dmooc

DIAGNOSTIC AND MONITORING OF ORGANIZATIONAL COACHING

MANUAL FOR SUPER ADMINISTRATORS

USAID FROM THE AMERICAN PEOPLE

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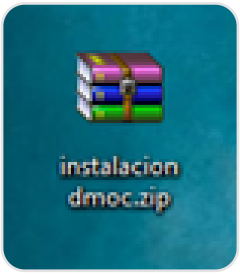
1 Installation of the application

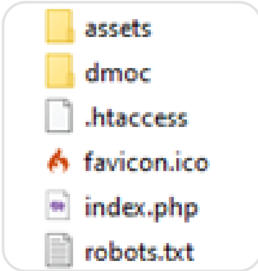
1.1. Technical requirements

- Web hosting with php 7.x and mysql 5.x, preferably php 7.4 and mysql 5.1 or 5.2, and with MariaDB server type (open source relational database management system).
- Domain or subdomain linked to the hosting (hosting)

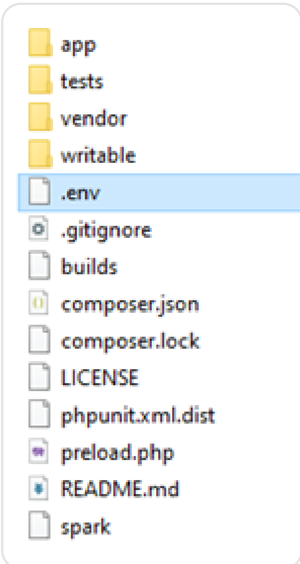
1.2. Steps for installation

Unzip the file "dmoc installation.zip" in a new folder, you will get all the necessary files to be modified and uploaded to the implemented web hosting.





Next, you need to modify some suggested parameters in the unzipped files: Access the file""env" located inside the "dmoc" folder



Edit the file with the text editor of your preference (for example, a notepad like NotePad or other), find and change the following lines of code which should be set as follows:

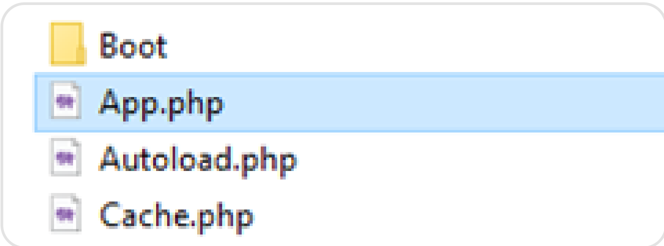
Original line	Change for
# app.baseUrl = "	app.baseURL = 'http://tusubdominio.tudominio.com/'

1 Installation of the application

It is not necessary that the application is installed on a subdomain "http://tusubdominio.tudominio.com /", it can also be installed on a main domain "http://www.tudominio.com /".

The web address "URL" or domain must be contracted or implemented in conjunction with the hosting where you can configure the subdomains you need.

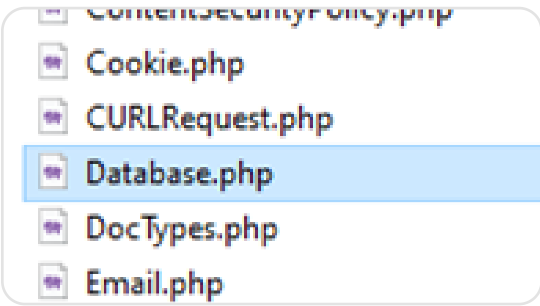
Access the "App.php" file from the "dmoc/app/Config" folder



Change the following code lines which should be set as follows:

Original line	Change for
public $baseURL = 'http://localhost/';	public $baseURL = ' http://tusubdominio.tudominio.com/';

To configure the database open the file "Database.php" from the folder "dmoc/app/Config"



1 Installation of the application

Change the following code lines which should be set as follows:

Original line	Change for
public $default = ['DSN' => '', 'hostname' => 'localhost', 'username' => 'root', 'password' => '', 'database' => 'ncba', 'DBDriver' => 'MySQLi', 'DBPrefix' => '', 'pConnect' => false, 'DBDebug' => (ENVIRONMENT !== 'production'), 'charset' => 'utf8', 'DBCollat' => 'utf8_spanish_ci', 'swapPre' => '', 'encrypt' => false, 'compress' => false, 'strictOn' => false, 'failover' => [], 'port' => 3306,];	public $default = ['DSN' => '', 'hostname' => 'localhost', 'username' => 'usuariobd', 'password' => 'passwordbd', 'database' => 'nombrebd', 'DBDriver' => 'MySQLi', 'DBPrefix' => '', 'pConnect' => false, 'DBDebug' => (ENVIRONMENT !== 'production'), 'charset' => 'utf8', 'DBCollat' => 'utf8_spanish_ci', 'swapPre' => '', 'encrypt' => false, 'compress' => false, 'strictOn' => false, 'failover' => [], 'port' => 3306,];

The fields "hostname", "username", "password" and "database" are obtained from the creation of a database and user in the implemented hosting, this depends on the version of the cpanel or similar. You can review the documentation regarding the creation of a database in the implemented hosting for more information.

Then save and upload all these files in your folder (main or subdomain) of the deployed hosting and open the url "http://tusubdominio.tudominio.com "or "http://www.tudominio.com /" as appropriate (it is recommended to use the online file manager of the hosting; if possible compress all the files, upload the compressed file and unzip it inside the hosting folder).

The application will be installed automatically and will send you to the main login screen.

The application will be installed automatically and will send you to the main login screen.

The installation includes the creation of the database tables and relationships from the same application and the inclusion of base information.

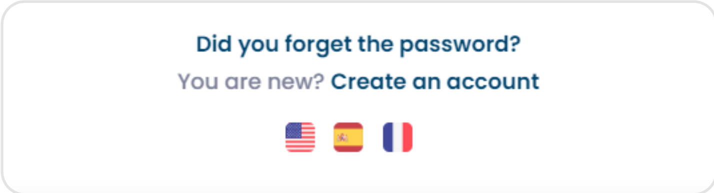
In addition, two templates are created to be used in the assessments, also additional data to be used in the management of organizations (legal forms, types, locations, etc.), user management (roles), assessment management (dimensions, levels, actions), reports and a "first project". Thus the application or the application is ready to be used.

1.3. Super administrator user base

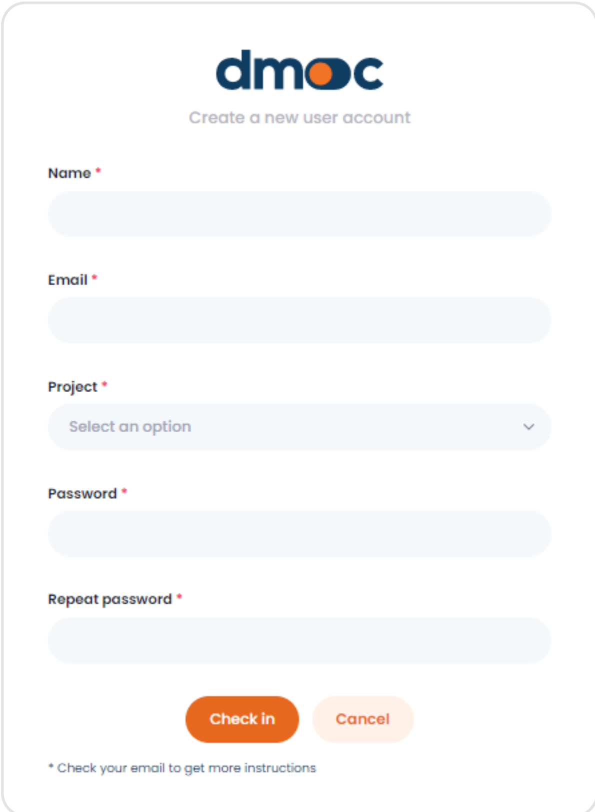
When you install the application, an initial user is automatically created with the email "admin@admin.com" and the "1234" password with the role of "super administrator". You will need to use this username in order to log in to the application for the first time.

2 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



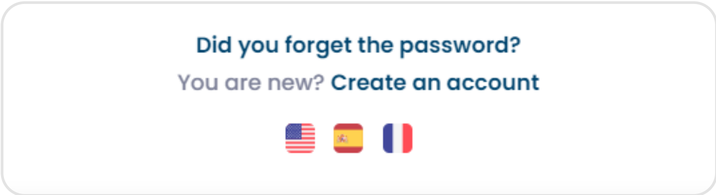
Next, the form for creating a new user account will be displayed, as indicated in the following image:



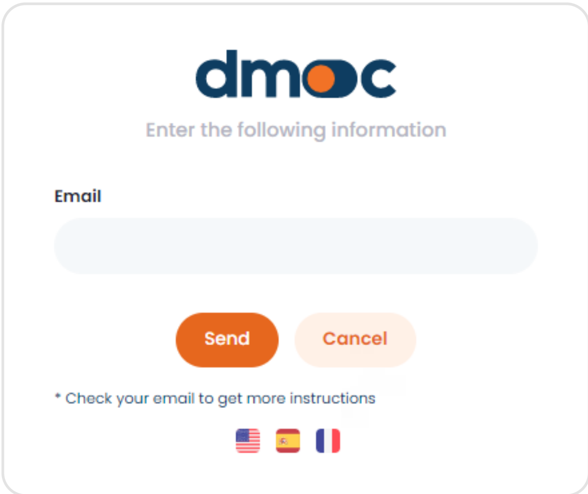
Enter the data requested: Name, Email, Project, Password (greater than 8 characters). After pressing the "register" button, check your email where you will get more information. **It is necessary for a "super administrator" to activate their account and they assign an "super administrator" role to be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

3 Password recovery

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

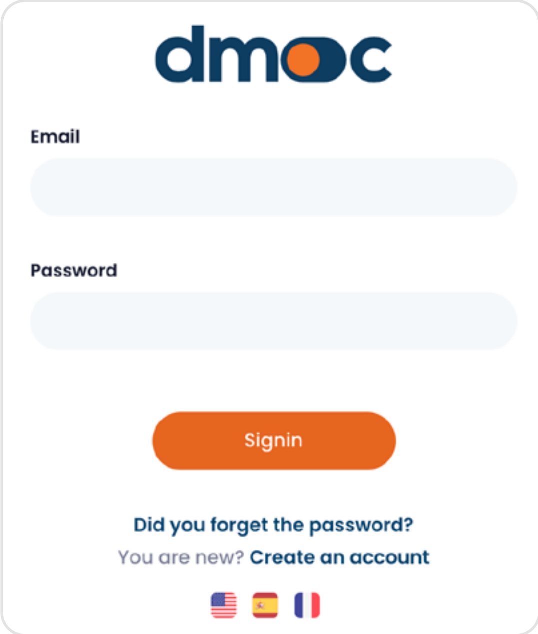


Next, the form for recovering a user account will be displayed, as indicated in the following image:

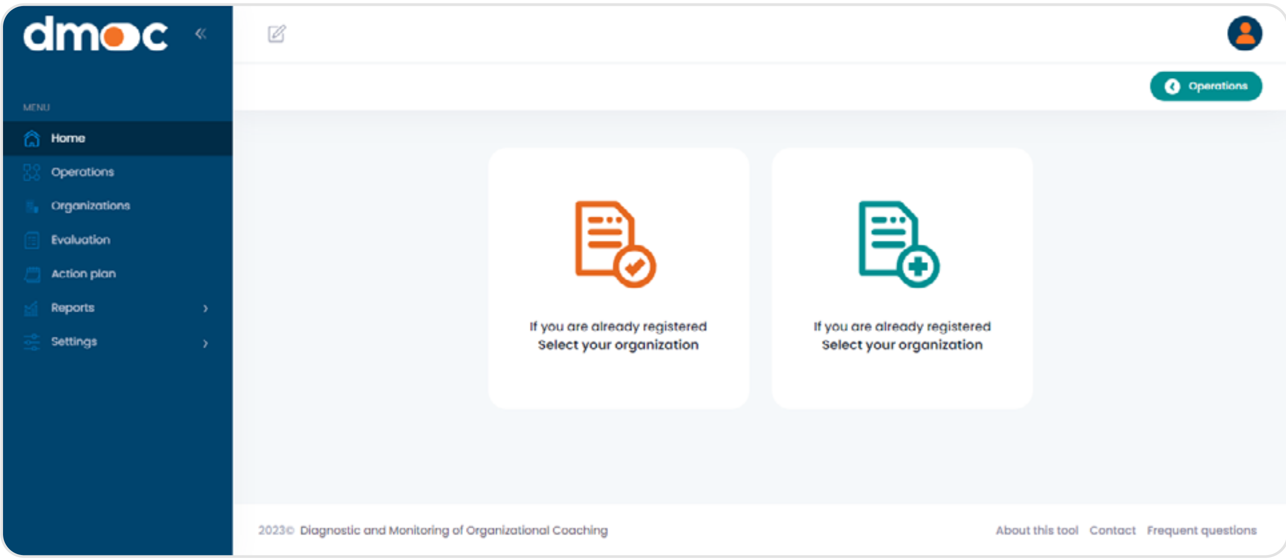


4 Login to the application

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. Then the following form will be displayed:



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):



5 Relationships between variables according to the user type

Project - There must be at least one project, so that users and organizations can be assigned to it. To create a new project go to the "Project Management" section in this manual, only users with the "super admin" can create or edit projects.

User - If the user has the role of "super administrator", regardless of whether they are assigned to any project, they can view all the users without exception, create or modify them. If the user has the role of "administrator" he will be able to have access to all the users (of their same or lesser role) related to the project or projects that they were assigned, they can create or modify them. If the user has the role of "assessor" or "observer" they will only be able to see themselves on the list of users. Thus, you will only be able to view the information of your user and modify it, excluding their role.

Organizations - If the user has the role of "super administrator", they can visualize all the organizations assigned to all the projects, they can create, modify or delete them. If the user has the role of "administrator", they can view all the organizations assigned to the projects related to this user, they can create, modify or delete them. If the user has the role of "assessor" or "observer, they can only view the organizations that has been assigned to this type of users. An "assessor" user can create an organization or modify it, and it is automatically assigned to that user. An "observer" user is not authorized to create or modify the information of any organization.

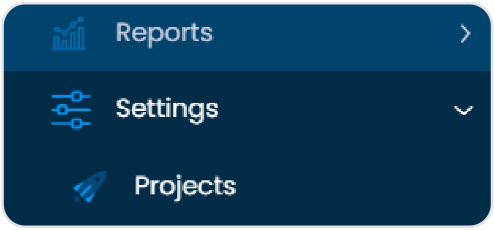
Assessment - An organization can have zero, one or more assessments. Only users with the role of "super admin", "admin" and "assessor" can create new assessments or modify them.

Action plans - An organization can have as many action plans as the number of assessments. An assessment can have only one action plan associated with it. Only users with the role of "super admin", "admin" and "assessor" can create new action plans or modify them.

6 Project Management

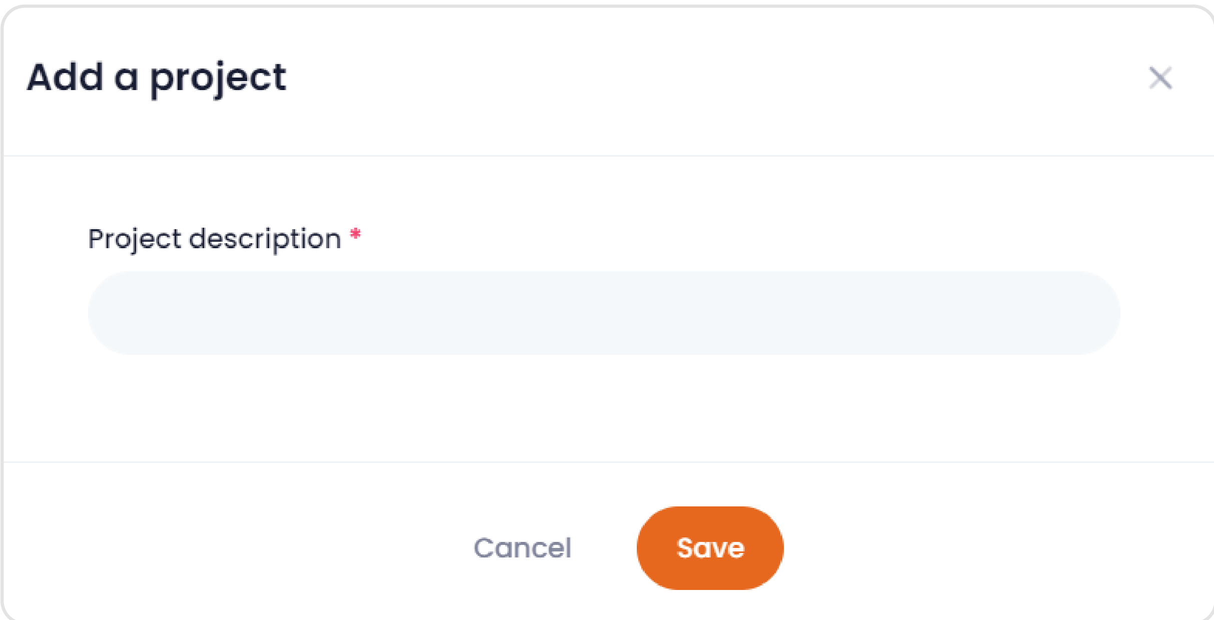
A project represents a working group (users) that carries out activities in interaction with organizations, reflecting a program or project implemented by its entity. A project can also be defined based on a location: project “Peru” for all organizations in Peru, or “Kenya” for all organizations in Kenya. In addition, a project can be defined to group users and organizations related to a specific cross-cutting topic to several projects implemented by their entity, such as “accompaniment/coaching” to group the users and organizations participating in that service.

To see the projects registered in the application, go to the main menu on the left side “Settings / Projects” as shown in the following image:



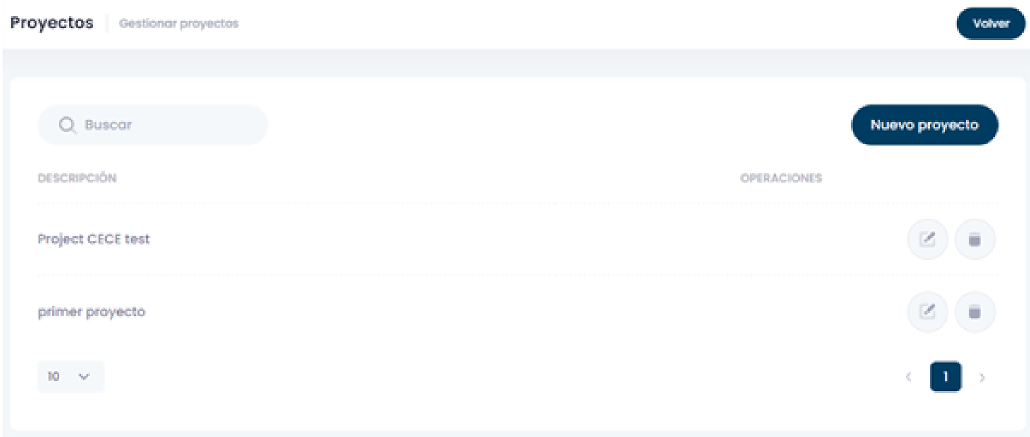
6.1. Add a new project

To add a new project, press the “New Project” button.



6.2. Edit or delete projects

Once you are viewing the list of registered projects in the application, as shown below:

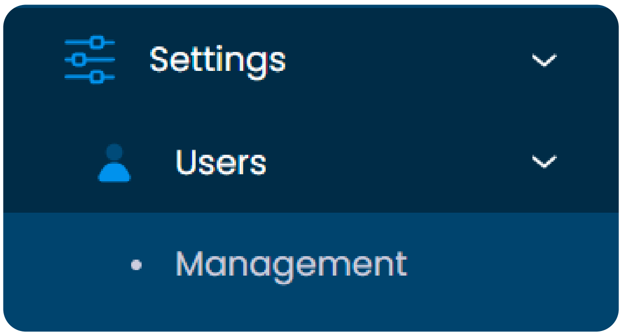


It is possible to edit or delete projects whenever they are not assigned to a user or an organization. This is because all users must be assigned to one or more projects. Likewise, organizations must be assigned to one or more projects.

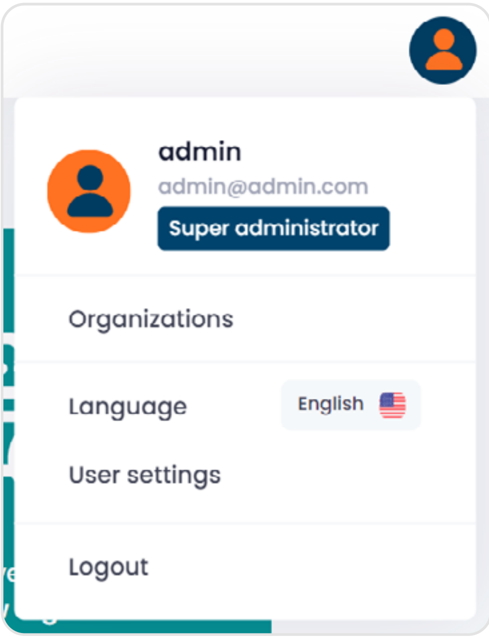
7 User management

7.1. Modify your user data

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



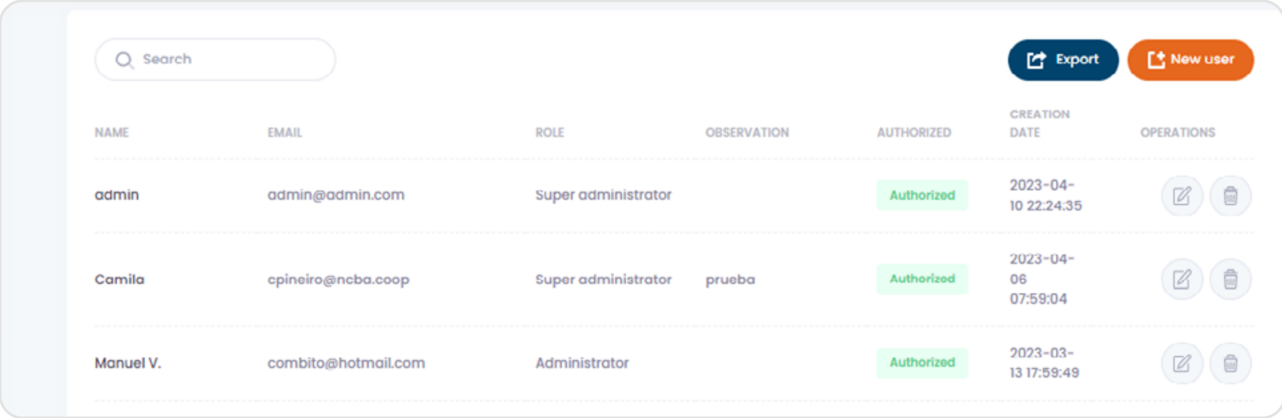
It is also possible to quickly access through the icon on the upper right side of the application where the quick options for the user are located, by clicking on “User Settings”



7.2. Modify your or others’ user data

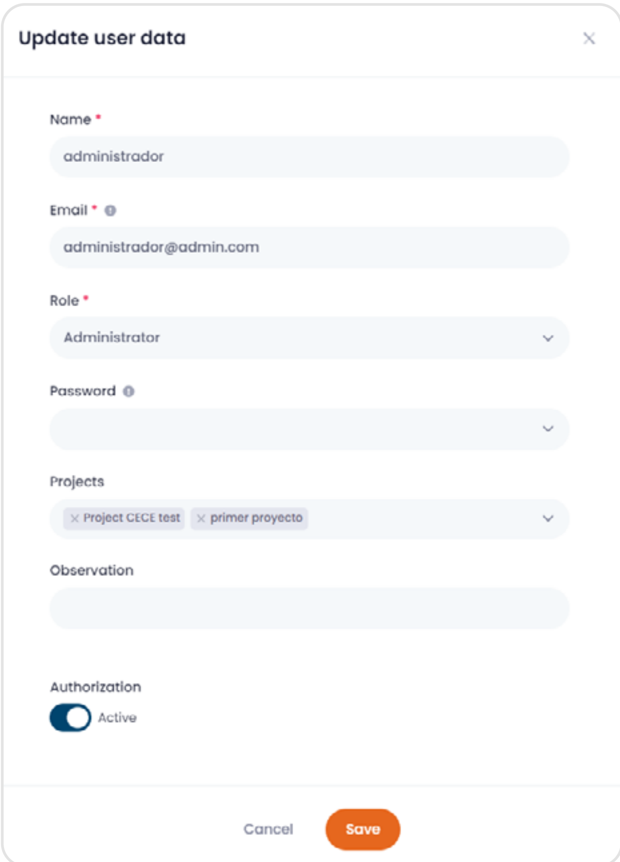
When accessing via the “User Settings” option in the menu in the upper right corner, or via the “Users” option in the main menu, a list will be displayed with the user or users that you want to modify. The users who will be on this list are all the users of all the different projects without restrictions.

7 User management



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. A “super admin” user can change the role of any user present on this list without restrictions, they can also appoint one or more projects to any user. **Password modification is optional: if you do not want to change the password, leave that field empty.**



7 User management

It is important to note that the super admin user is responsible for the activation of admin users. While admin users can activate assessor and observer users.

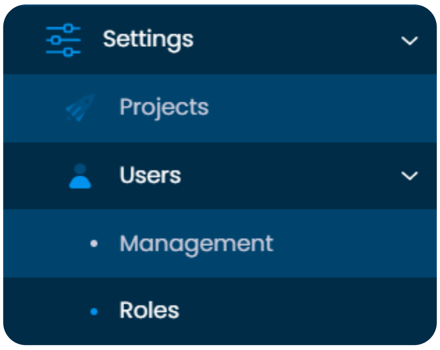
7.3. Deleting a user

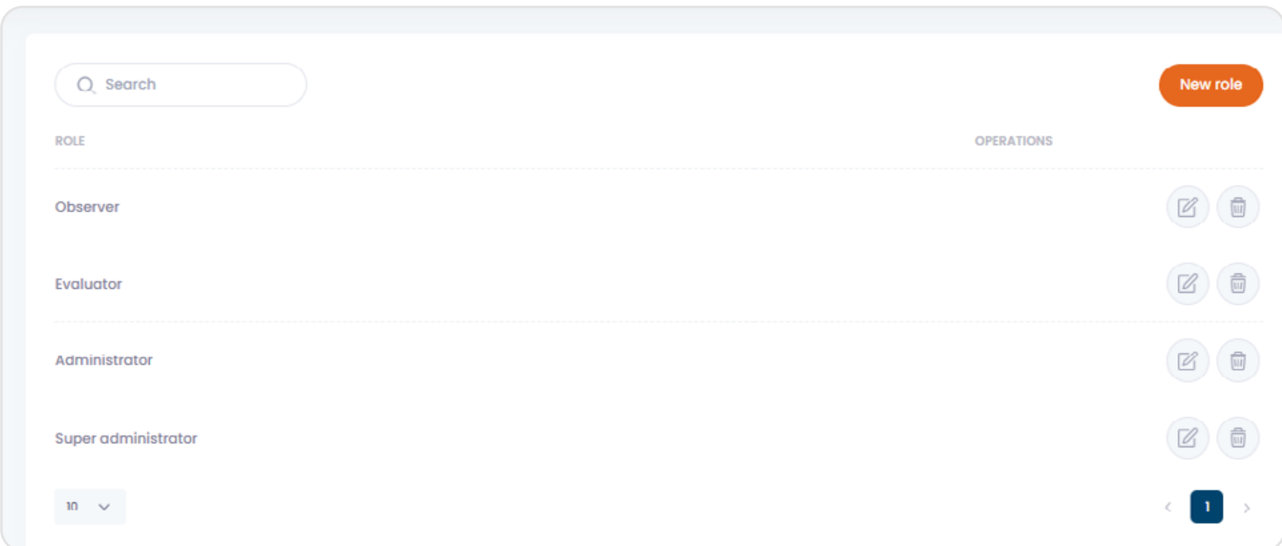
To **delete a user** it is necessary that it not have any assigned organization, then press the following button:

7.4. User roles

This section defines the different permissions and accesses that the different roles or types of users will have. By default, the tool has 4 types of users pre-configured: “super administrator”, “administrator”, “assessor”, “observer”.

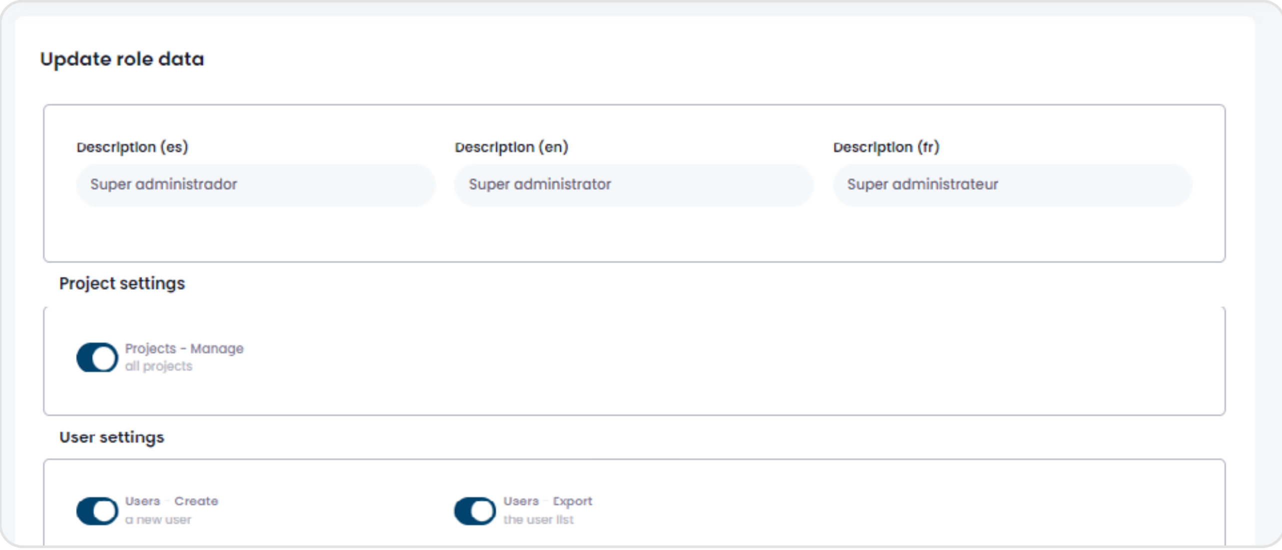
To create a new role go to the main menu on the left “Settings / users / roles” as shown in the following image:





7 User management

It is also possible to edit or delete existing roles as long as they are not assigned to users. Be careful when changing the permissions of the pre-configured users. The creation of new roles is recommended.

