with respect to the transfer of knowledge programme.

Not provided

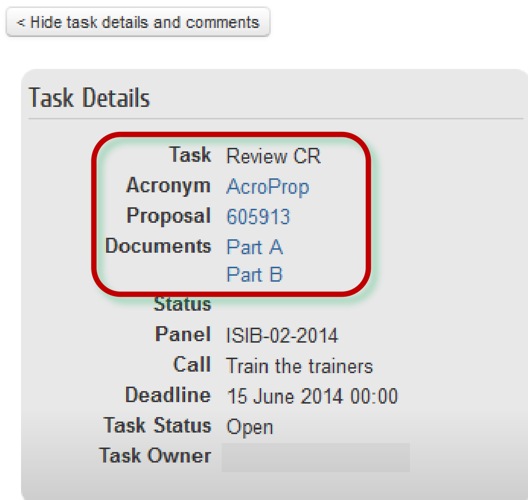
Overall Comment*

Evaluation is a systematic determination of a subject's merit, worth and significance, using criteria governed by a set of standards. It can assist an organization to ascertain the degree of achievement or value in regards to the aim and objectives of an undertaken project. The primary purpose of evaluation, in addition to gaining insight into prior or existing initiatives, is to enable reflection and assist in the identification of future change.

IMPORTANT: If you submitted your evaluation report by mistake, or if you want to re-open it, **please contact your Call Coordinator**, who is the only person authorised to re-open and administer your task.

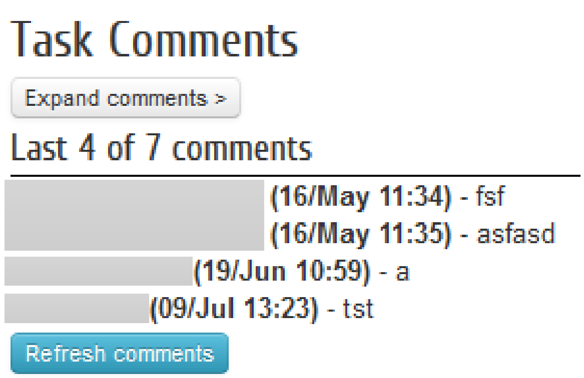
The Task Details

The Proposal Summary page and all the task form pages include a Task Details section from where you can download the proposal documentation.



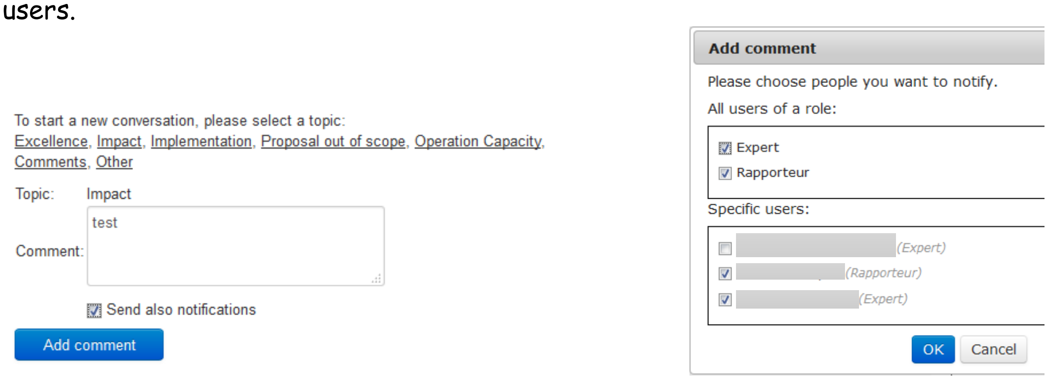
The Task Comments

To facilitate remote consensus communications, the Proposal Summary page and all the task form pages include a section for asynchronous Task comments.

