

OPSYS Presentation

How to use OPSYS?

*DEVCO R4
19 March 2019*

Agenda

1. Introduction to OPSYS : What is OPSYS? OPSYS Global Planning
2. Results and Monitoring: Key Functionalities and Milestones
3. Contracts and Procurement: Key Functionalities and Milestones
4. Presentation of Change Management

INTRODUCTION TO OPSYS

What is OPSYS?

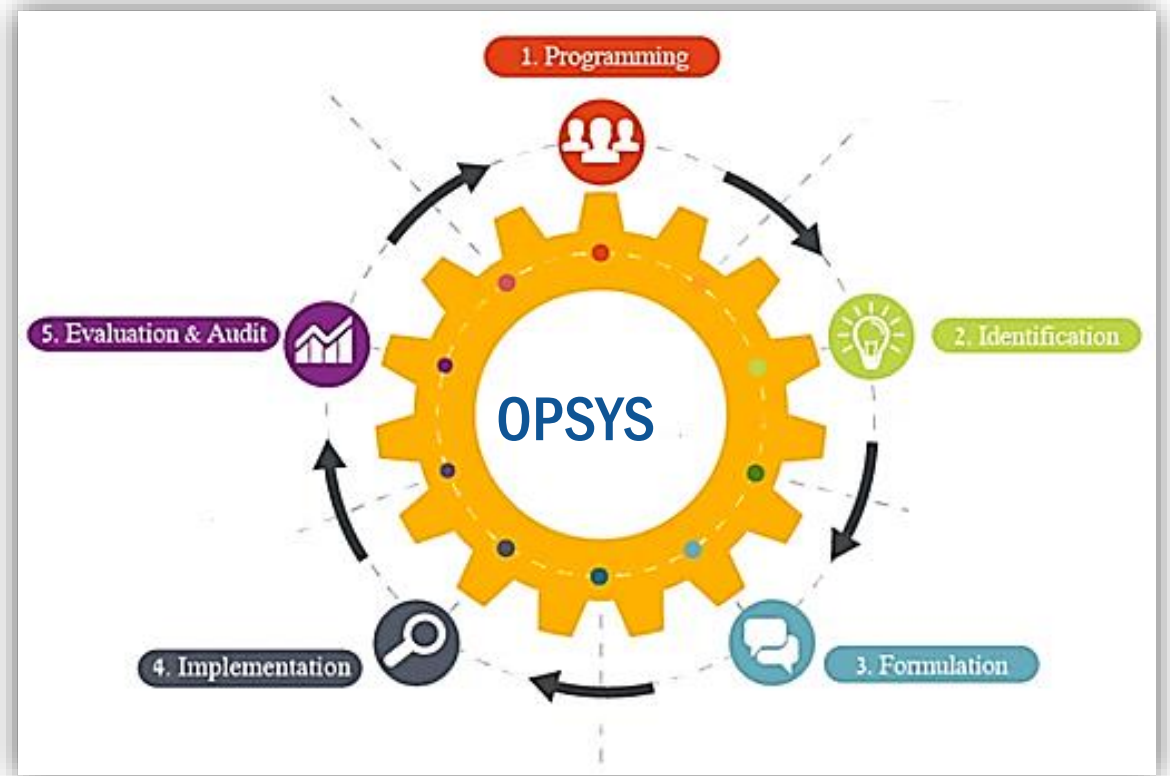
OPSYS is the new one-stop-shop for the effective and efficient management of the entire EU external relations portfolio of projects and programmes throughout the project cycle, from programming to evaluation and audit

OPSYS will **integrate:**

- **CRIS**
- **ROM & EVAL**
- **E-Procurement**
- **PROSPECT**
- **PADOR**
- **Audit**
- **Grant Management**
- **GIS**

OPSYS will **interface with:**

- **ABAC**
- **ARES**
- **EAMR**



Why do we want OPSYS?