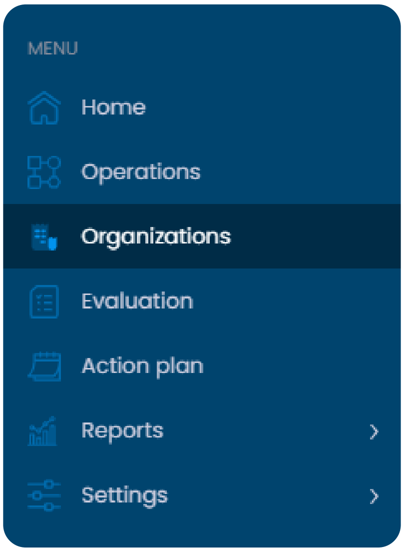


When creating a new role it is necessary that the description of these be made in all available languages.

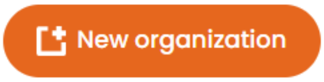
8 Organizations Management

8.1. Creating a new organization

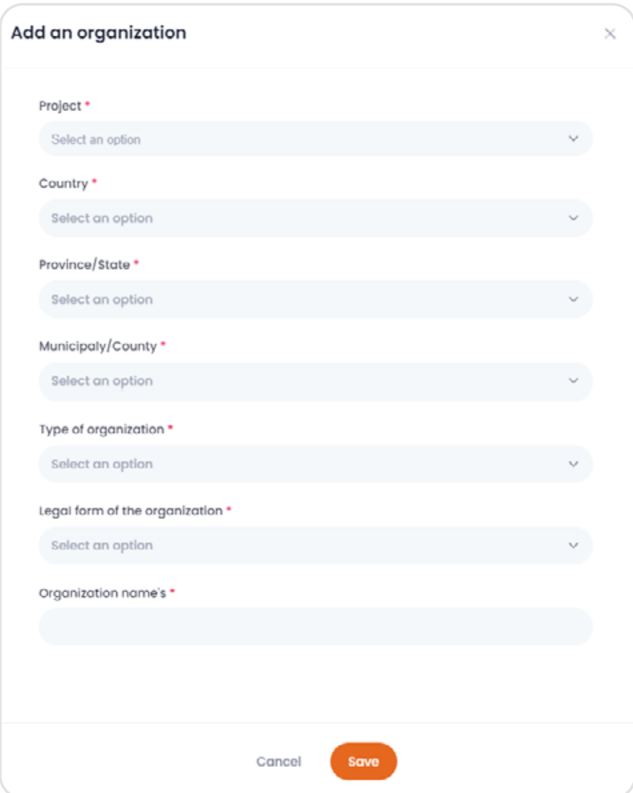
An super-administrator user can create one or more organizations, to manage them enter the main menu on the left in “Configuration / Organizations / Management” where you can create and edit the information related to the organizations as indicated below:

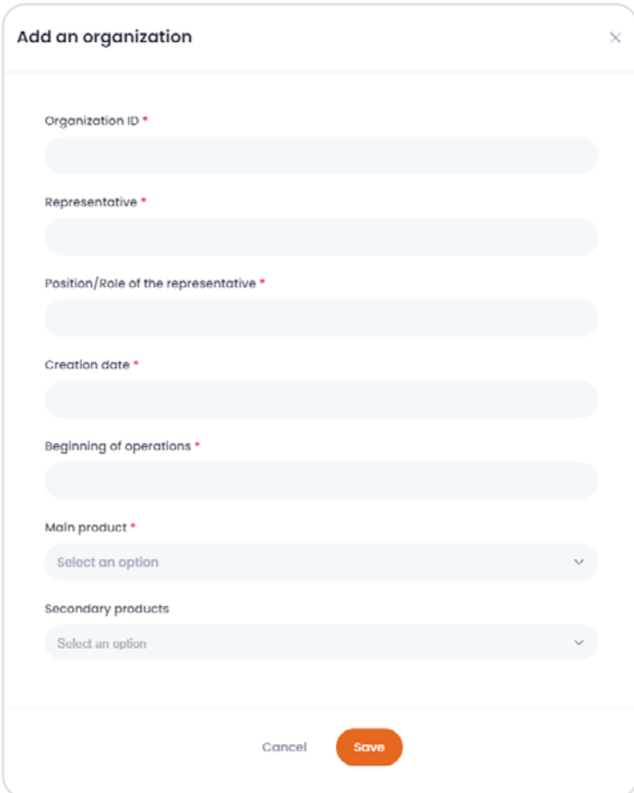


To create a new organization press “New Organization”:



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





8 Organizations Management

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.

8 Organizations Management

Start of operations

Foundation date related to the start of an organization's operations.

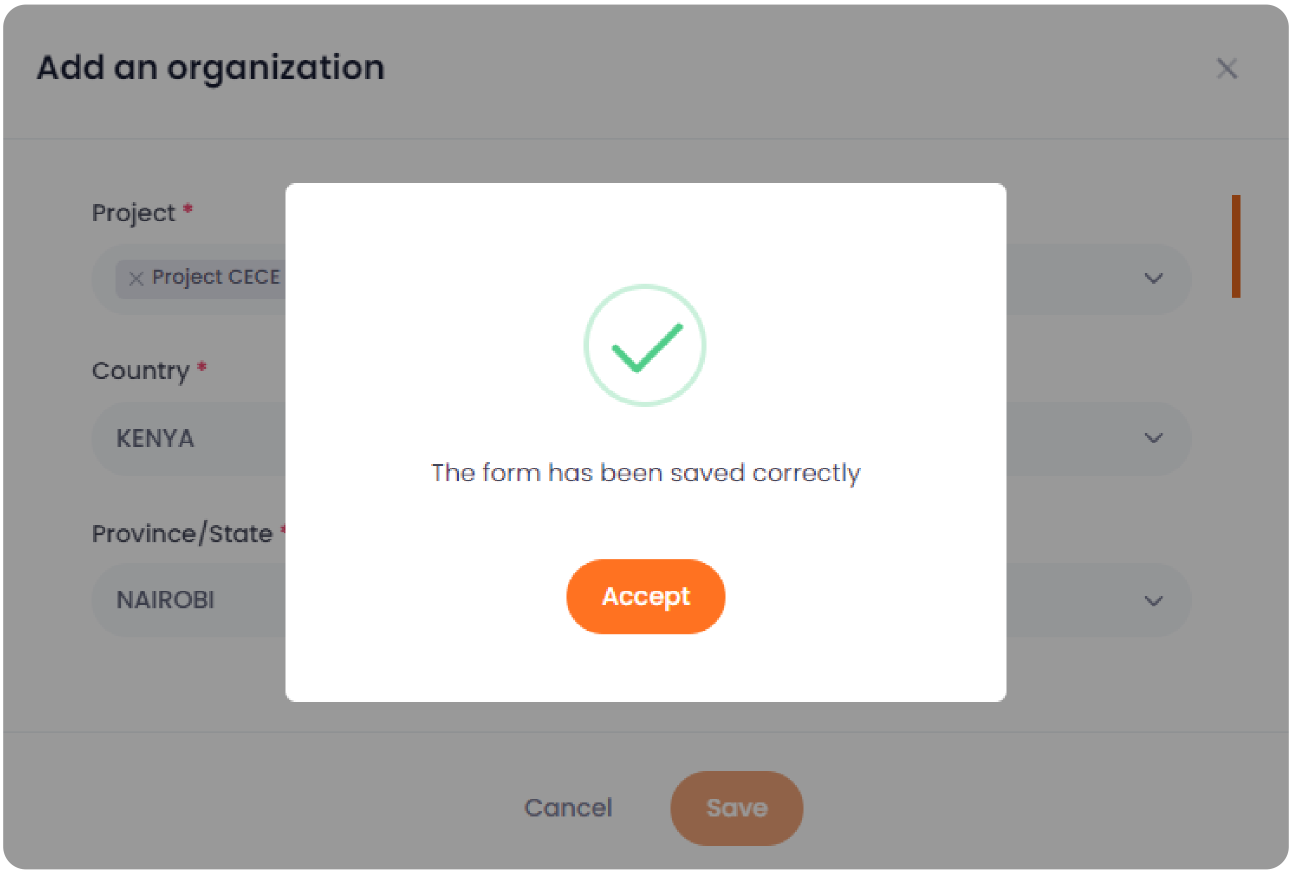
Main product

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.

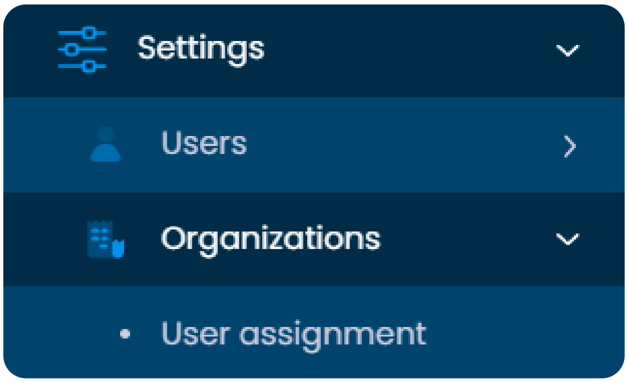
After saving the form you will see an approval message:



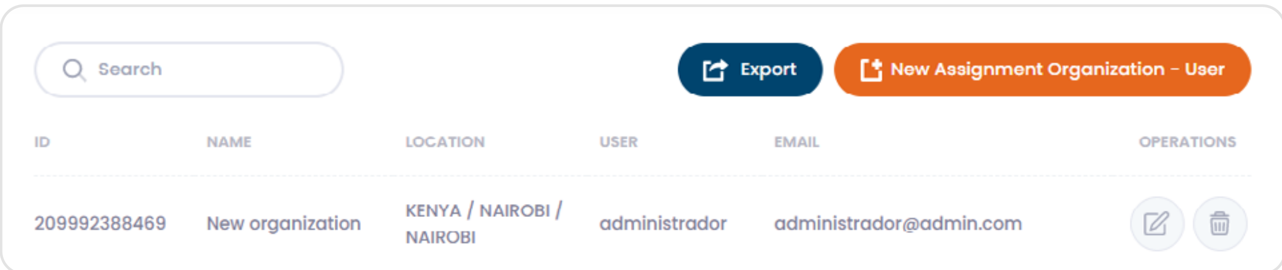
8.2. Assigning a user to an organization

So that an evaluating user can assess one or more organizations that have not been created by the assessor, it's necessary for an super-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, a super 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. However, a super admin user can view all organizations without restrictions.

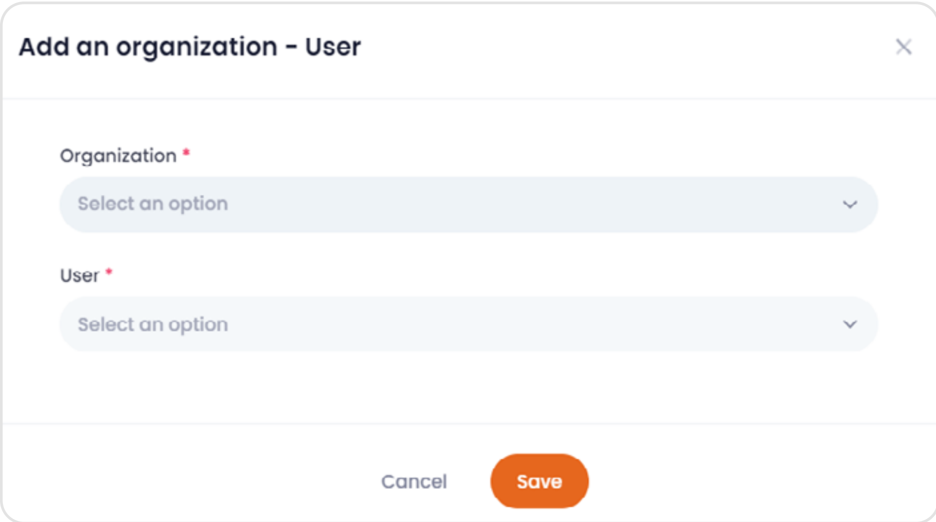
To do this assignment you must go to the main menu on the left in "Configuration / Organizations / User Assignment".



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



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.

8.3. 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.

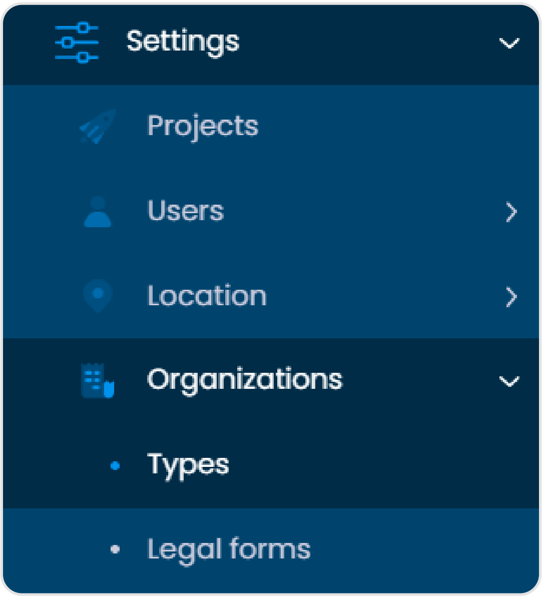
8.4. Deleting an organization

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

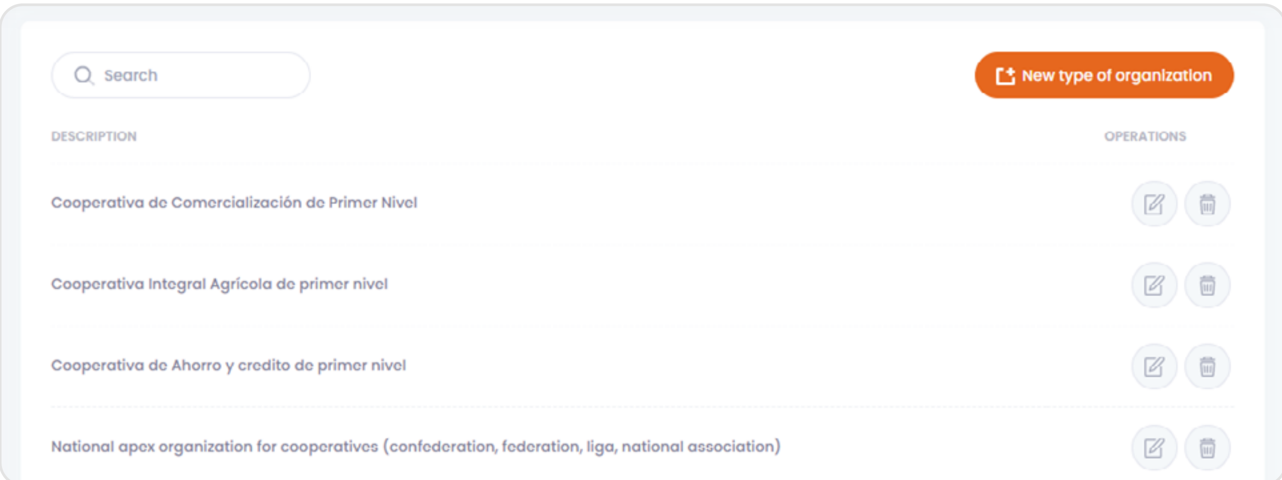
8 Organizations Management

8.5. Defining types of organization

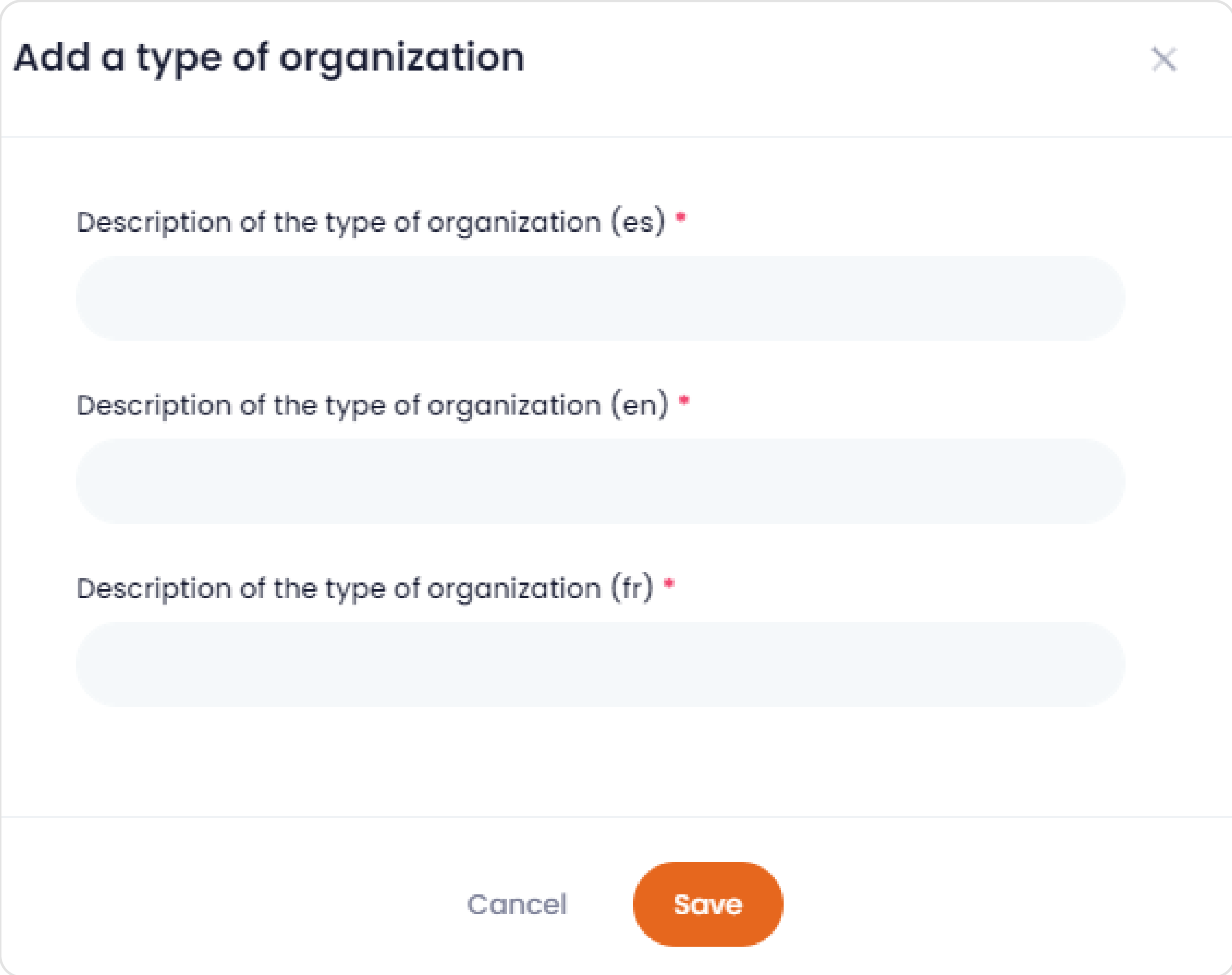
In this section it is possible to create different types of organizations that will be assigned when creating a new organization. To create a new item enter through the main menu on the left in “Settings/Organizations/Types”



The options for creating and modifying the organization types are located within the list as shown below:

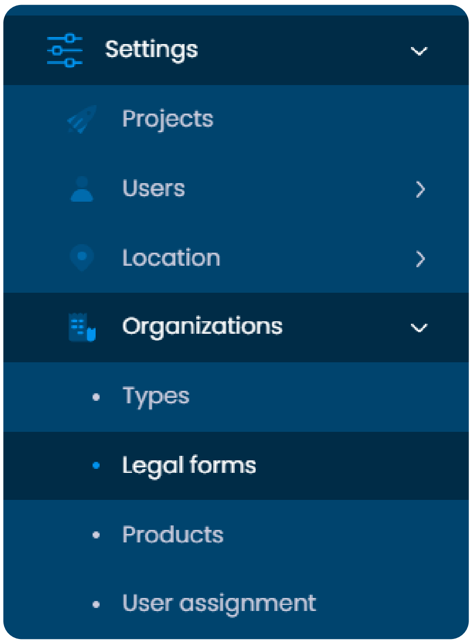


When creating or editing an organization type, it is necessary to fill in the description in the available languages.



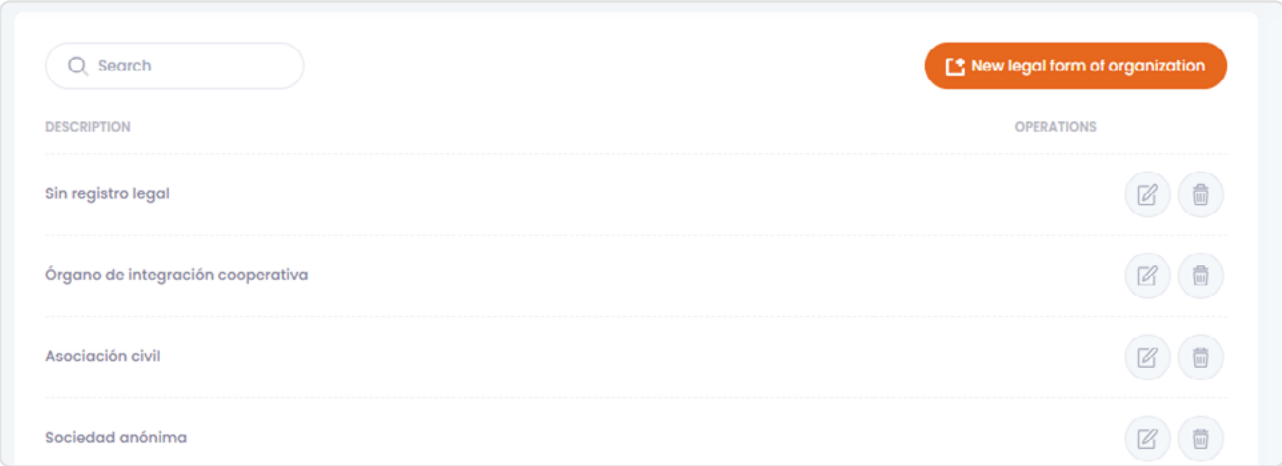
8.6. Defining legal forms of organizations

In this section legal forms of organizations are created and edited. To create a new item enter through the main menu on the left in "Settings/Organizations/legal forms"

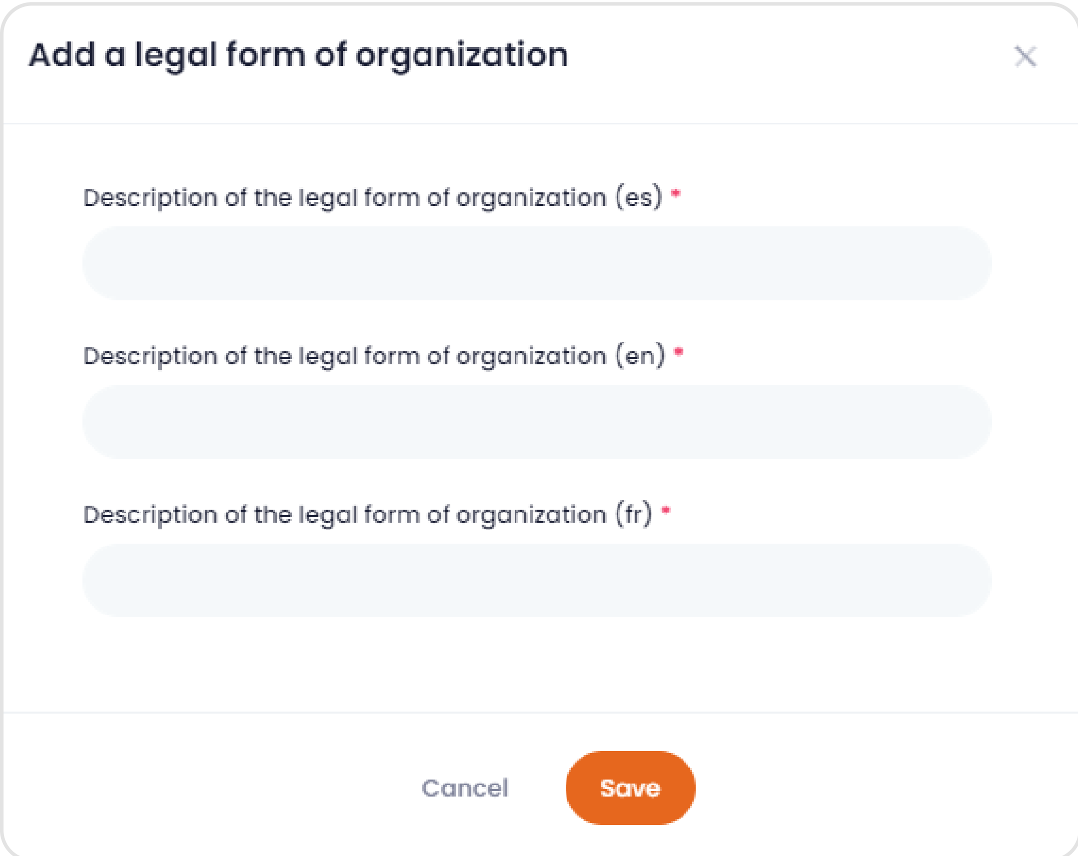


8 Organizations Management

The options for creating and modifying the organization legal forms are located within the list as shown below:

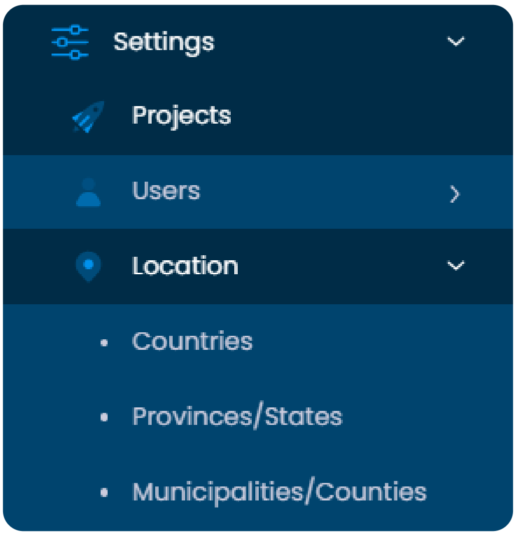


When creating or editing an organization legal form, it is necessary to fill in the description in the available languages.



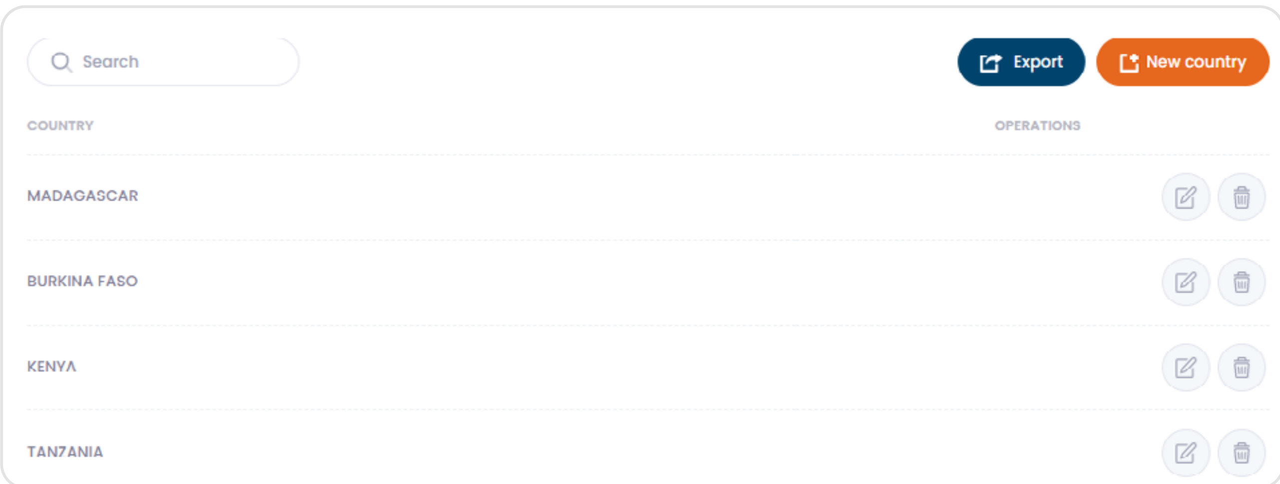
8.7. Define the locations of the organizations

In this section the information corresponding to the organizations location divided into three levels will be created and edited: countries, Provinces/states/regions and Municipalities/counties, to access this configuration go to the main menu on left "Configuration / Location", then select the level to be managed.



Countries

In this section you can create or modify the countries to which the organizations belong. Below is an image with the available options for creating and editing countries.