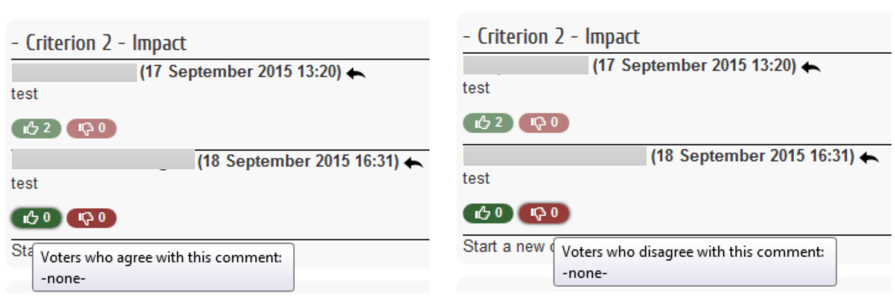


Users are able to start a new conversation by criterion, read and reply to existing comments, mark comments as read, or click on Refresh to update the list. The total number of unread comments is clearly indicated and each unread comment is in bold letters.

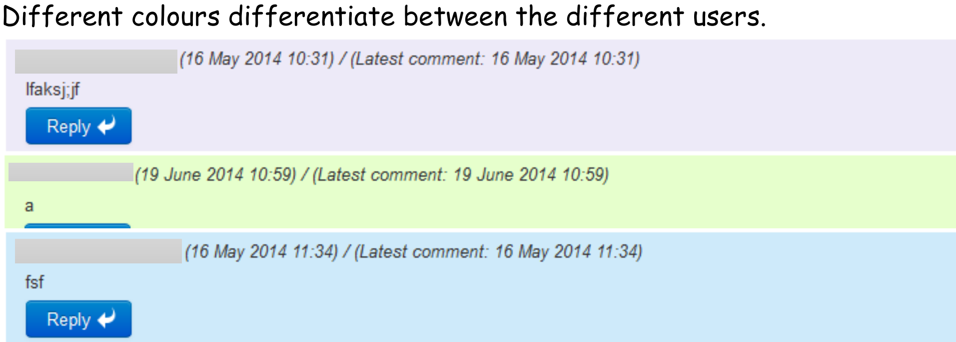
When entering a Task comment at the Consensus phase, email notifications can be sent to other users.



Also at the Consensus phase, users can vote on a Task comment indicating their approval or disapproval.



Different colours differentiate between the different users.



Summary of Tasks and Actions

From the **Proposals** page:

Proposal evaluation tasks	Write IER	Write CR	Review CR	Approve CR	Draft ESR	Review ESR	Clicking on the square takes me to:	Actions to complete @ the page
Assigned but not yet started	W W W	W	R	A A A	D	R	Proposal summary page	Read proposal summary & PartA; Accept or Decline task
Started	mine W	someone else's W					Task page (online form)	Complete online report, Leave Task comments, Save, Submit CR: Merge IERs, Initialize, View changes, Approve, Disapprove
								View online report, Leave Task comments
Finished	W	R					Task page (online form)	View online report, Leave Task comments

From the **Active Tasks** and **All Tasks** pages:

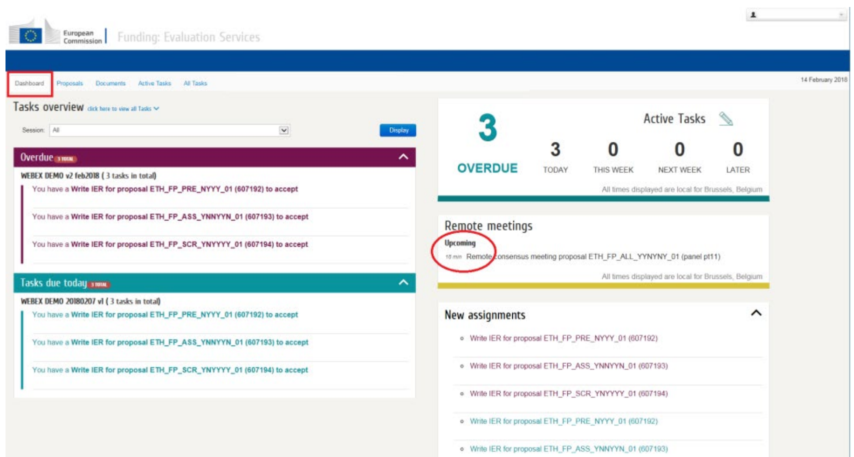
Proposal evaluation tasks	Write IER	Write CR	Review CR	Approve CR	Draft ESR	Review ESR	Clicking on the links or buttons takes me to:	Actions to complete @ the page
Assigned but not yet started	Proposal: 606778-1	Acronym: Acro-ECSEL-01-2015					Proposal summary page	Read proposal summary & PartA; Accept or Decline task
Started	Edit						Task page (online form)	Complete online report, Leave Task comments, Save, Submit CR: Merge IERs, Initialize, View changes, Approve, Disapprove
Finished	View						Task page (online form)	View online report; Leave Task comments