User centricity:

- User centred: my workplace, portfolio, projects and programmes
- User friendly look and feel
- Receipt of notifications about tasks pertinent to each specific user



Velocity and trustworthiness:

- Faster link between progress reports and invoices
- Cheaper, easier and safer tendering and grant procedures: e-signature
- External users gain access to the system
- Automatic generation of documentation/contracts

Ease of use:

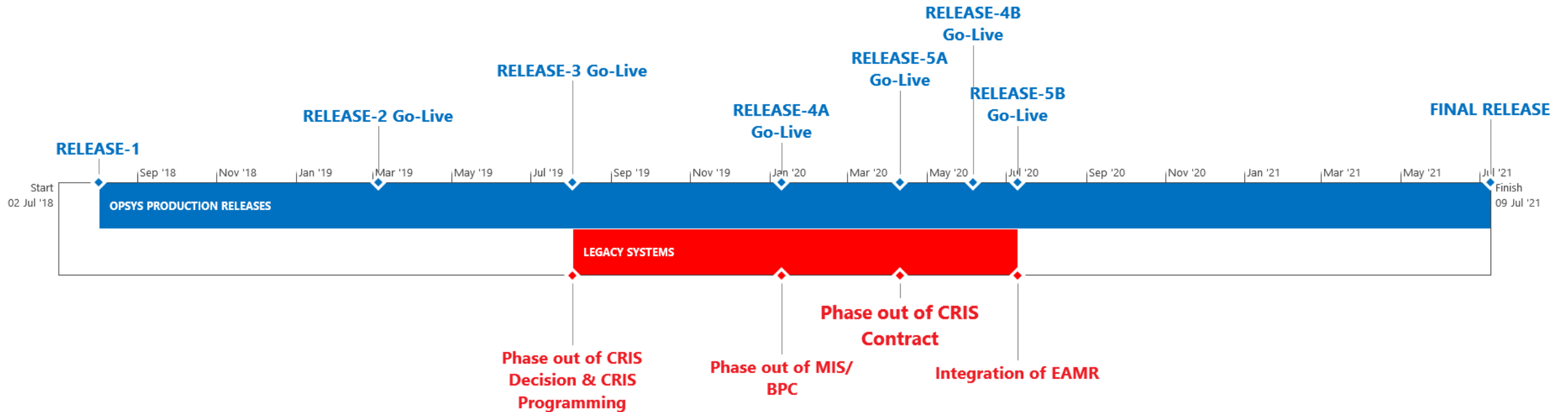
- Single interface covering all the workflows of the project cycle and providing access to all applications
- No re-encoding
- Will allow progress and completion reports to be submitted and approved online
- Core and corporate indicators stored in the system for re-use
- Ability to delegate tasks to colleagues
- Offline mode
- Automatic interface with ABAC
- E-signature

OPSYS Stakeholders

- *European Commission staff:*
 - HQ, EUDs, and FPI Regional Teams
 - Finance and Contracts Sections
 - Operational Sections
- *Partner Countries:*
 - NAOs
 - Line Ministries
- *Implementing Partners - Contractors:*
 - NGOs, consulting companies, etc.
 - All bodies that have a contract with the EC