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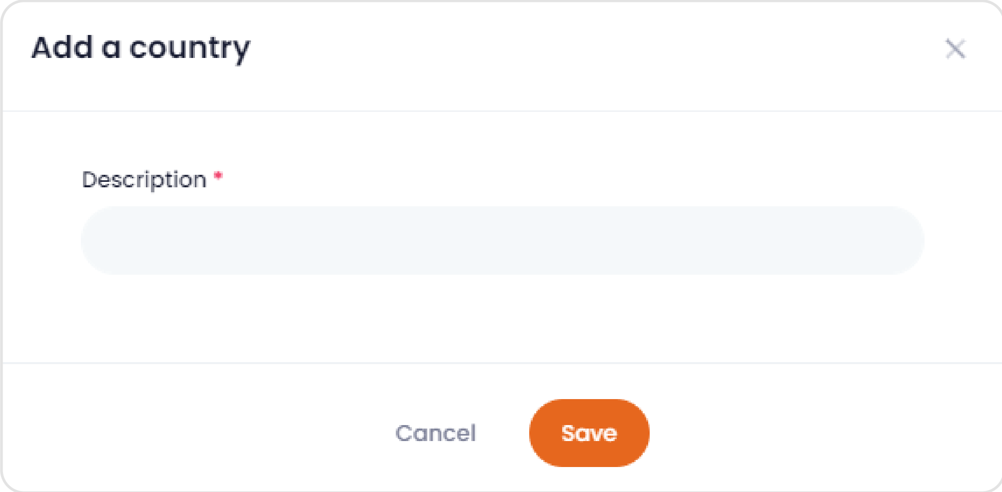
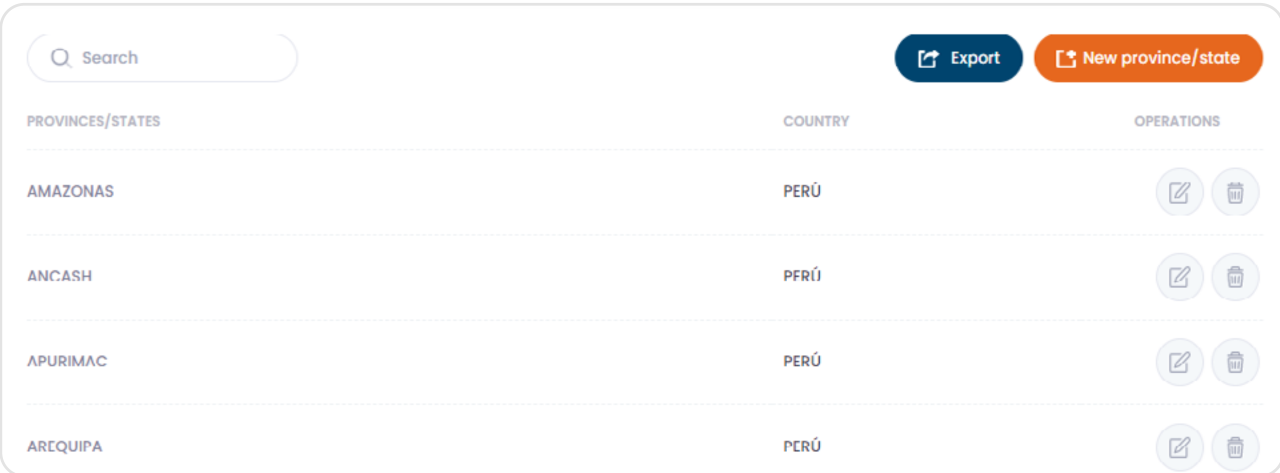
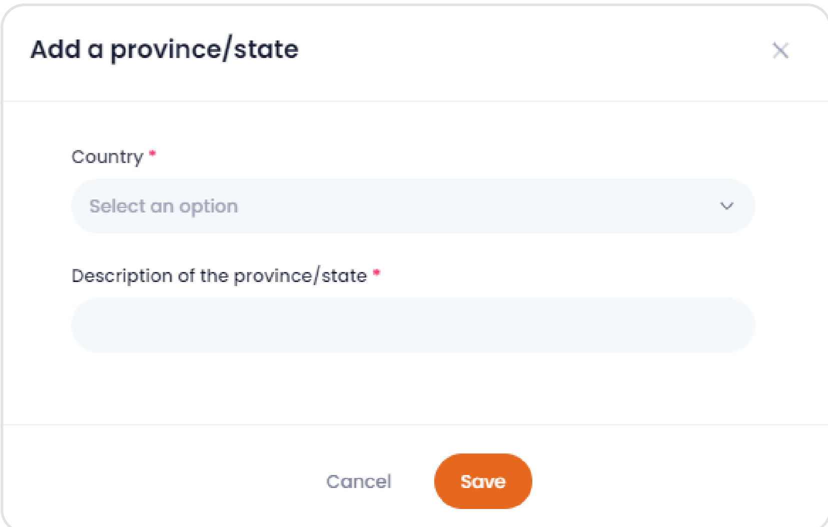


Provinces/states/regions

This section is similar to the previous one. When creating a new item it is necessary to indicate the country in the creation or editing form.





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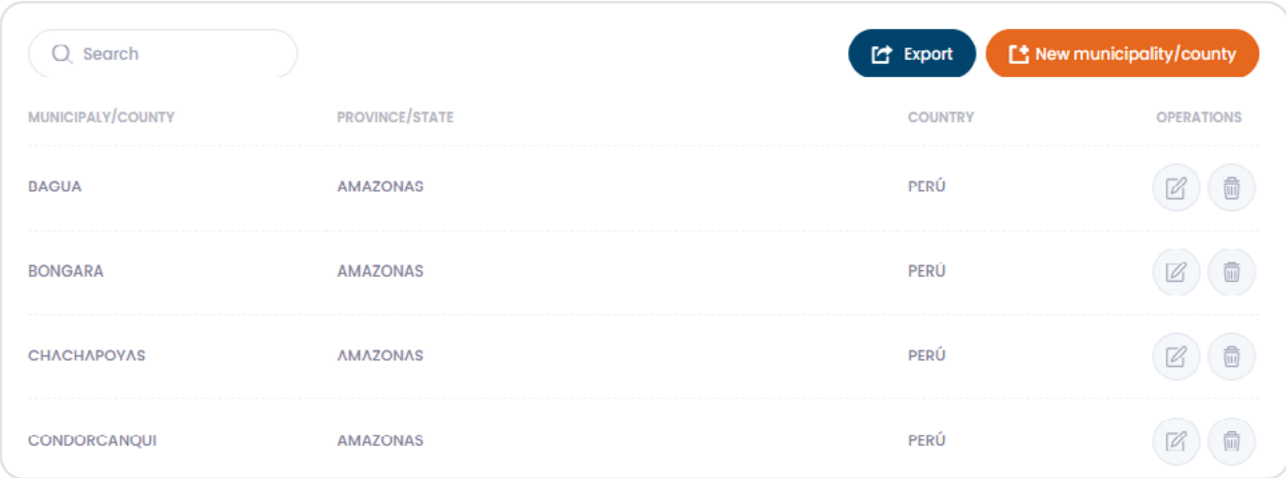
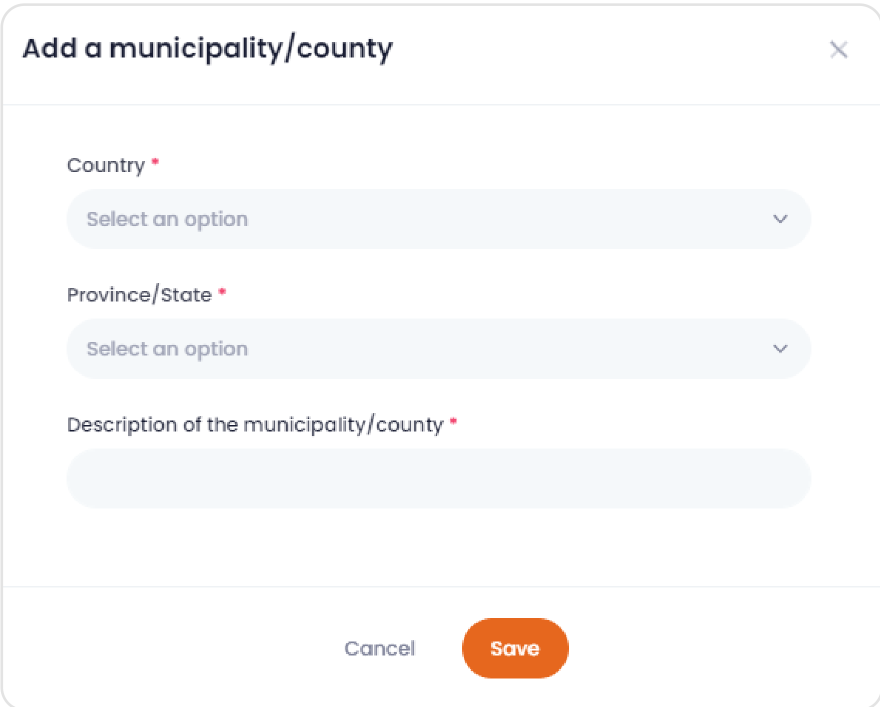
Municipalities/counties

This section is similar to the previous one. When creating a new item it is necessary to indicate the country,a s well as the provinces/states/ regions in the creation or editing form.

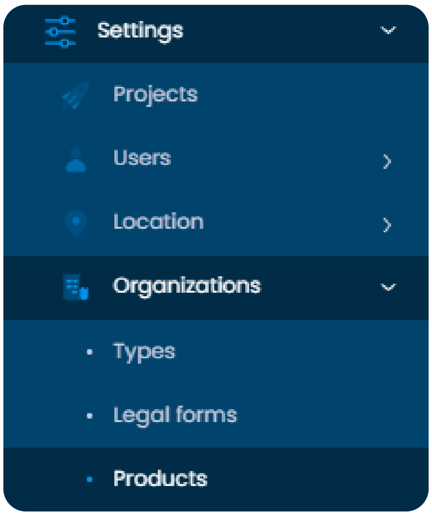




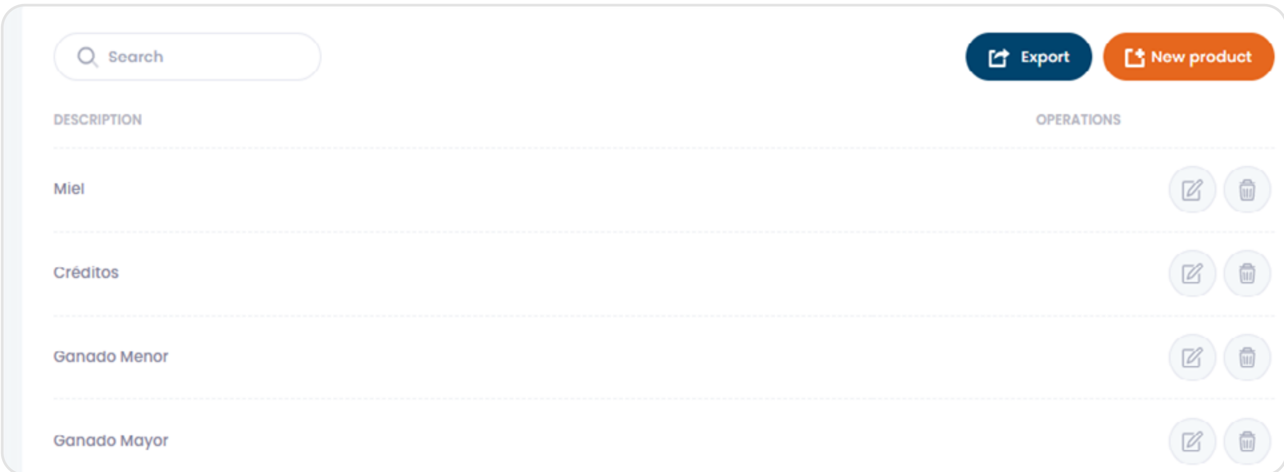
8.8. Defining organizations' products

In this section the products that the organizations produce are created and edited. To create a new item enter through the main menu on the left in "Settings/Organizations/Products"

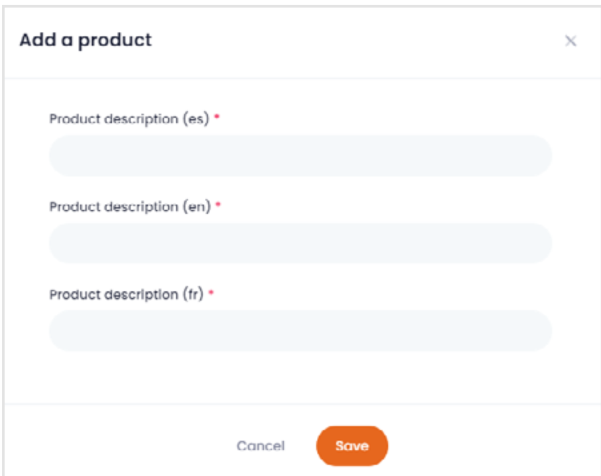
8 Organizations Management



The options for creating and modifying the organization products are located in the list as shown below:

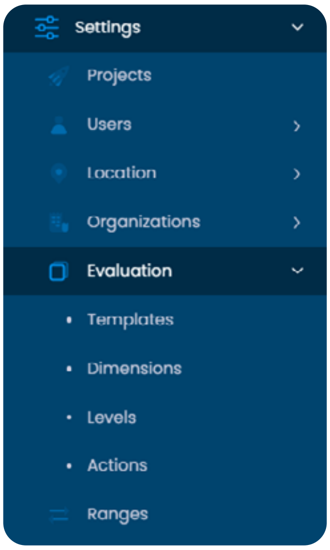


When creating or editing an organization product, it is necessary to fill in the description in the available languages.



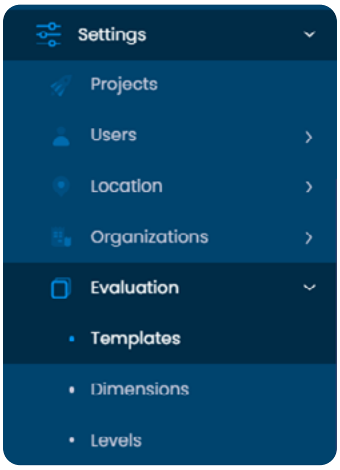
9 Setting up an assessment template

In this section all the operations that will allow an assessment are mentioned, to access this set of configurations you must enter through the main menu on the left side to “Configuration / Assessments”.



9.1. Templates

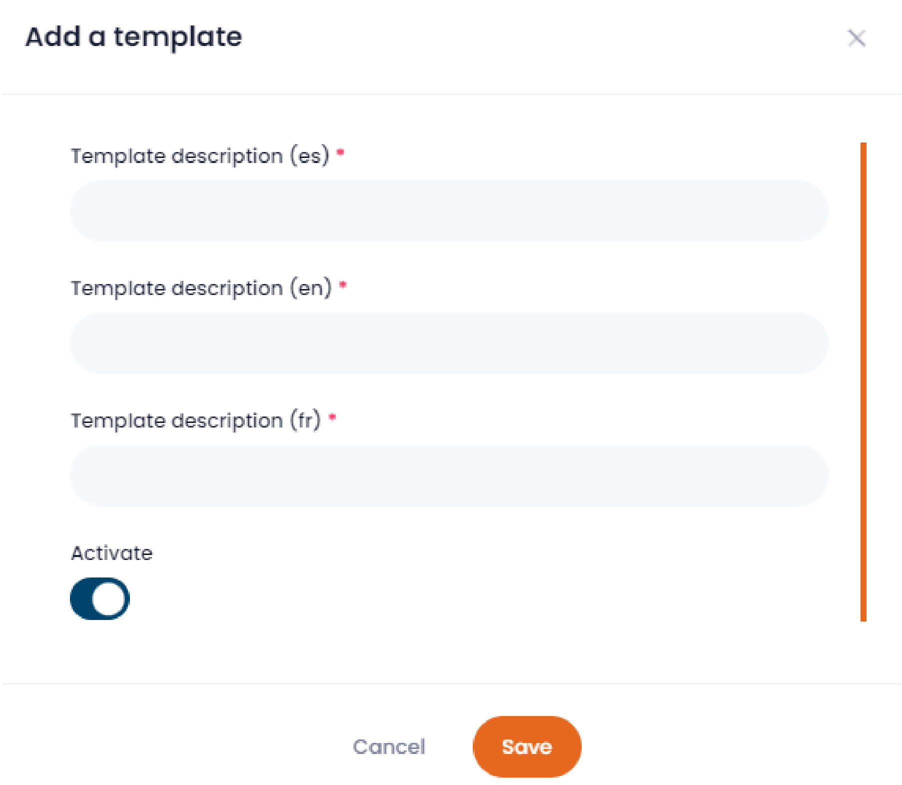
This section details the entire process of creating templates that are questionnaires that have quantitative, qualitative questions and services (list of services provided by the organization to its members), these will be assigned when an organization is assessed. To do this action you must go to the main menu on the left in “Configuration / Assessments / Templates”.



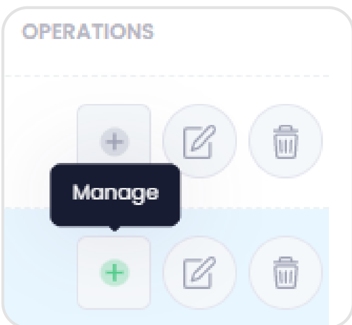
By default, two templates have been created to be used according to the criteria of the assessors. To create a template, click on “New Template”.

9 Setting up an assessment template

Then the following form will be presented, where you must fill out the description in the available languages. It is possible to activate or deactivate a template, and only the active templates will appear as options when creating a new assessment and assigning the corresponding template.



Then, to establish the qualitative, quantitative and services questions it is necessary to press “manage” as shown in the following image:

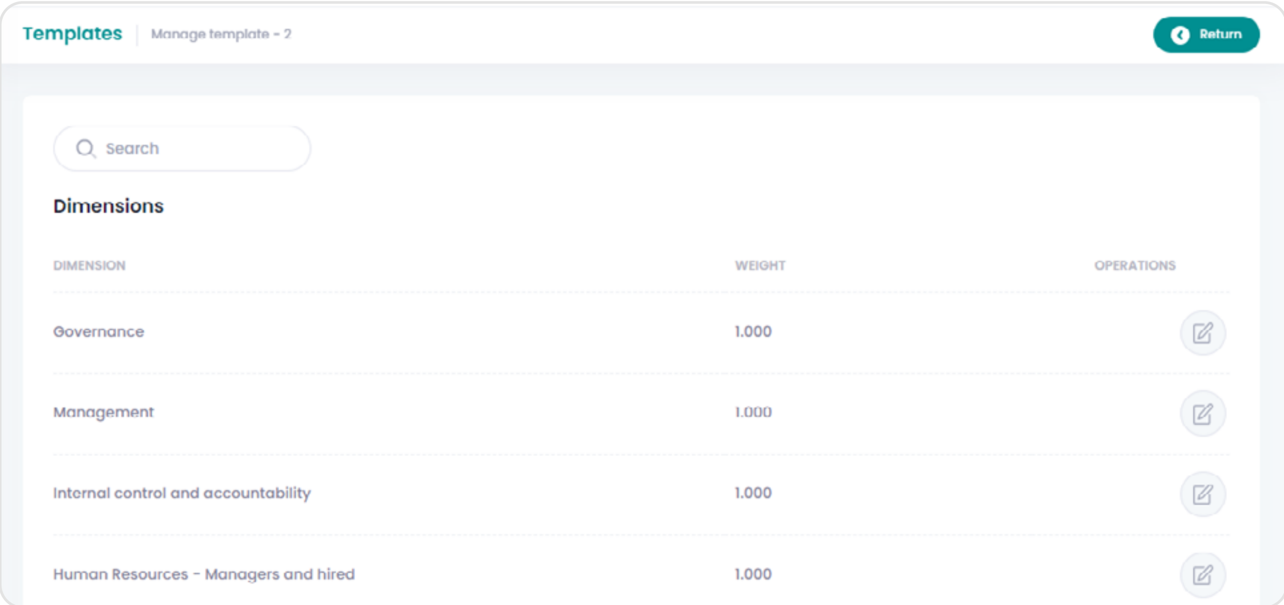


You will then be redirected to a new view where you will find four lists which are explained below:

9 Setting up an assessment template

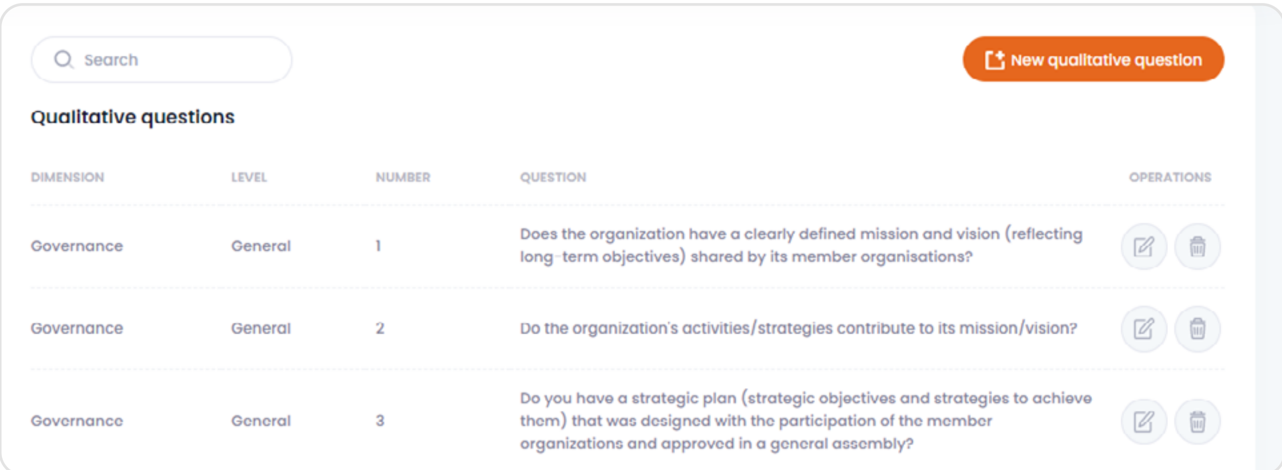
Dimensions

This list allows you to edit the weight the different dimensions applied to the questions, this weight changes the way to average the final score of an evaluation. The higher the score, the greater the importance of the chosen dimension.



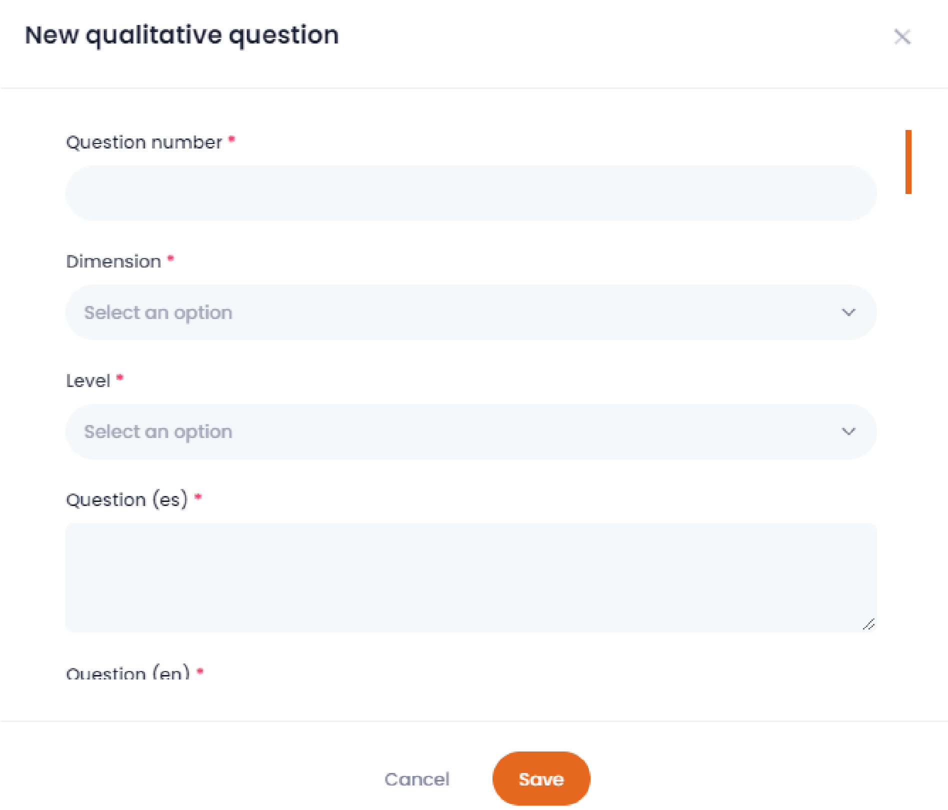
Qualitative questions

Qualitative questions can be created and edited in this list.



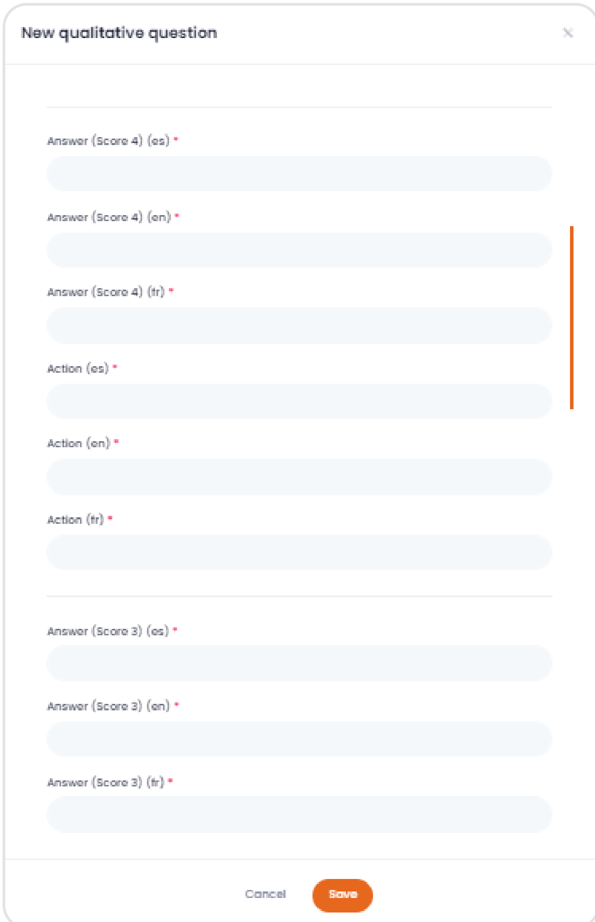
When creating a qualitative question it is necessary that you have previously created the dimensions and the level that will be used in the question, additionally each question must be written in the available languages, as it also answers and actions.

9 Setting up an assessment template



Keep in mind that each answer has a different score, the higher the score the answer is positive, the score ranges from 4 to 0, 4 being the best score that can be obtained on a question. It is recommended to use a Likert scale with the answer options, respecting the suggested order just mentioned.

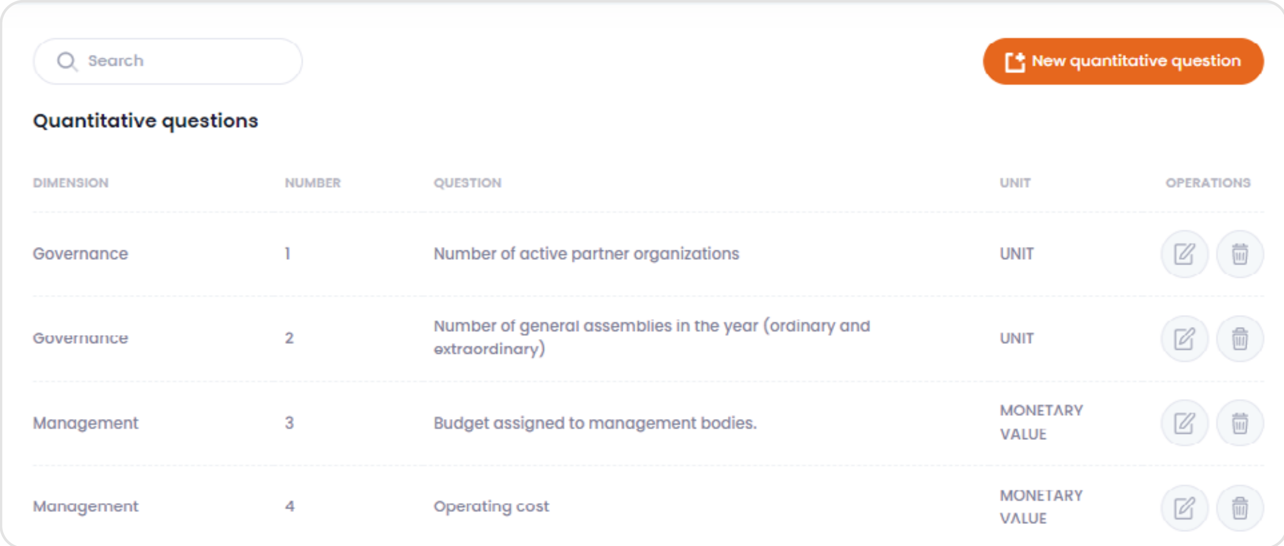
At the end of this qualitative question, your answers will be added to the template, you can edit or delete each question from a template as long as it has not been used in any assessment. It is advisable to create a new template and/or deactivate the previous one so as not to lose or alter evaluation data.