Remote meetings

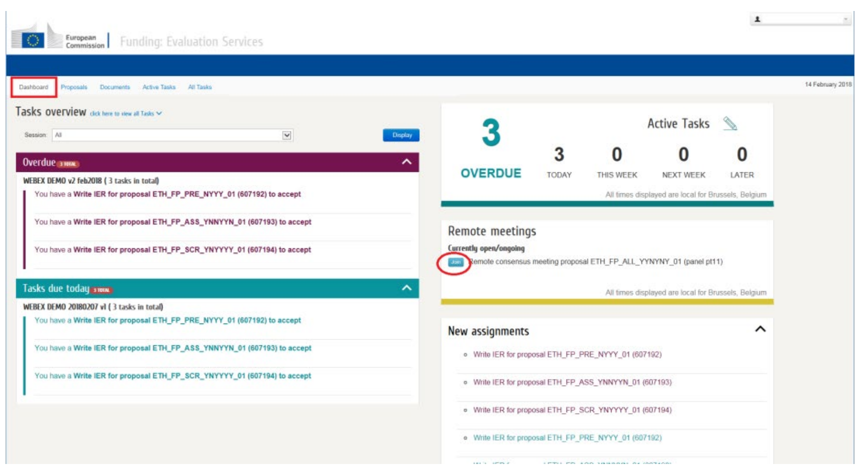
Connecting to WebEx

Launching the meeting from the dashboard

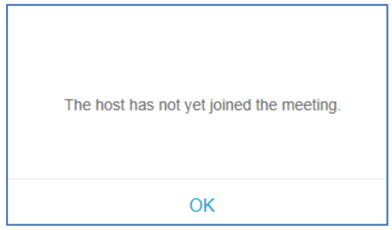
The dashboard displays the future remote meetings on right side.



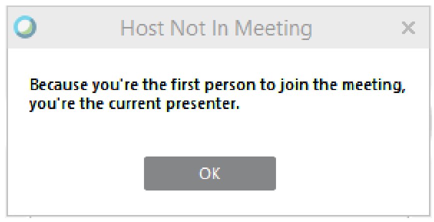
Those meetings are accessible only 10 minutes by default before the start time, but this parameter can be modified when setting up the meeting. A **Join** button will display close to the meeting name.



Note: The **host** is the person who sets up the meeting. If the CallCo is setting up the meeting, it could be the case that he/she is not present in the remote session. Therefore, you could see this message when joining in.

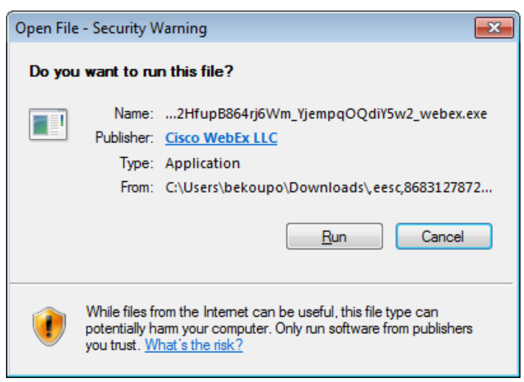


Just click on **OK.** The person joining will be set as presenter, see below how to make someone else the presenter when all are connected.



If you did not install the software or did not configure your browser before, you will be prompted to do it when clicking on the **Join** button to launch the meeting.

When launching WebEx from within the SEP application, the software Cisco WebEx will be executed on your pc. Therefore, the kind of access you have in your pc will determine if the software can be executed or not.

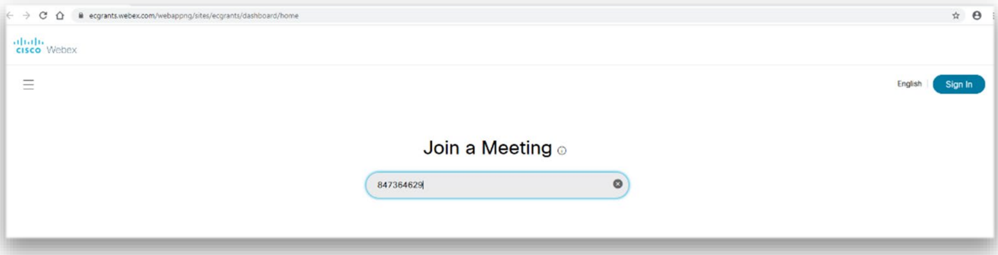


You also have the possibility to use the browser, instead of the desktop application.

