

dmooc

DIAGNOSTIC AND MONITORING
OF ORGANIZATIONAL COACHING



MANUAL FOR ADMINISTRATORS



Content

1. Creating a user account	4
2. Password recovery	5
3. Login to the application	6
4. User management	7
4.1. Modify your user data	7
4.2. Modify your or others' user data	7
4.3. Deleting a user	9
5. Organizations Management	10
5.1. Creating a new organization	11
5.2. Assigning a user to an organization	13
5.3. Updating an organization's data	14
5.4. Deleting an organization	14
6. Assessment management	15
6.1. What you should know before starting an assessment	15
6.2. Selection of the organization to be evaluated	17
6.3. List of assessments	18
6.4. Do an assessment	19
6.5. Print the answers to the assessment questions	26
6.6. Conducting an offline assessment	26
6.7. Starting an offline assessment	29
6.8. Uploading and synchronizing the offline assessment in the online tool	31
6.9. Developing the offline action plan	32
6.10. Results of an assessment	37
7. Management of action plans	40
7.1. What you need to know before developing an action plan	40
7.2. Creating a new plan	40
7.3. Updating information on an existing plan	42
7.4. Indicate the status of an action plan	43

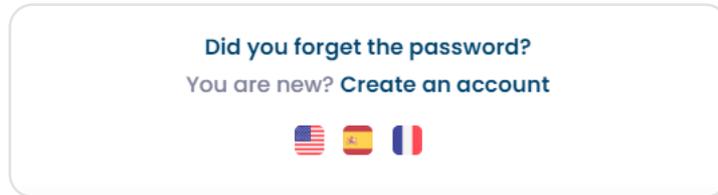
Content

7.5. Information update of the general actions of the plan	43
7.6. Edit a general action	43
7.7. Add, update and complete a milestone	45
7.8. Additional actions	47
7.9. Print an action plan	49
8. Organization Report	50
8.1. Report of the main data of the organization	50
8.2. Assessment report of the organization	51
8.3. Personalized report of the organization	51
9. Global reports	53
9.1. Main indicator	53
9.2. Plans	55
9.3. Products	55
10. Glossary of terms	56
10.1. Projects	56
10.2. User	56
10.3. User management	56
10.4. User roles	56
10.5. Observer	56
10.6. Assessor	56
10.7. Administrator	56
10.8. Super administrator	56
10.9. Organizations	56
10.10. Dimensions	57
10.11. Levels	57
10.12. Actions	57
10.13. Milestones	57

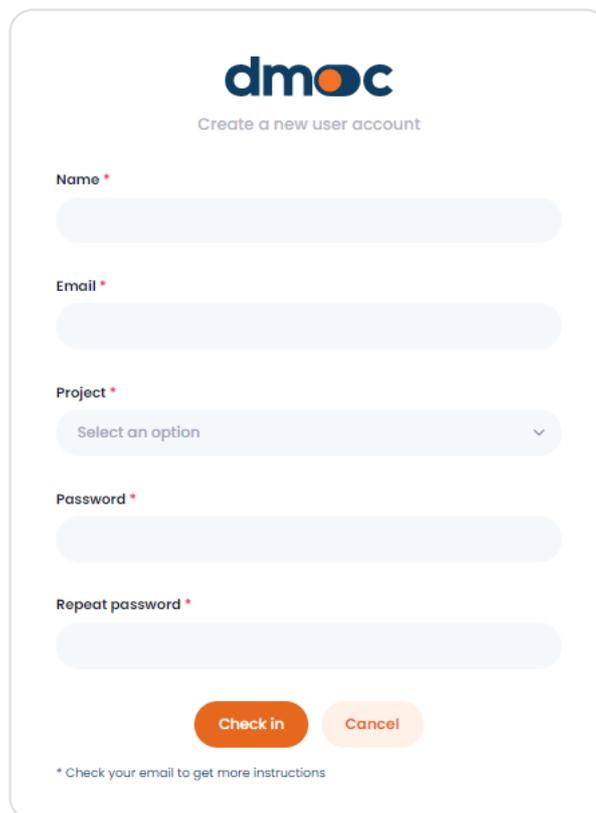
1

Creating a user account

To create a new user account enter the web address **dmoc.businessschool.coop** and click on the “Create an Account” link



Next, the form for creating a new user account will be displayed, as indicated in the following image:



The screenshot shows a registration form for dmoc. At the top is the dmoc logo and the text 'Create a new user account'. The form contains the following fields:

- Name ***: A text input field.
- Email ***: A text input field.
- Project ***: A dropdown menu with the placeholder text 'Select an option' and a downward arrow.
- Password ***: A text input field.
- Repeat password ***: A text input field.

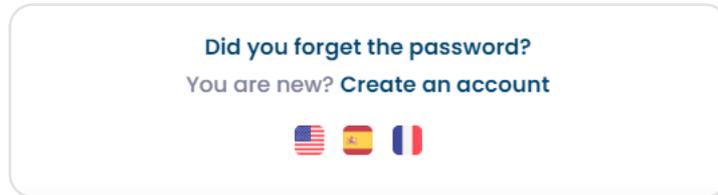
At the bottom of the form are two buttons: 'Check in' (orange) and 'Cancel' (light orange). Below the buttons is a small asterisked note: '* Check your email to get more instructions'.

Enter the data requested: Name, Email, Project, Password (greater than 8 characters). After pressing the “register” button, check your email where you will get more information. **It is necessary for a “super administrator” to activate their account and they assign an “administrator” role to be able to use it.**

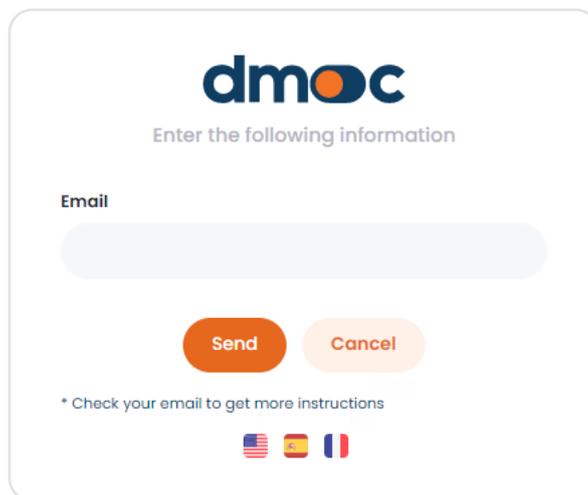
2

Password recovery

Enter the web address dmoc.businessschool.coop and click on the link "Forgot password?".

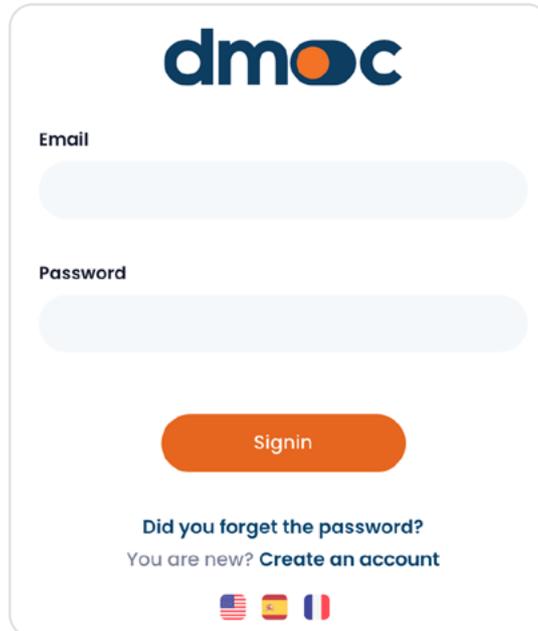


Next, the form for recovering a user account will be displayed, as indicated in the following image:

A screenshot of a password recovery form. At the top is the "dmoc" logo in a dark blue font. Below the logo is the text "Enter the following information" in a smaller, lighter blue font. The form has a label "Email" above a light blue input field. Below the input field are two buttons: "Send" in an orange rounded rectangle and "Cancel" in a light orange rounded rectangle. At the bottom of the form, there is a small asterisk followed by the text "* Check your email to get more instructions" and three small icons representing the flags of the United States, Spain, and France.

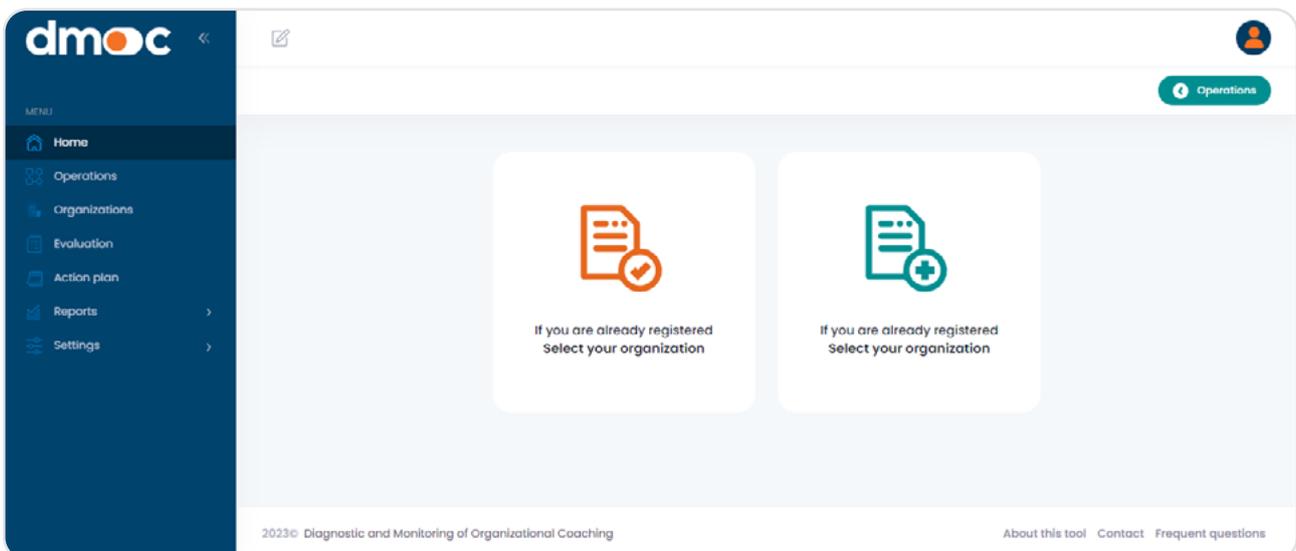
3 Login to the application

To access the application enter the web address **dmoc.businessschool.coop** with the username and password. It is necessary to have your account activated. This operation is done by an administrator or super-administrator. Then the following form will be displayed:



The login form features the dmoc logo at the top. Below it are two input fields: 'Email' and 'Password'. A prominent orange 'Signin' button is centered below the fields. At the bottom, there are links for 'Did you forget the password?' and 'You are new? Create an account', along with flags for the United States, Spain, and France.

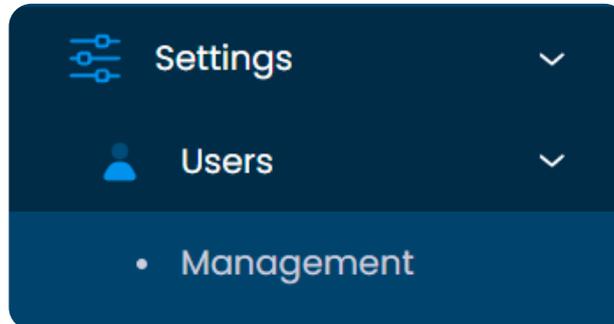
After pressing the “enter” button, the Home screen will be displayed, where you can choose or create a new organization where you want to work (this will be discussed later):



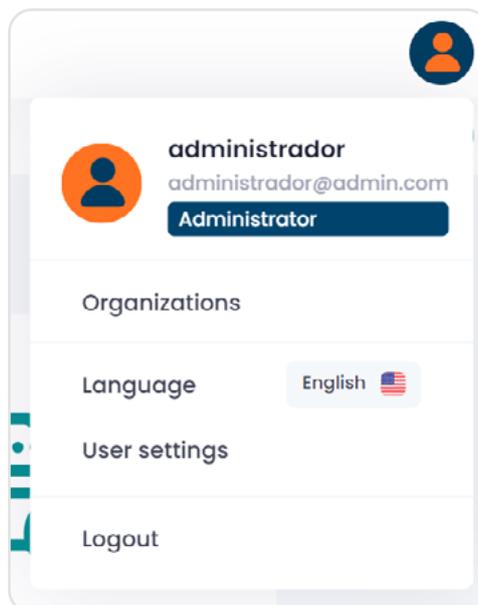
4 User management

4.1. Modify your user data

Access to modify your personal data email through the main menu, section of “Configuration / Users / Management”



It is also possible to quickly access through the icon on the upper right side of the application where the quick options for the user are located, by clicking on “User Settings”



4.2. Modify your or others' user data

When accessing via the “User Settings” option in the menu in the upper right corner, or via the “Users” option in the main menu, a list will be displayed with the user or users that you want to modify. The users that will appear in this list belong to the same project(s) assigned to the administrator user. In other words, administrator users will only be able to see other users of the same or lesser role assigned to the same project(s).

4 User management

NAME	EMAIL	ROLE	OBSERVATION	AUTHORIZED	OPERATIONS
 administrador	administrador@admin.com	Administrator		Authorized	 

10 ▾ < 1 >

To modify the data of a user press the next button to the right:



Then, the following form will be displayed where you can make the modifications that you think are necessary. An “Administrator” user can change the role to “Assessor” or “Observer” of any user present in this list. **Password modification is optional: if you do not want to change the password, leave that field empty.**

Update user data

Name *

Email *

Role *

Password

Projects

Observation

Authorization

 Active

Cancel Save

4 User management

It is important to note that the user may be assigned to one or more projects managed by the administrator. In addition, the user (assessor or observer) must be assigned to the project to which the organization or organizations whose information the user should be able to access will be or has been assigned.

4.3. Deleting a user

To delete a user it is necessary that it not have any assigned organization, then press the following button:

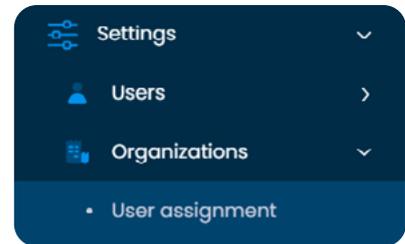


5

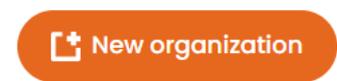
Organizations Management

5.1. Creating a new organization

An administrator user can create one or more organizations, to manage them enter the main menu on the left in "Configuration / Organizations / Management" where you can create and edit the information related to the organizations as indicated below:



To create a new organization press "New Organization":



Then fill in the details of the form that will appear as in the following image:

Two side-by-side screenshots of a web form titled 'Add an organization'. The left screenshot shows the first section with dropdown menus for 'Project', 'Country', 'Province/State', 'Municipality/County', 'Type of organization', and 'Legal form of the organization', and a text input for 'Organization name's'. The right screenshot shows the second section with text inputs for 'Organization ID', 'Representative', 'Position/Role of the representative', 'Creation date', 'Beginning of operations', 'Main product', and 'Secondary products'. Both forms have 'Cancel' and 'Save' buttons at the bottom.

The following describes all the fields that are required:

Projects

They represent the different projects that are developed according to their characteristics, scope or field.