9 Setting up an assessment template

Quantitative questions

In the quantitative questions, values corresponding to the current period of the assessment and the two previous periods are entered. To create or edit a quantitative question move to the corresponding list as shown in the image:

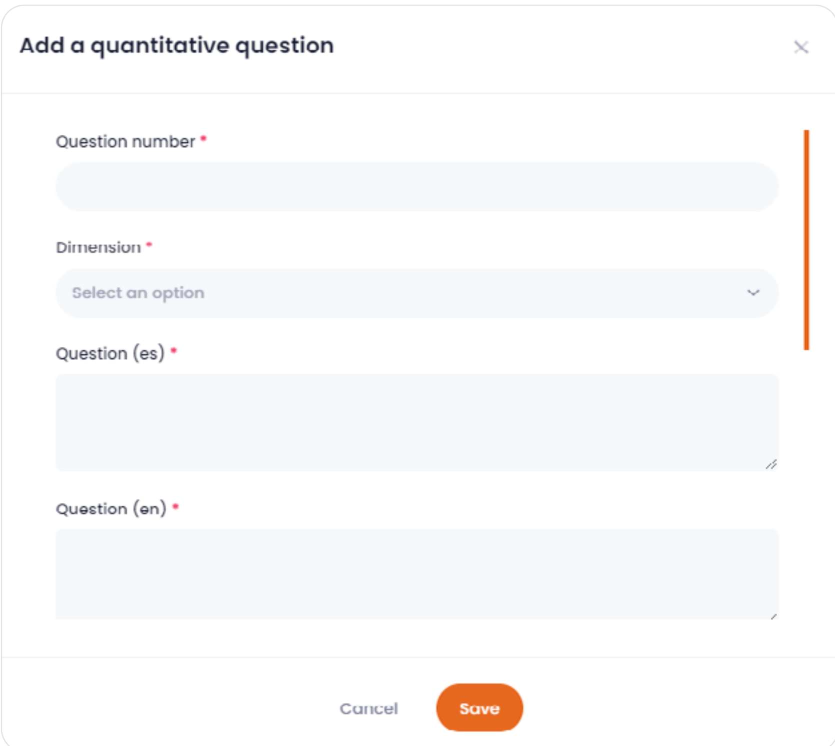

Search

New quantitative question

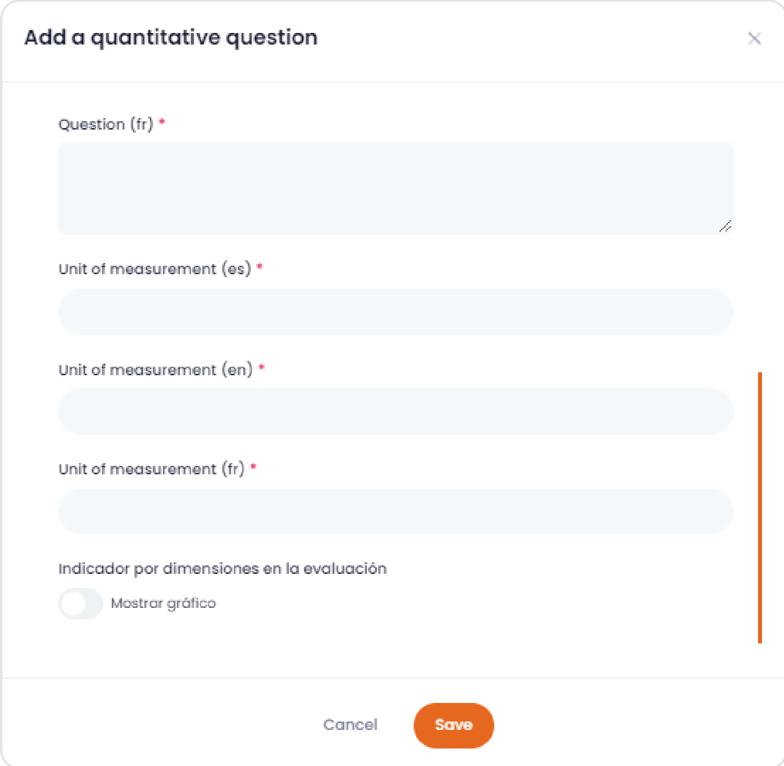
Quantitative questions

DIMENSION	NUMBER	QUESTION	UNIT	OPERATIONS
Governance	1	Number of active partner organizations	UNIT	
Governance	2	Number of general assemblies in the year (ordinary and extraordinary)	UNIT	
Management	3	Budget assigned to management bodies.	MONETARY VALUE	
Management	4	Operating cost	MONETARY VALUE	

By clicking on “New Quantitative Question” fill in the form previously created, the question, which must be written in the available languages and the units that must also be written in the available languages.



9 Setting up an assessment template



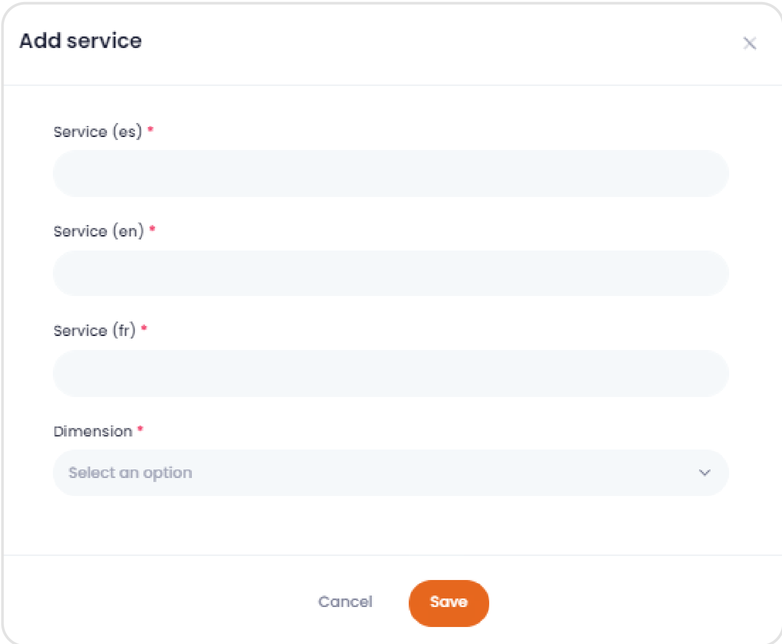
At the end of this quanitative question, it will be added to the template, you can edit or delete each question from a template as long as it has not been used in any assessment. It is advisable to create a new template and/or deactivate the previous one so as not to lose or alter evaluation data.

Services

The services are optional lists to be able to mark existing services or not of each one offered by the organizations to be assessed for their members. To create or delete a service move to the corresponding list as shown below:

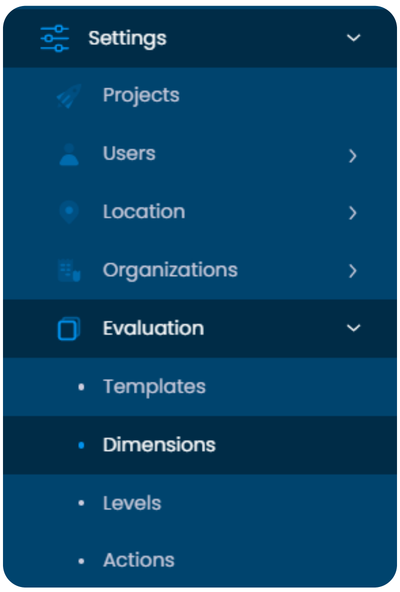
9 Setting up an assessment template

The services cannot be edited, when they are created it is necessary to describe them in the available languages and assign them a previously created dimension.



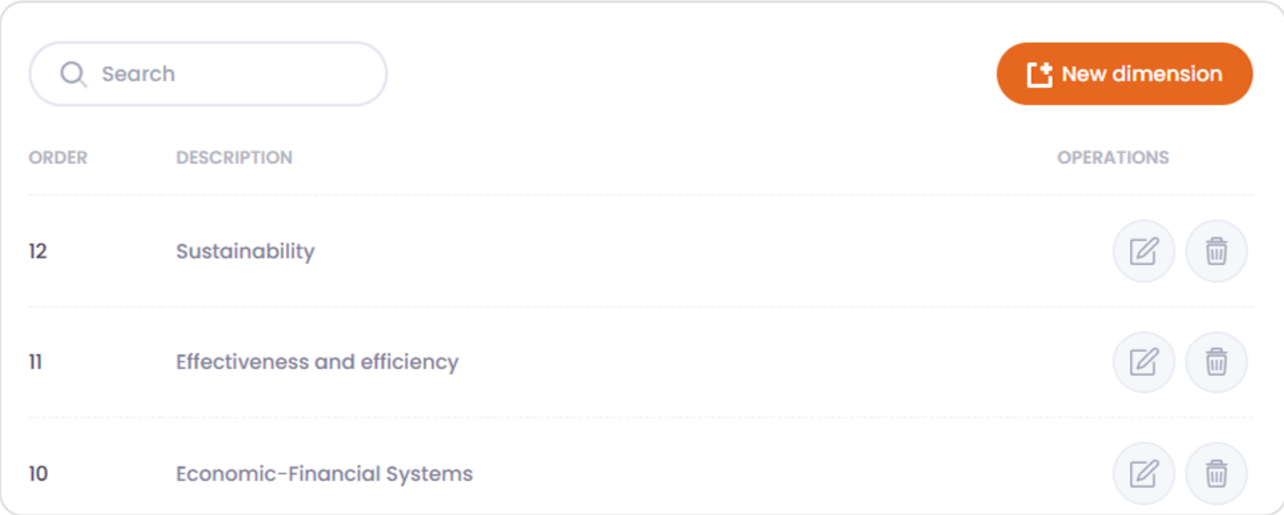
9.2. Dimensions

The dimensions represent groupings of qualitative, quantitative questions and services oriented towards a particular classification or component of the assessment. For the dimensions you must go to the main menu on the left in “Configuration / Assessments / Dimensions”.

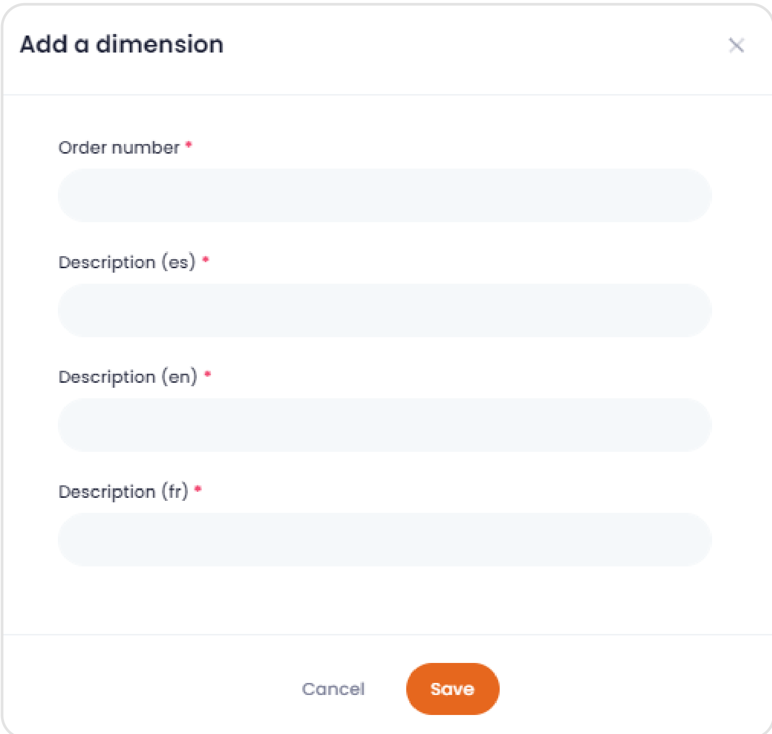


9 Setting up an assessment template

To create or edit a dimension use the options on the list:

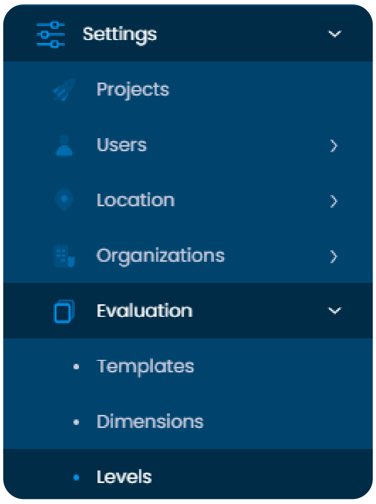


The order number of a dimension will be used in the order of appearance in the questionnaire of an assessment. Remember to write the description in the available languages as shown below

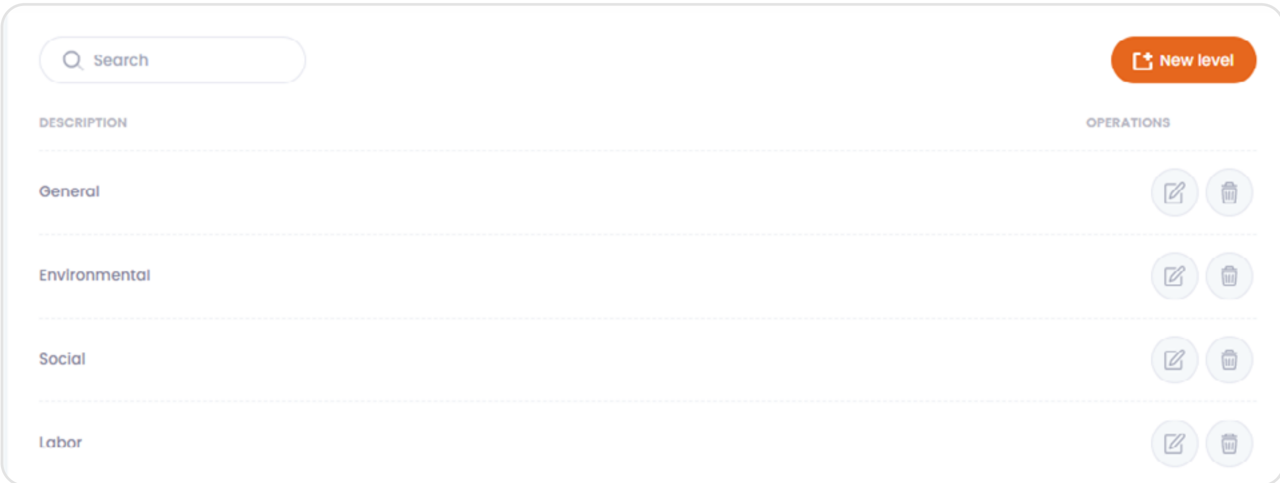


9.3. Levels

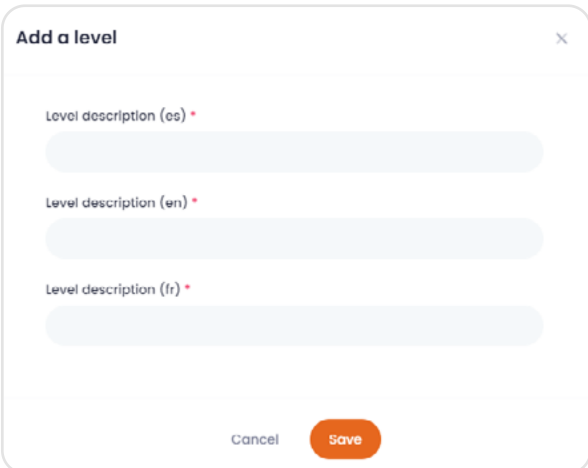
It consists of a sub-grouping only for the qualitative questions, very similar to the dimensions, these levels are only used for grouping purposes. To manage the levels you must go to the main menu on the left in “Configuration/Assessments/Levels”.



To create or edit a level use the options shown on the list:



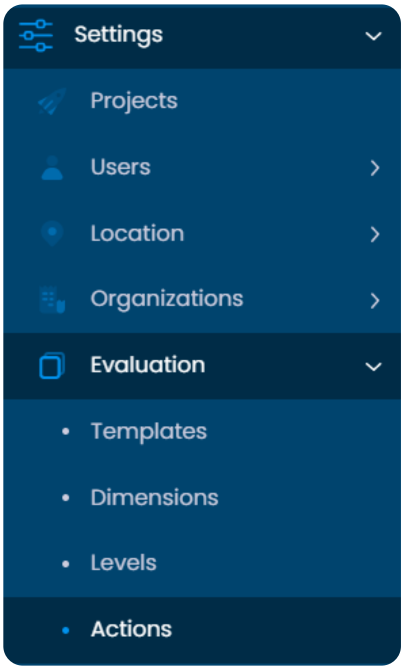
It is necessary to describe a new level in the available languages as shown below:



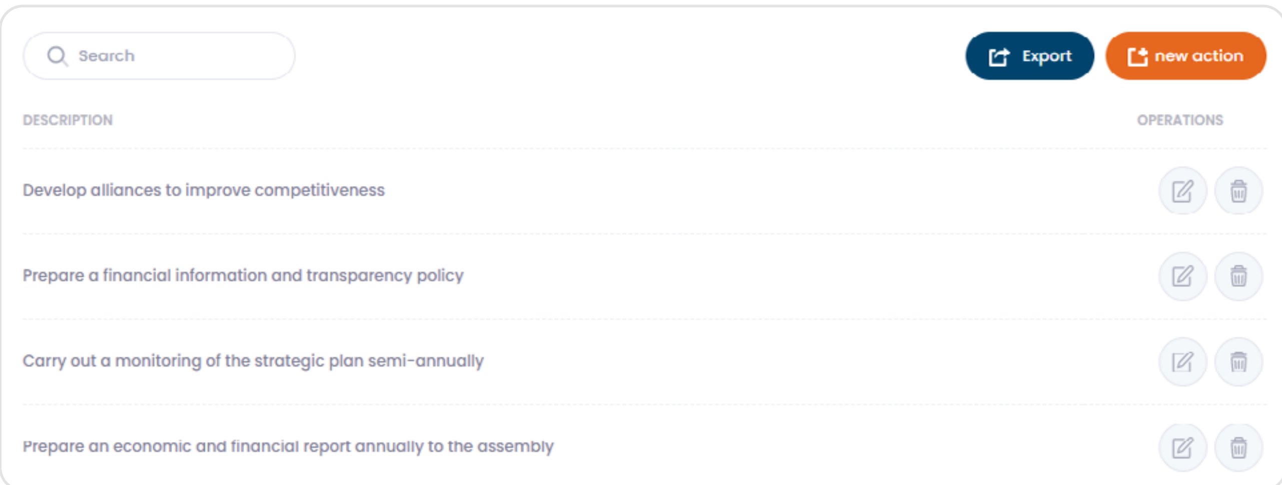
9.4. Actions

An action is associated with an answer to a qualitative question in a template, so that it automatically appears at the time of generating the plan as the consequence of an answer with a score that requires it. Since the same action may be relevant for different answers to qualitative questions, a list of actions is kept and these are selected to be assigned to the answers to questions in a template.

In this section you can edit each action that could be created automatically or if you prefer you can also create new actions. To manage the actions you must go to the main menu on the left in "Configuration/Assessments/Actions".

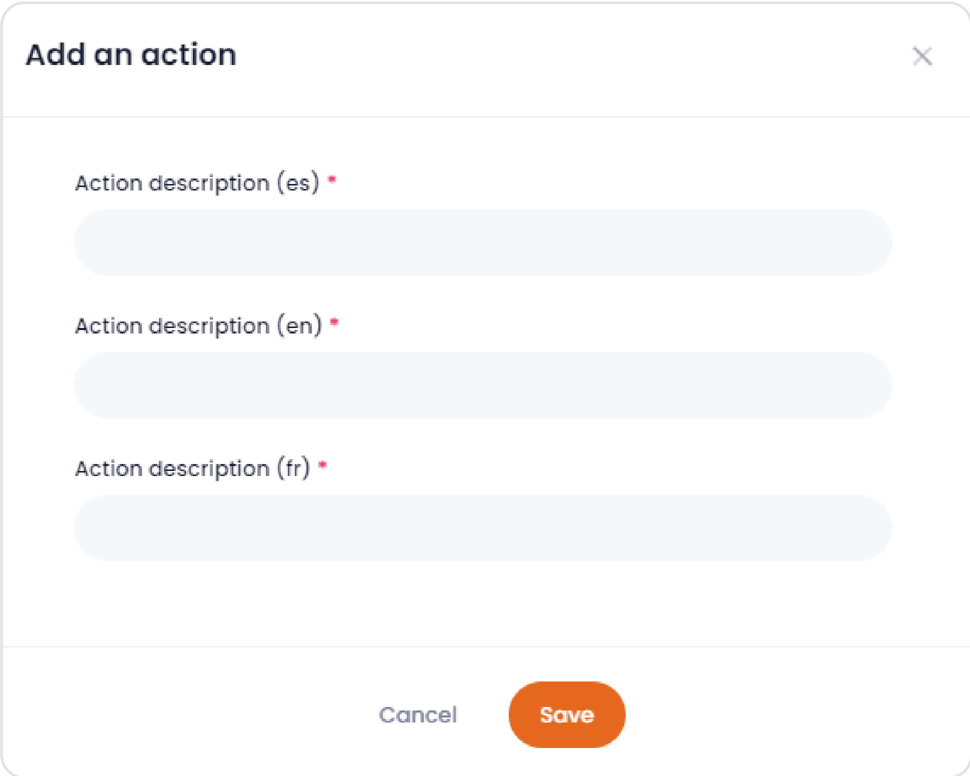


To create or edit an action use the options from the list as shown below:



9 Setting up an assessment template

It is necessary to write the description of the action in the available languages.



9.5. Setting up score ranges

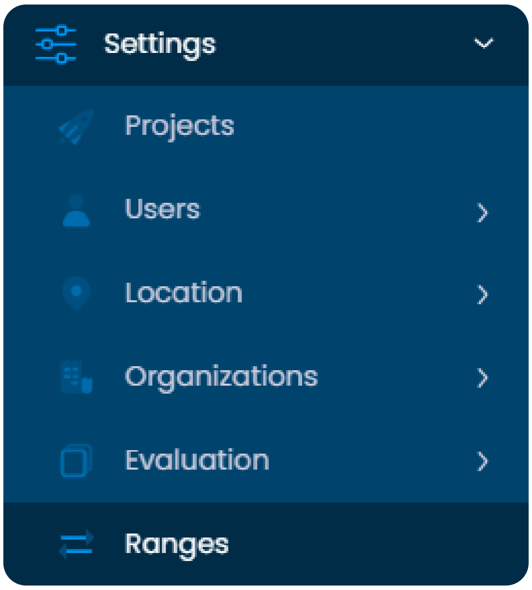
The ranges represent percentages that divide the total score obtained in an assessment into 6 parts in order to obtain a grade.

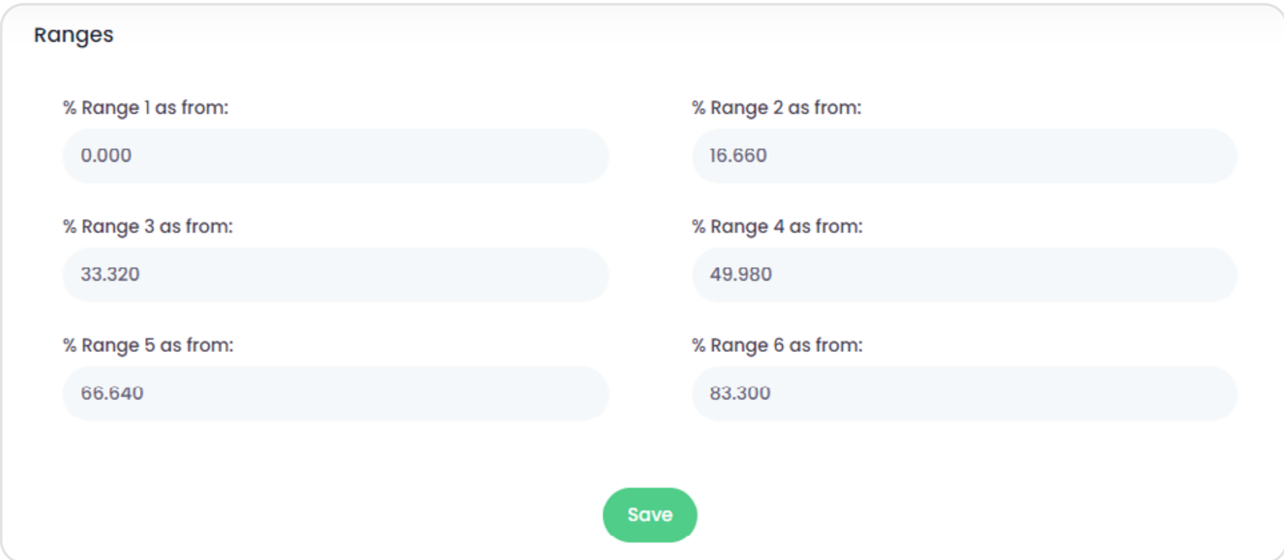
By default, the percentage of each part or rank has been determined to obtain the rating or situation of an organization according to the results of its assessment and is shown in the following table:

Rank 1	Rank 2	Rank 3	Rank 4	Rank 5	Rank 6
From 0% at 16.66%	From 16.66% at 33.32%	From 33.32% to 49.98%	From 49.98% to 66.64%	From 66.64% to 83.3%	From 83.3% to 100%
Situation: unwanted	Situation: Regular	Situation: Regular	Location: Good	Location: Good	Location: Optimal

9 Setting up an assessment template

To edit the ranges you must go to the main menu on the left in "Configuration/Ranges".





You will need to edit each value and finally press "save".

10 Assessment management

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).

10.1. What you should know before starting an assessment

To learn more about how the assessment process should be organized and conducted, please see this section in the administrators or assessors manual.

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

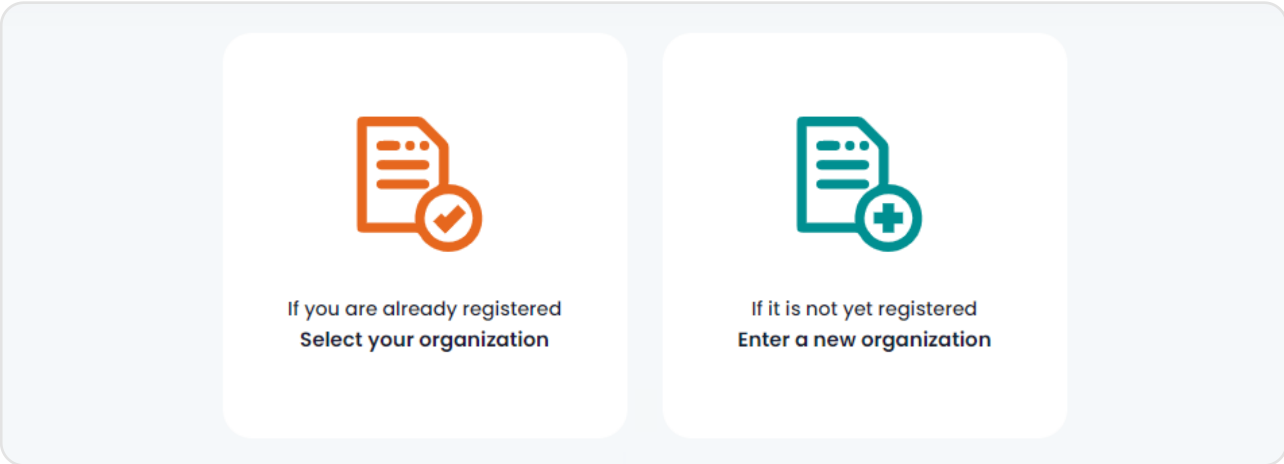
the evaluation, because the quantitative information should be checked and not contradict the answers to the qualitative questions. In case of contradiction, the interviewees should be noted and the qualitative or quantitative answers should be corrected, as appropriate.

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 ofthe action plan, as explained below.

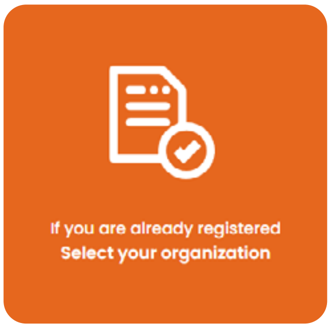
10.2. Selection of the organization to be evaluated

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

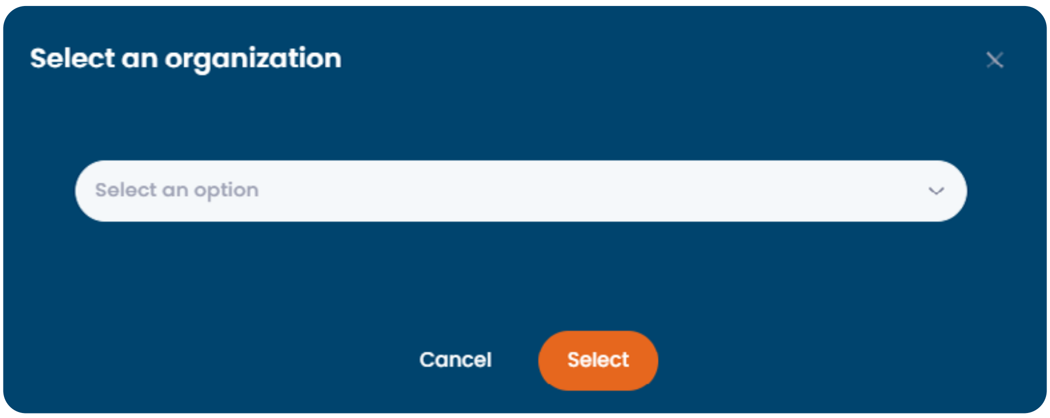
Then the following two options will be displayed:



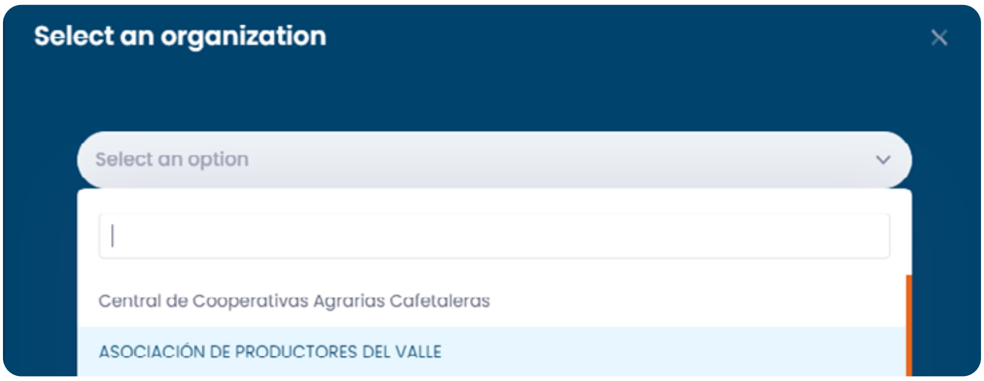
You have two options to choose from, in case you have previously created an organization or have been assigned one, press the green button:



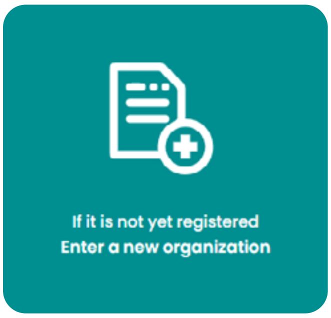
This option will provide a form to choose the organization that you want to evaluate.