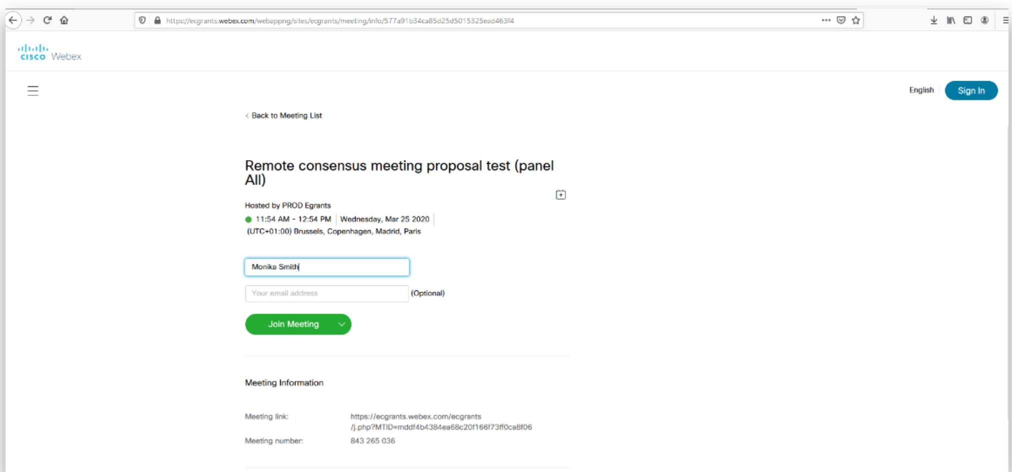
Using the browser is a good option if you are experiencing issues with the software, you will lose a couple of functionalities, which are not essential, and you only need the meeting ID. Go to:

https://ecgrants.webex.com/webappng/sites/ecgrants/dashboard/home

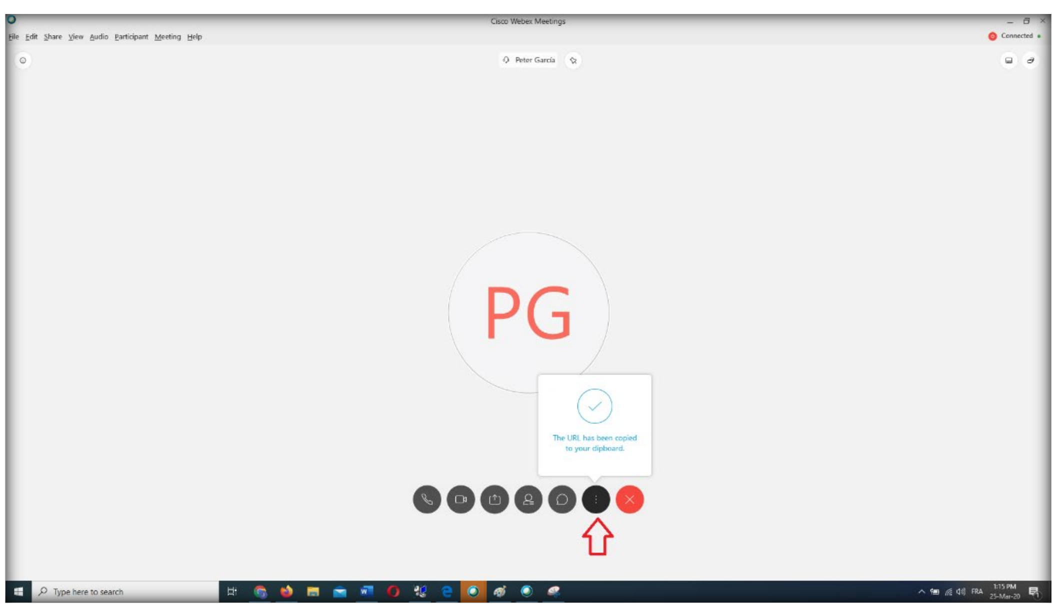
In the first screen, enter the meeting ID and click **Enter**.