An organization can be assigned to one or more projects, those through which they work with that organization. The way to do this is by selecting the project(s) related to the organization in this field. An administrator user will be able to view and manage all the organizations assigned to the project(s) that are assigned to that administrator.

Country

It's the country where the organization is located.

Province/state/region

Represents the province, state, region or other similar of the country where the organization is located.

Municipality/county

Represents the municipality, county or similar that is part of the province, state or region where the organization is located.

Type of organization

It represents a type of organization (primary or secondary cooperative integration organizations or others).

Legal form of the Organization

It represents a legal form that will be assigned to an organization (joint stock company, association, grassroots cooperative or others).

Name of the organization

Name of the organization, legal and/or representative name.

Organization ID

The organization's legal registration number, may be the same as the organization's tax registration.

Representative

Name of the organization's main representative.

Representative's position

Name of the role or position of the organization's representative.

5 Organizations Management

Date the organization was created

Date of the organization's foundation or constitution.

Date of operations commencement

The date on which the organization's operations begin.

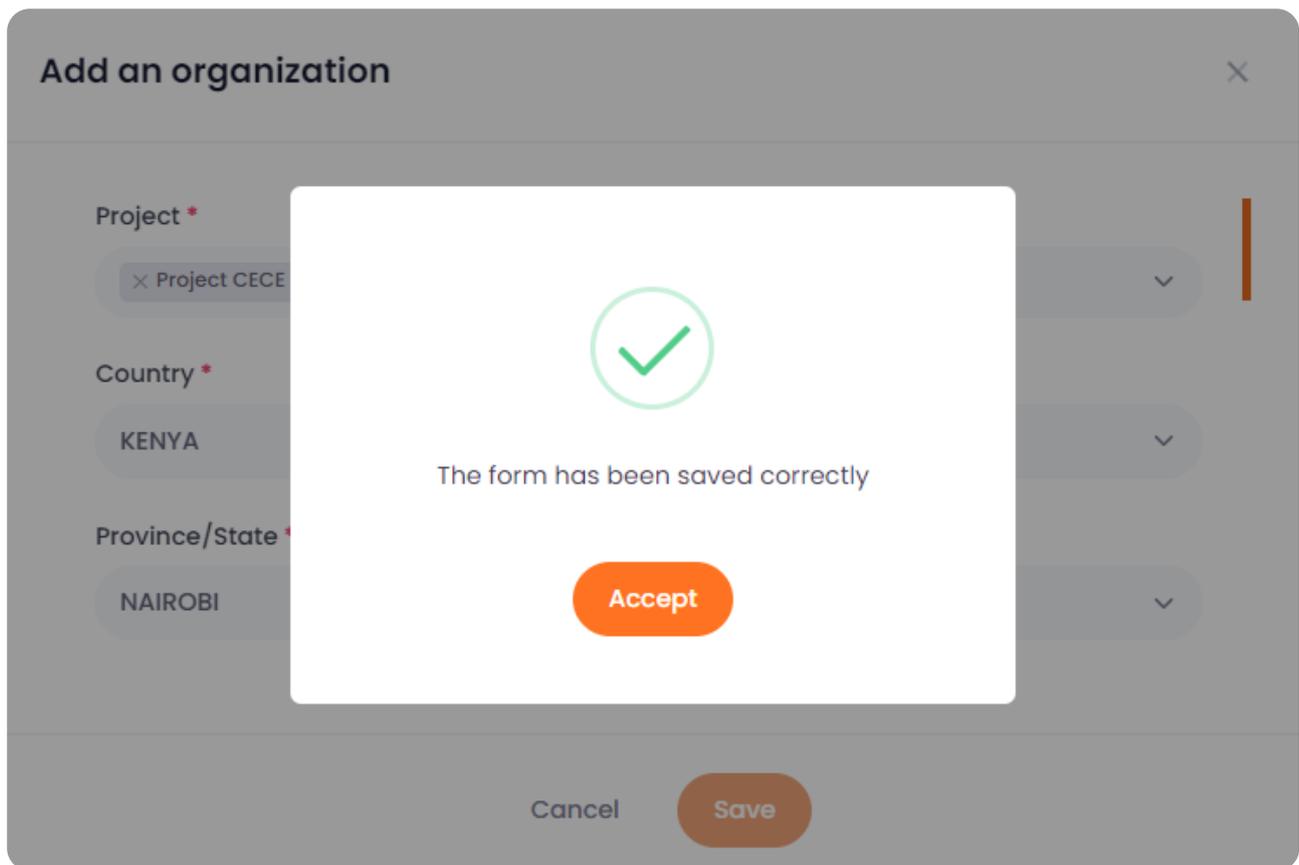
Main product

The main product or service developed by the organization.

Secondary products

If you have more than one product or service, you can optionally select this field.

After saving the form you will see an approval message:



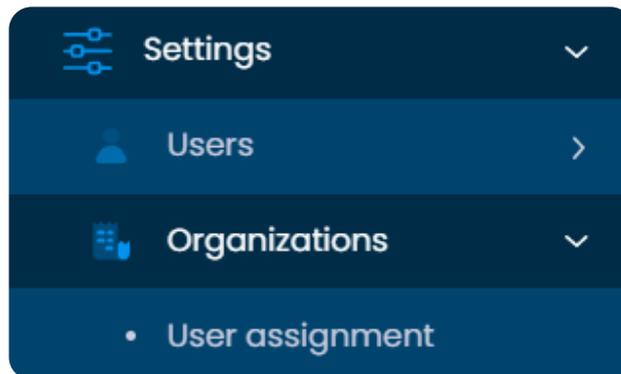
The screenshot shows a mobile application interface for adding an organization. The form is titled "Add an organization" and has a close button (X) in the top right corner. The form fields are: "Project *" with a dropdown menu showing "Project CECE"; "Country *" with a dropdown menu showing "KENYA"; and "Province/State *" with a dropdown menu showing "NAIROBI". At the bottom of the form are "Cancel" and "Save" buttons. A white modal dialog box is centered on the screen, displaying a green checkmark icon, the text "The form has been saved correctly", and an orange "Accept" button.

5 Organizations Management

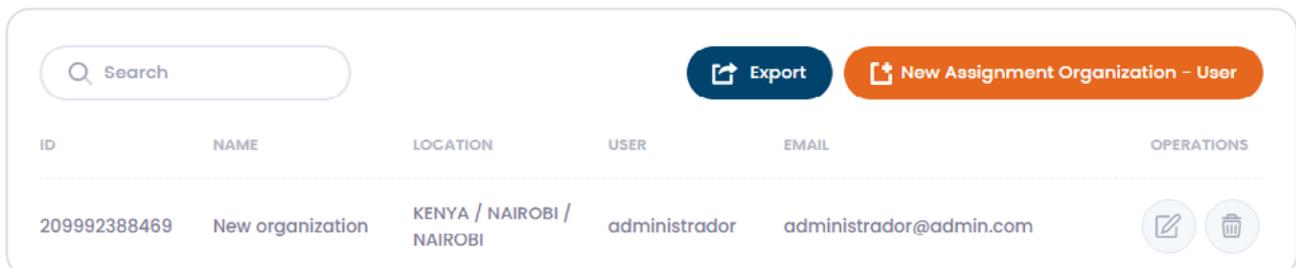
5.2. Assigning a user to an organization

So that an evaluating user can assess one or more organizations that have not been created by the assessor, it's necessary for an administrator user to assign one of these organizations to that assessor user. Also, in order for an observer user to be able to view the information, evaluations and corresponding action plans of one or more organizations, an administrator user must assign them to the observer user. In order for the administrator user to be able to assign users (assessors or observers) to one or more organization, these organizations must belong to the same project that the administrator user manages.

To do this assignment you must go to the main menu on the left in "Configuration / Organizations / User Assignment".



You can add a new assignment by pressing "New assignment organization user" as shown in the following image:

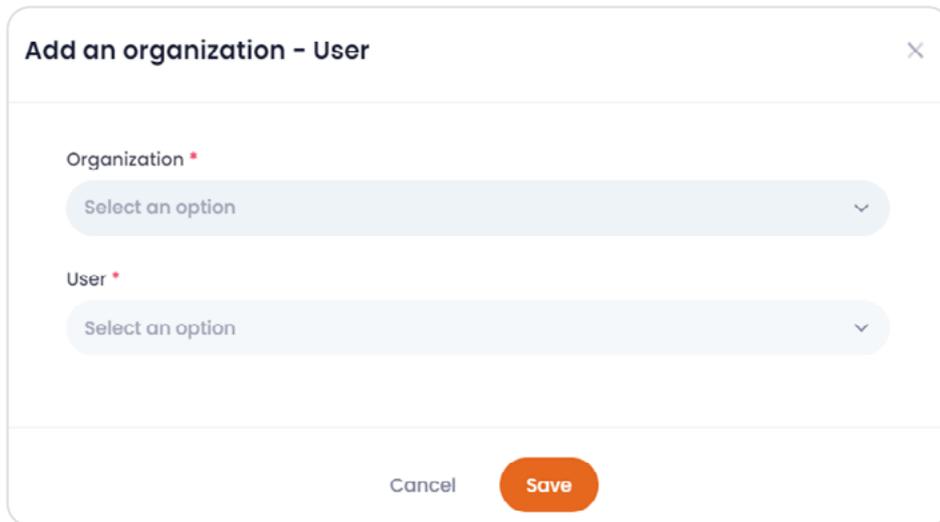


 New Assignment Organization - User

5

Organizations Management

Then, a form will open where you select an organization and a user as shown in the following image:



Then press Save. It is also possible to edit or delete these mappings using the buttons available on the list.

5.3. Updating an organization's data

To update or edit the data of an existing organization, you must be in the "Organizations" menu option where the list of organizations appears. Click on edit to the right of the name of the organization whose data you want to update, and a form similar to the one that appears to add a new organization will appear. If you want to assign this organization to another project, you must add this one in the Projects field.

5.4. Deleting an organization

To delete an organization it is necessary that it not have any assessment, then press the following button:



An organization may have none, one or several assessments. Generally, an organization is evaluated with the same assessment template with a certain frequency (usually annual), in order to monitor its development and co-draft a corresponding action plan (together with the organization).

6.1. What you should know before starting an assessment

The assessment should be participatory and inclusive of different members of the organizations. Therefore, it is important to plan the meeting well in advance, to: 1) ensure the presence of key members for their knowledge and different points of view or perspectives, and 2) ensure that they are collecting and have quantitative information available required for the assessment.

The assessment should be carried out in a workshop format where not only the top managers (president, administrator or manager), but the largest number of members in the organization's governing bodies participate. In addition to the board of directors or Administrators council, and management, it is vitally important that the members of the supervisory, auditing or internal control board participate. You can invite as many members of the organization as you consider. It should only be borne in mind that the answers to the qualitative questions of the assessment questionnaire should be selected in such a way as to represent the consensus of the workshop participants, so, usually, a group of more than 15-20 people can delay the assessment process.

To facilitate the completion of the questions, they are subdivided into dimensions. A dimension is a logical subset of the assessment questionnaire questions that groups related questions by subdividing them. Each dimension consists of qualitative and quantitative questions.

The assessment process has several steps:

1. Select an organization to be evaluated. If it has not been created or registered, the organization must be entered or added. As explained below, before the assessment workshop, you must ensure that the organization to be evaluated has already been entered and assigned to the corresponding evaluating user.

2. Before creating a new assessment, please make sure that this assessment has not already been created by reviewing the list of assessments of those organization, as explained below.
3. If you are going to take the assessment in a location without internet, you should before going to that location while you have internet access, add or start the assessment and download or export it so that you can fill it offline, as explained below. Even if you are going to take the assessment at an internet location, it is advisable that you create it in advance and let the organization know the information that you will need to collect in order to fill in the fields with quantitative information.
4. The assessment must be carried out in a participatory and inclusive way, as explained above. The time it takes to complete the assessment will depend on the time it takes for the members of the organization participating in the assessment workshop to reach a consensus on the answers to the qualitative questions of the assessment. Assessment templates should be designed to take no more than 4-6 hours.
5. At the end of each dimension, the quantitative data should be used to triangulate the answers to the qualitative questions of the evaluation, because the quantitative information should be checked and not contradict the answers to the qualitative questions. In case of contradiction, the interviewees should be noted and the qualitative or quantitative answers should be corrected, as appropriate.
6. The assessment can be paused at any time. Even if all the qualitative and quantitative questions of all dimensions have not been answered, you can see the results and even create an action plan for the development of your skills and improvements in your performance.
7. After the assessment is completed, the results should be shared with the organization to then move on to the development of the action plan, as explained below.

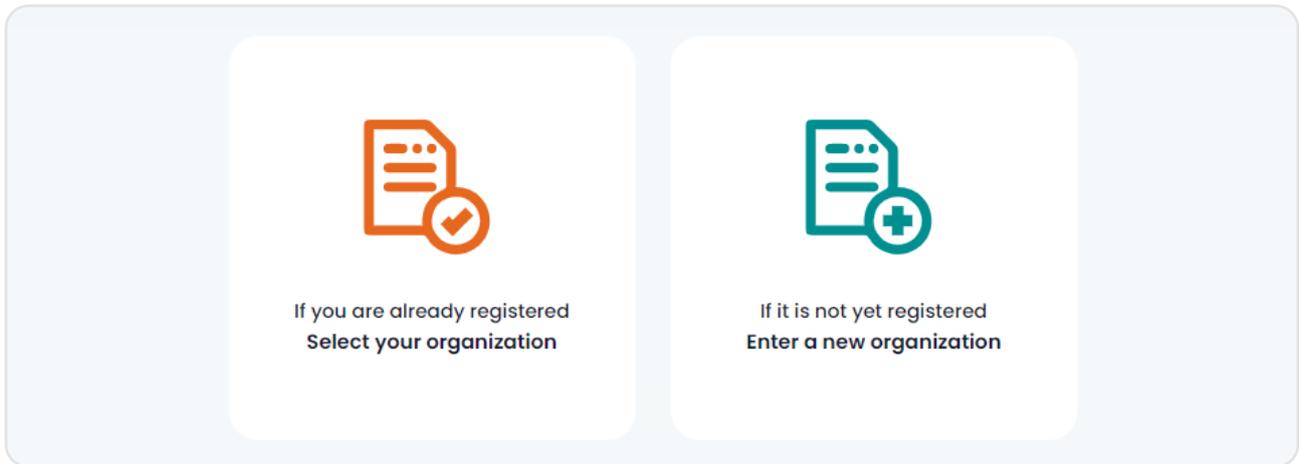
6 Assessment management

6.2. Selection of the organization to be evaluated

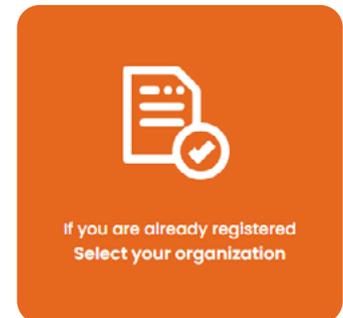
Go to the main screen or home of the application using the main menu:



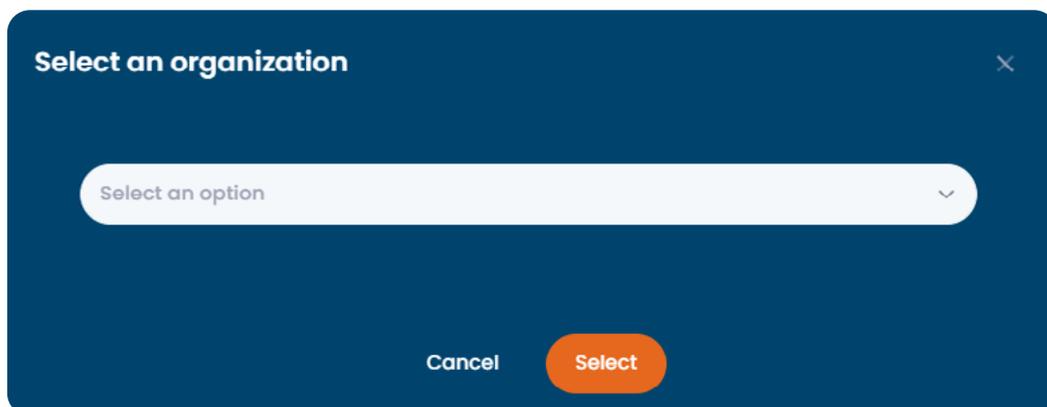
Then the following two options will be displayed:



You have two options to choose from, in case you have previously created an organization or have been assigned one, press the green button:

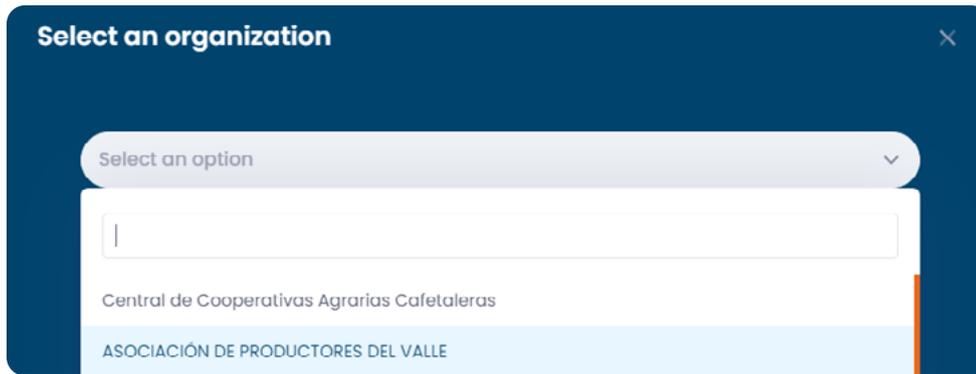


This option will provide a form to choose the organization that you want to evaluate.



6

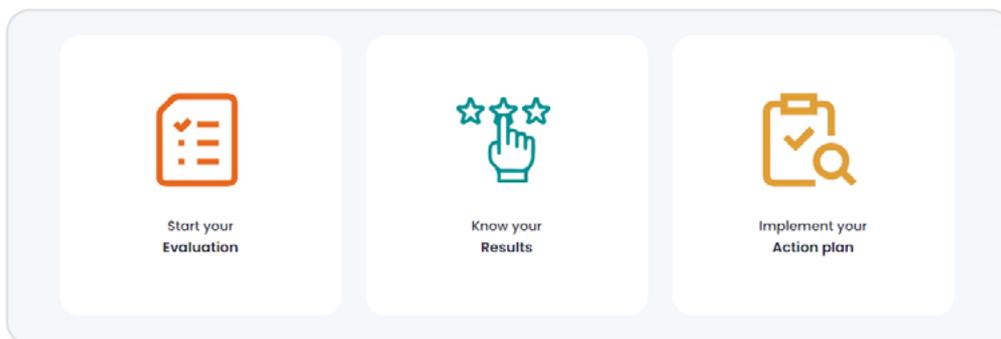
Assessment management



In the event that you do not find the organization you need to assess, you can create a new organization by pressing the blue button:

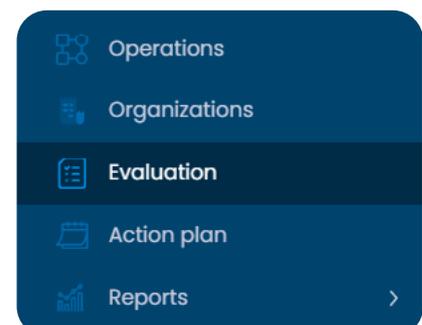


Next, you will be presented with the form to create a new organization, as explained above under "5) Organization Management." When you are finished, after pressing the "OK" button, you will be redirected to the following screen where three buttons will appear:



6.3. List of assessments

Before creating an assessment, please make sure that the assessment does not already exist. To access all the assessments of an organization it is first necessary to select an organization and then select "Assessment" on the left side menu of the application:



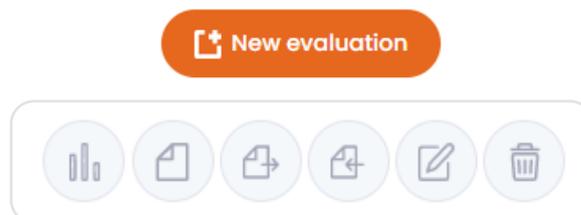
6 Assessment management

This menu, in addition to having direct access to the assessment, also contains access to the start of the application, general operations, action plan, reports and configuration.

After clicking on the main menu the link “Assessment” will take you to the assessment management and you will access the following screen:

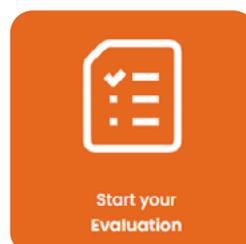
TEMPLATE	PERIOD	DATE	INTERVIEWED(S)	OBSERVATION	OPERATIONS
Cooperativas (primarias o secundarias) de producción agropecuaria	2022	2022-07-22	VLADIMIR	PRIMERA EVALUACIÓN	[Icons: Bar chart, Document, Copy, Paste, Edit, Delete]

Here it is possible to create a new assessment, access the assessment by dimensions, the action plan, download the files to do an offline assessment, upload the offline content to synchronize, edit general data on the assessment or delete it using the buttons.



6.4. Do an assessment

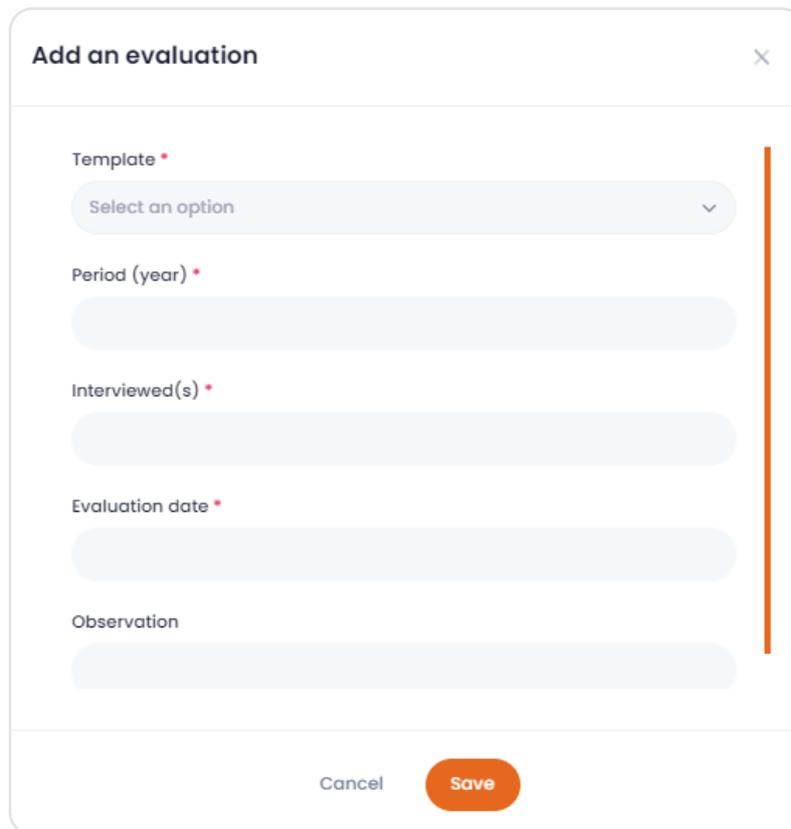
To start the assessment process press the blue button “Start your assessment”:



6

Assessment management

A form to add a new assessment to the organization will be submitted immediately afterwards. It is possible to assess one or more organization.



The screenshot shows a modal window titled "Add an evaluation" with a close button (X) in the top right corner. The form contains the following fields:

- Template ***: A dropdown menu with the text "Select an option" and a downward arrow.
- Period (year) ***: A text input field.
- Interviewed(s) ***: A text input field.
- Evaluation date ***: A text input field.
- Observation**: A text area for notes.

At the bottom of the form, there are two buttons: "Cancel" and "Save".

The following describes all the fields that are required:

Template

The chosen template is the name of a questionnaire containing qualitative questions (including their answers and actions), quantitative questions and a list of services that offer members and are related to the type of organization. This is the questionnaire that will be answered or filled out later when the evaluation is carried out.

Please ensure that you are selecting the correct template according to the type of organization and even the project, in case another assessment template adapted to the needs of the project has been developed.

Period (year)

It is the period or year that you want to assess.

Interviewee(s)

It is the name or names of the people who will be interviewed to fill out the assessment questionnaire.

Evaluation Date

Represents the date on which the assessment is made.

Observation

In this field you can add any comments you see fit.

When you save the form, you will be redirected to a new screen where the list of dimensions to be assessed is displayed. This list of dimensions, and your questions, will depend on the template that was selected when creating or adding the assessment. The dimensions of an assessment template for first or second grade/level cooperatives that carry out productive activities are shown in the case below. There are other templates for other types of organizations such as higher-level cooperatives that mainly have representative purposes.

Dimensions	Advance	Advance %	General progress (Qualitative indicator)	
Management	Qualitative (0/3) Quantitative (0/2)	0% 0%	0%	Evaluate
Governance	Qualitative (0/5) Quantitative (0/2)	0% 0%	0%	Evaluate
Internal control and accountability	Qualitative (0/3) Quantitative (0/2)	0% 0%	0%	Evaluate
Human Resources - Managers and hired	Qualitative (0/5) Quantitative (0/3)	0% 0%	0%	Evaluate
Economic-Financial Systems	Qualitative (0/3) Quantitative (0/2)	0% 0%	0%	Evaluate
Effectiveness and efficiency	Qualitative (0/3) Quantitative (0/1)	0% 0%	0%	Evaluate
Sustainability	Qualitative (0/4) Quantitative (0/3)	0% 0%	0%	Evaluate

Print result Print manual evaluation

6

Assessment management

By pressing “Assess” for each dimension, you will be able to access the questionnaire related to this dimension, the following screen will be presented:

Effectiveness and efficiency

General	Answers
24. Does the organization successfully comply with the planned activities?	<input type="radio"/> No <input type="radio"/> Very few activities <input type="radio"/> More or less half of the activities <input type="radio"/> Regularly, well over half <input type="radio"/> Yes, almost always almost all activities
25. Does the organization provide its member organizations with the services they need?	<input type="radio"/> No <input type="radio"/> Very little <input type="radio"/> More or less <input type="radio"/> Quite <input type="radio"/> Yeah
26. Does the organization have procedures to ensure the use of resources responsibly, without unnecessary waste or luxuries?	<input type="radio"/> No <input type="radio"/> It is had orally <input type="radio"/> It exists, but it is not used <input type="radio"/> It exists and is used <input type="radio"/> It is used and has had an impact

Save

Quantitative information

Description ^	2021	2022	2023
Cost effectiveness (percentage)			

Save

Services

- Merchandising (retail sales)
- Distribution (selling to wholesale buyers)
- Marketing (brands, certifications, exposure at trade fairs, etc.)
- Purchases of inputs, etc.
- Procurement of technical/ productive services (eg: phytosanitary care, etc.)
- Leasing or use of equipment or machinery
- Storage
- Transport
- Post-harvest treatment , production of finished products, etc.)
- Productive financial services (loans for the purchase of inputs or investments, price risk management, etc.)
- Savings and credit services for non- productive needs (home construction or repair, purchase of medicines, etc.)
- Medical services (emergencies, comprehensive, dental, vision, psychological, etc.)
- Accounting services
- Legal advisory services
- Advocacy (representation before governments and local, regional entities, etc.)
- Training, training or individual consultancies for productive and management issues
- Cooperative education (values, cooperative principles, best cooperative practices, exchange of experience with other cooperatives, etc.)
- Child rearing support
- Formal education (pre-school , primary, secondary, technical, etc.)

[Save](#)

As the questions of one dimension are answered, the green “Save” must be pressed in each section of the form.

Effectiveness and efficiency

General	Answers
24. Does the organization successfully comply with the planned activities?	<input checked="" type="radio"/> No <input type="radio"/> Very few activities <input type="radio"/> More or less half of the activities <input type="radio"/> Regularly, well over half <input type="radio"/> Yes, almost always almost all activities
25. Does the organization provide its member organizations with the services they need?	<input type="radio"/> No <input checked="" type="radio"/> Very little <input type="radio"/> More or less <input type="radio"/> Quite <input type="radio"/> Yeah
26. Does the organization have procedures to ensure the use of resources responsibly, without unnecessary waste or luxuries?	<input type="radio"/> No <input type="radio"/> It is had orally <input type="radio"/> It exists, but it is not used <input checked="" type="radio"/> It exists and is used <input type="radio"/> It is used and has had an impact

[Save](#)

Quantitative information

Description	2021	2022	2023
Cost effectiveness (percentage)	12,000.00	13,000.00	14,000.00

[Save](#)

6

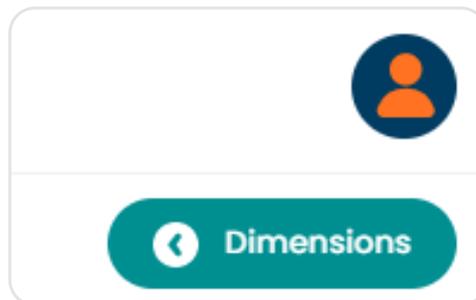
Assessment management

Services

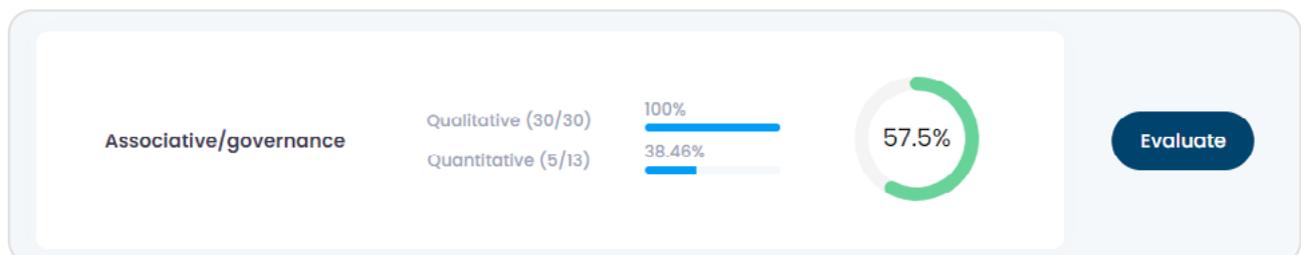
- Merchandising (retail sales)
- Distribution (selling to wholesale buyers)
- Marketing (brands, certifications, exposure at trade fairs, etc.)
- Purchases of inputs, etc.
- Procurement of technical-productive services (eg. phytosanitary care, etc.)
- Leasing or use of equipment or machinery
- Storage
- Transport
- Post-harvest treatment, production of finished products, etc.)
- Productive financial services (loans for the purchase of inputs or investments, price risk management, etc.)
- Savings and credit services for non-productive needs (home construction or repair, purchase of medicines, etc.)
- Medical services (emergencias, comprehensive, dental, vision, psychological, etc.)
- Accounting services
- Legal advisory services
- Advocacy (representation before governments and local, regional entities, etc.)
- Training, training or individual consultancies for productive and management issues
- Cooperative education (values, cooperative principles, best cooperative practices, exchange of experience with other cooperatives, etc.)
- Child rearing support
- Formal education (pre-school , primary, secondary, technical, etc.)