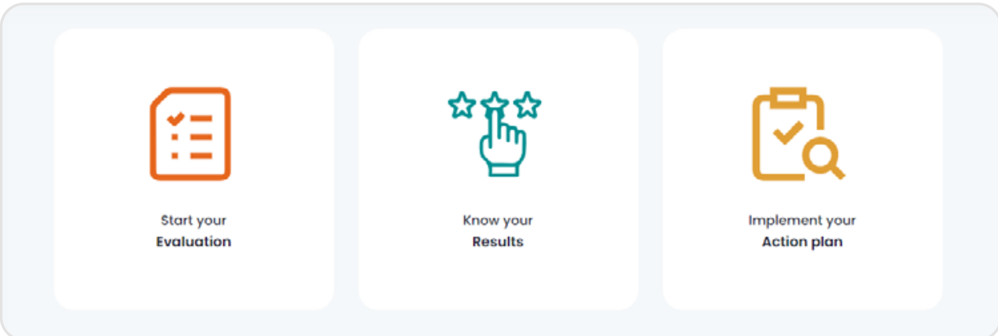
10 Assessment management



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:

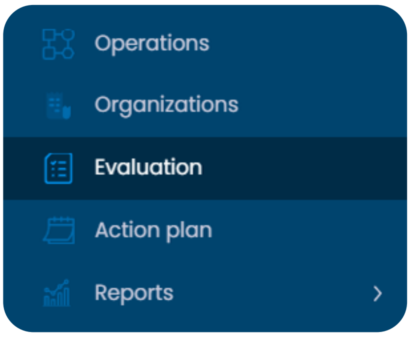


Next, you will be presented with the form to create a new organization, as explained above under "5) Organization Management." When you are finished, after pressing the "OK" button, you will be redirected to the following screen where three buttons will appear:



10.3. List of assessments

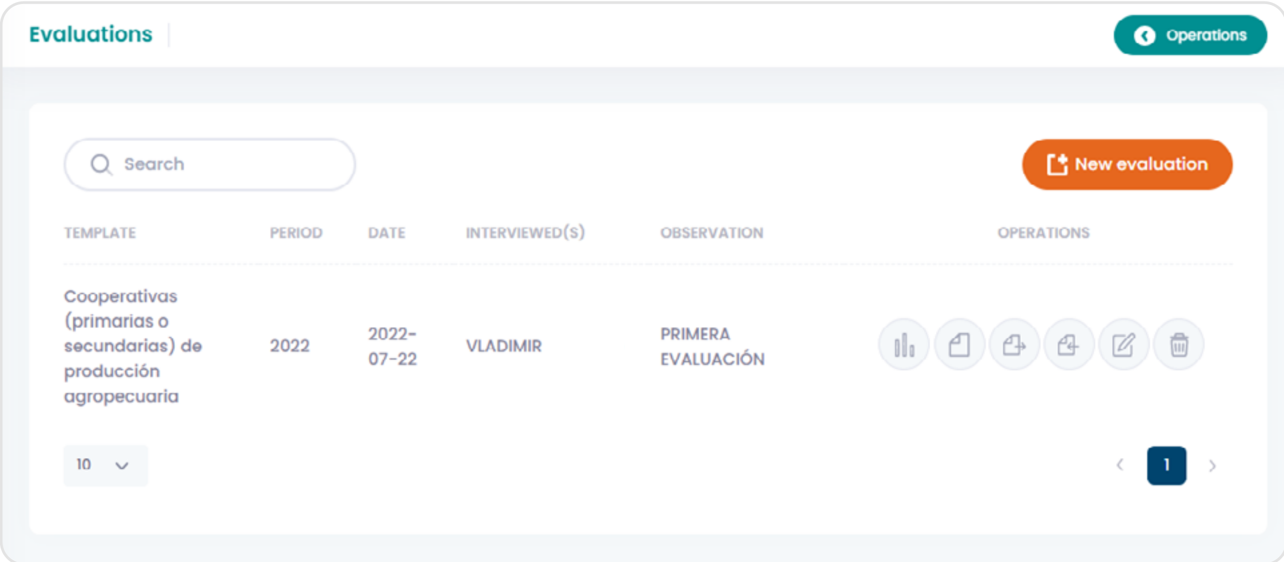
Before creating an assessment, please make sure that the assessment does not already exist. To access all the assessments of an organization it is first necessary to select an organization and then select "Assessment" on the left side menu of the application:



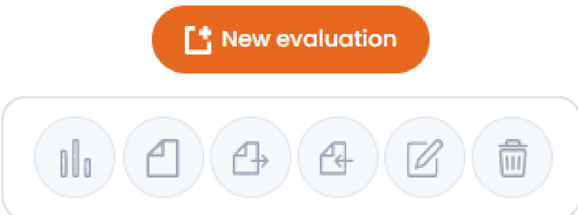
10 Assessment management

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:



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.

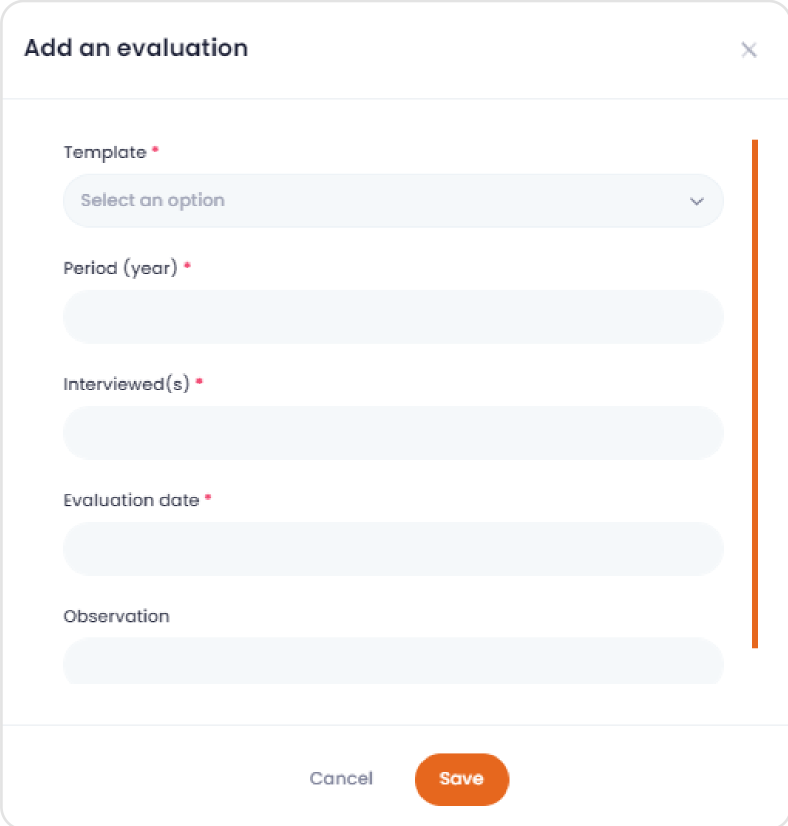


10.4. Do an assessment

To start the assessment process press the blue button "Start your assessment":

10 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 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.

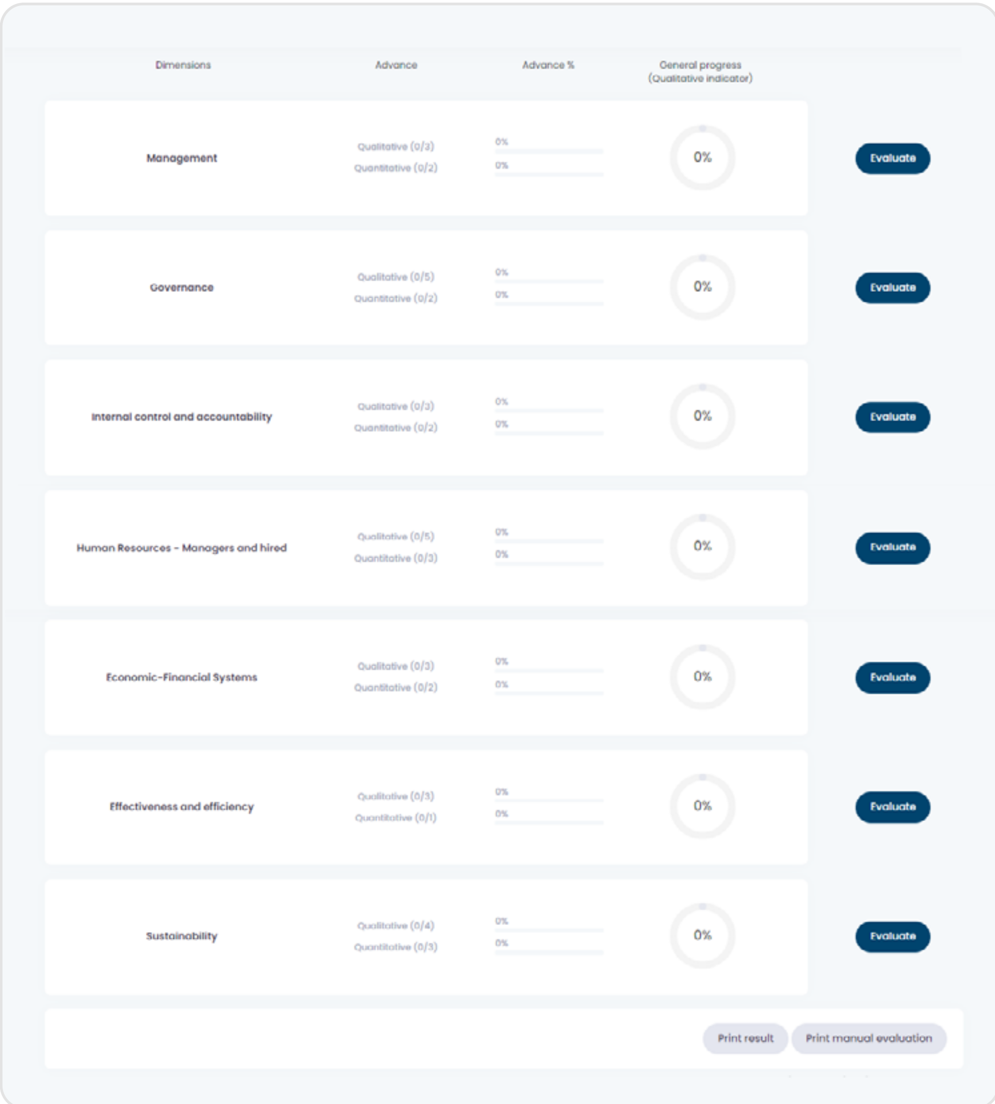
Evaluation Date

Represents the date on which the assessment is made.

Observation

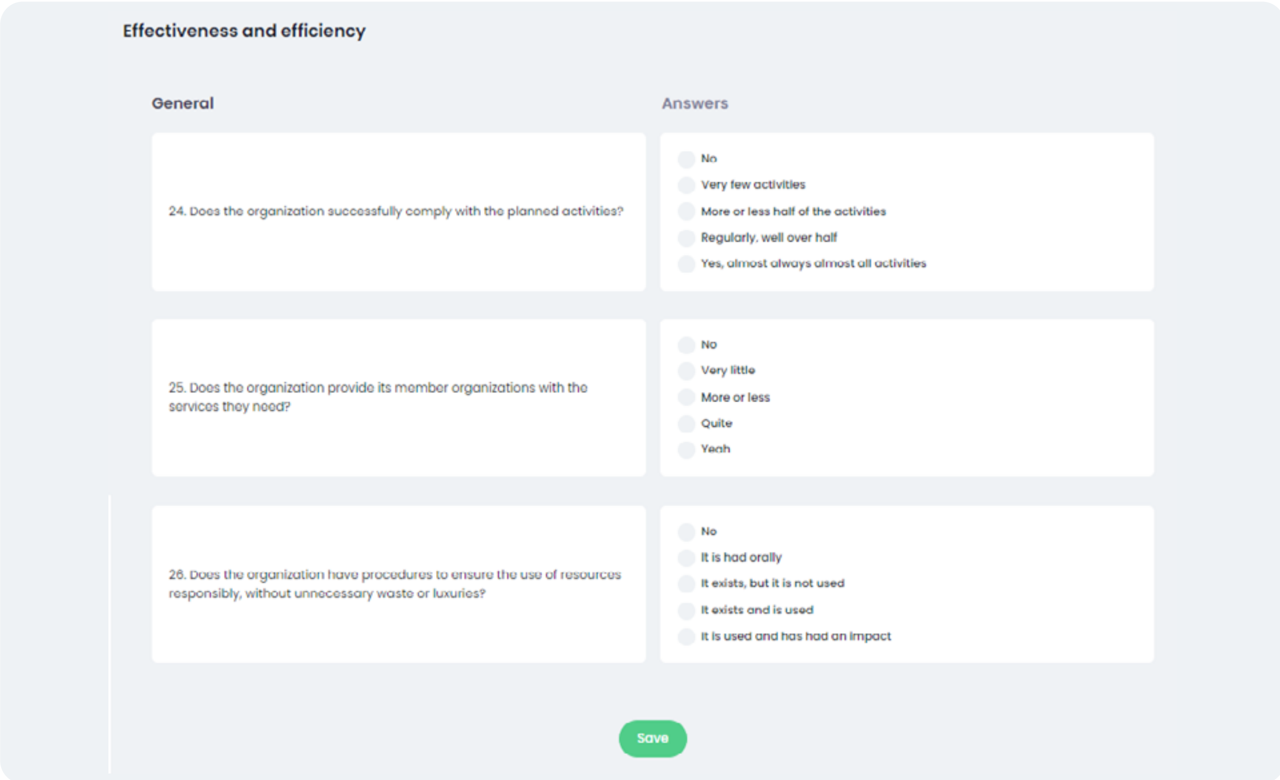
In this field you can add any comments you see fit.

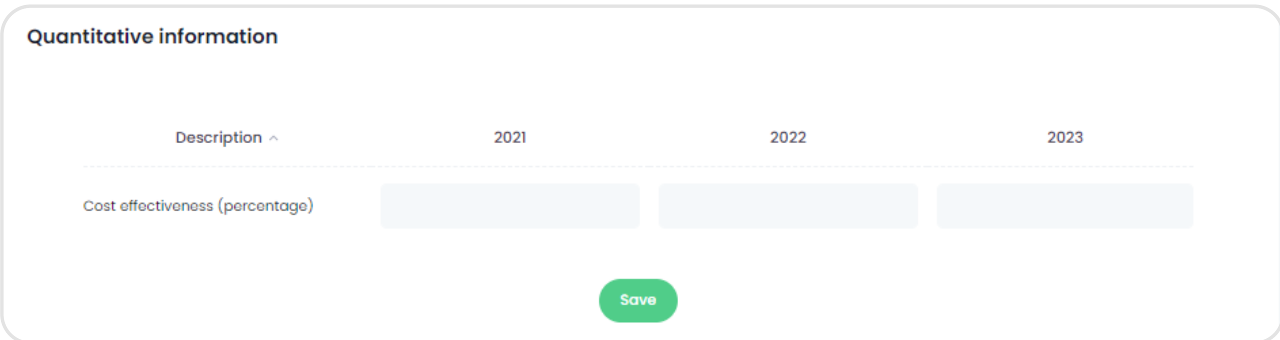
When you save the form, you will be redirected to a new screen where the list of dimensions to be evaluated is displayed. A dimension is a component related to the assessment questionnaire that classifies the questions according to the main criteria evaluated.



10 Assessment management

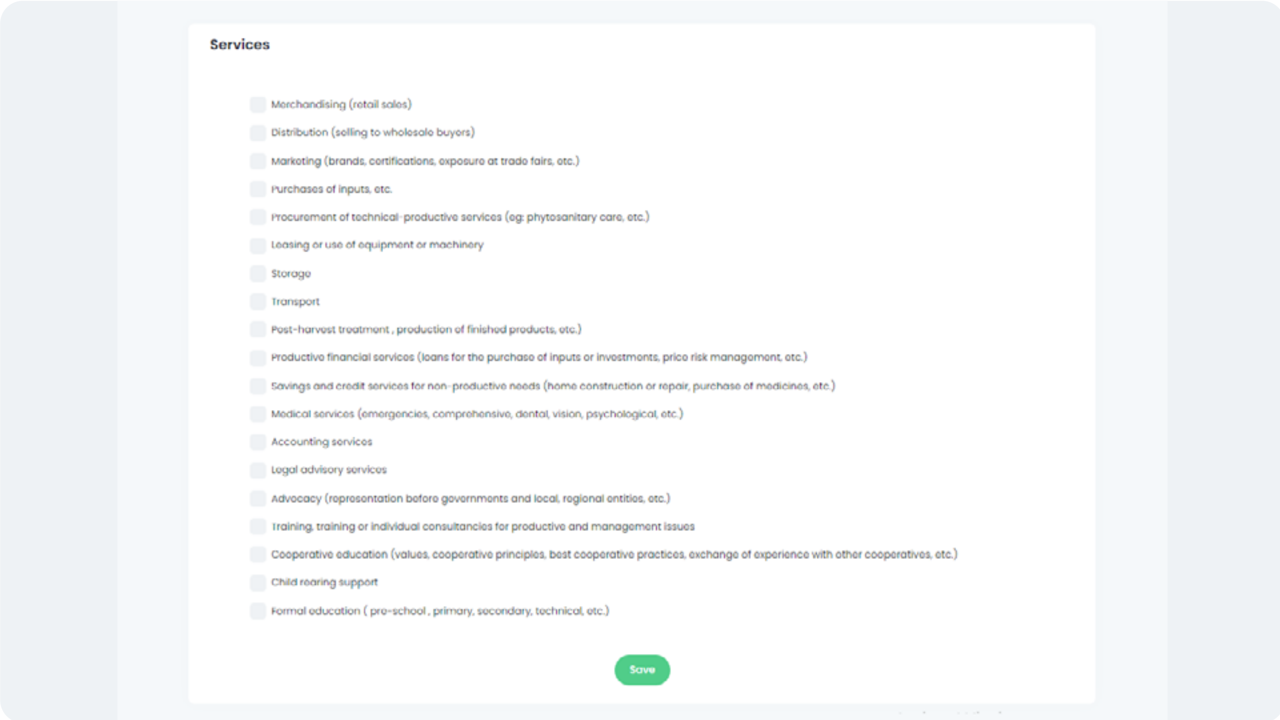
By pressing “Assess” for each dimension, you will be able to access the questionnaire related to this dimension, the following screen will be presented:



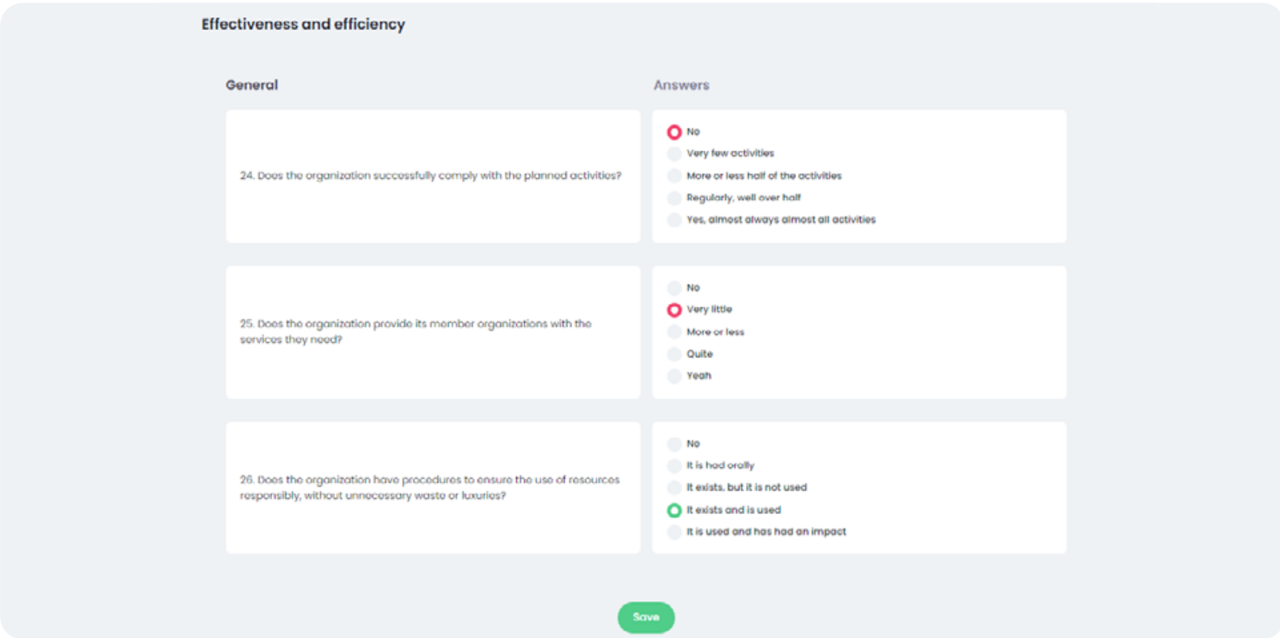


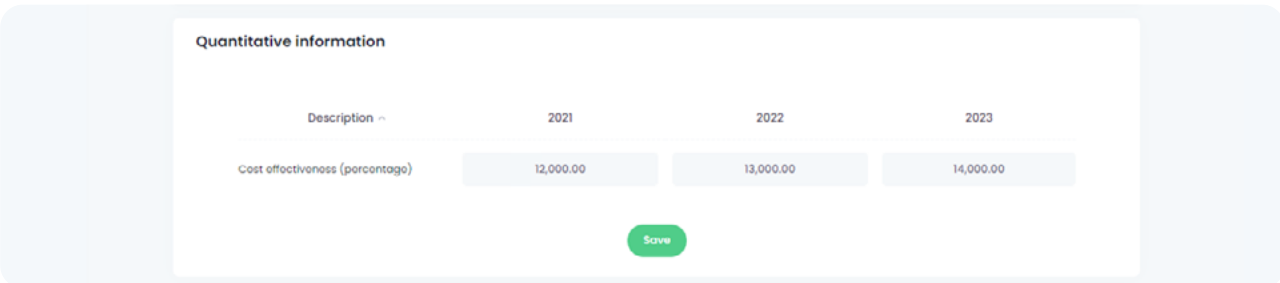
dmoc

10 Assessment management

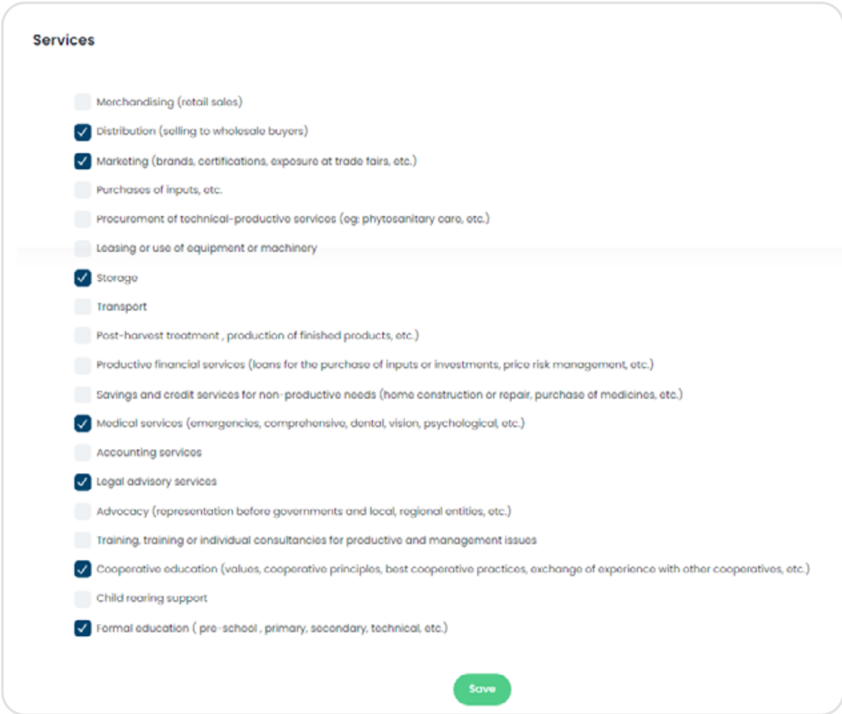


As the questions of one dimension are answered, the green “Save” must be pressed in each section of the form.

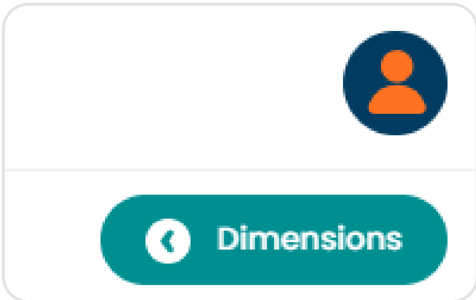




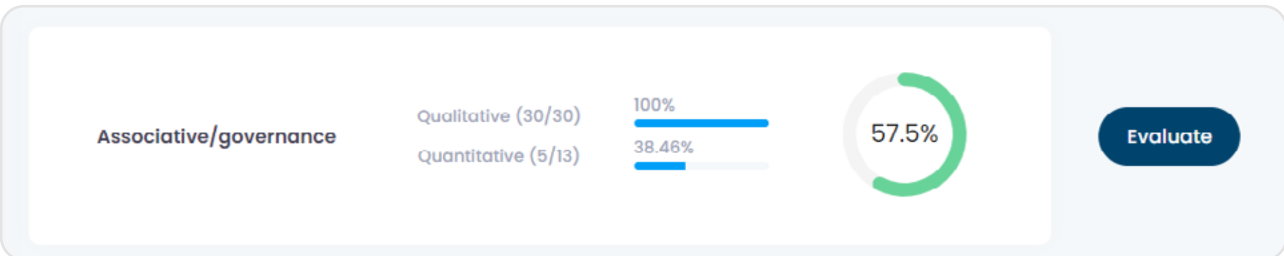
10 Assessment management



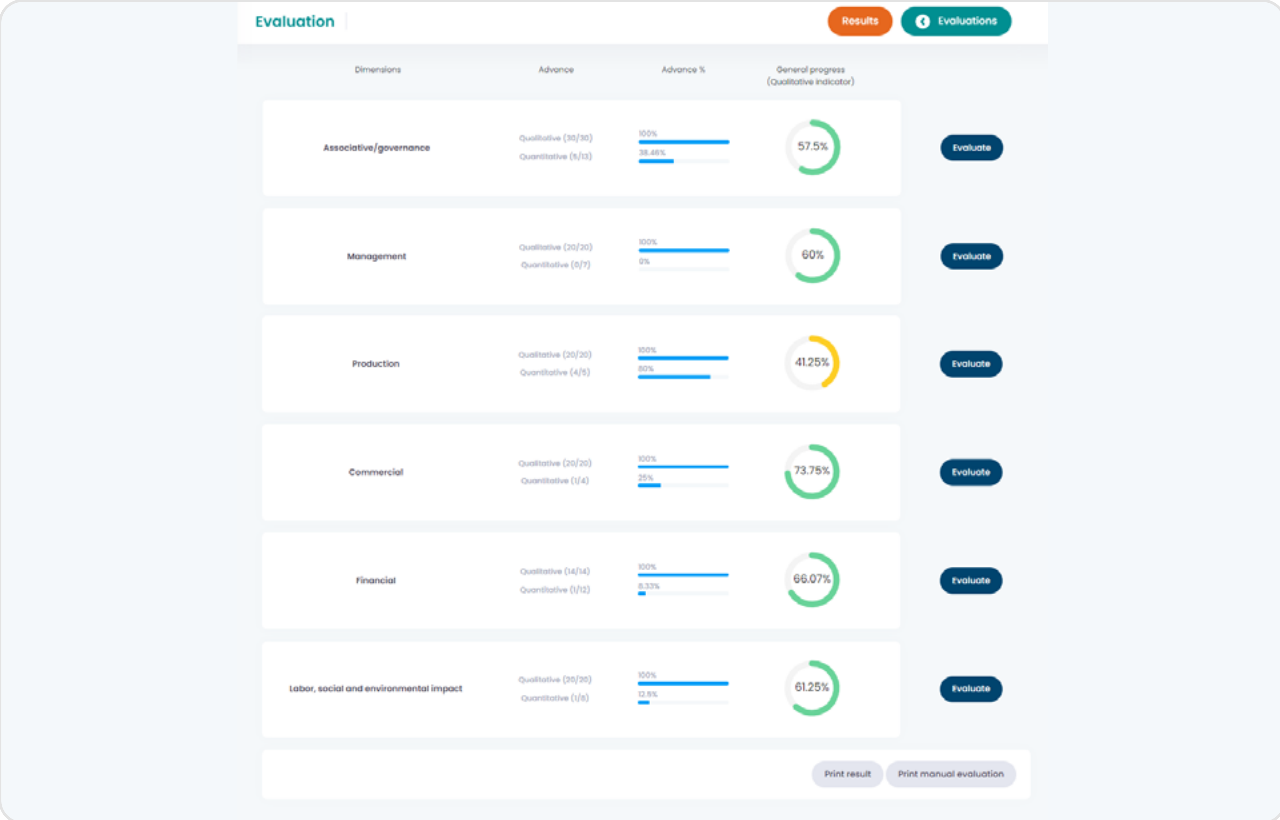
To re-assess the other dimensions, press “Dimensions” located at the top right of the application.