Then enter your name and click on **Join Meeting**, the meeting will be open in the browser.

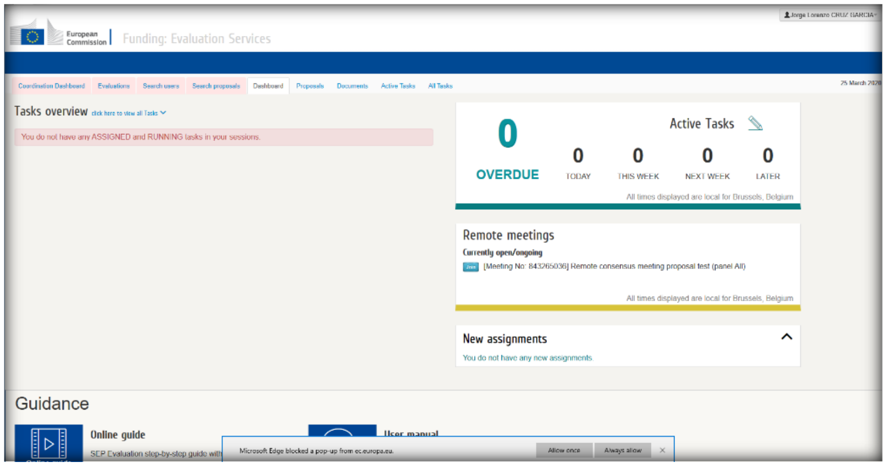


If you do not know the ID, you can ask another participant to copy the link of the meeting and send it to you, you will get the second screen above when clicking on the link:

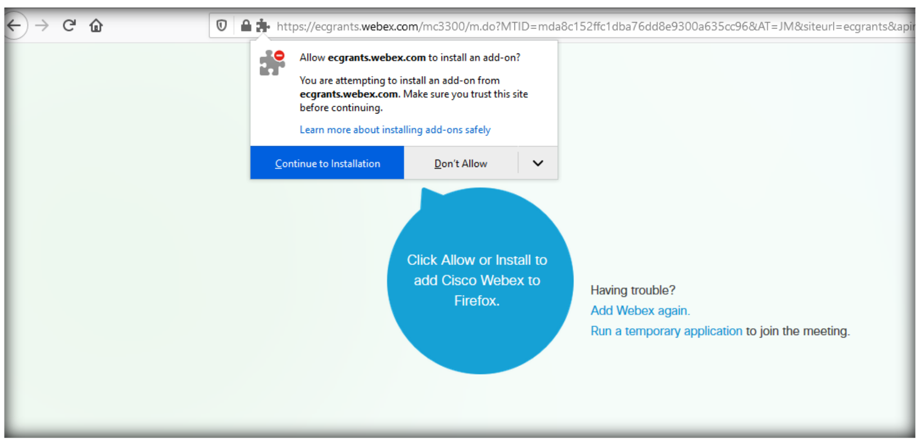


Regardless of the browser in use, you will be requested to install or allow the Cisco WebEx add-on:

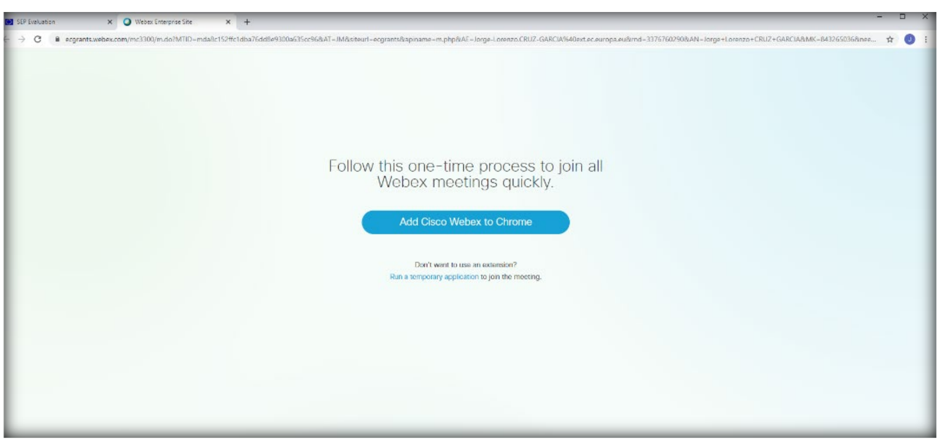
<u>Edge</u>



<u>Firefox</u>



<u>Chrome</u>



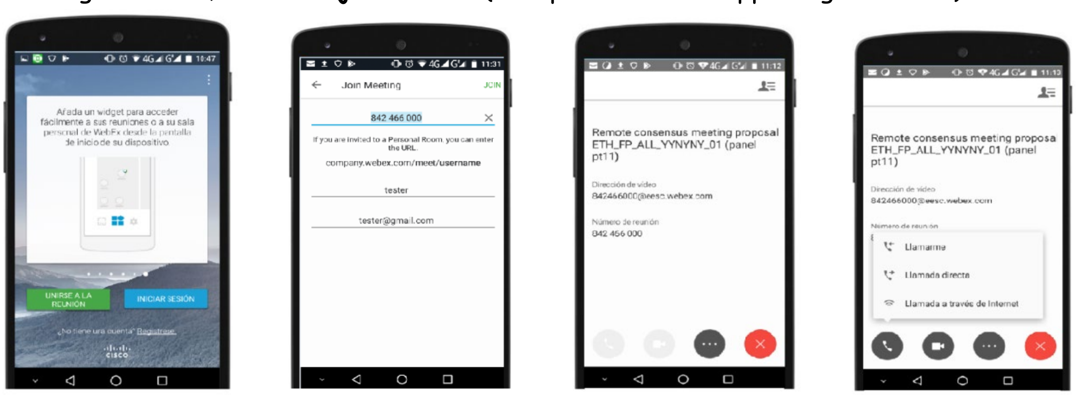
If you lack admin rights on your machine, executing the add-in can fail. Try first to execute it as "a temporary application". Please note; if you are able to execute the plugin, it will have to be done only once. If you run it as a temporary application, it will need to be run every time you launch a meeting. If you are not able to execute the plug-in, even as temporary application, please check in the following section how to connect via your mobile phone. This can be the quickest solution when the meeting is imminently starting.

Connecting from your Mobile phone

It is also possible to connect via your mobile phone. First, make sure that you get Cisco WebEx installed in your device from the Play Store (Android) or Apple Store (iPhone).

After the installation, you have two possibilities to join a meeting:

- Either open the WebEx app, click on the **join meeting** button (green button) and enter the meeting ID; then, click the **join** button (it is placed on the upper right corner)