[Save](#)

To re-assess the other dimensions, press “Dimensions” located at the top right of the application.

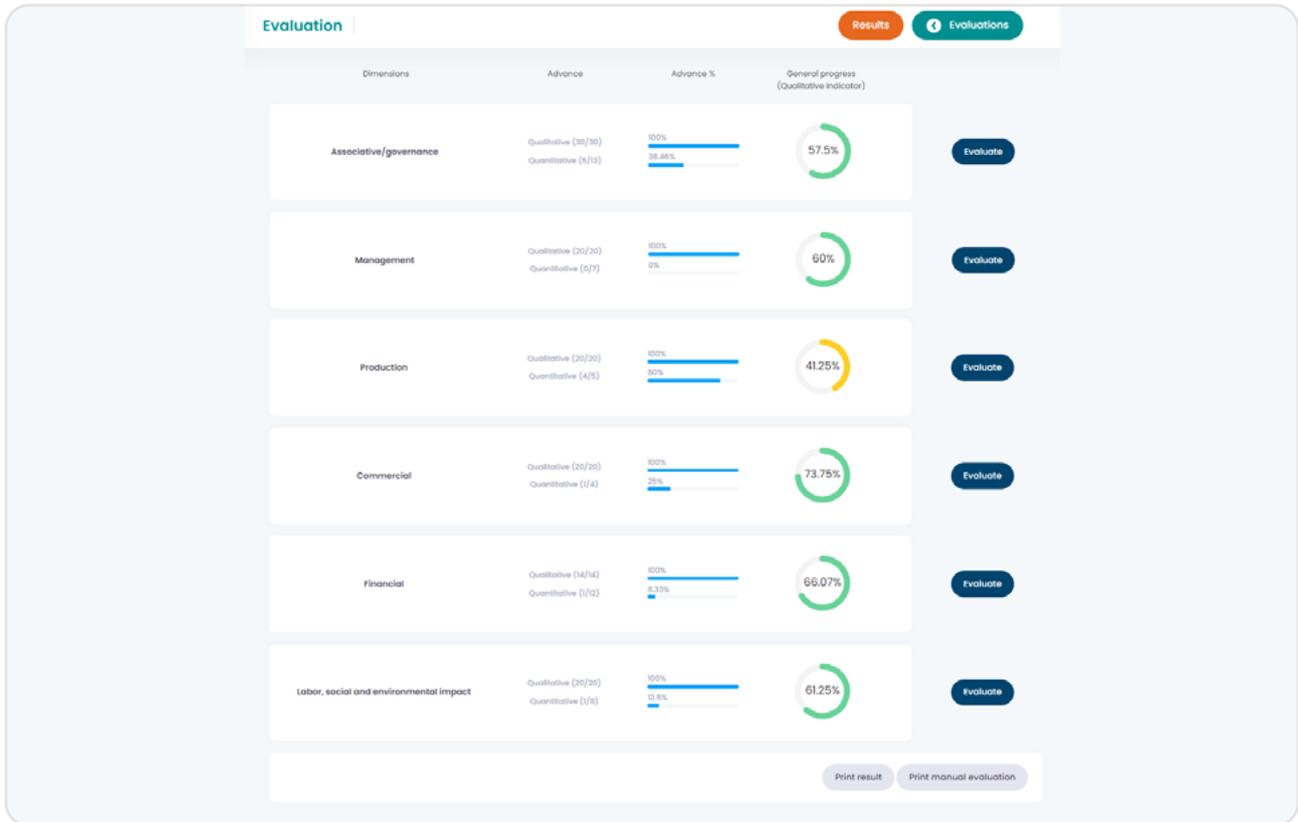


When you return, you will be able to visualize the progress of filling out the questionnaire for each dimension, as well as the result in percentage derived from the assessment according to the scores that were assigned to the answers of the qualitative questions.

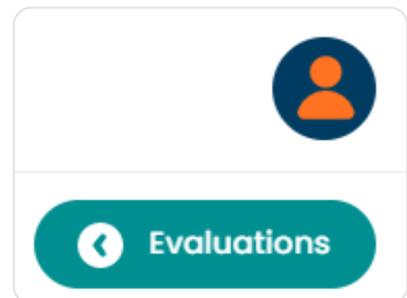


6

Assessment management



Once the assessment is completed, you must return using "Assessments" located at the top right of the application to return to the assessments section:



The 'Evaluations' section includes a search bar, a 'New evaluation' button, and a table of evaluation records. The table has columns for Template, Period, Date, Interviewed(s), Observation, and Operations. A pagination control shows 10 items per page and page 1 of 1.

TEMPLATE	PERIOD	DATE	INTERVIEWED(S)	OBSERVATION	OPERATIONS
Cooperativas (primarias o secundarias) de producción agropecuaria	2022	2022-07-22	VLADIMIR VIVANCO	PRIMERA EVALUACIÓN	[Icons for chart, print, copy, share, edit, delete]

6

Assessment management

6.5. Print the answers to the assessment questions

Access the assessment where the dimensions to be assessed are shown using the button



Then press “print result”

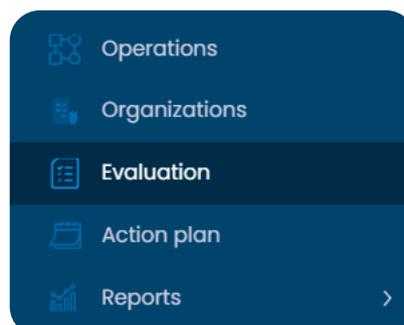
Print result

The information that appears can be printed to share with the assessed organization.

Central de Cooperativas Agrarias Cafetaleras Cocola	
Evaluation - Date: 2022-07-22 - type: Cooperativas (primarias o secundarias) de producción agropecuaria - Period: 2022 - Interviewed(s): VLADIMIR VIVANCO - Observation: PRIMERA EVALUACIÓN	
Associative/governance	
Qualitative evaluation	
Question	Answer
Internal norms and associate rights	
1. Does the organization deliver or make accessible (published on a wall and/or web page) an annual copy of the cooperative's bylaws to members, and does it provide training on these and other internal regulations so that all members know their rights and duties?	No (0 pts.)
2. Does the organization hold, at least once a year, a general assembly where the financial results of the previous year are analyzed in detail (results of production, collection, sales and, above all, comparative evolution of the costs of the last 3 years and the projection for beginning year)?	Yes, and partners understand and ask (3 pts.)
3. Do all associates have the same right to participate and vote in the General Assembly ("one person, one vote"), regardless of position or responsibility, contributed capital, seniority or other criteria?	Yes, totally (4 pts.)

6.6. Conducting an offline assessment

To develop an offline assessment, it is necessary to previously create an online assessment following the instructions previously exposed in the “Assess someone” section or you can access it on the left menu as shown in the image.



6

Assessment management

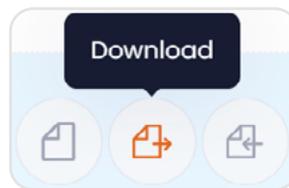
Then you will need to create or choose an assessment from the list of assessments available in this section:

The screenshot shows the 'Evaluations' management interface. At the top right, there is an 'Operations' button. Below it is a search bar and a 'New evaluation' button. The main area contains a table with the following data:

TEMPLATE	PERIOD	DATE	INTERVIEWED(S)	OBSERVATION	OPERATIONS
Cooperativas (primarias o secundarias) de producción agropecuaria	2022	2022-07-22	VLADIMIR VIVANCO	PRIMERA EVALUACIÓN	[Icons for chart, document, share, edit, delete]

At the bottom left, there is a dropdown menu set to '10'. At the bottom right, there is a pagination control showing '1'.

Then press the download button to get a package with the necessary information for offline work:



You will get a single compressed file:

Name	Modification date	Type	Size
eval-23.zip	17/03/2023 09:41		326 KB

Unzip the downloaded (zip) file to get two separate files:

Name	Modification date	Type	Size
dmoc.xlsm	08/03/2023 17:56		307 KB
eval-23.json	17/03/2023 09:41		376 KB

Open only the "dmoc.xlsm" file, this file works with Microsoft Excel 2010 software or higher with macros enabled. It is also necessary that the files "dmoc-xlsm" and "eval-xx.json" are located in the same folder without any additional files.

SECURITY WARNING Macros have been disabled Enable Content

L16

Assessment

Evaluation: 13/03/2023
 Organization: Central de Cooperativas Agrarias Cacao Aroma de Tocache Ltda. (CECAT)
 Type of Organization: Cooperative of second level farmer's cooperative (union)
 Legal form: Second Level Cooperative
 ID: 20572190251
 Representative: IRENO MENDOZA
 TOCACHE / SAN MARTIN / PERÚ

Associative/governance	<input type="button" value="EVALUATE"/>	57.50%
Management	<input type="button" value="EVALUATE"/>	60.00%
Production	<input type="button" value="EVALUATE"/>	41.25%
Commercial	<input type="button" value="EVALUATE"/>	73.75%
Financial	<input type="button" value="EVALUATE"/>	66.07%
Labor, social and environmental impact	<input type="button" value="EVALUATE"/>	61.25%

In the event that a message is displayed at the top of the Excel macro in yellow, accept it, close the file and reopen it.

Assessment

Evaluation: 13/03/2023
 Organization: Central de Cooperativas Agrarias Cacao Aroma de Tocache Ltda. (CECAT)
 Type of Organization: Cooperative of second level farmer's cooperative (union)
 Legal form: Second Level Cooperative
 ID: 20572190251
 Representative: IRENO MENDOZA
 TOCACHE / SAN MARTIN / PERÚ

Associative/governance	<input type="button" value="EVALUATE"/>	57.50%
Management	<input type="button" value="EVALUATE"/>	61.25%
Production	<input type="button" value="EVALUATE"/>	51.25%
Commercial	<input type="button" value="EVALUATE"/>	65.00%
Financial	<input type="button" value="EVALUATE"/>	73.21%
Labor, social and environmental impact	<input type="button" value="EVALUATE"/>	37.50%

6

Assessment management

The operation of the macro is similar to the online operations to develop an assessment and develop the action plan.

If you want to update the general information of the assessment such as the date, the person responsible or add some information, you must double-click on the section where this information is presented.

Evaluation: 13/03/2023
Organization: Central de Cooperativas Agrarias Cacao Aroma de Tocache Ltda. (CECAT)
Type of Organization: Cooperative of second level farmer's cooperative (union)
Legal form: Second Level Cooperative
ID: 20572190251
Representative: IRENO MENDOZA
TOCACHE / SAN MARTIN / PERÚ

EVALUATION ×

INTERVIEWED

EVALUATION DATE

OBSERVATION

6.7. Starting an offline assessment

To start assessing double-click on “assess”, you will automatically be directed to another view where the questionnaire is located with the qualitative, quantitative questions and services as appropriate

Associative/governance

1. Does the organization annually provide or make a copy of the cooperative's Bylaws to the members easily accessible (posted on a mural and/or website), and trains on this and other internal rules so that all members are aware of their rights and duties?

No
 Yes, but they don't know it
 Yes, and members are trained
 Yes, and the members know it
 Yes, they know it, and they apply it

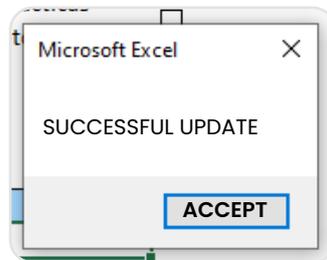
6

Assessment management

	2021	2022
% of members who are women (percentage)		
% of members who comply with their capital contributions to the cooperative (percentage)		
% of women in governing bodies (percentage)		
% of youth members (percentage)		
Amount invested in cooperative education vs. Operating Profit (monetary value)		
Amount invested in providing services to its members (see type of services below) (monetary value)		

Retail sales	<input checked="" type="checkbox"/>
Distribution (sale to wholesale buyers)	<input type="checkbox"/>
Marketing (brands, certifications, exhibition at trade fairs, etc.)	<input checked="" type="checkbox"/>
Purchases of inputs, etc.	<input checked="" type="checkbox"/>

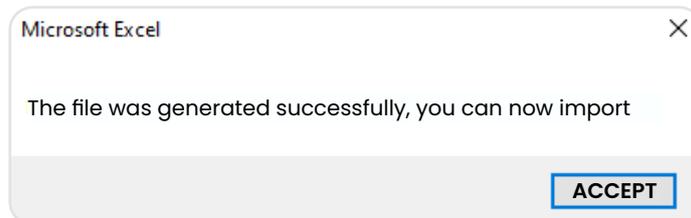
Upon completion of the work for the selected dimension update the file by double clicking on the button at the end of the questionnaire:



In case you only want to develop the assessment and not the action plan, you can save and generate the evaluation by double clicking on the red button on the main assessment screen.



You will get the following message:

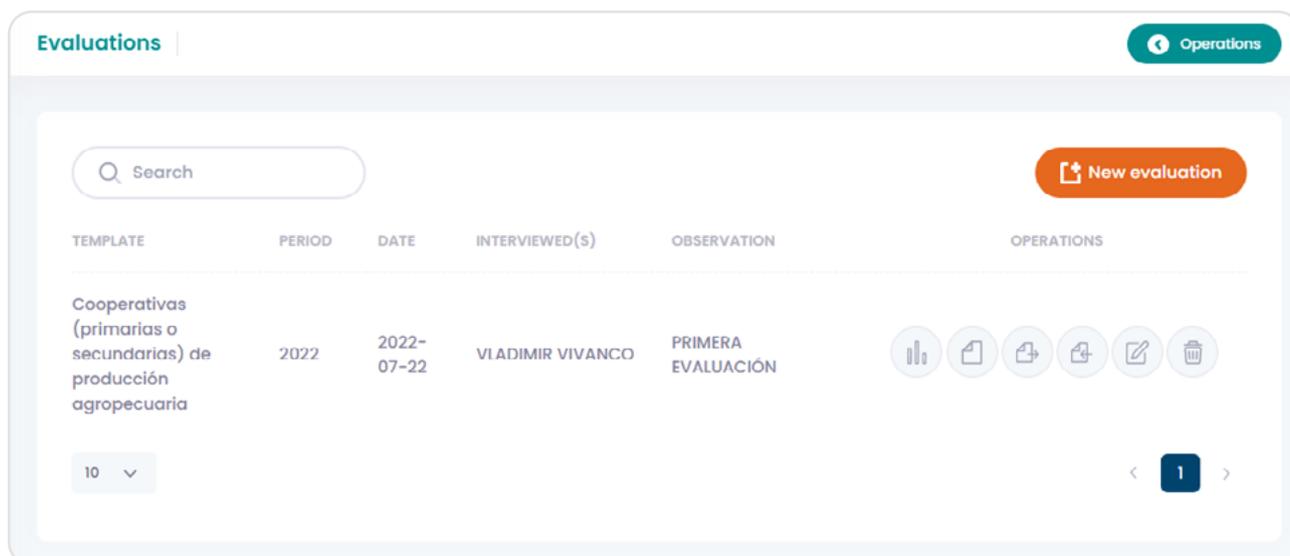


From this stage you can already import the assessment to the online tool.