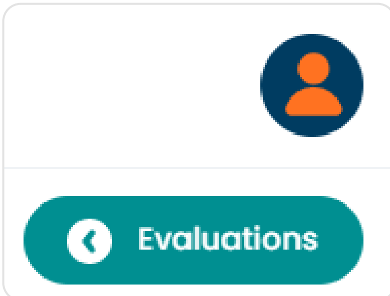
When you return, you will be able to visualize the progress of filling out the questionnaire for each dimension, as well as the result in percentage derived from the assessment according to the scores that were assigned to the answers of the qualitative questions.

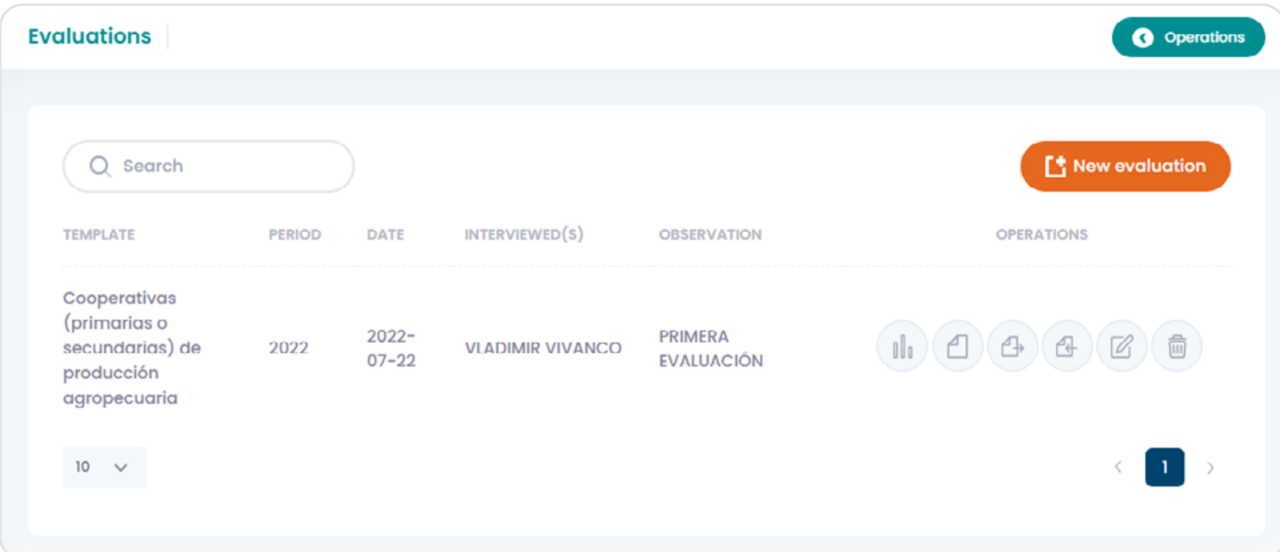


10 Assessment management



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





10.5. 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 Cocla

Evaluation - Date: 2022-07-22 - type: Cooperativas (primarias o secundarias) de producción agropecuaria - Period: 2022 - Interviewed(s): VLADIMIR VIVANCO - Observation: PRIMERA EVALUACIÓN

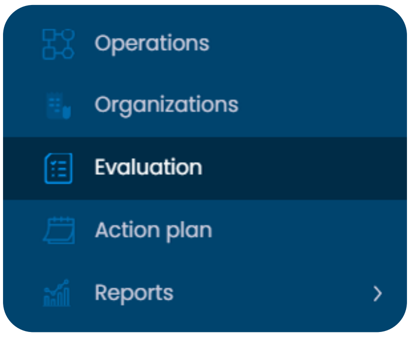
Associative/governance

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.)

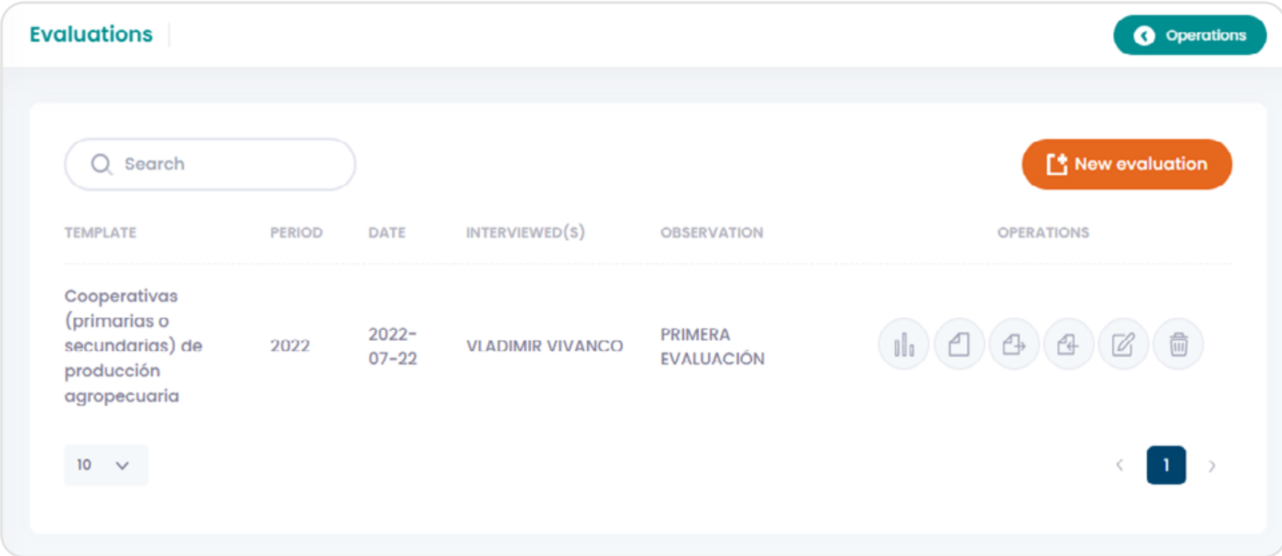
10.6. Conducting an offline assessment

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.



10 Assessment management

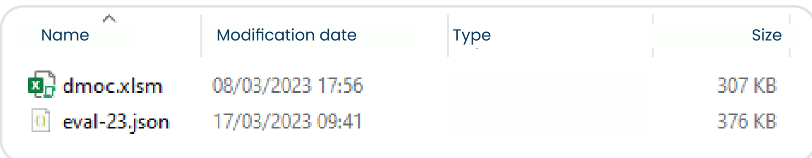
Then you will need to create or choose an assessment from the list of assessments available in this section:



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

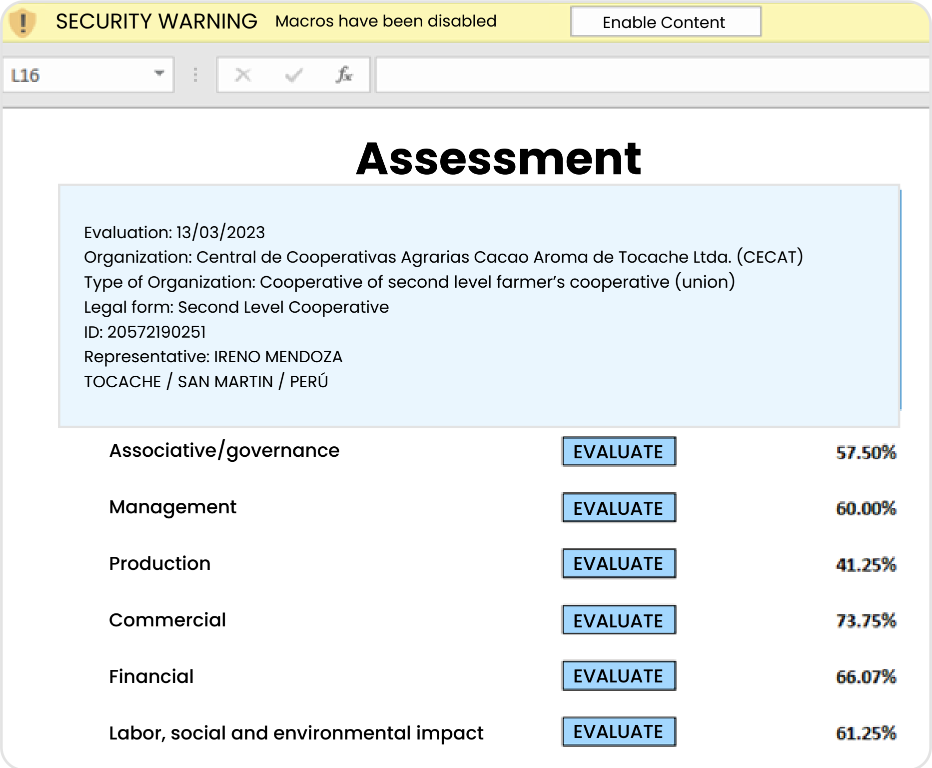
You will get a single compressed file:

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

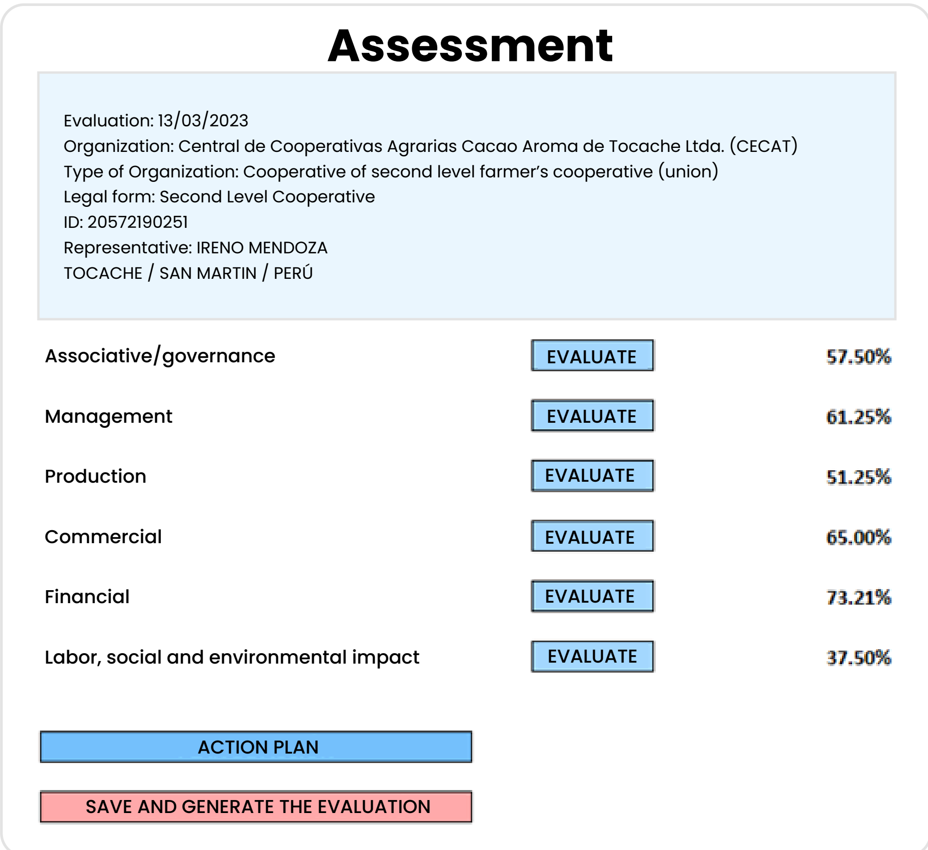


Open only the “dmoc.xlsm” file, this file works with Microsoft Excel 2010 software or higher with macros enabled. It is also necessary that the files “dmoc-xlsm” and “eval-xx.json” are located in the same folder without any additional files.

10 Assessment management



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.

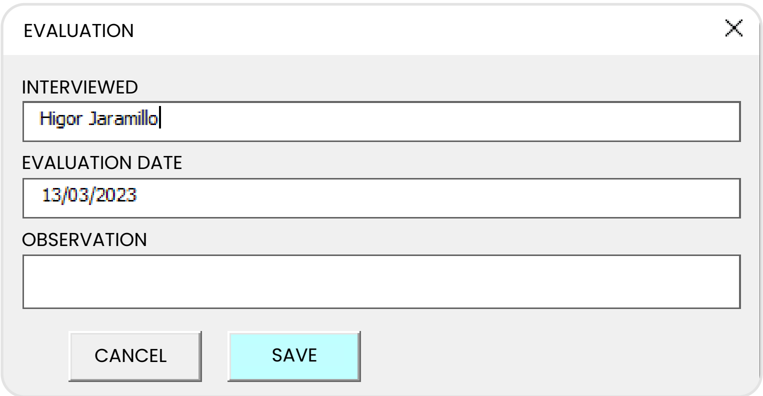


10 Assessment management

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

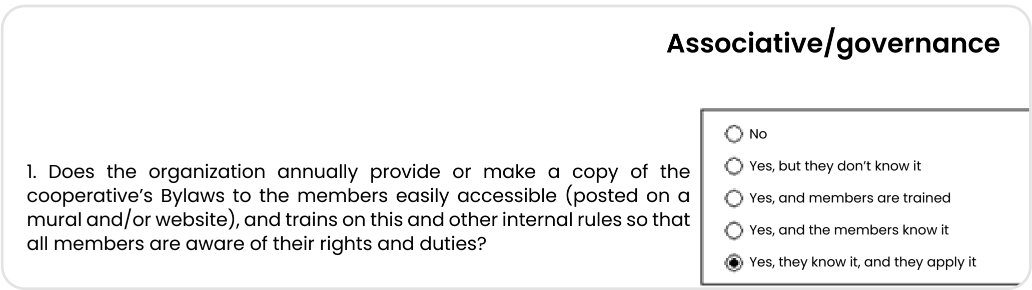
If you want to update the general information of the assessment such as the date, the person responsible or add some information, you must double-click on the section where this information is presented.

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

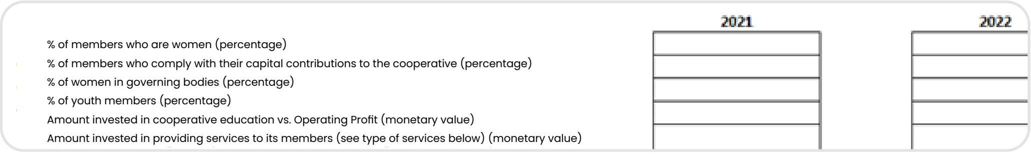


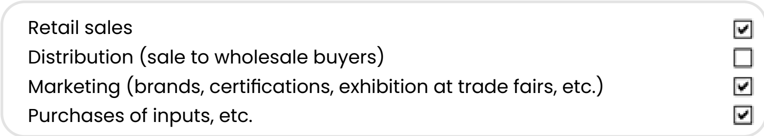
10.7. Starting an offline assessment

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

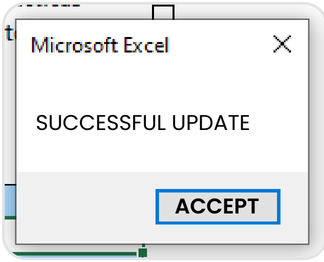


10 Assessment management



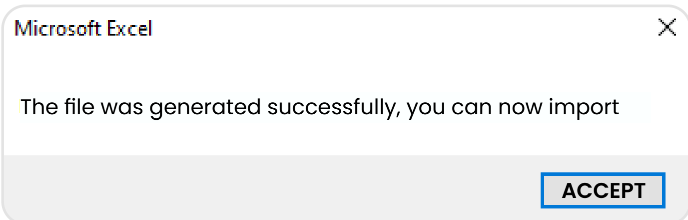


Upon completion of the work for the selected dimension update the file by double clicking on the button at the end of the questionnaire:



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.

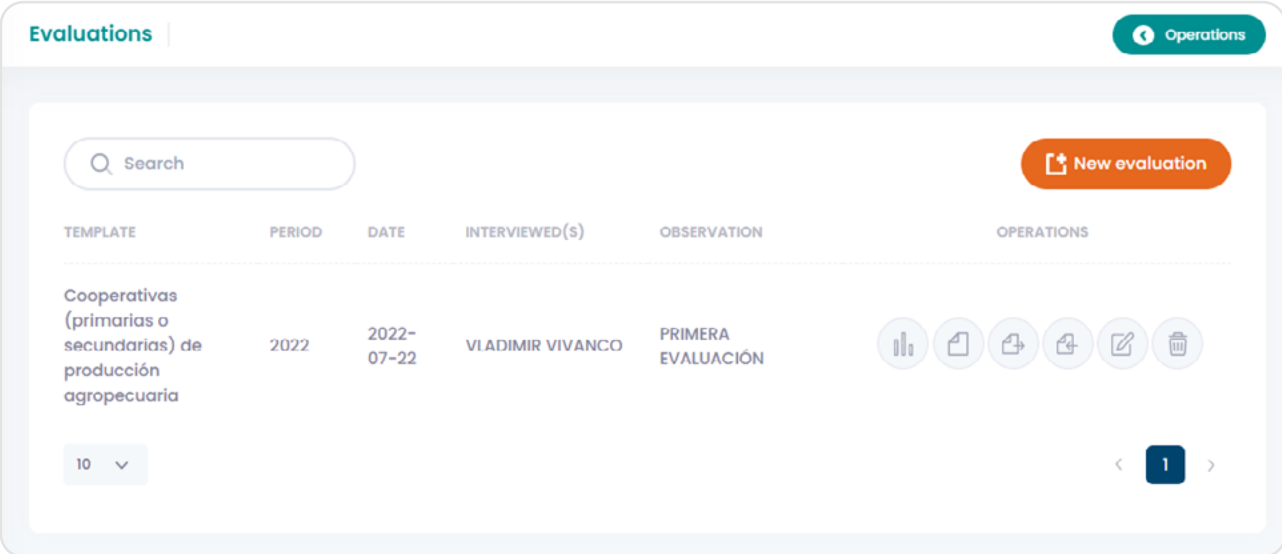
You will get the following message:



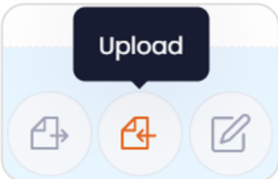
From this stage you can already import the assessment to the online tool.

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

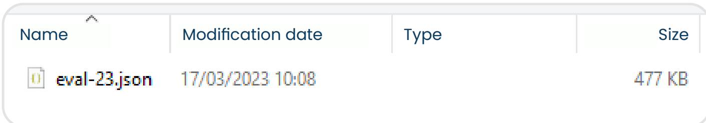
To perform this task previously you must save and generate the assessment as indicated above, then go to the list of evaluations in the online tool:



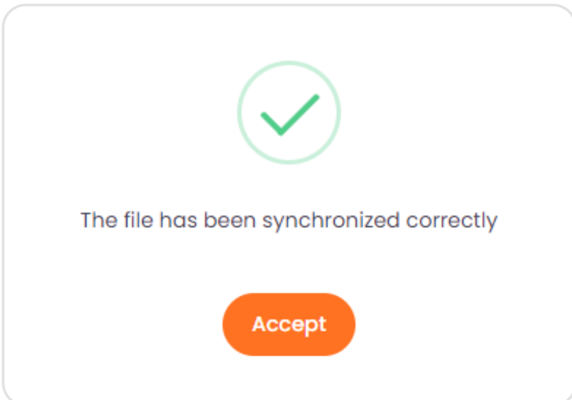
Press upload:



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



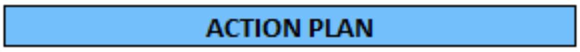
Select the file and press OK, then a confirmation message will be displayed:

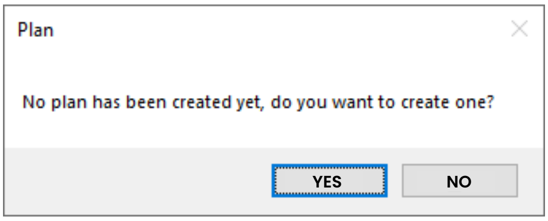


To finish, enter the evaluation and confirm the changes made.

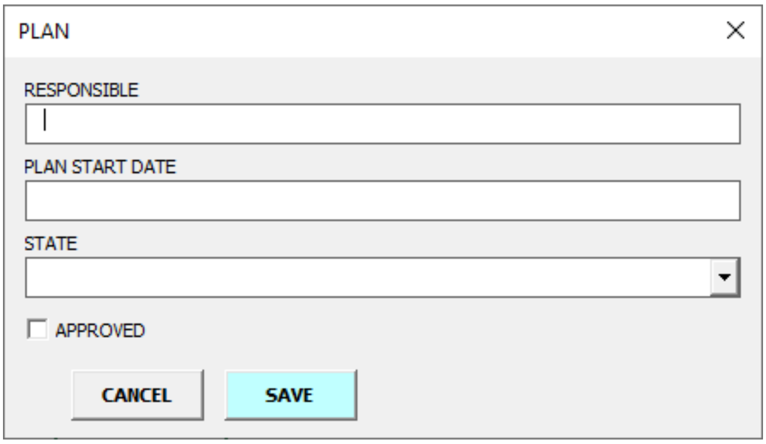
10.9. Developing the offline action plan

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

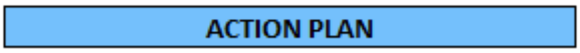




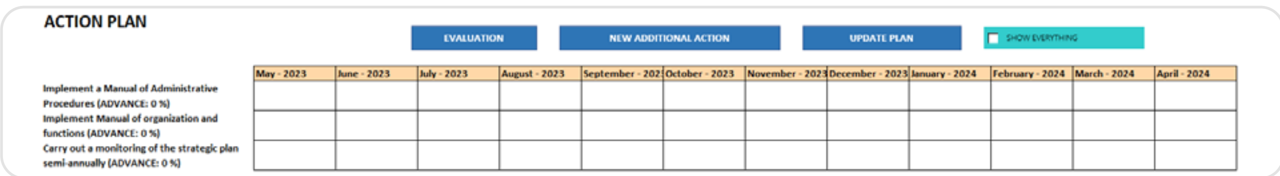
To access press yes, the following form will be displayed:



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



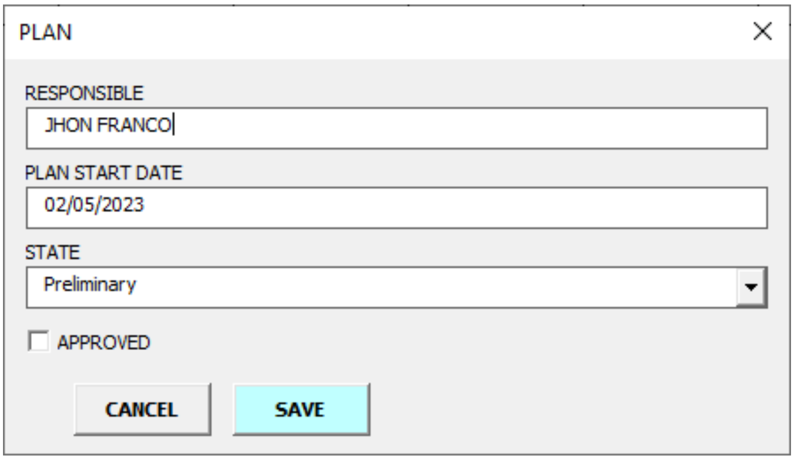
A new list of the action plan will be shown:



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.

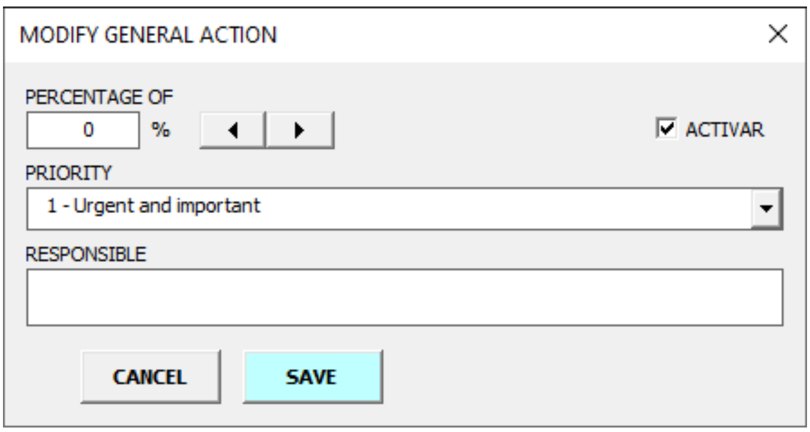
10 Assessment management

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



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

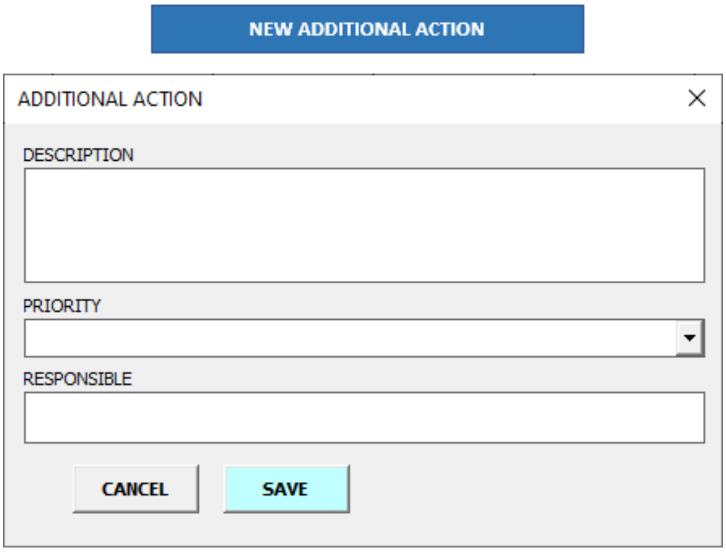
A form will be displayed to edit and place additional data for this action.

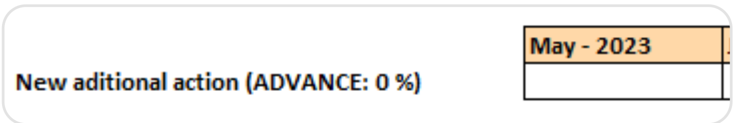


10 Assessment management

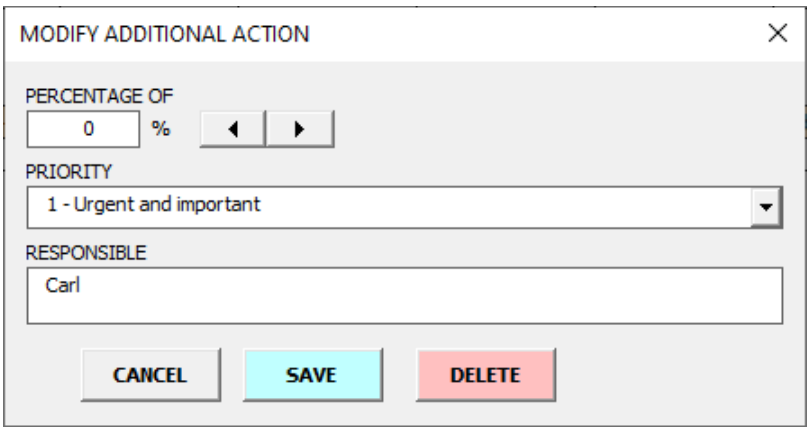
The operation of this form is the same as its online version.

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





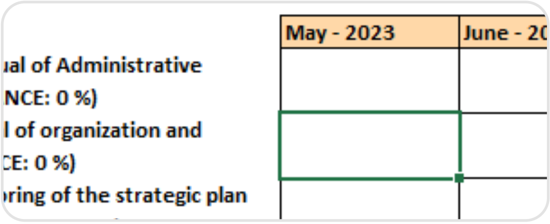
To edit or delete an additional action, double-click on the action name located on the left side of the table.



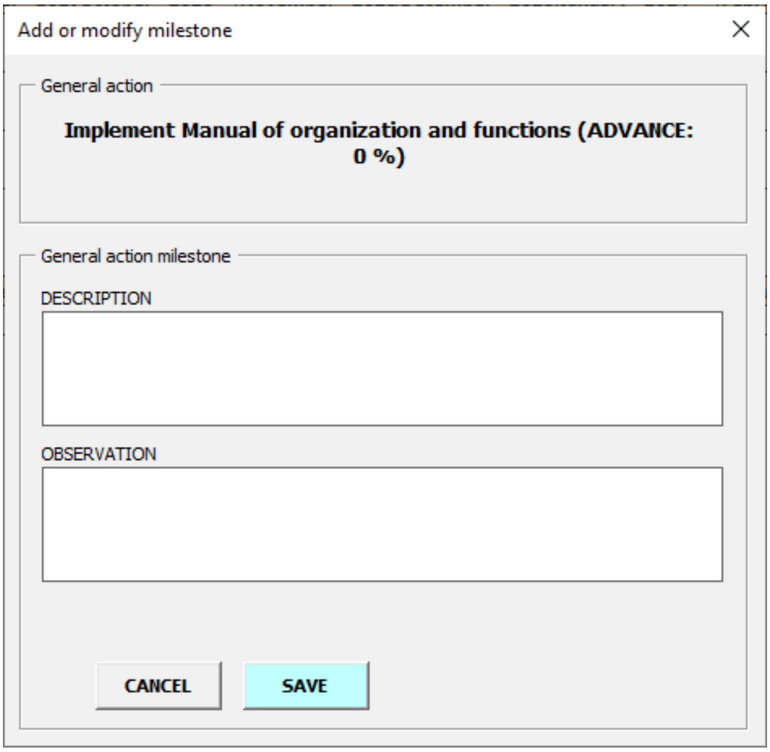
10 Assessment management

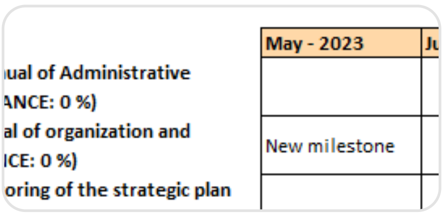
The operation of this form is the same as its online version.

