TIPS AND TRICKS FOR USING EVAL-TRACK

EVAL-TRACK: THIS IS THE MODULE CONTAINING ALL PLANNING AND PROCESS DOCUMENTS FOR EVALUATION PLANS.

To find evaluation planning and process documents:

EVAL-Track serves as the storage for process documents such as evaluation Project Approval minutes, TORs, Inception Reports, draft reports and sometimes the CVs considered for the evaluation. **To see a list of searchable fields, <u>click here</u>.**

FINDING A SPECIFIC EVALUATION

<u>Click here</u> to retrieve a specific evaluation using the TC/Symbol

<u>Click here</u> to retrieve a specific evaluation using geographic criteria

BROWSING THROUGH EVALUATIONS

<u>Click here</u> to select a range of evaluations EVAL TYPE, NATURE, TIMING

<u>Click here</u> to search and browse by ADMIN or TECH units **criteria**

CREATING SPECIFIC QUERY REPORTS FOR EXPORT TO EXCEL

<u>Click here</u> to use CREATE LIST

TO VIEW EVALUATION PLANNING DOCUMENTS: Process Documents, Reports linked in DOCU-Track, Recommendation, Lessons Learned and Good Practices Modules

Click here to learn how to access process documents

Click here to view the full report in DOCU-TRACK

Click here to learn how to view Recommendations, Lessons Learned, Good Practices

MANAGEMENT REPORTS

Click here to generate a management report for WORKFLOW

Click here to learn how to generate the Recommendations Report

Click here to learn how to generate the Lessons Learned

Searching by TC/SYMBOL

If the user knows the TC/SYMBOL this is one of the fastest ways to find an evaluation, and all the records that belong to a project. Query results will list all documentation related to the chosen TC/SYMBOL, offering the user the possibility to find all relevant documents in one query, e.g. mid-term and final evaluations, summaries. When more than one project code is related to an evaluation, search for the most recent TC/SYMBOL.

The TC/SYMBOL might appear as INT/00/000/000. This happens in cases of RBSA or thematic evaluations which do not link to a specific project.

If the user does not know the TC/Symbol then it is best to browse a selection of reports by country or region and some date criteria

Searching by geographic fields: Main Country/Region   Additional countries   Region

Country Searches using the Main Country/Region field: Each EVAL record has one geographic code and this is linked to TC/Symbol. TC Symbols begin with a three letter geographical code. URT/05/05/USA is Tanzania, BEN/01/01/SPA is Benin, etc. Regional project codes are:

RAF for African region	**RAB for Arab States**	**RAS for Asia Regional**
RER, for Europe and Central Asia		**RLA for the Americas.**

Searching for all evaluations in a country: TWO queries are needed to pick up all instances of country activity and they must be done separately.

- Conduct a query selecting one option in the **Main country/Region** field (select from pull down menu)
- Conduct a query using the **Additional countries** field where the user types in the ENGLISH name of the country

The user can also search by **REGION**.

Searching by Evaluation Type - Nature   -   Timing

Evaluations have different types, timing and levels of independence. This information is reflected in the options for these fields. Use   CTRL CLICK to choose more than one option when searching.

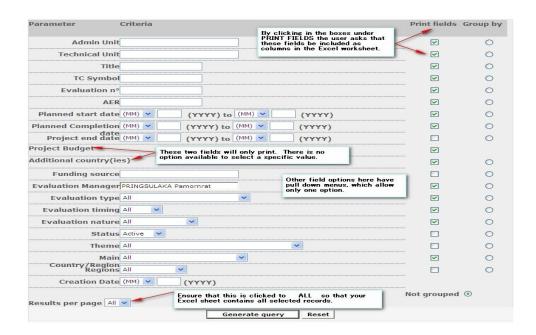| Types	Nature	Timing
Country programme evaluation	**Cancelled**	**Final**
DWCP Internal Review	**External**	**Interim**
Organizational review	**Independent**	**Other**
Partnership Evaluation	**Internal - DWCP**	
Policy evaluation	**Internal - project**	
Project evaluation – Under joint program		
Project evaluation – External		
Project evaluation – Over 5 million		
Project evaluation		
RBSA funded activity		
Strategy evaluation		
Synthesis review		
Strategy evaluation		
Thematic evaluation		

Searching using ADMIN or TECH Unit criteria

The ADMIN and TECH unit fields are selected to reflect the offices which are administratively and technically backstopping the project. These are pull-down menus populated by the IRIS official list.