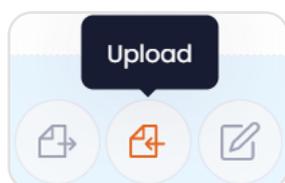
6 Assessment management

6.8. Uploading and synchronizing the offline assessment in the online tool

To perform this task previously you must save and generate the assessment as indicated above, then go to the list of evaluations in the online tool:



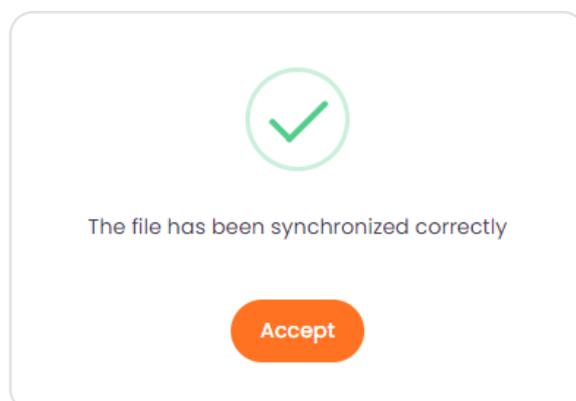
Press upload:



Then, you will need to select the "eval-xx.json" file from the folder where you have worked with the offline macro:

Name	Modification date	Type	Size
eval-23.json	17/03/2023 10:08		477 KB

Select the file and press OK, then a confirmation message will be displayed:

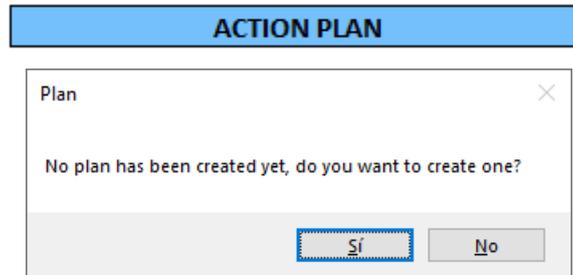


To finish, enter the evaluation and confirm the changes made.

6 Assessment management

6.9. Developing the offline action plan

To develop an offline action plan double click on "ACTION PLAN", in case you have not generated any, the following message will appear:

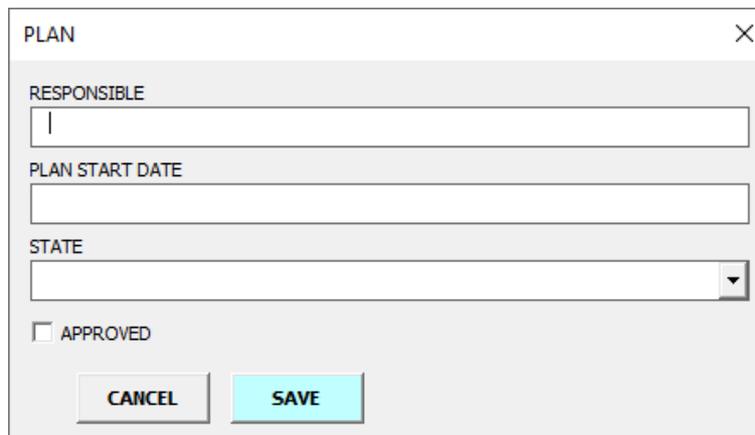


ACTION PLAN

Plan

No plan has been created yet, do you want to create one?

To access press yes, the following form will be displayed:



PLAN

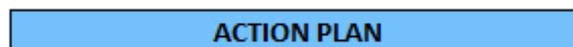
RESPONSIBLE

PLAN START DATE

STATE

APPROVED

Fill in the data in the same way as in the online version, when finished press save, then double-click the button again



ACTION PLAN

A new list of the action plan will be shown:



ACTION PLAN

EVALUATION NEW ADDITIONAL ACTION UPDATE PLAN SHOW EVERYTHING

	May - 2023	June - 2023	July - 2023	August - 2023	September - 2023	October - 2023	November - 2023	December - 2023	January - 2024	February - 2024	March - 2024	April - 2024
Implement a Manual of Administrative Procedures (ADVANCE: 0 %)												
Implement Manual of organization and functions (ADVANCE: 0 %)												
Carry out a monitoring of the strategic plan semi-annually (ADVANCE: 0 %)												

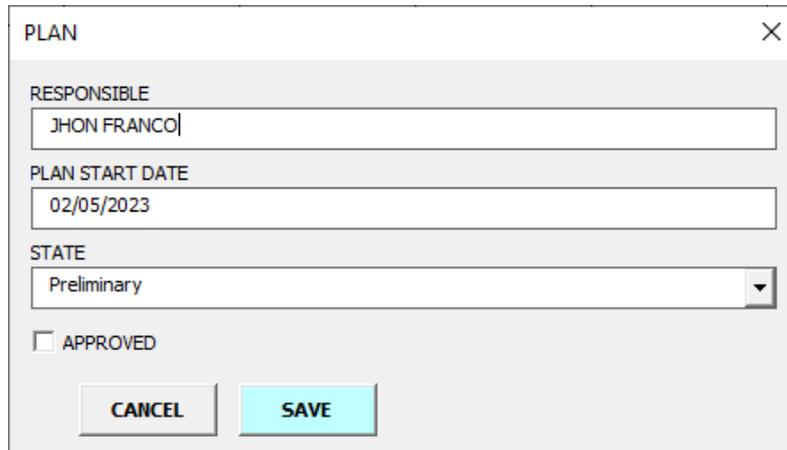
You should note that the plan associated with the assessment will be generated and will contain the general actions that appear automatically on the left side depending on the answers to the assessment questions.

6

Assessment management

To modify the general information of the plan click on "UPDATE PLAN":

ACTUALIZAR PLAN



A screenshot of a web form titled "PLAN" with a close button (X) in the top right corner. The form contains the following fields:

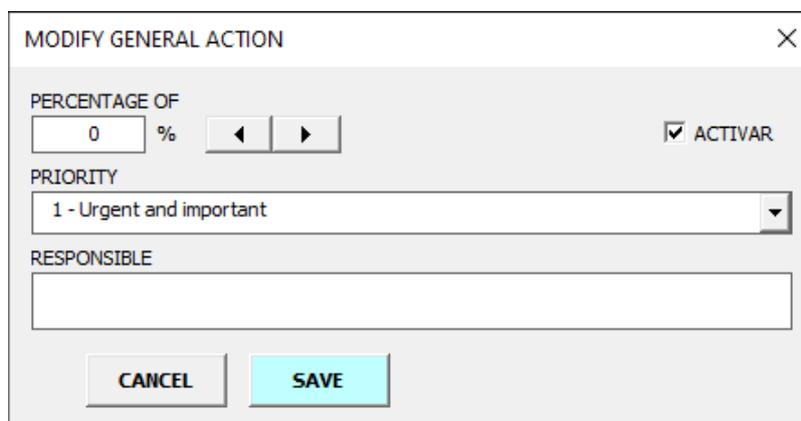
- RESPONSIBLE:** A text input field containing "JHON FRANCO".
- PLAN START DATE:** A date input field containing "02/05/2023".
- STATE:** A dropdown menu with "Preliminary" selected.
- APPROVED:** A checkbox that is currently unchecked.
- Buttons:** "CANCEL" and "SAVE" buttons at the bottom.

To modify the general actions, click on each action that appears on the left side of the table:



A screenshot of a table row. The text on the left reads "Implement a Manual of Administrative Procedures (ADVANCE: 0 %)". To the right is a date field containing "May - 2023".

A form will be displayed to edit and place additional data for this action.



A screenshot of a web form titled "MODIFY GENERAL ACTION" with a close button (X) in the top right corner. The form contains the following fields:

- PERCENTAGE OF:** A numeric input field with "0" and a percentage sign, followed by left and right arrow buttons.
- ACTIVAR:** A checked checkbox.
- PRIORITY:** A dropdown menu with "1 - Urgent and important" selected.
- RESPONSIBLE:** An empty text input field.
- Buttons:** "CANCEL" and "SAVE" buttons at the bottom.

6 Assessment management

The operation of this form is the same as its online version.

In case you want to add an additional action, you must press “NEW ADDITIONAL ACTION” at the top of this view.

NEW ADDITIONAL ACTION

ADDITIONAL ACTION ×

DESCRIPTION

PRIORITY

RESPONSIBLE

CANCEL SAVE

New additional action (ADVANCE: 0 %)

May - 2023

To edit or delete an additional action, double-click on the action name located on the left side of the table.

MODIFY ADDITIONAL ACTION ×

PERCENTAGE OF

%

◀ ▶

PRIORITY

1 - Urgent and important

RESPONSIBLE

Carl

CANCEL SAVE DELETE

6

Assessment management

The operation of this form is the same as its online version.

To work with milestones you must double-click on the cells where the name of the action and the month of entry of the milestone intersect, do not write in these cells:

	May - 2023	June - 2023
Manual of Administrative (ADVANCE: 0 %)		
Manual of organization and functions (ADVANCE: 0 %)		
Approval of the strategic plan		

Then the following form will be displayed:

Add or modify milestone
✕

General action

Implement Manual of organization and functions (ADVANCE: 0 %)

General action milestone

DESCRIPTION

OBSERVATION

CANCEL

SAVE

	May - 2023	June - 2023
Manual of Administrative (ADVANCE: 0 %)		
Manual of organization and functions (ADVANCE: 0 %)	New milestone	
Approval of the strategic plan		

To add a new milestone for the same action in the same month, double-click on the cell where you want to add the milestone, the following form will be displayed.

6

Assessment management

Add or modify milestone

General action

Implement Manual of organization and functions (ADVANCE: 0 %)

General action milestone

DESCRIPTION

New milestone

OBSERVATION

COMPLETE

CANCEL SAVE DELETE NEW

Then press New.



Fill in the form with the new milestone and press save.

Add or modify milestone

General action

Implement Manual of organization and functions (ADVANCE: 0 %)

General action milestone

DESCRIPTION

Other new milestone

OBSERVATION

Other

COMPLETE

CANCEL SAVE

6 Assessment management

At the end you will get all the milestones entered for the action and the corresponding month will be displayed:

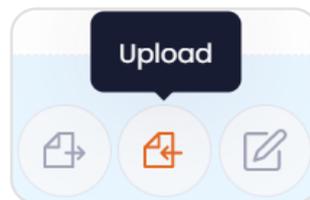
	May - 2023	Jun
Implement a Manual of Administrative Procedures (ADVANCE: 0 %)		
Implement Manual of organization and functions (ADVANCE: 0 %)	New milestone	
Carry out a monitoring of the strategic plan	Other new milestone	

In the same way, the entry of milestones for additional actions should proceed.

When the work of developing the action plan has been completed and you want to synchronize this information with the online tool, proceed in the same way as indicated above, saving and generating the assessment and the plan with the button:

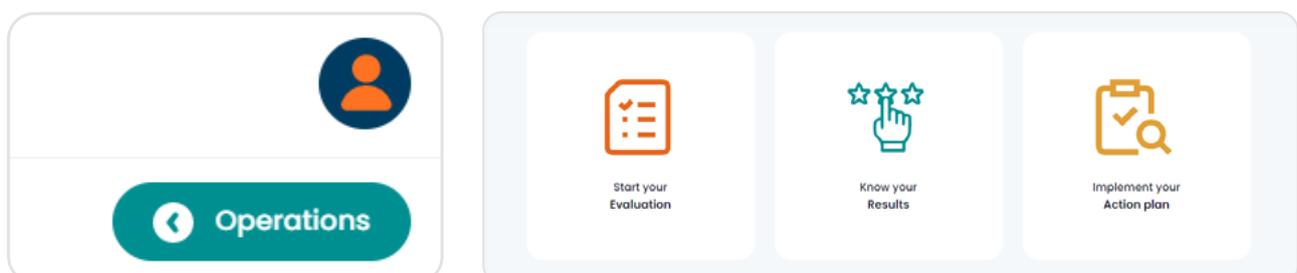
SAVE AND GENERATE EVALUATION

Then import the eval-xx.json file on the online platform with the upload button:



6.10. Results of an assessment

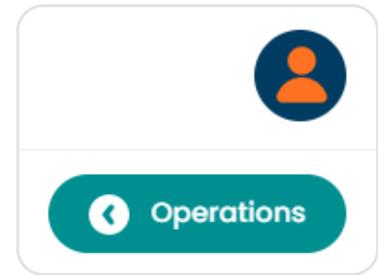
To see the Results of the assessment, you must press "Operations" also located at the top right of the application, obtaining the following screen with "Know your Results":



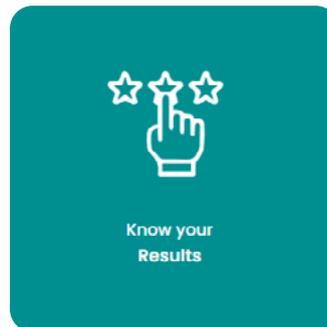
6

Assessment management

To find out the results of the assessment, return to the main operations by pressing “Operations” located at the top right of the application.



Then press the green “Results”.



The results of the assessment and the action plan are summarized in this section:

The screenshot shows the assessment results page. At the top, there is a section titled "Evaluation" with a date range of "2022-07-22 - 2022". Below this, the details for "Central de Cooperativas Agrarias Cafetaleras Cocola" are listed:

Id:	20196201213
Representative:	VLADIMIR VIVANCO - GERENTE GENERAL
Creation date:	0000-00-00
Beginning of operations:	1966-07-26
Type of organization:	Cooperativa de productores agrarios de primer nivel
Legal form:	Cooperativa de segundo nivel
Location:	LA CONVENCION / CUSCO / PERU

Below the details, there is another "Evaluation" section with the following information:

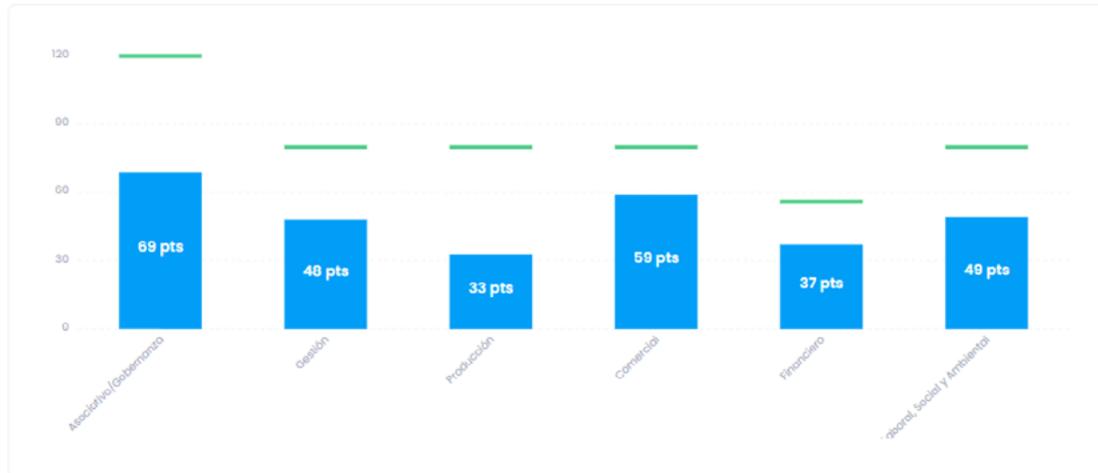
Template:	Cooperativas (primarias o secundarias) de producción agropecuaria
Evaluation date:	2022-07-22
Period:	2022
Evaluator:	admin
Interviewed(s):	VLADIMIR VIVANCO
Observation:	PRIMERA EVALUACIÓN
Score:	295 de 496 puntos

On the right side of this section, there is a circular progress indicator showing "Score %: 59.48%". Below the indicator, the text "Situating: Good" is displayed in a green box.