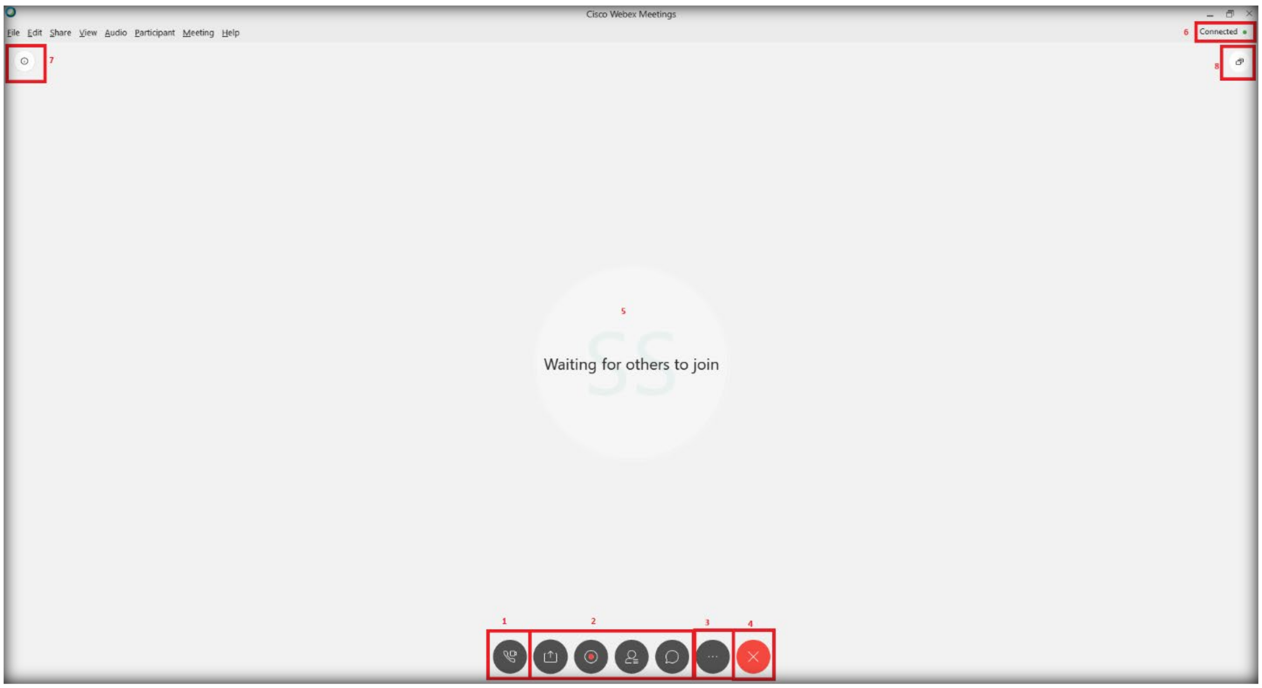


- Or connect to SEP via a browser within your mobile device; then launch the meeting by clicking the **Join** button from the **Dashboard**, as usual. The meeting will open using the APP in the device.

Please, disregard the log in option; unless you have gotten an account by your own means, scheduling the meeting from SEP did not generated any Cisco accounts.

Using via WebEx (remote consensus meetings)

When launching your meeting from the dashboard on your PC, the main screen shows the following icons and buttons:

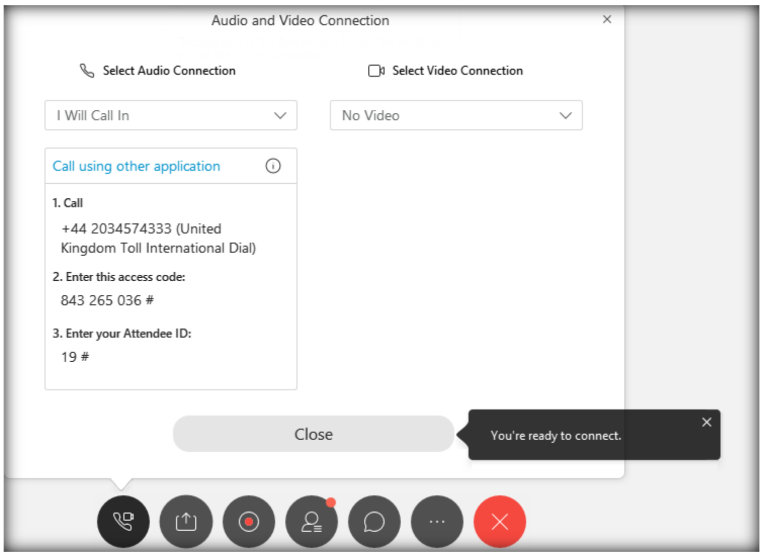


1. Audio/video connection options. You use these buttons to connect to the conference via audio and video. By default, when entering the meeting you will be prompted to set the values for audio and video.
2. The panel and sharing icons. Panels within WebEx are functionalities, they are call panels because they can get separated in different floating windows as will we see below. They are, from left to right:
    1. **Sharing**. This functionality allows to share your screen or a specific programme running on your pc with others. Normally, the presenter shares the screen.
    2. **Recording**. This panel launches an application to record the meeting.
    3. **Participants**. Under this panel you can check the users which are connected to the web conference, if they are connected using the PC as audio system or they are calling in from a telephone, and who the presenter is.
    4. **Chat**. You are able to send messages to all attendees via the Chat panel.
3. Other actions such as copying meeting url and managing audio settings.
4. Leave meeting. This button closes WebEx
5. The initials of the presenter.