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**:

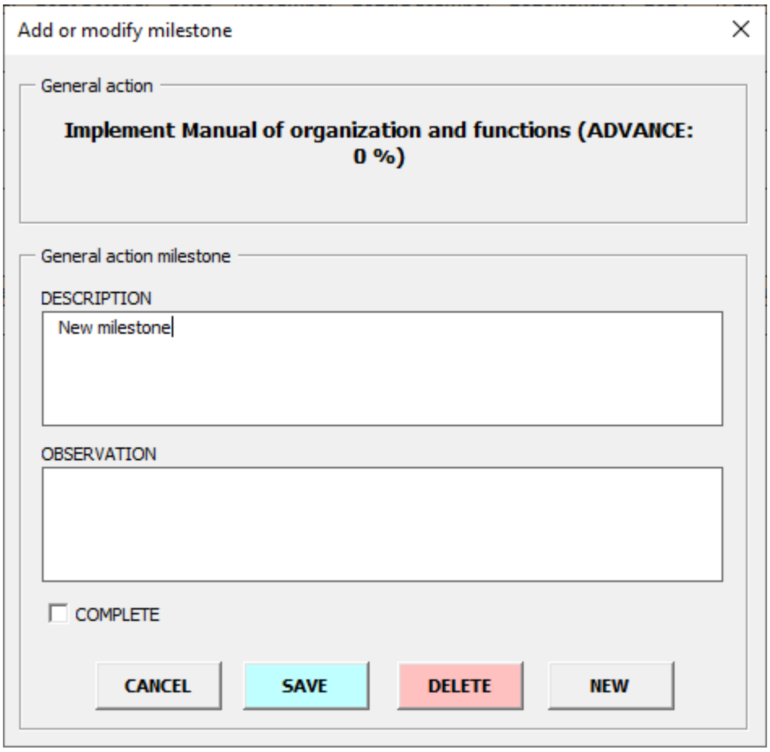


Then the following form will be displayed:

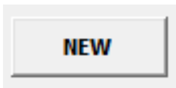




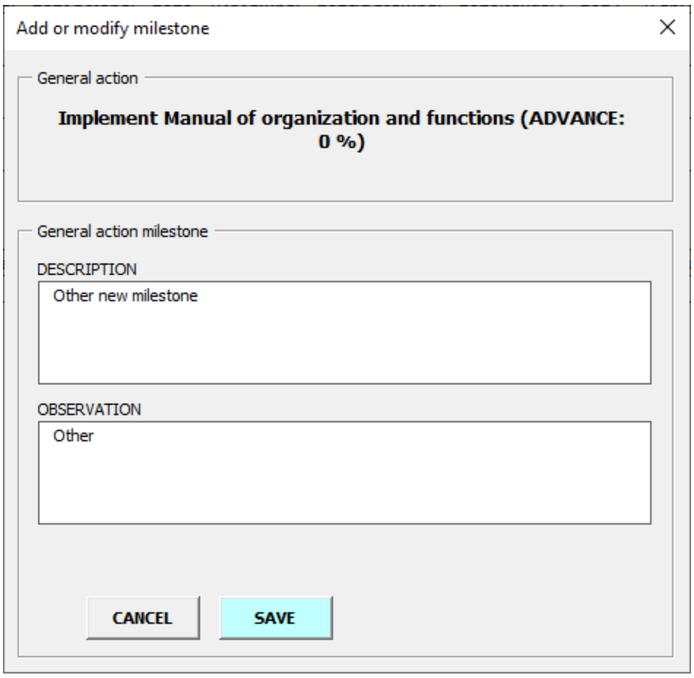
To add a new milestone for the same action in the same month, double-click on the cell where you want to add the milestone, the following form will be displayed.



Then press New.

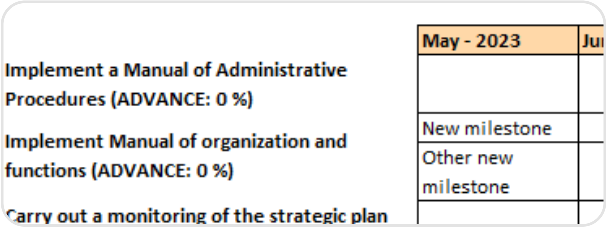


Fill in the form with the new milestone and press save.



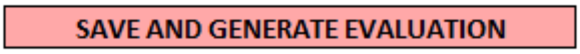
10 Assessment management

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

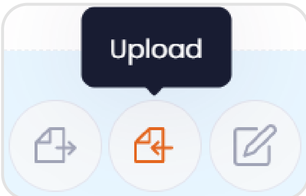


In the same way, the entry of milestones for additional actions should proceed.

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:

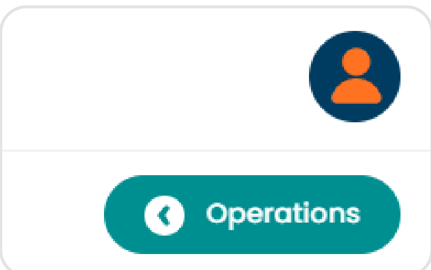


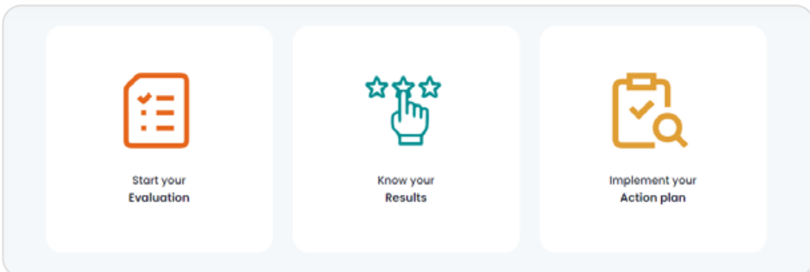
Then import the eval-xx.json file on the online platform with the upload button:



10.10. Results of an assessment

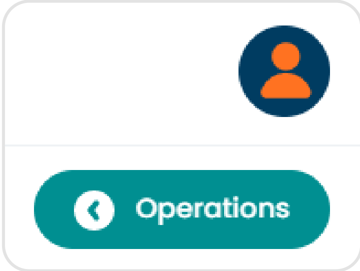
To see the Results of the assessment, you must press “Operations” also located at the top right of the application, obtaining the following screen with “Know your Results”:



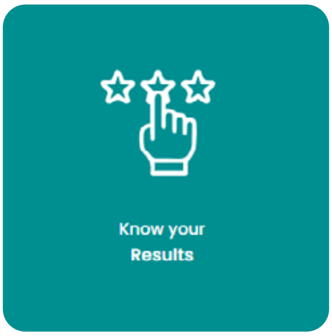


10 Assessment management

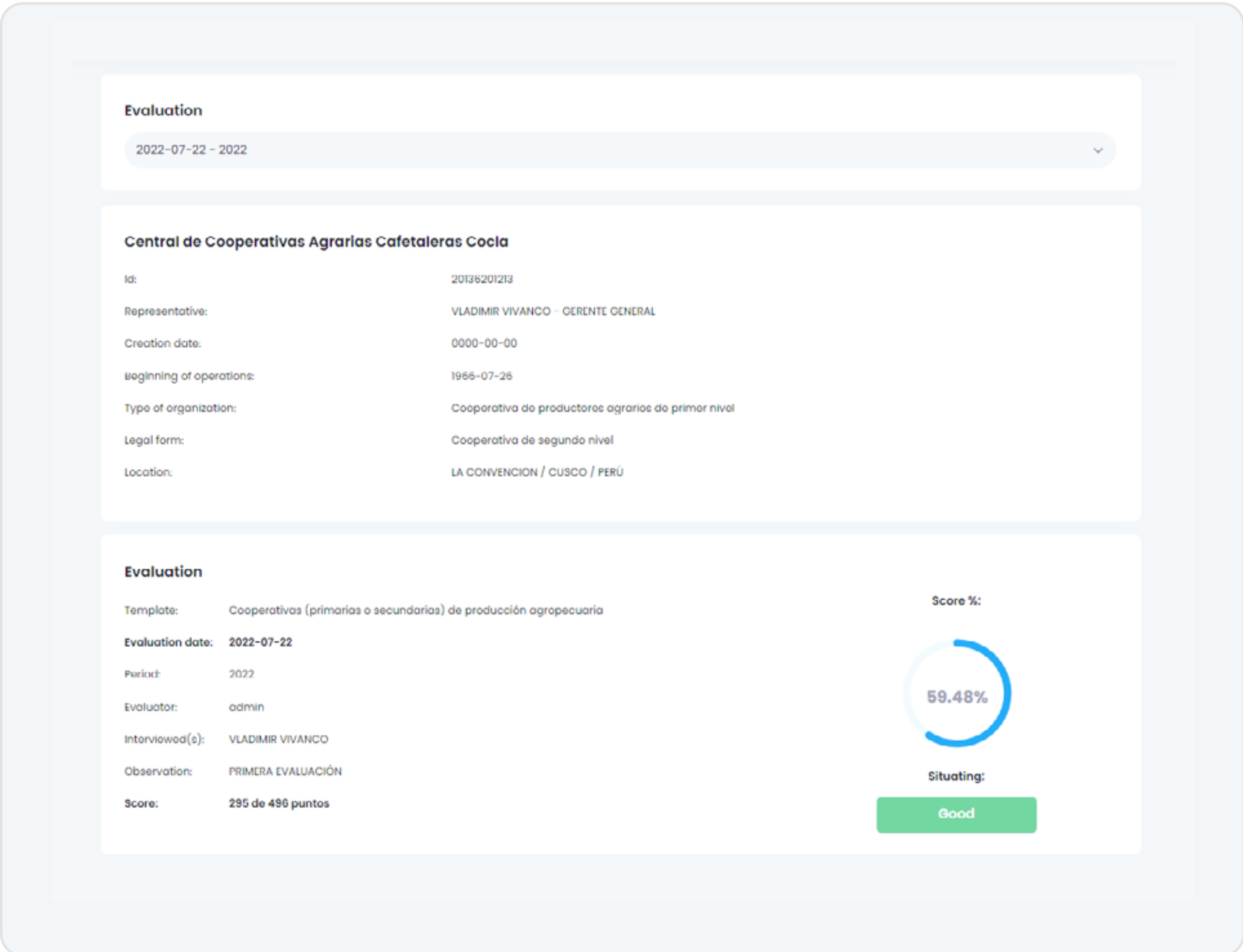
To find out the results of the assessment, return to the main operations by pressing “Operations” located at the top right of the application.



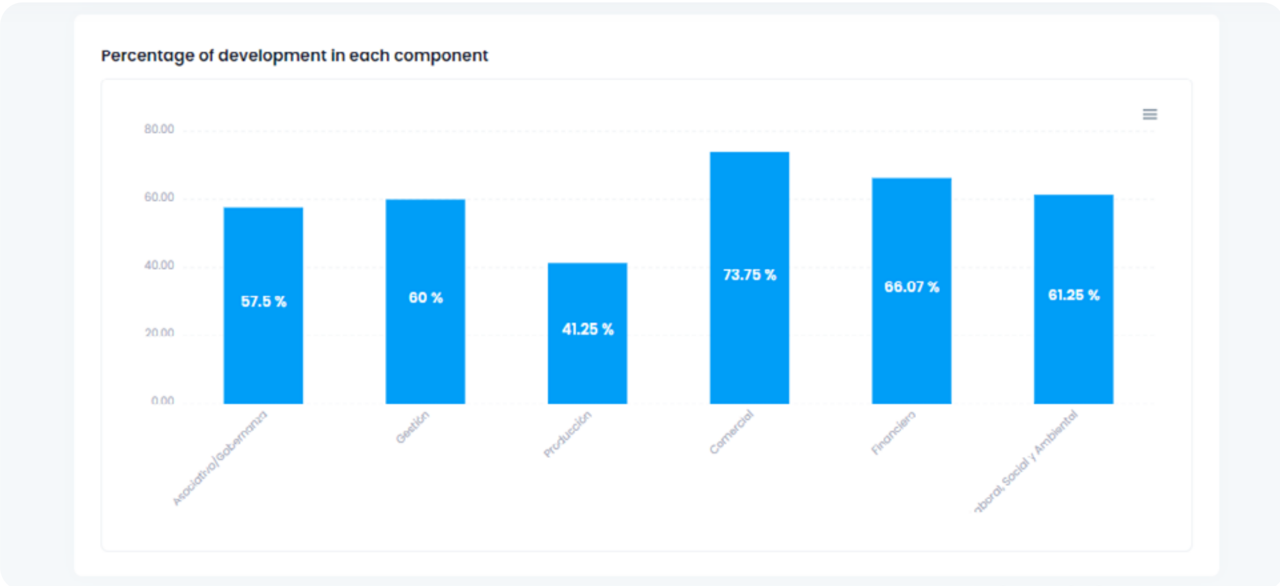
Then press the green “Results”.



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



10 Assessment management



Advance : 0.00 %

11 Management of action plans

11.1. 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.

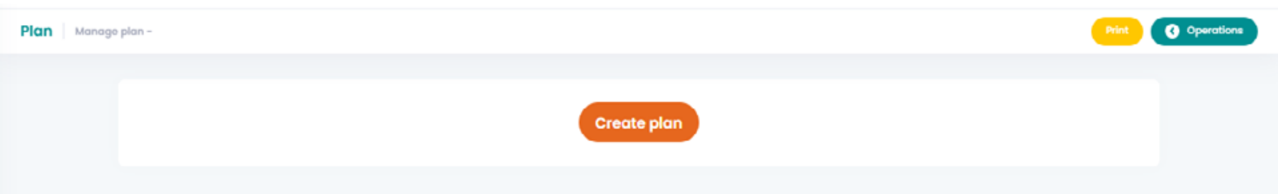
When generating or creating an action plan, general actions will appear that are automatically generated from the answers of the qualitative questions, according to the assessment template. As we will see, you can disable these actions, and also add additional or non-automatically generated actions.

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

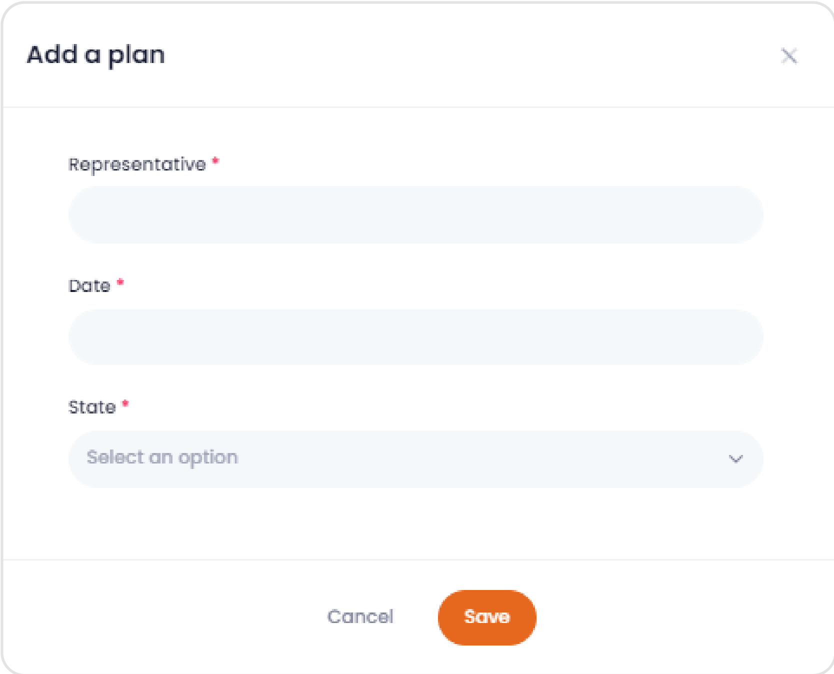
11.2. Creating a new plan

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

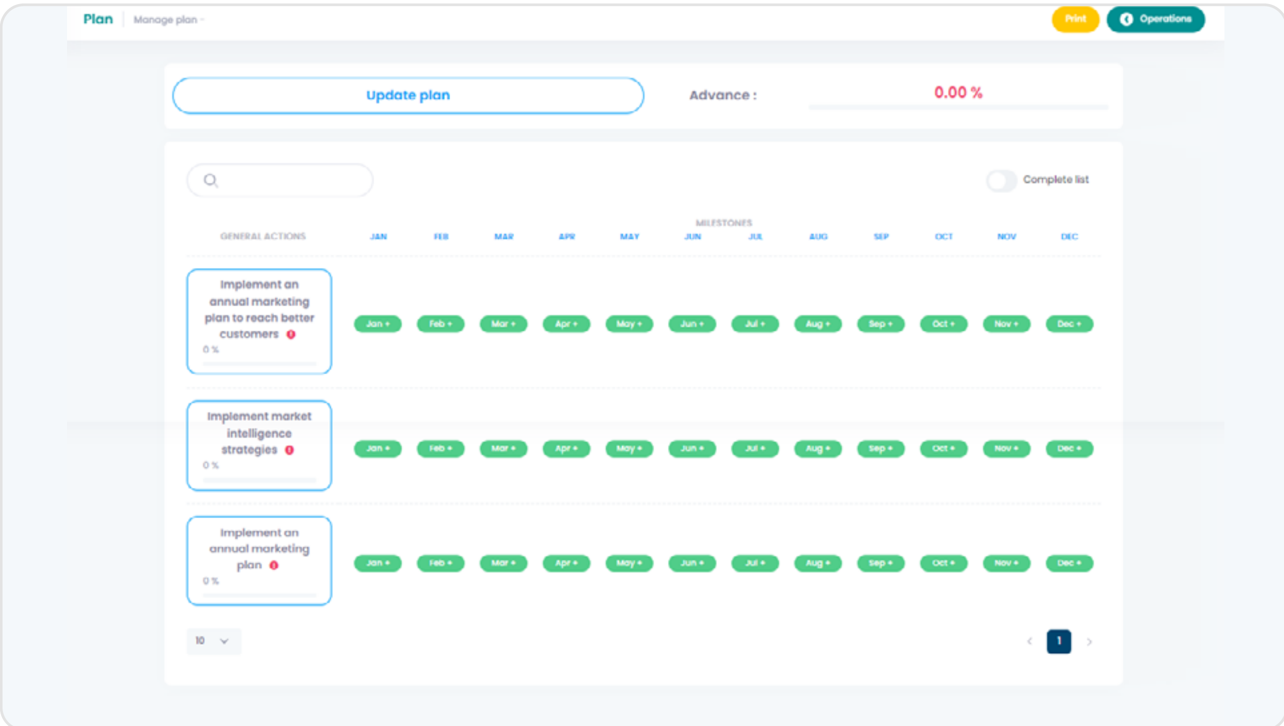
Then, you will be redirected to a new view where you can create a plan by pressing "Create Plan". The creation of a plan requires the completion of the assessment development. If the assessment has been partially carried out, you can update the plan again to reorganize the resulting actions.



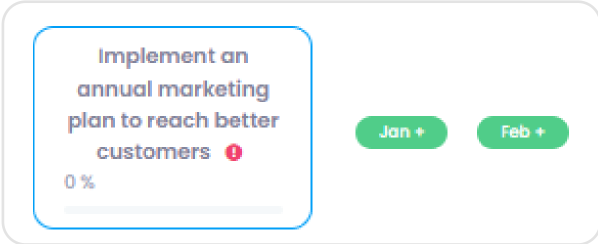
11 Management of action plans



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



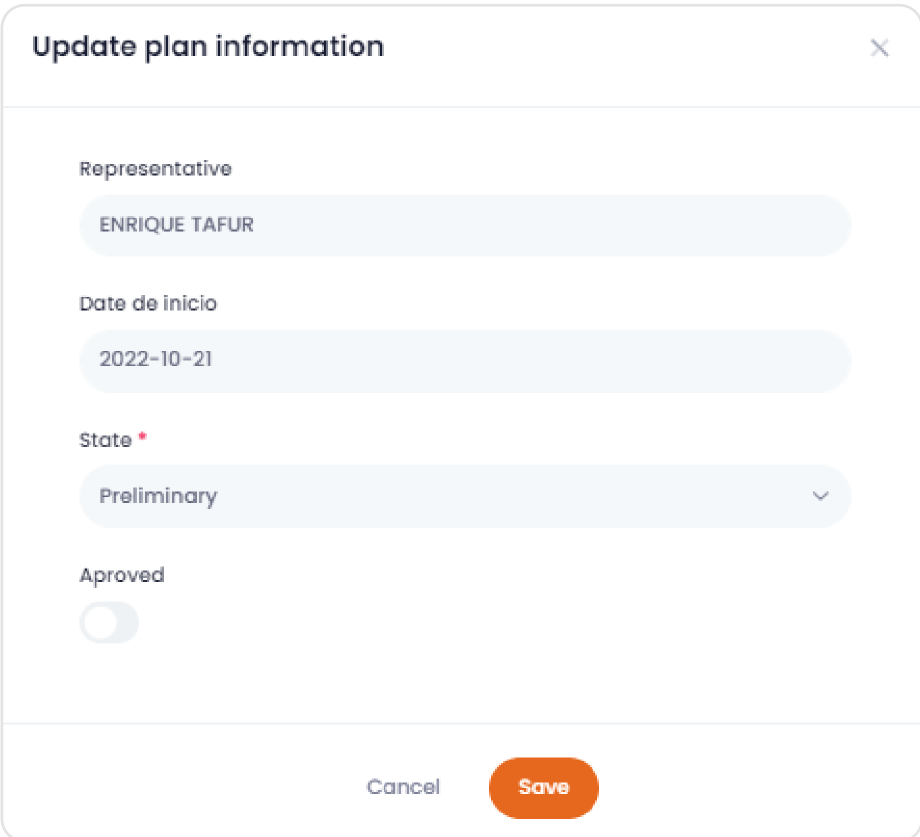
General actions will be shown in this view. A general action is visible because of the answer given to a qualitative question. The tool will show the most relevant actions for implementation purposes.



11.3. 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:



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.

11.4. 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.

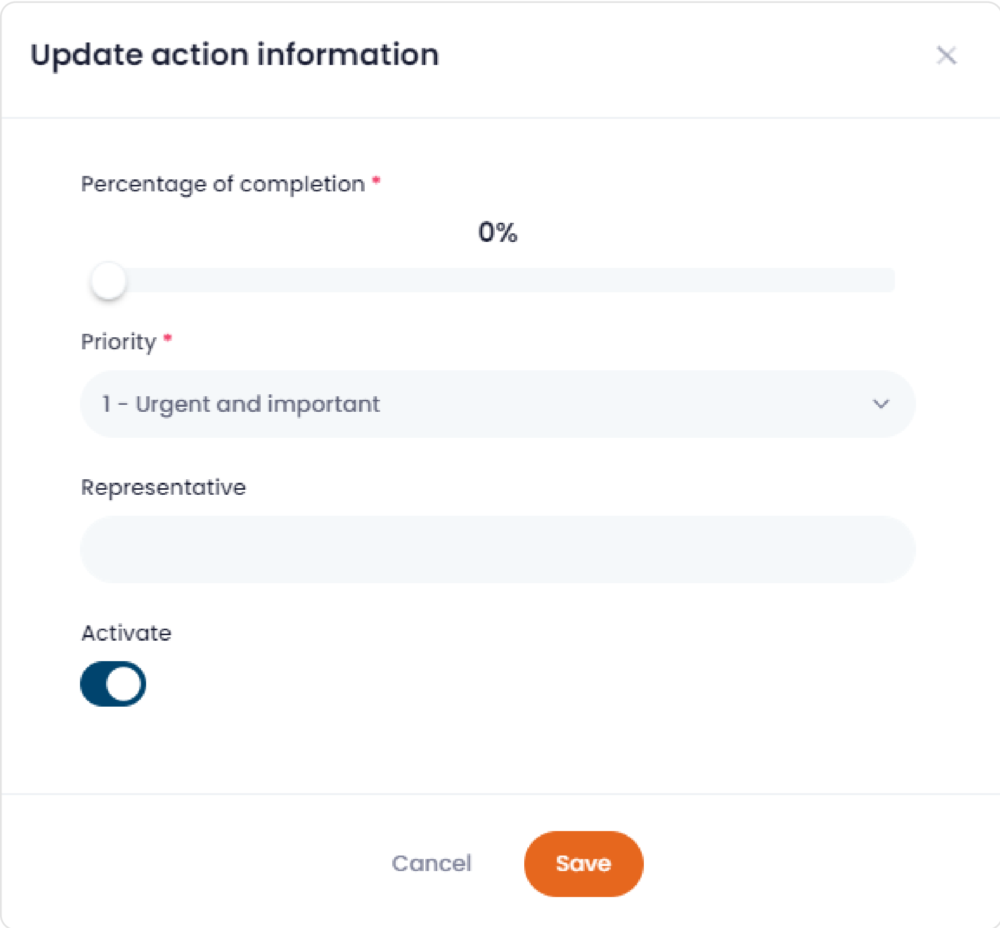
11.5. Information update of the general actions of the plan

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.

11.6. Edit a general action

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

11 Management of action plans



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

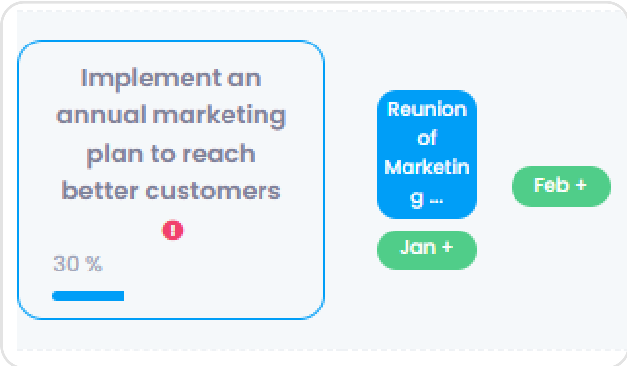
Person who will be in charge of implementing the general action.

Enable

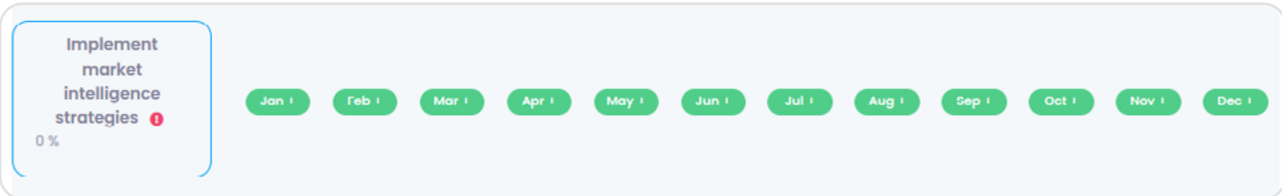
Allows the action to be visible to the assessor, when it is deactivated the general action remains hidden but not deleted, it is possible to re-activate it.

11.7. Add, update and complete a milestone

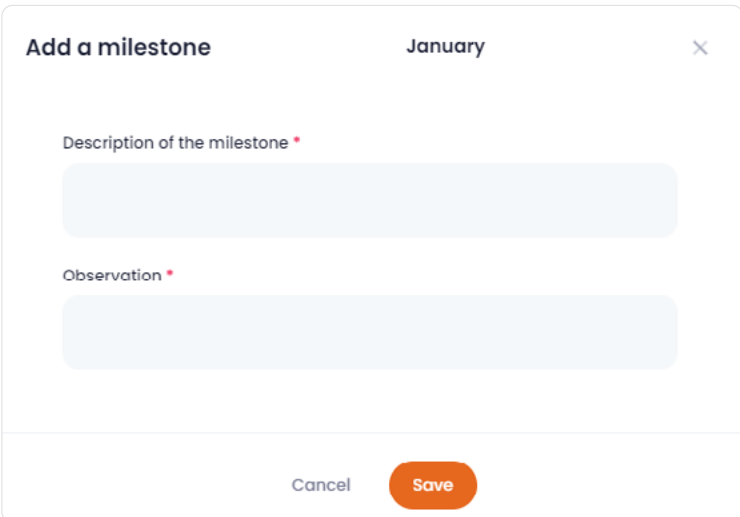
To determine deadlines for the implementation of the general actions proposed by the application, it is necessary to create milestones, these are more specific actions or concrete results that must be met in the month they are established.



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.

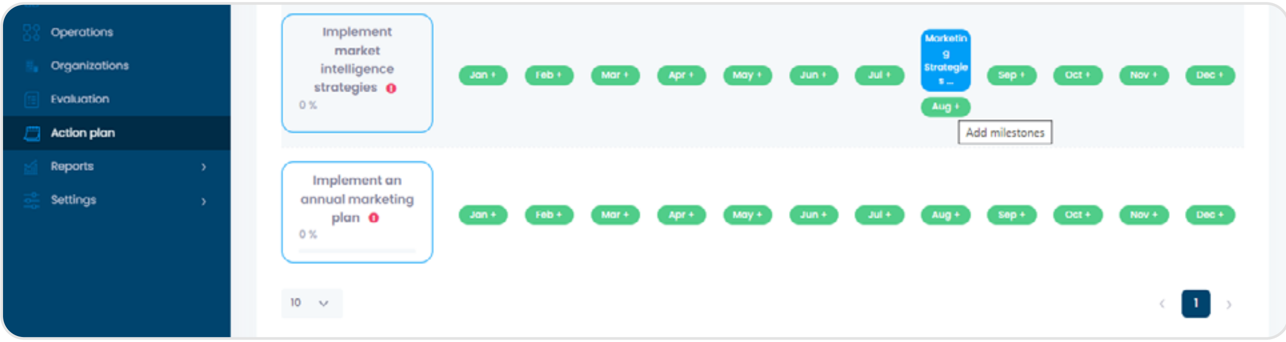


Each button displays a form that contains a field for the milestone description and another field for any observation.