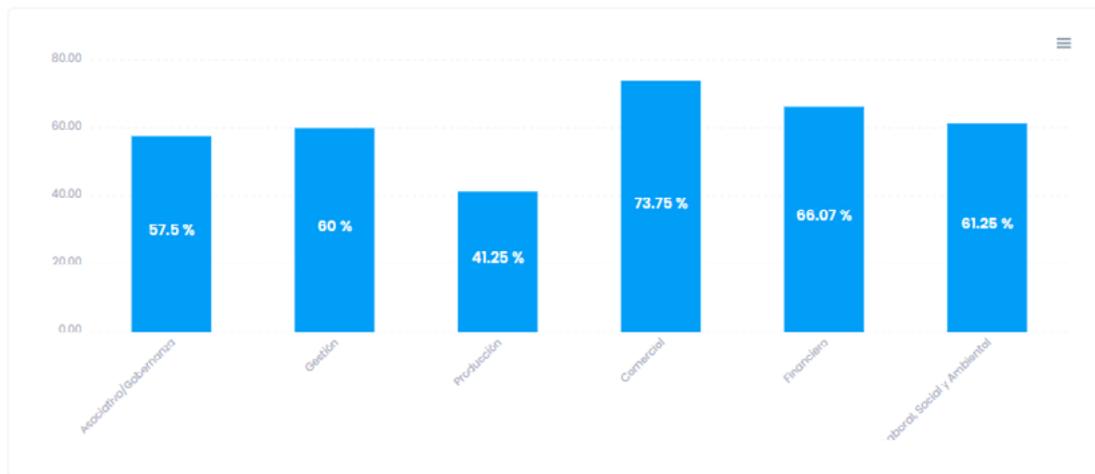
6

Assessment management

Score according to evaluated components



Percentage of development in each component



Advance :

0.00 %

7.1. What you need to know before developing an action plan

An action plan is a list of actions derived from the answers given to the qualitative questions, each with a responsible party and milestones that must be completed by responsible parties.

A single action plan is generated from an assessment, consequently, there is only one action plan for each assessment.

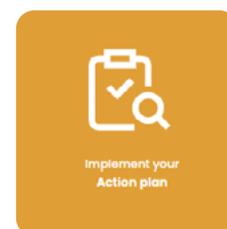
Action plans should be co-developed with the people who participated in the assessment, ideally on the same day or the day after the assessment.

When generating or creating an action plan, general actions will appear that are automatically generated from the answers of the qualitative questions, according to the assessment template. As we will see, you can disable these actions, and also add additional or non-automatically generated actions.

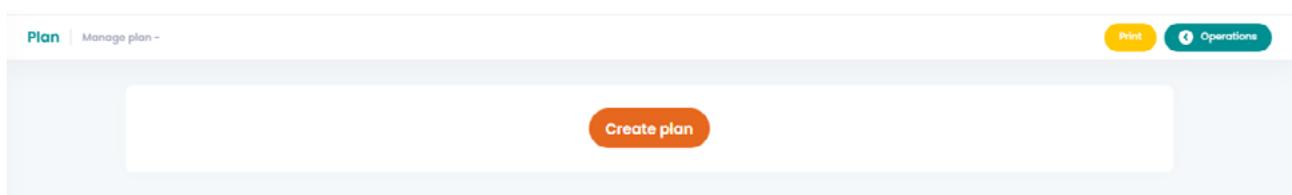
If the assessment has been carried out offline, the corresponding work plan can also be carried out offline, as explained above.

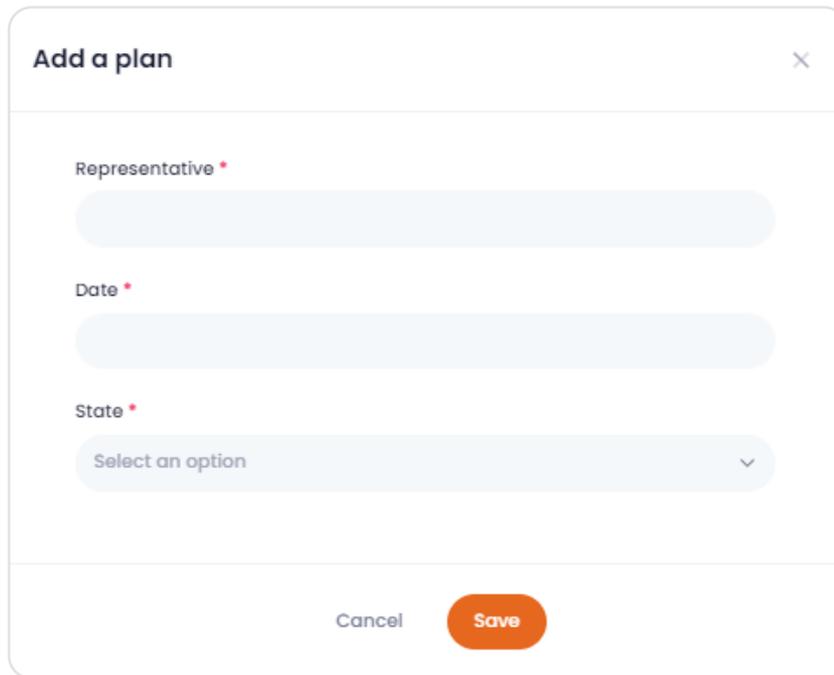
7.2. Creating a new plan

To start the co-drafting of the action plan or work, press “Action Plan”:



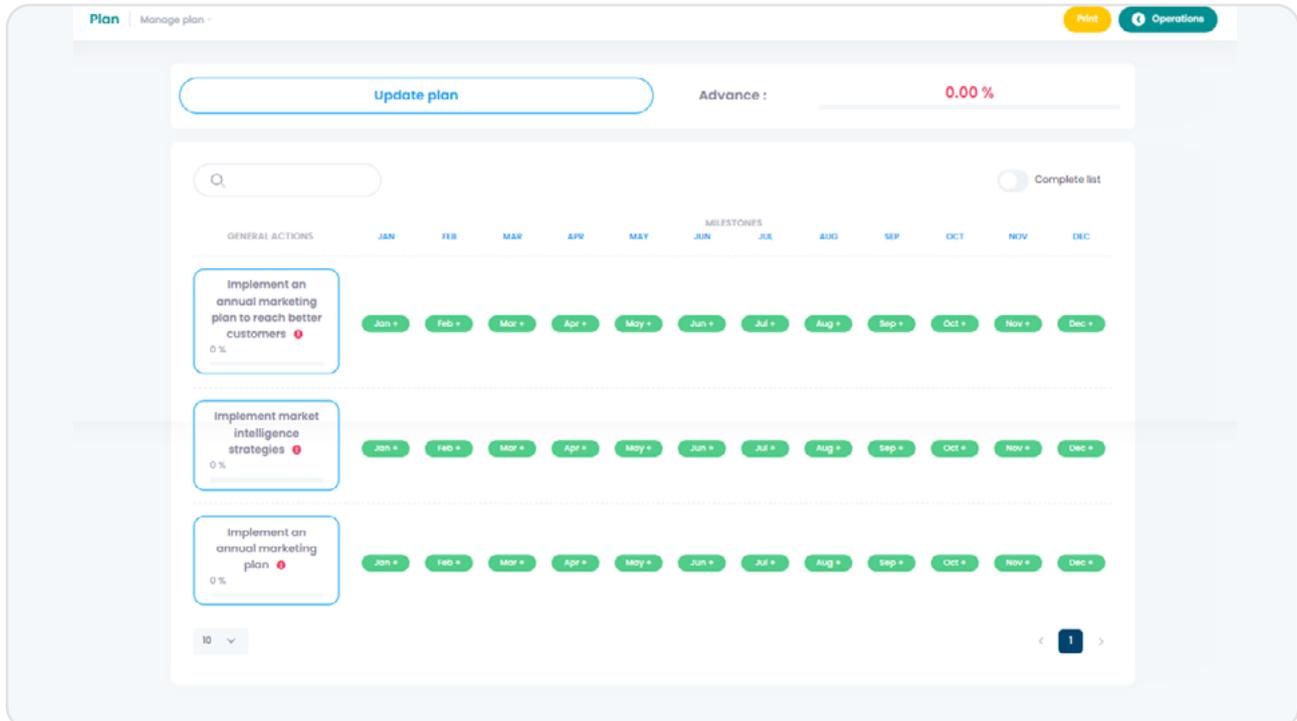
Then, you will be redirected to a new view where you can create a plan by pressing “Create Plan”. The creation of a plan requires the completion of the assessment development. If the assessment has been partially carried out, you can update the plan again to reorganize the resulting actions.





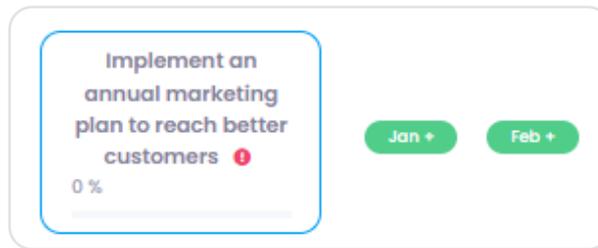
The 'Add a plan' form is a modal window with a close button (X) in the top right corner. It contains three input fields: 'Representative' (a text input), 'Date' (a date picker), and 'State' (a dropdown menu with the text 'Select an option'). At the bottom of the form are two buttons: 'Cancel' and 'Save'.

After the creation of the plan you will be redirected to the following view:



The 'Manage plan' view shows a dashboard for a plan. At the top, there is a 'Plan' tab and a 'Manage plan' sub-tab. On the right, there are 'Print' and 'Operations' buttons. The main content area features an 'Update plan' button and an 'Advance' progress bar showing 0.00%. Below this is a search bar and a 'Complete list' toggle. The main section is a table with columns for months (JAN to DEC) and 'MILESTONES'. Three general actions are listed: 'Implement an annual marketing plan to reach better customers', 'Implement market intelligence strategies', and 'Implement an annual marketing plan'. Each action has a progress bar and a '0%' indicator. The table also includes a 'GENERAL ACTIONS' column and a 'MILESTONES' column. At the bottom, there is a pagination control showing '10' items and a page number '1'.

General actions will be shown in this view. A general action is visible because of the answer given to a qualitative question. The tool will show the most relevant actions for implementation purposes.



7.3. Updating information on an existing plan

It is possible to update the general information of the plan by pressing "Update Plan"



Then the following form will be submitted:

Update plan information ×

Representative
ENRIQUE TAFUR

Date de inicio
2022-10-21

State *
Preliminary ▾

Aproved

Cancel **Save**

By updating the general information of the plan, it is possible to modify the information entered through the form and also update the general actions in the event that the assessment has been modified and the answers to the qualitative questions changed.

7.4. Indicate the status of an action plan

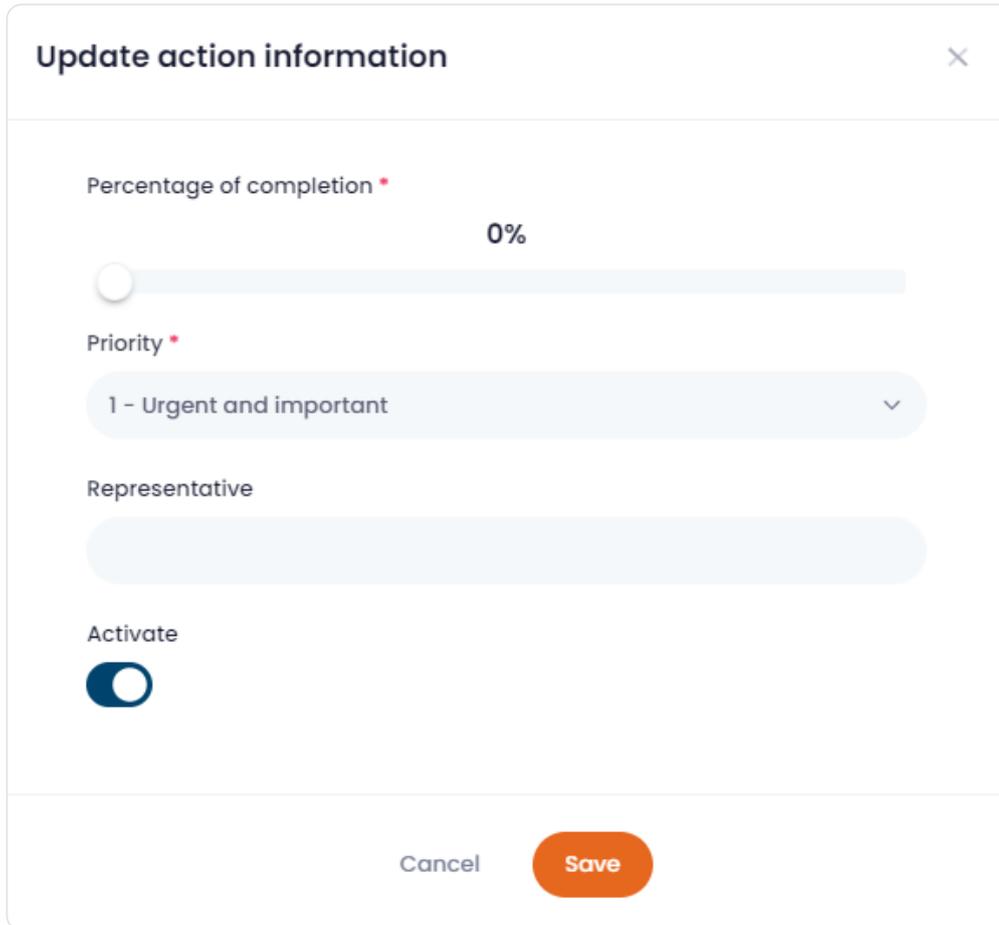
To indicate that the action plan has already been finalized by the organization, you must select the options of the state, “preliminary” or “final”. The “preliminary” status means that changes may be made to the general information, actions, milestones or assessment that will cause an update of the general actions. The “final” status means that it has already been finalized and approved by the organization, so no further changes will be made, except for the modification of the actions progress percentage or the status of the milestones. This information will be used as an indicator to determine the number of plans in “preliminary” or “final” status.

7.5. Information update of the general actions of the plan

By updating the general information of the plan as explained above, the general actions are also updated, in case the assessment has been modified and the answers to the qualitative questions changed. This behavior is useful when it has not been possible to complete the assessment completely and the plan needs to be developed in parallel.

7.6. Edit a general action

By pressing the box containing the general action you can update the main data:



Update action information

Percentage of completion *

0%

Priority *

1 - Urgent and important

Representative

Activate

Cancel Save

The following describes all the fields that are required:

Progress percentage

Refers to the implementation percentage estimate of the general action, this estimate is proposed by the interviewee.

Priority

It is the estimation of the importance and urgency that is determined in the general action.