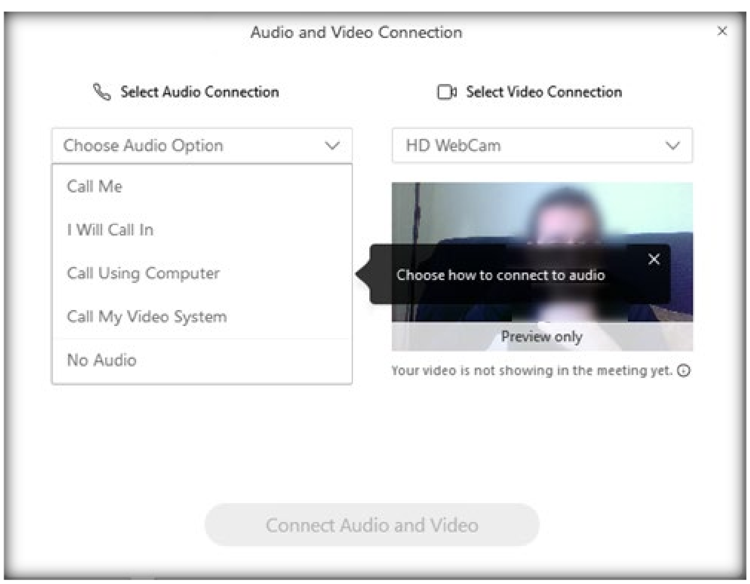
6. Your status, only visible if you are using the software and not a browser. Additional icons display to indicate your means of connection, also visible by the others. displays when connecting to audio using your computer and when call it from the phone. This option is available only if you connect using WebEx, not if you are connecting via a browser.
7. Meeting info. Here, you find all the details of the current meeting.

Audio and Video

When you enter the meeting, you are prompted to select which channel you will use to connect your audio.

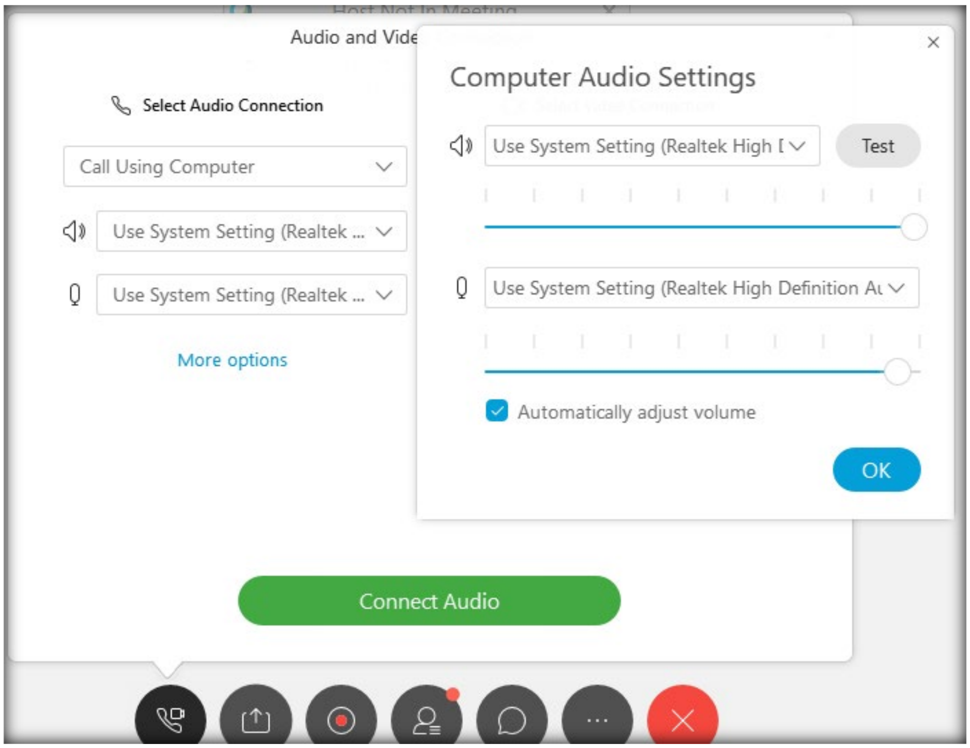


From the possible options, you should select either **I will call in** or **Call using Computer**, please do NOT use any other options.

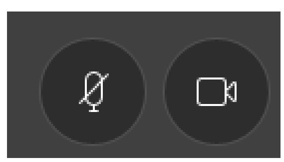


In the same window, you can set the video settings.

If you are using the computer to call in, you will able to set up additional options according to your computer configuration (i.e. headset, etc.). By clicking in More options, you are able to test both the audio and the mike.



Once the video and voice settings are set and you called in, the initial icon will split into two, click on the mike icon to mute/unmute yourself or on the camera icon to manage your video.



For an explanation on additional functionalities such as recording the meeting or sharing the screen/files, please consult the page in [IT How To].