OPSYS Global Planning

Releases and Integrations



OPSYS Key Features

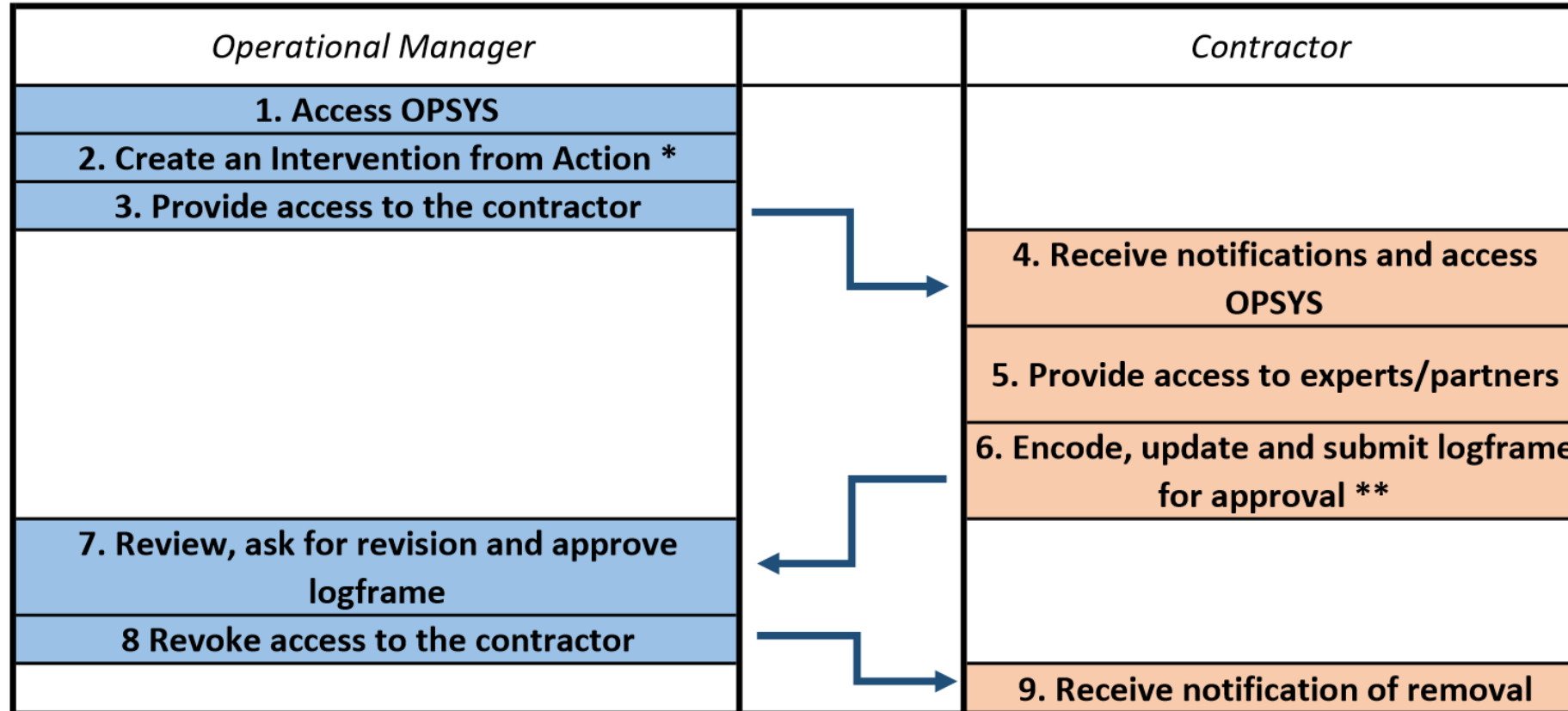
Releases	Tracks	Key Features	Phase-out & Integration
Release 2 MAR 2019	Results	<ul style="list-style-type: none"> Quality Manager Features: <ul style="list-style-type: none"> Manage Core Indicators Grouping of Aggregable Indicators Quality Control of values linked to Aggregable Indicators Disaggregation Types Units of Measure Qualitative Types Sources of Verification Results visualization Results encoding & review for all EUDs and HQ - LF migration Agnostic LogFrame 	
	Data	<ul style="list-style-type: none"> Import data from CRIS (CRIS sync) and daily update 	
Release 3 AUG 2019	Results	<ul style="list-style-type: none"> Budget Support + Blending (alpha version) – new container type(s) host indicators – values can be added but – reporting through materialized views Risk Assessment (POC) Import/Export of Logframes (with existing info and format chosen xml/json) 	Phase-out of CRIS Decision & CRIS Programming
	Contracts	<ul style="list-style-type: none"> Submission of a structured offer (for the SIEA procedure) Award of the contract Preparation of the Specific Contract (based on the SIEA Specific Contract template) with structured data previously entered, including the DAC form and budgetary commitment level 2 (CL2) among other data CL2 validation and electronic signature of the contract by the Authorising Officer Management of deliverables Management of amendments (without modification of the amount) Management of contractual correspondence A contractor can consult his offer at any moment (even after submission) Manage procedural corrigenda and requests for clarifications Pre-financing for specific contract 	