Responsible party

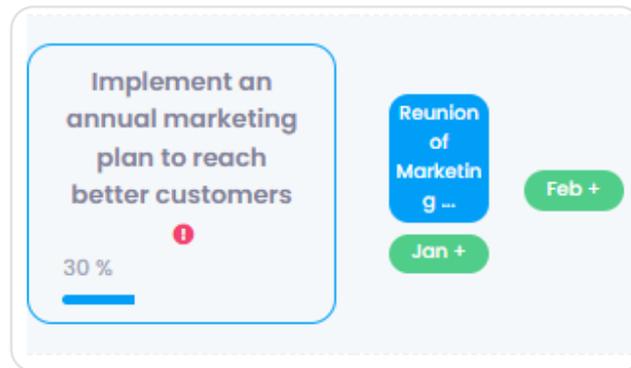
Person who will be in charge of implementing the general action.

Enable

Allows the action to be visible to the assessor, when it is deactivated the general action remains hidden but not deleted, it is possible to re-activate it.

7.7. Add, update and complete a milestone

To determine deadlines for the implementation of the general actions proposed by the application, it is necessary to create milestones, these are more specific actions or concrete results that must be met in the month they are established.



To add a milestone you must press the green buttons that are located to the right of each general action, these are 12 buttons that represent one month from the creation date of the plan, considering the creation month and the following eleven months.



Each button displays a form that contains a field for the milestone description and another field for any observation.

Add a milestone January ×

Description of the milestone *

Observation *

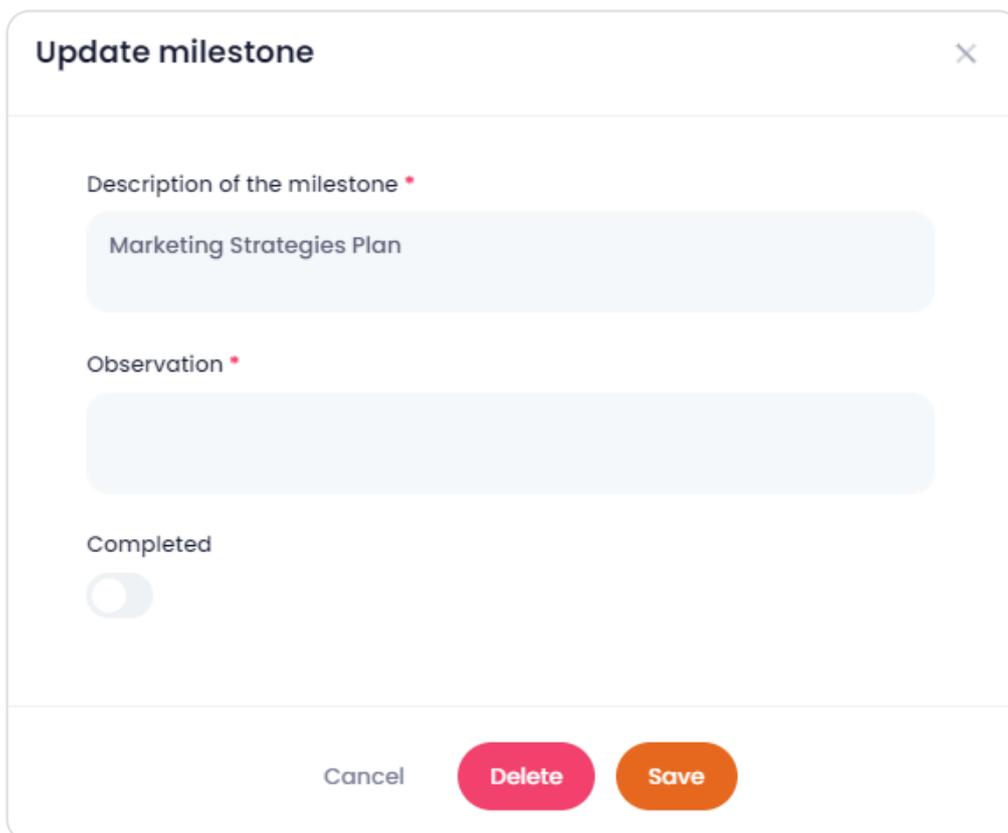
Cancel Save

6 Management of action plans

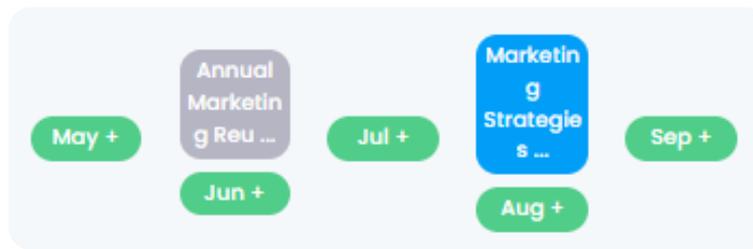
When saving the form a new milestone will be added which is represented on a button in an abbreviated form:



To edit a milestone press the blue button representing the milestone, then a form will be displayed as shown in the following image:

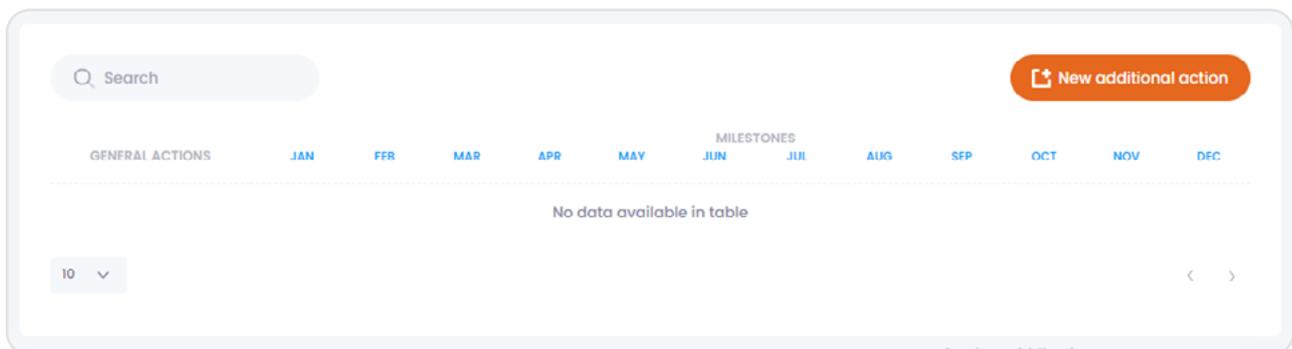
The 'Update milestone' form is a modal window with a close button (X) in the top right corner. It contains three main sections: 1. 'Description of the milestone *' with a text input field containing 'Marketing Strategies Plan'. 2. 'Observation *' with a larger text input field. 3. 'Completed' with a toggle switch that is currently turned off. At the bottom of the form, there are three buttons: 'Cancel' (text), 'Delete' (pink), and 'Save' (orange).

In addition to editing the description and the observation of the milestone you can also mark it as completed, this will cause the milestone to change color which will indicate that it has been fulfilled for implementation.



7.8. Additional actions

The additional actions are those actions that were not included in the corresponding assessment template and therefore do not automatically appear among the “general” ones. These are actions that are not shown in the general actions list. These may respond to some particularity of the organization on which it is necessary to carry out an improvement action. Thus, an additional action can be generated from a very obvious need but that is not considered in the assessment.



To create a new additional action press “New Additional Action”, then the following form will be displayed:

Add additional action
✕

Description of additional action *

Select an option

Priority *

Select an option

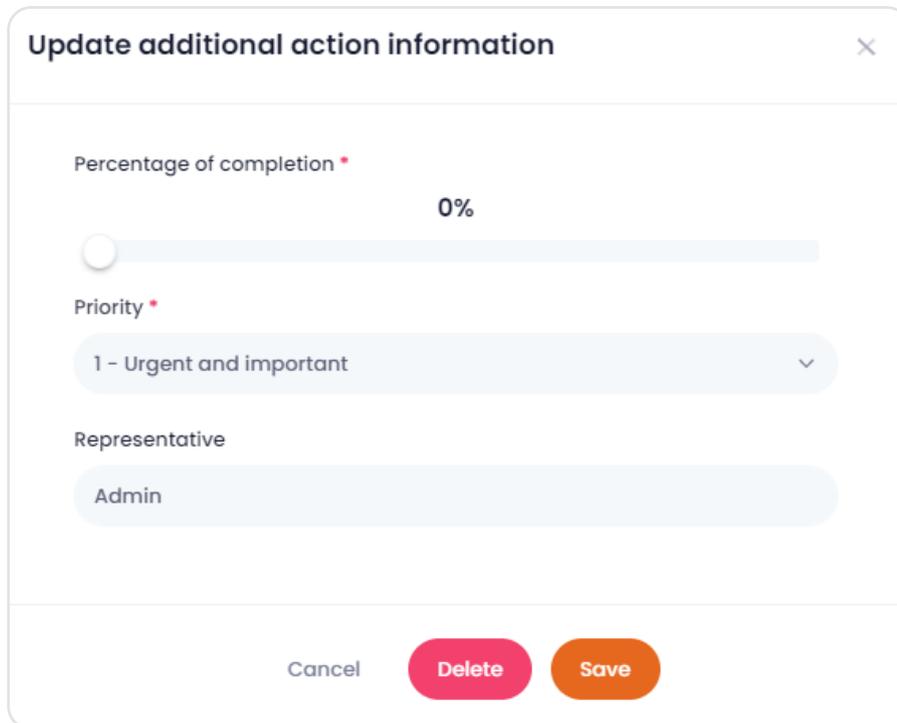
Representative *

Cancel
Save

7

Management of action plans

By pressing save you will be able to create a new additional action, as in the general actions, the additional actions can be edited and even deleted, you just have to press the box containing the name of the additional action of which the following form will show.

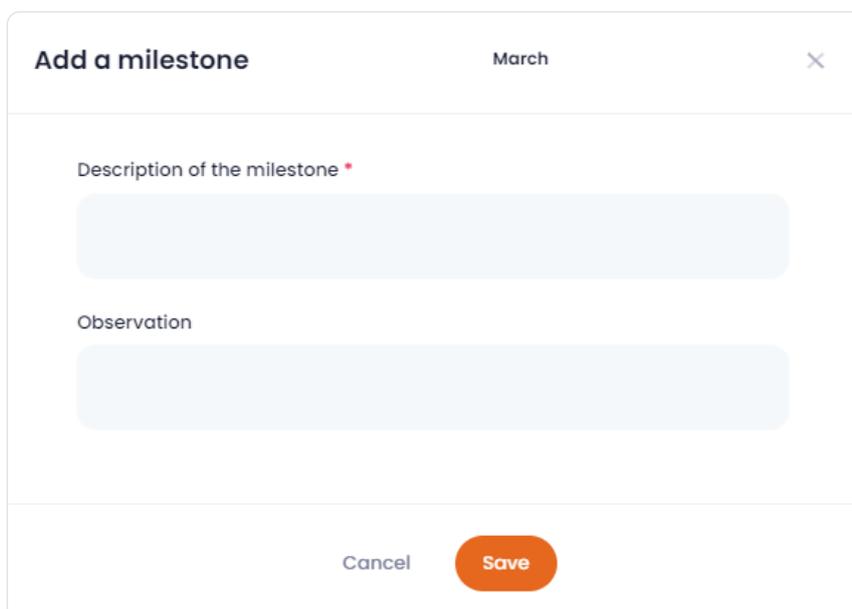


The screenshot shows a modal window titled "Update additional action information" with a close button (X) in the top right corner. The form contains the following fields:

- Percentage of completion ***: A progress bar set to 0%.
- Priority ***: A dropdown menu currently showing "1 - Urgent and important".
- Representative**: A text input field containing "Admin".

At the bottom of the modal, there are three buttons: "Cancel", "Delete" (in a pink rounded rectangle), and "Save" (in an orange rounded rectangle).

To add a new milestone to an additional action, similar steps are taken to create milestones in the general actions, just press the green buttons and complete the form that will allow adding a milestone.



The screenshot shows a modal window titled "Add a milestone" with a close button (X) in the top right corner. The word "March" is displayed in the top right area of the modal. The form contains the following fields:

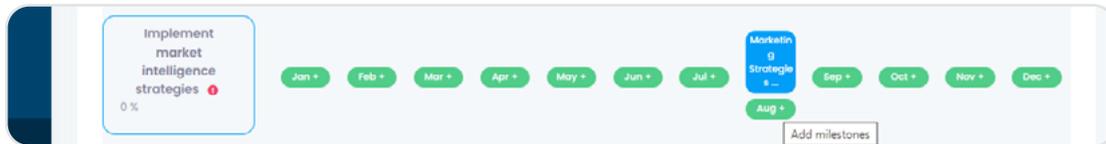
- Description of the milestone ***: A large text input field.
- Observation**: A large text input field.

At the bottom of the modal, there are two buttons: "Cancel" and "Save" (in an orange rounded rectangle).

7

Management of action plans

After finishing the creation of the milestones for the additional actions it is also possible to edit or delete them by just pressing the blue buttons that contain the abbreviated name of the milestone, additionally you can mark the milestone as completed.



Update milestone

Description of the milestone *

Observation *

Completed

Cancel Delete Save

7.9. Print an action plan

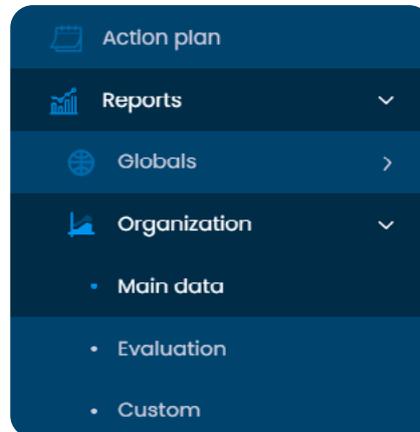
Whether or not the action plan has been finalized, you can print a report of all the general and additional actions entered using "Print" located at the top right of the application.

Print

The information that appears can be exported as a PDF to share with the assessed organization.

8 Organization Report

The main menu on the left side of the application shows the options of different reports types available:



8.1. Report of the main data of the organization



8.2. Assessment report of the organization

See above, which is the same as if you press “Results” of an assessment.

8.3. Personalized report of the organization

This report shows defined groups of qualitative questions related to qualitative questions that define a common theme. It is necessary to select the required assessment fields and name of the custom report group.

Comparative analysis of the evaluation

Evaluation

Select an option ▼

Group of questions

Select an option ▼

After selecting the data will allow to see the following screen:

Comparative analysis of the evaluation

Evaluation

2022-07-22 - 2022 ▼

Group of questions

Membership ▼

Qualitative questions

Do you have statistical information on women and youth in the membership and governing bodies?

Yes they have on both

(4 Pts.)

Are there women in the governing bodies, at least in proportion to their participation in the membership?

Yes, more than 10% and less than 20%

(2 Pts.)

Are there young people in government bodies?

No

(0 Pts.)

Are you implementing a plan to incorporate women into the organization and strengthen their capacities to occupy management positions (including training on gender equality)?