Exporting query results to EXCEL   -   in   CREATE LIST

If the user intends to generate an Excel file they must:

- **Ensure the Browser supports the full display of the query results. Try a different browser if the lay out is bad.**
- **Adjusting the query formulation for RESULTS PER PAGE =   ALL : Before submitting the query this must be set to ALL.**
- **Do not use the SORT BY option on the query screen: This can be used when using a simple search and accessing only the query results in i:Track. If the user intends to export to EXCEL, no SORT BY options should be selected.**

printing options: Results per page: This should be set at **ALL** if the user intends to export the query results to Excel, otherwise, results are broken up into pages

Sort By: This offers the right to sort query results by a selection of fields. If the user intends to export to Excel, this should not be used and sorting should be done from Excel

Accessing process documents

Go to the bottom of the Eval Record page. Click on Detailed evaluation information

View the full report in DOCU-TRACK

Go to the bottom of the Eval Record page. Click on VIEW REPORT. This takes the user into the DOCU-Track module record containing the report.

View recommendations, lessons learned and good practices modules

Go to the bottom of the Eval Record page. Click on any of the options there for recs, LLs, GPs. The system will list any that have been entered. If you want to generate a management template go to the management report section.

Generating a Workflow Report **- Used for looking at a regional portfolio**

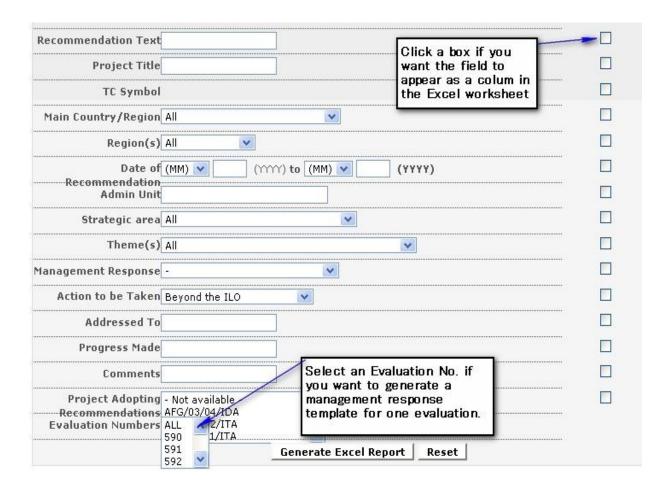**The following screen generates an Excel worksheet based on criteria chosen here.**

Excel sheet is generated, due to some bugs this needs 1) formatting, 2) fix: In Excel, select DATA, REMOVE DUPLICATES.

i-Track Database – Tips & Tricks

Generating a Management Report for Recommendations

The following screen generates an Excel worksheet containing whatever fields you include by ticking on the box. The resulting Excel sheet needs some formatting, but is accurate.

Click a box if you want the field to appear as a colum in the Excel worksheet

Select an Evaluation No. if you want to generate a management response template for one evaluation.

Generating a Management Report for Lessons learned (forthcoming)

List of Searchable Fields in EVAL Track

Searchable Fields - presented as they appear on the search screen

Title: The title of the project, with a notation at the end on the type

Eval No. This is the unique code assigned by the i:Track system

TC/Symbol This is the project number set by PARDEV.

Funding Source: IRIS list of donors

Oracle Code: IRIS code

Evaluation Manager: This is a pull down menu of ILO staff. It is initially entered with the name of the official known to backstop the ADMIN unit designated in the Approval minuteand is updated later once the evaluation manager is actually appointed.

Status: Indicates active or completed,

Dates: Linked to the date the evaluation starts or ends.

Countries: Country Searches using the Main Country/Region field: Each EVAL record has one geographic code and this is linked to TC/Symbol. TC Symbols begin with a three letter geographical code. URT/05/05/USA is Tanzania,

RAF for African region **RAB for Arab States** **RAS for Asia Regional**
RER, for Europe and Central Asia **RLA for the Americas**

TWO queries are needed to pick up all instances of country activity and they must be done separately. Conduct a query selecting one option in the Main country/Region field Conduct a query using the Regional project countries field (ENGLISH name of country) The user can also search by REGION.

Theme: Theme is more for searching finalized reports in DOCU-Track.

Eval Type: Includes a range of different document types.

Eval Nature: Includes a range of options related to level of independence of an evaluation

Eval Timing: Final - Interim - Other

Regional Project Countries: This field contains a simple **text** list of countries included in regional projects (English only). The user can simply type a country name to retrieve regional projects that cover the country. **Use only one country at a time in this field**.

Regions: Browse through list and CTRL CLICK the items if more than one region is queried

Admin Unit: Office responsible for administering the project (on Approval Minute)

Tech Unit: Office responsible for technical backstopping on Approval Minute)