OPSYS Key Features

Releases	Tracks	Key Features	Phase-out & Integration
Release 4 Jan-2020	Results	<ul style="list-style-type: none"> Narrative reports Upload of documents related to results (sources of verification) - via COMPASS Corporate Risk assessment (<i>Full version</i>) Follow-up of key events/milestones 	Integration of ROM and EVAL Modules within OPSYS EAMR Integration
	Contracts	<ul style="list-style-type: none"> Closure of contract 	
Release 5A APR 2020	Contracts	Go-Live of “all procedures” (with some workarounds) <ul style="list-style-type: none"> Target release functional architecture Preparation and publication for procurement & grant procedures The launch of a RELEX procedure such as a programme estimate that do not need a publication will also be supported Evaluation and awarding for all procedures (procurement, grant & RELEX) Contracting processes for all procedures (procurement, grant & RELEX) Amendments for for all procedures (procurement, grant & RELEX) Deliverables management for all procedures (procurement, grant & RELEX) Pre-financing for all procedures (procurement, grant & RELEX) Prospect supporting grants in OPSYS Legacy PROSPECT module support 	Phase out of CRIS CONTRACT & PADOR
			Integration of PROSPECT
Release 5B Jul 2020	Results	<ul style="list-style-type: none"> Linkage of logframes and narrative reports with invoices and payments (link with Track 2) 	

RESULTS AND MONITORING

OPSYS TODAY - WORKFLOW



* Use the already existing interventions

** The submission of the Logframe with updated values can be done at any time

The screenshot shows the OPSYS homepage layout. A dark blue header bar contains the 'My workplace' title and navigation icons. Below it is a sidebar with links to Home, Portfolio, Tasks, Search, and Notifications. The main content area is divided into three sections: 'My portfolio' (a list of interventions), 'My portfolio status' (two charts: 'Results' and 'EU contribution'), and 'My tasks' (a list of tasks). A red circle highlights the 'Intervention for Demo' entry in the 'My portfolio' list. A yellow box on the right contains a numbered list of features corresponding to the arrows: 1-Menu, 2-Overview of portfolio, 3-Portfolio status, 4-My tasks, 5-Profile, 6-Notifications. At the bottom, a footer contains copyright and legal information.

European Commission | Opsys

Welcome DIGIT-OPSY-FOXTROT
11:50 Belgium - Brussels (GMT+02:00)
11:50 Belgium - Brussels (GMT+02:00)

My workplace

Home

Portfolio

Tasks

Search

Notifications

My portfolio

Filter Expand all

TEST Intervention - Noemi Kovacs
BUDGET €7,500,000.00
CONTRACTS 0/30 TASKS 1

TEST Intervention - Elena Faga
BUDGET €7,500,000.00
CONTRACTS 0/30 TASKS 0

TEST Intervention - Loic Bourguignon
BUDGET €7,500,000.00
CONTRACTS 0/30 TASKS 0

Intervention for Demo
BUDGET €7,500,000.00
CONTRACTS 0/30 TASKS 0

Action for test FPI Indicators - AIVE FLOREN
BUDGET €2,500,000.00
CONTRACTS 0/11 TASKS 0

My portfolio status

Results

EU contribution

€ 55,000,000

None 4

On track 1

Issues 0

Off track 0

EU contribution € 55,000,000

Contracted € 22,999,641

Under preparation € 0

My tasks

My visas and contributions 3

My unit/delegation's tasks 23

1-Menu

2-Overview of portfolio

3-Portfolio status

4-My tasks

5-Profile

6-Notifications

Choose an intervention

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European Commission | Opsys

My workplace > INTV-0000633

Intervention

Intervention for

General information

Status

Ongoing

ACT-0007267

Operational manager

DIGIT-OPSY-FOXTR0T DIGIT-OPSY-FOXTR0T

EUD in charge

Delegation Georgia

HQ entity in charge

DEVCO/D - EU-Africa Relations, East and Southern Africa

DAC Sector

15110-Public sector policy and administrative management

My tasks

My visas and contributions

0

My unit/delegation's tasks

0

Description

Benefitting zone

Mozambique

Intervention status

Results

EU contribution

€ 7,500,000

Related entities

IPD - Indicative Programming Document

National Indicative Programme for Mozambique 2014 to 2020

Sector of concentration

Support measures

Action

Action for test 3

Edit

Access logframe

Implementing partners management

- 1-General Information
 - 2-My tasks
 - 3-Description
 - 4-Intervention status
 - 5-Related entities
 - 6-Edit; Access LFM, IP management
- Scroll down
- 7-Timeline and progress
 - 8-List of contracts and calls related to this intervention