There is a plan but there is no manager and budget

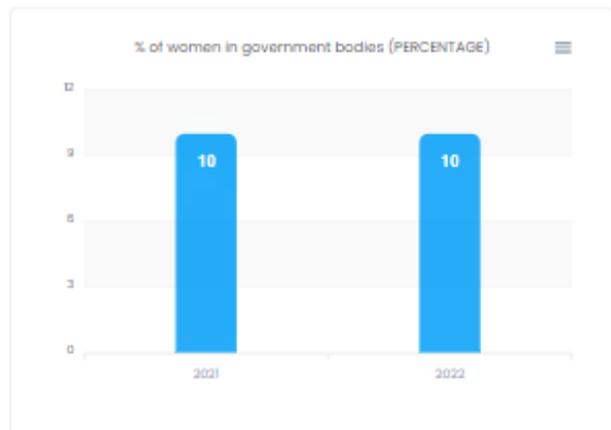
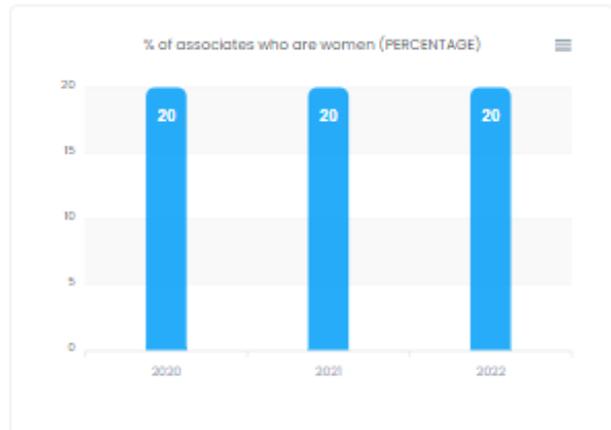
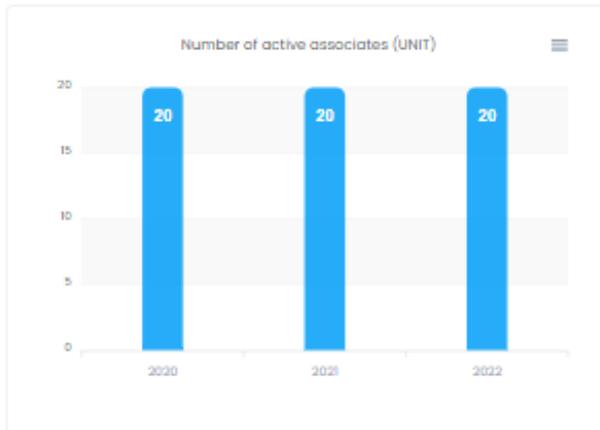
(2 Pts.)

managerial succession or generational change plan to renew managers?

No

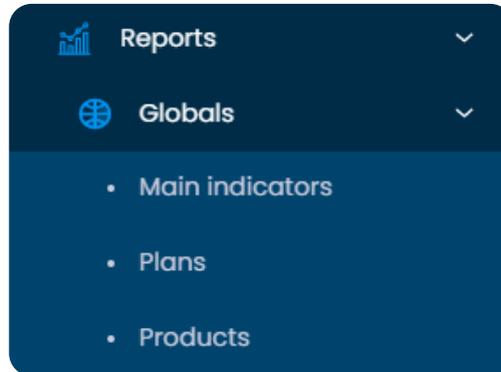
(0 Pts.)

Quantitative questions



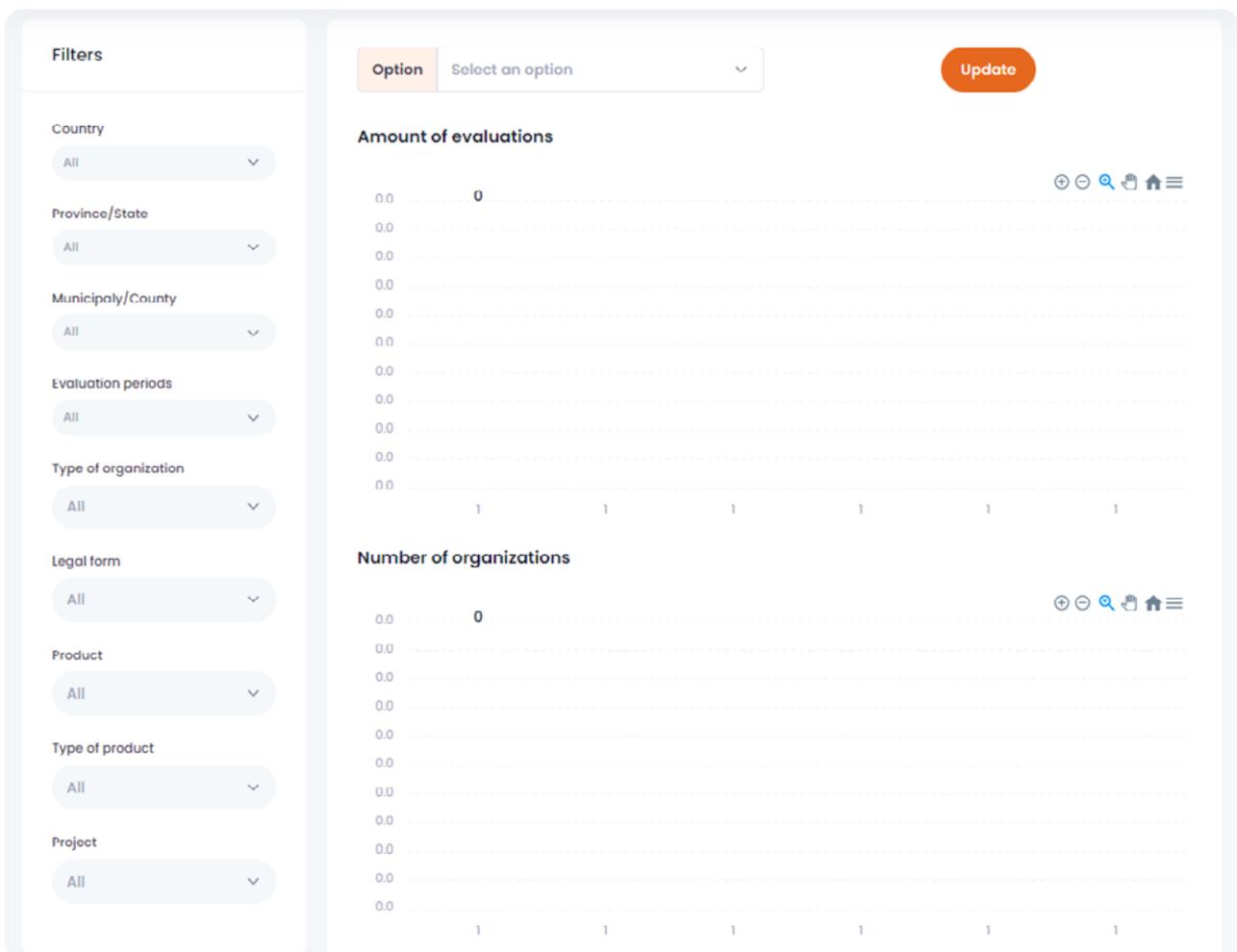
9 Global reports

An administrator user can view the global reports that are indicators and graphs of consolidated data of the organizations that are registered under the projects you are assigned, and you can apply various filters to generate different charts.



9.1. Main indicator

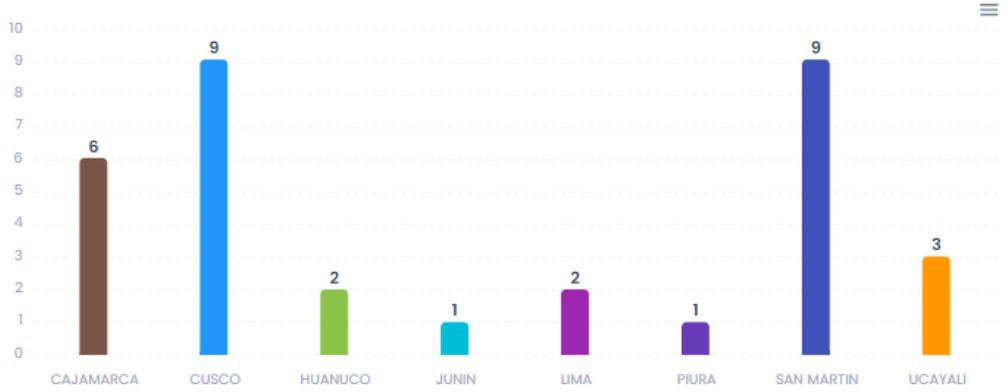
Contains graphs about “Number of assessments” and “Top 10 services” these graphs can be filtered with the options shown at the top of this section:



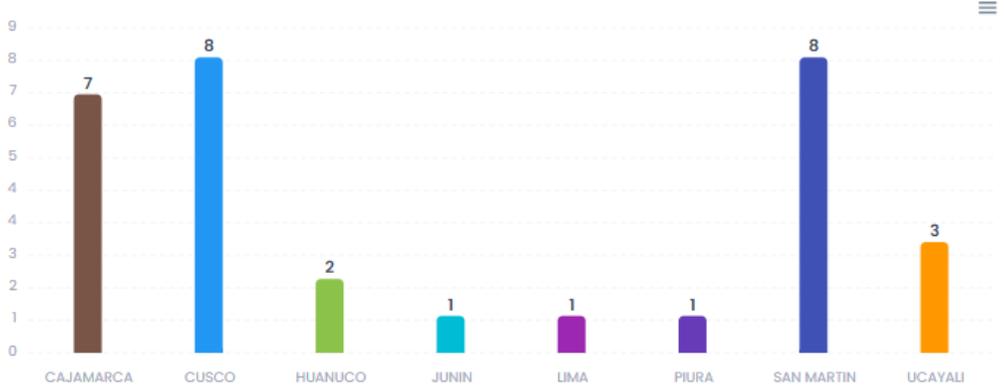
Option Province/State ✕ ▼

Update

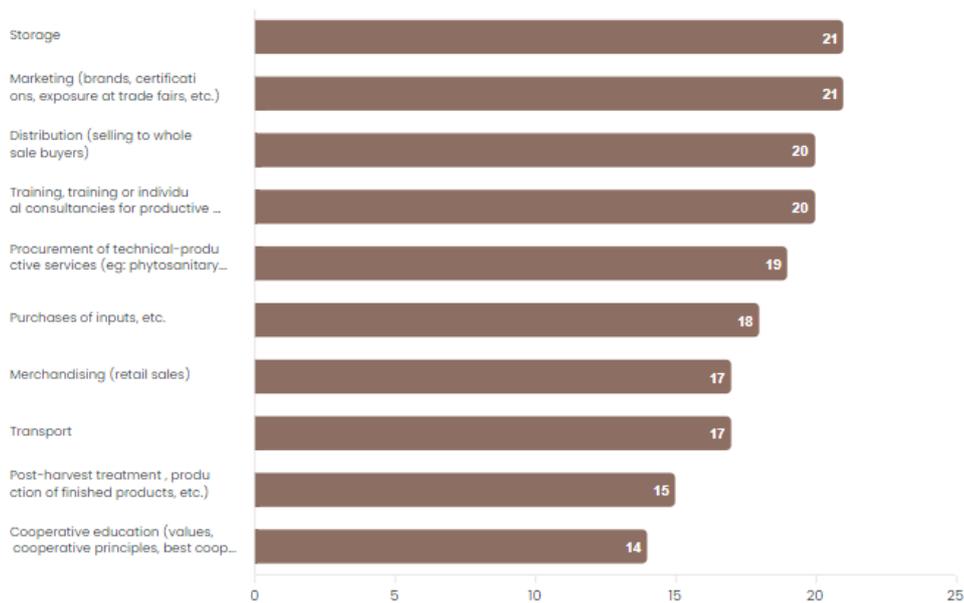
Amount of evaluations



Number of organizations



Top 10 services



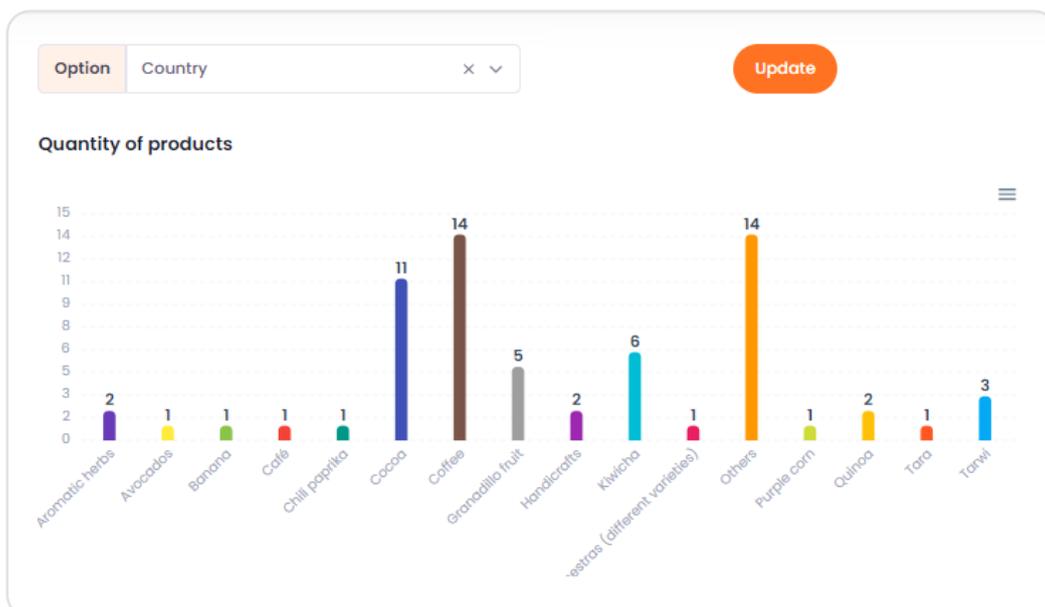
9.2. Plans

This section shows graphs related to the plans, their amount and their average percentage of progress according to the filters available at the top of this section.



9.3. Products

This section shows the quantity of products according to the filters selected at the top of this section.



10.1. Projects

They represent the different projects that are developed according to their characteristics, scope or field.

10.1. User

They are the people in charge of using the application according to the role they were assigned.

10.1. User management

Section where it is possible to create, modify or delete users, this section depends on the role assigned to the user it manages.

10.1. User roles

Are the set of permissions enabled or disabled for one or more users, which provides them with access to the different functions of the application. There are four types of users explained below: observer, assessor, administrator and super administrator.

10.1. Observer

User who has access only to see the organization's data to which they have been assigned, their assessments and corresponding work plans, as well as the reports corresponding to their organization.

10.1. Assessor

The User who has access to create a new organization, assess it, execute the action plan and have access to some reports corresponding to the organizations that they have created or have been assigned.

10.1. Administrator

They have access to the entire application, except for the creation of global parameters in the application (projects, location, templates, assessment measurement parameters, global parameters of the organizations), the administrator according to the project to which they belong, has control over the assessors belonging to the same project.

10.1. Super administrator

You have access to all the functions of the application without exception.

10.1. Organizations

This section shows the quantity of products according to the filters selected at the top of this section.

10.1. Dimensions

They group the levels of the qualitative and quantitative questions and services, they can have a variable weight associated with the qualitative questions that affects the final score of the assessments of the organizations.

10.1. Levels

It groups the qualitative questions, the levels are only used as a reference for grouping questions.

10.1. Actions

They group the levels of the qualitative and quantitative questions and services, they can have a variable weight associated with the qualitative questions that affects the final score of the assessments of the organizations.

10.1. Milestones

They are the tasks scheduled to finish in a defined month, at the time of being implemented they must be edited and set as completed.



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