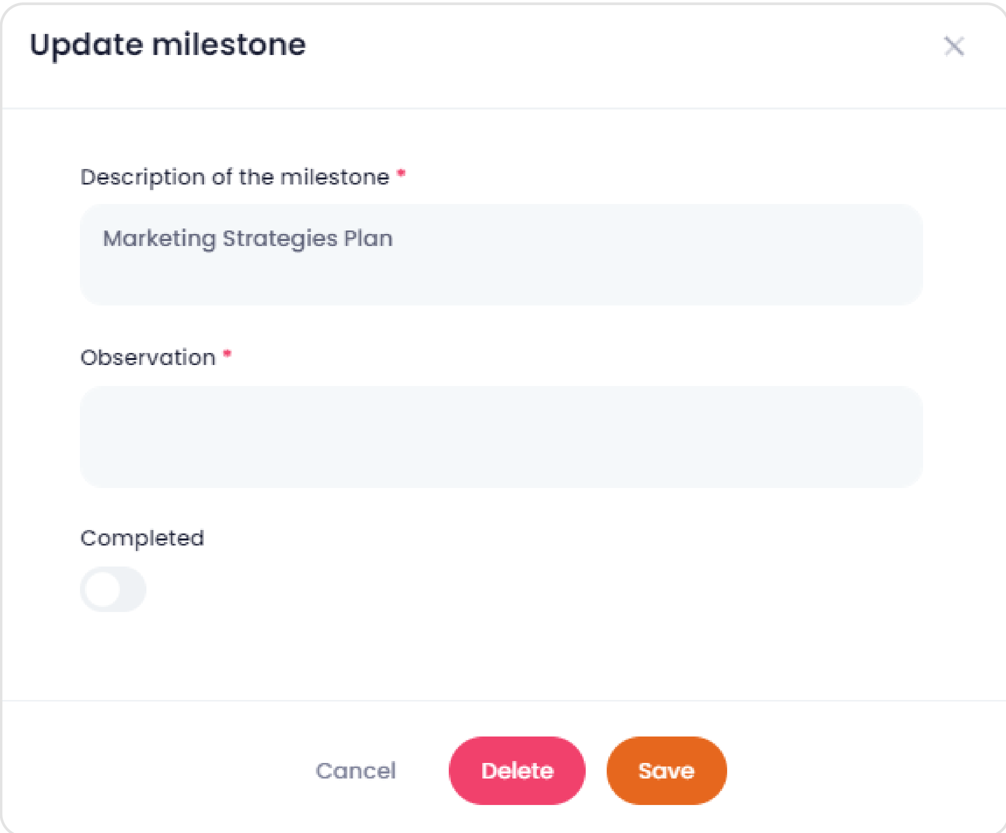


11 Management of action plans

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



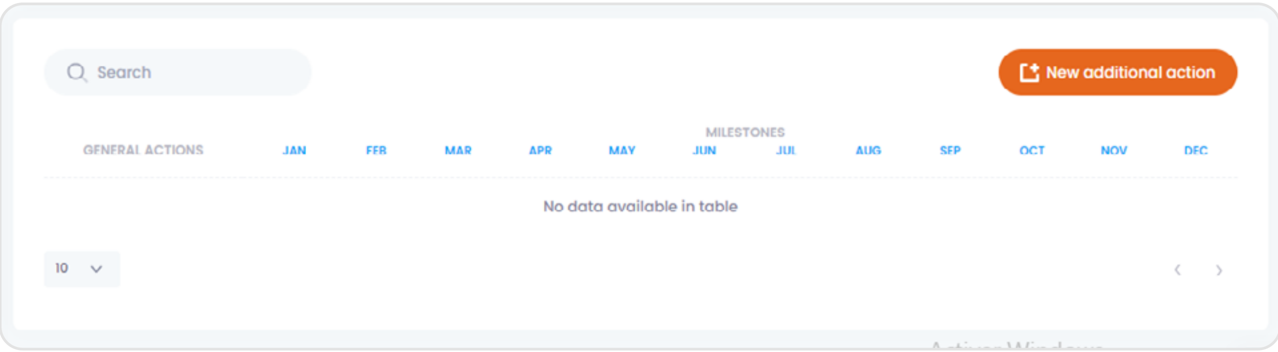
To edit a milestone press the blue button representing the milestone, then a form will be displayed as shown in the following image:



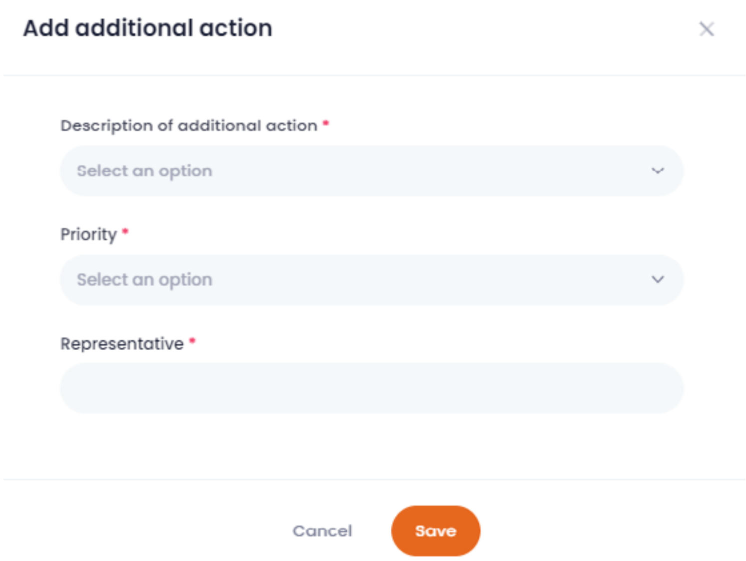
In addition to editing the description and the observation of the milestone you can also mark it as completed, this will cause the milestone to change color which will indicate that it has been fulfilled for implementation.

11.8. 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.

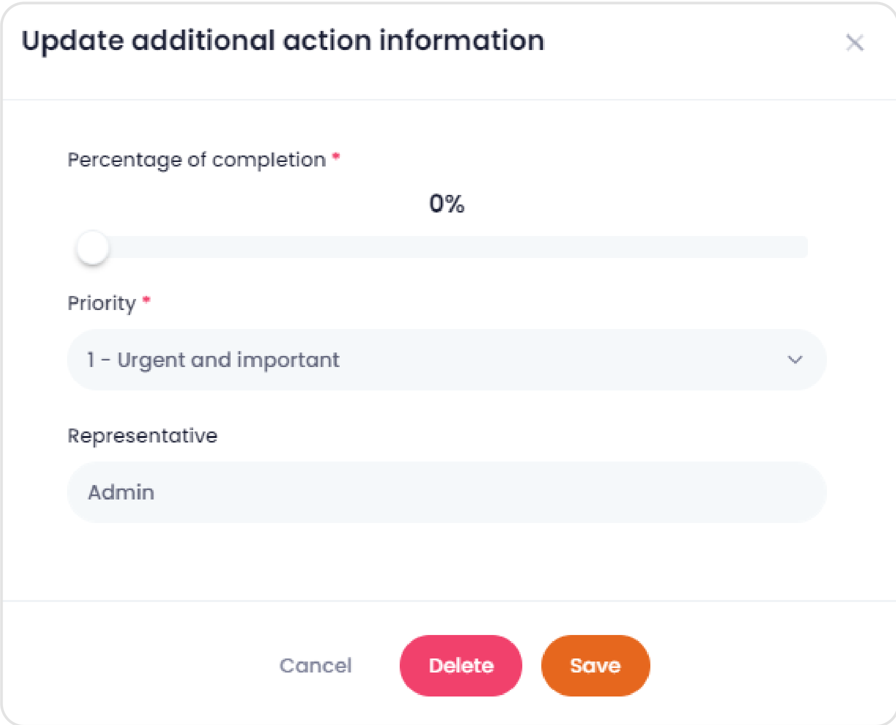


To create a new additional action press “New Additional Action”, then the following form will be displayed:

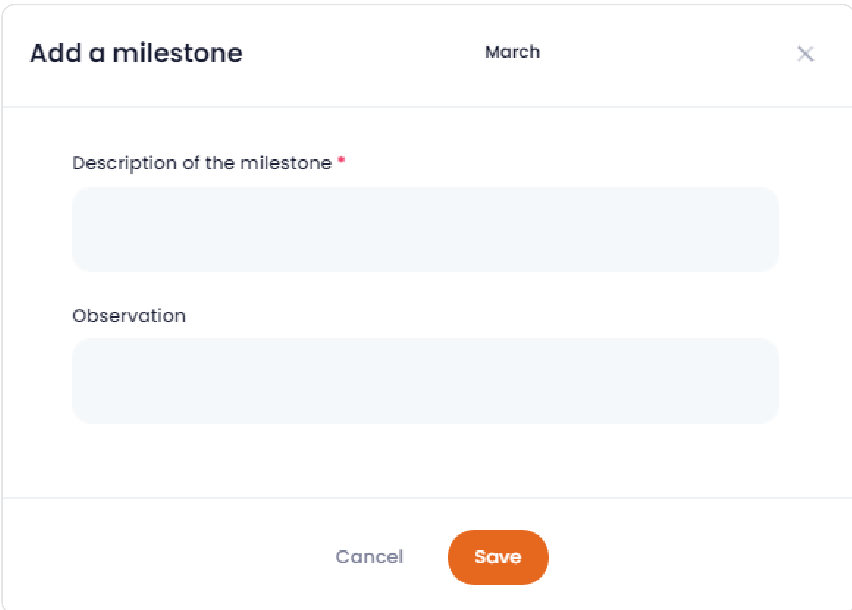


11 Management of action plans

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.

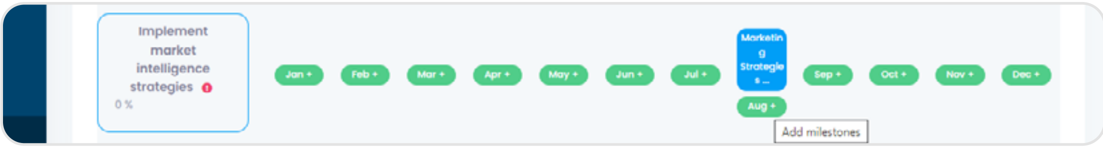


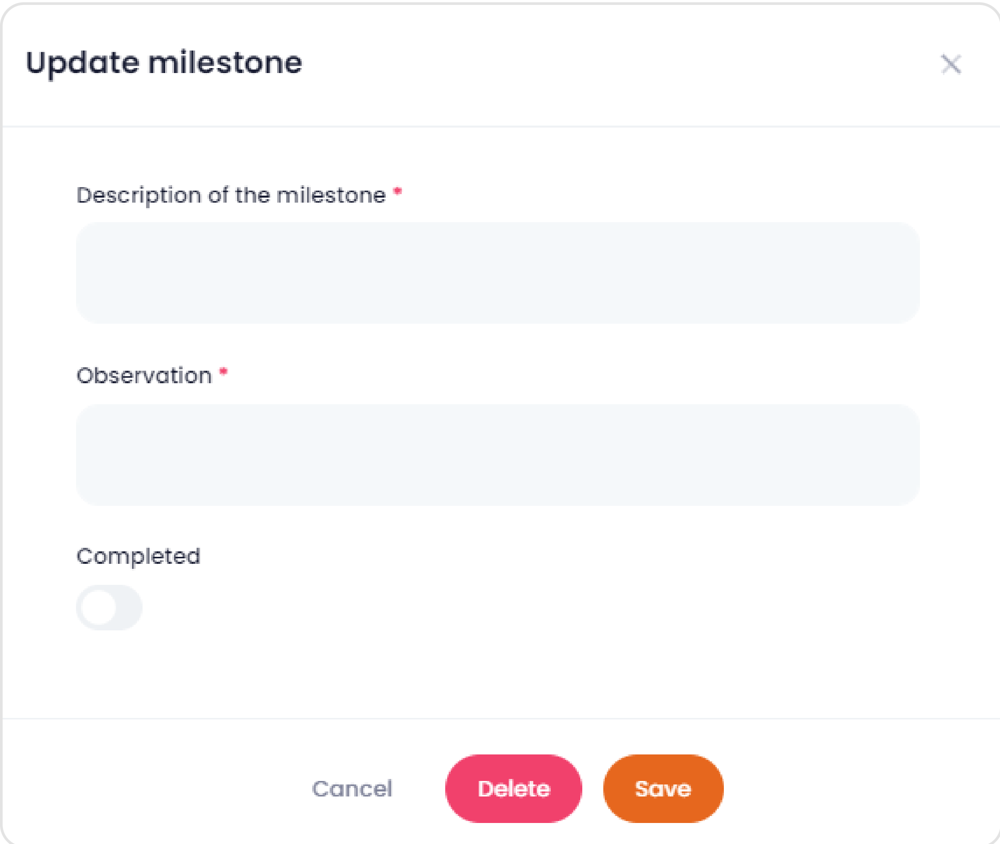
To add a new milestone to an additional action, similar steps are taken to create milestones in the general actions, just press the green buttons and complete the form that will allow adding a milestone.



11 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.





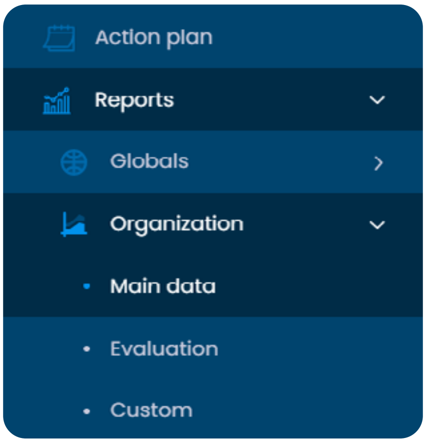
11.9. Print an action plan

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.

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

12 Organization Report

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



12.1. Report of the main data of the organization

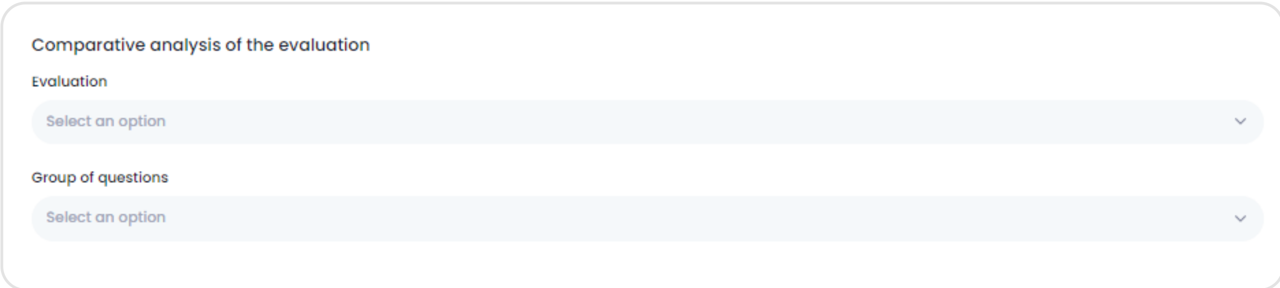
dmoc

12.2. Assessment report of the organization

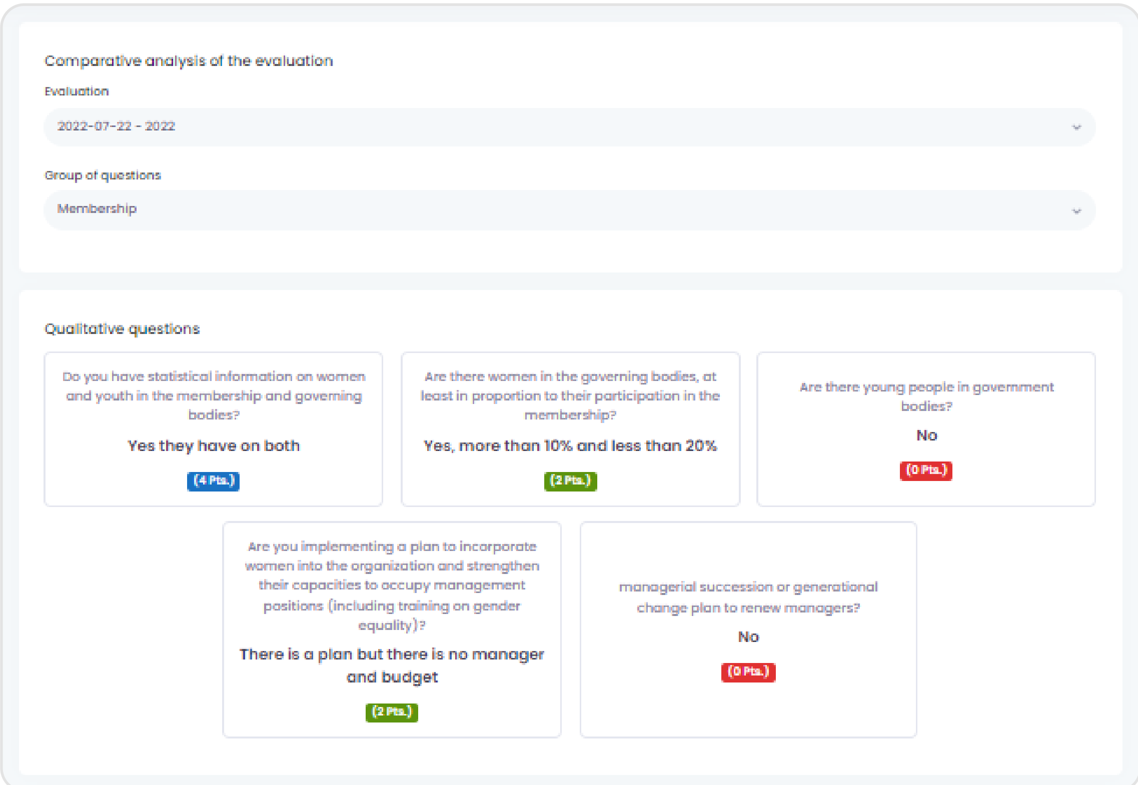
See above, which is the same as if you press “Results” of an assessment.

12.3. Personalized report of the organization

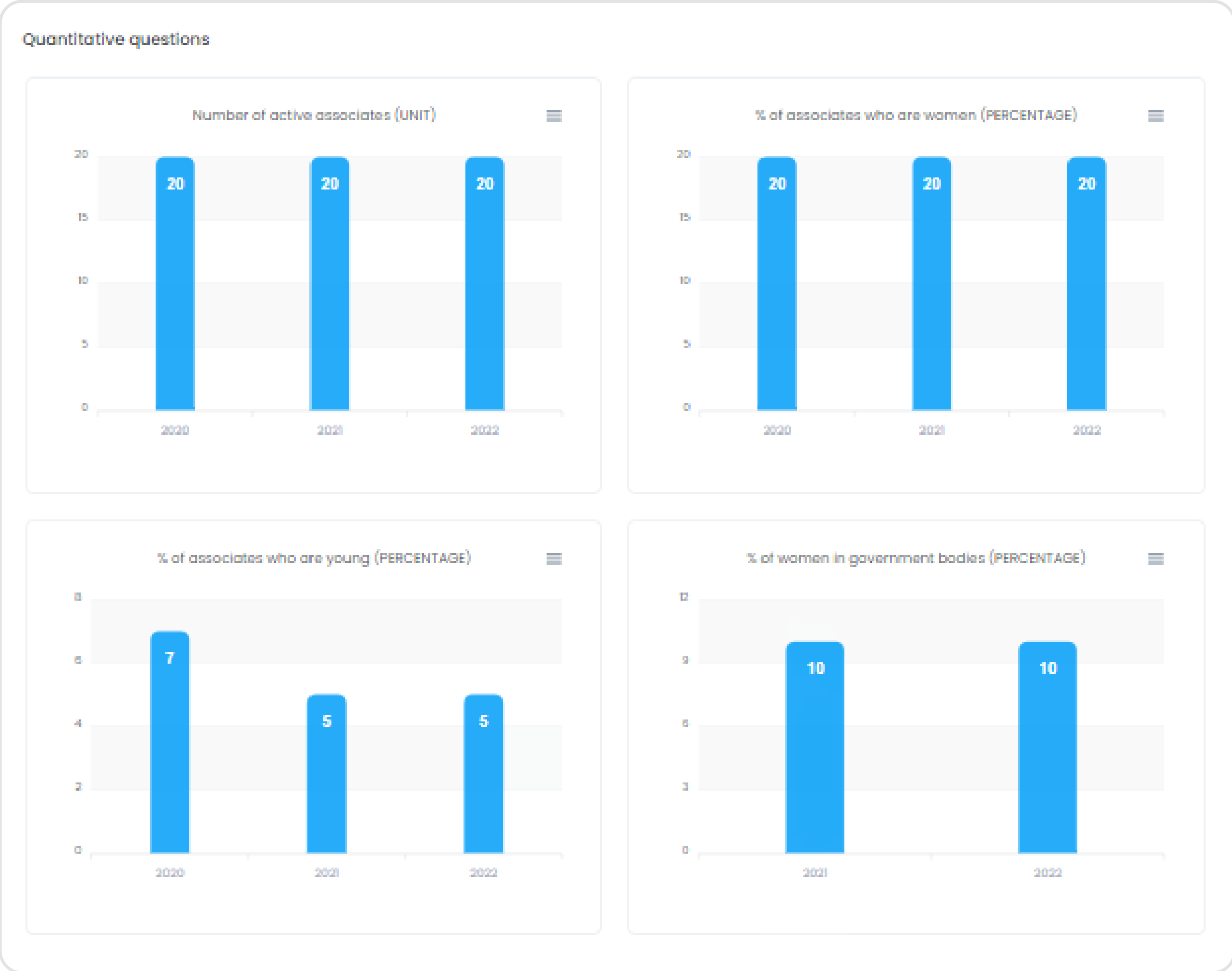
This report shows defined groups of qualitative questions related to qualitative questions that define a common theme. It is necessary to select the required assessment fields and name of the custom report group.



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

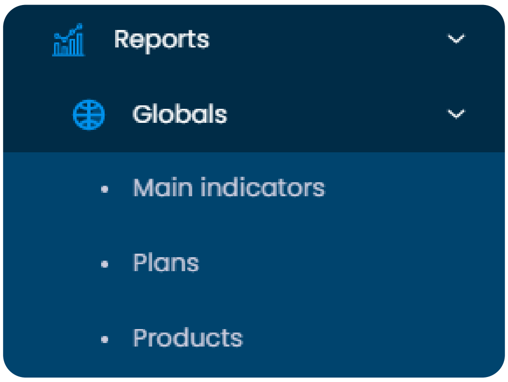


12 Organization Report



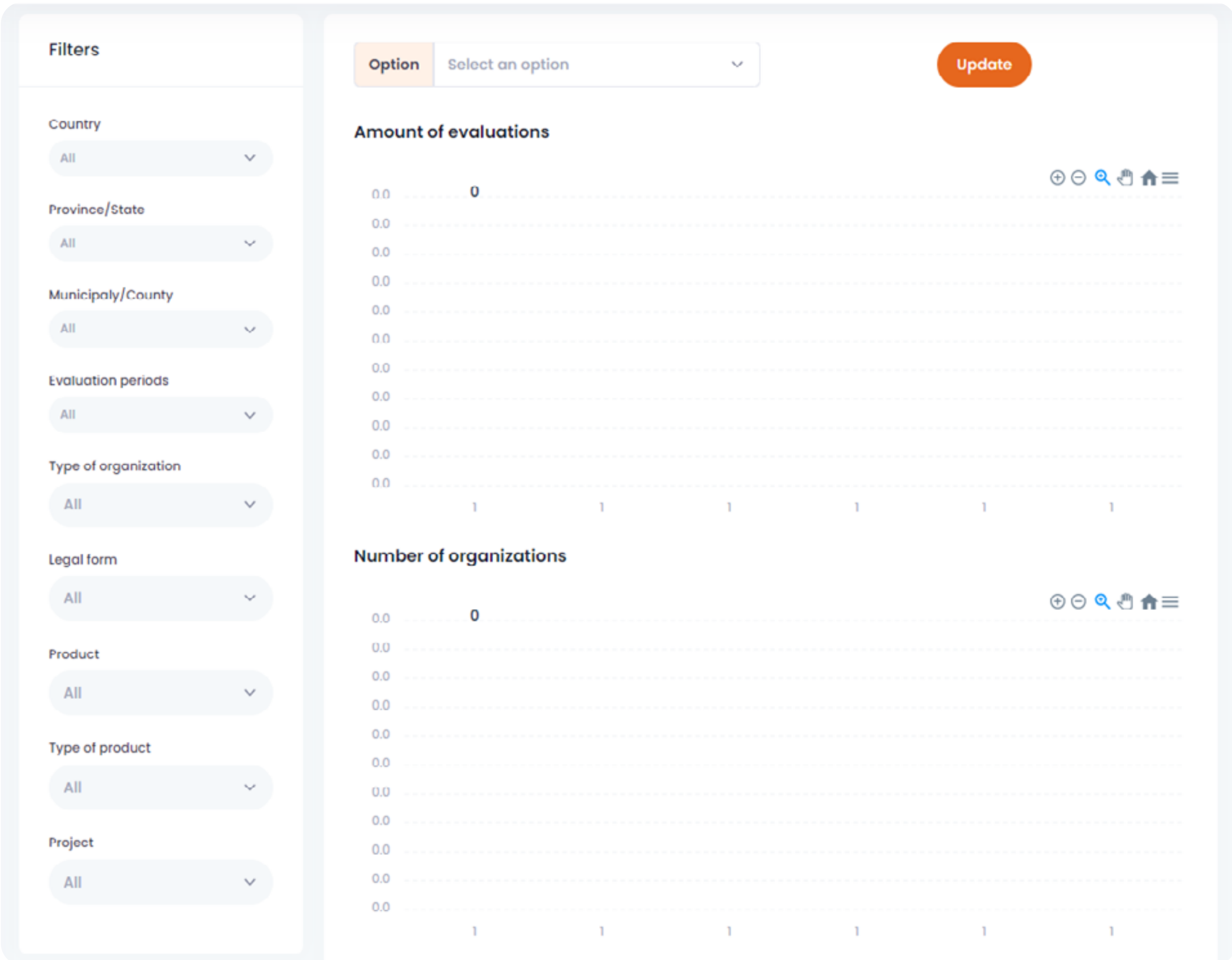
13 Global reports

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.

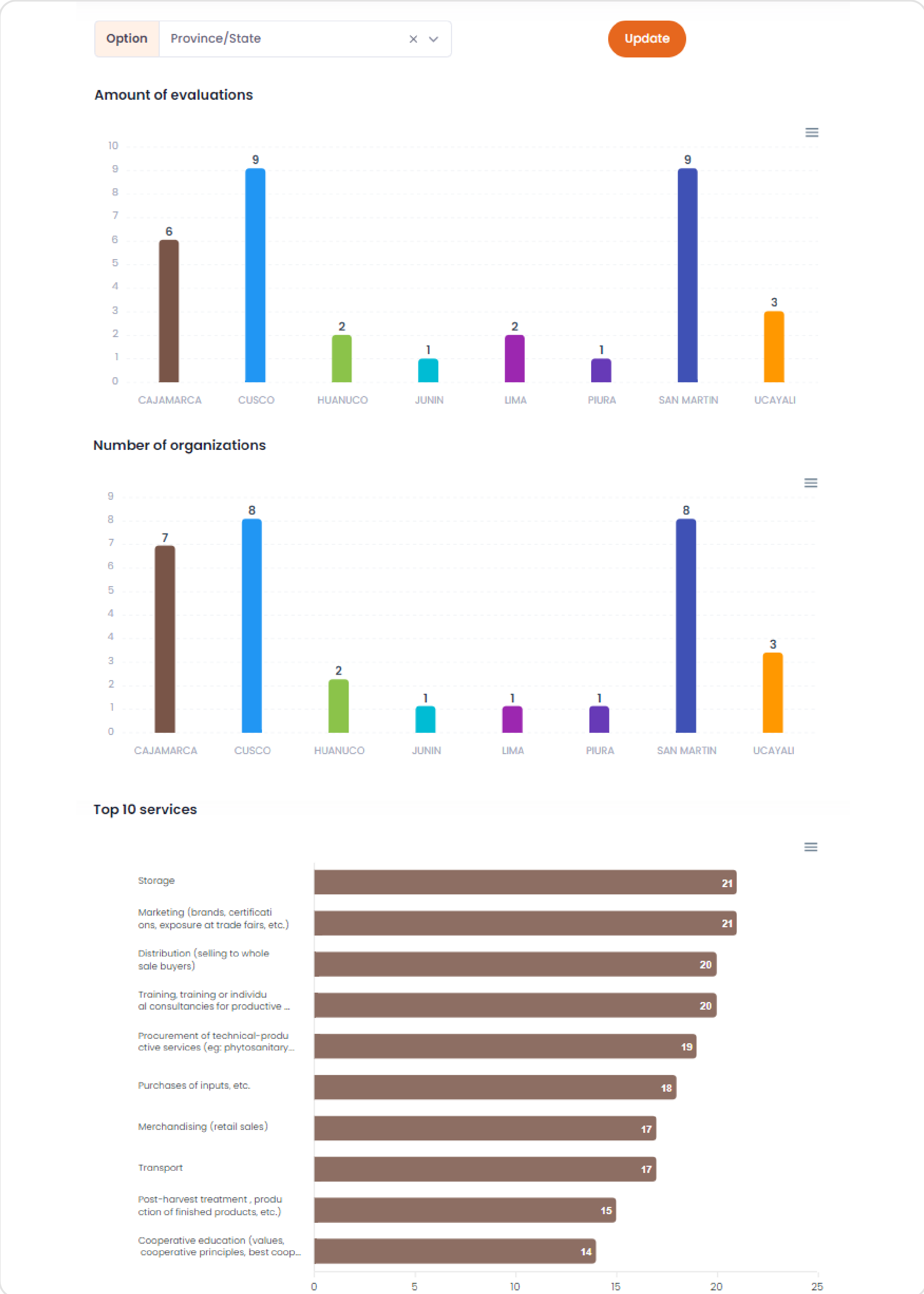


13.1. Main indicator

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:



13 Global reports



13 Global reports

13.2. 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.

13.3. Products

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

14 Glossary of terms

14.1. Projects

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

14.2. User

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

14.3. 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.

14.4. 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.

14.5. 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.

14.6. 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.

14.7. 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.

14.8. Super administrator

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

14.9. Organizations

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

14.10. 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.

14.11. Levels

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

14.12. 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.

14.13. 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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NCBA CLUSA National Cooperative Business Association • CLUSA International