Give access to IPs

European Commission | RESULTS PORTAL

Welcome opsyt Uat (n0028fiv)

Home

My Dashboard

Tasks

My Notifications

My Notification(s)

Inbox Preferences

Search..

<input type="checkbox"/>	Date ↕	Source ↕	Subject ↕	Priority ↕
<input type="checkbox"/>	26-07-2018 15:56:19	RESULT	Logframe values approved - Valeurs logframes approuvées	NORMAL
<input type="checkbox"/>	26-07-2018 15:49:19	RESULT	Logframe approved - Logframe approuvé	NORMAL
<input type="checkbox"/>	26-07-2018 15:39:27	RESULT	Logframe to be revised - Logframe à réviser	NORMAL
<input type="checkbox"/>	26-07-2018 15:19:23	OPSYS OE	You are assigned as Lead IP - Vous êtes assigné comme Lead IP	NORMAL
<input type="checkbox"/>	24-07-2018 15:01:08	OPSYS OE	You are assigned as IP - Vous êtes assigné comme IP	NORMAL
<input type="checkbox"/>	23-07-2018 11:00:54	RESULT	Logframe approved - Logframe approuvé	NORMAL
<input type="checkbox"/>	20-07-2018 16:58:06	RESULT	Logframe to be revised - Logframe à réviser	NORMAL
<input type="checkbox"/>	19-07-2018 16:15:25	RESULT	Logframe values approved - Valeurs logframes approuvées	NORMAL
<input type="checkbox"/>	18-07-2018 16:41:32	RESULT	Logframe approved - Logframe approuvé	NORMAL
<input type="checkbox"/>	18-07-2018 15:57:44	OPSYS OE	You are assigned as IP - Vous êtes assigné comme IP	NORMAL

1 2 3 4 5 10

1-Menu
Dashboard
My tasks
Notifications

2-My Notifications

Operational Manager

Implementing Partner - Contractor



Intervention for Development

LOGFRAME

Current status

APPROVED

Open all

1. Overall Objective

Result 1

001 | 1. Indicator

Current value [object]

MANAGEMENT MODE

Add Indicator - Search for an existing Indicator

Search filters: 15110 - Public sector policy and administrative management Overall Objective - Impact

Type part of the Indicator name

+More search criteria

List of Indicators matching your search criteria 19 results found

CORPORATE INDICATORS

EURF 1-13 EURF 1-13 Change in domestic revenue mobilisation as a percentage of GDP over the last three years.	Quantitative / Numeric
EURF 1-31 EURF 1-31 Proportion of seats held by women in national parliaments	Quantitative / Numeric
EURF 1-32 EURF 1-32 Percentage of women aged 20-24 years old who were married before their 15th/ 18th birthday	Quantitative / Numeric
EURF 1-4 EURF 1-4 Average Rule of Law score(as measured by the Worldwide Governance Index)	Quantitative / Numeric
EURF 1-5 EURF 1-5 Average Control of Corruption score (as measured by the Worldwide Governance Index)	Quantitative / Numeric
EURF 1-6 EURF 1-6 Average Voice and Accountability score (as measured by the Worldwide Governance Index)	Quantitative / Numeric

CORE INDICATORS

Country ranking according to the Political Stability and Absence of Violence Dimension of the Worldwide Governance Indicators	Quantitative / Numeric
Country ranking according to the Rule of Law Dimension of the Worldwide Governance Indicators	Quantitative / Numeric
Fundamental Rights Country Score according to the World Justice Project	Quantitative / Numeric
Group Grievances Country Score according to the Fragile State Index	Quantitative / Numeric

Cancel Reset criteria Create new Indicator

Add Result

OPSYS-FOXT

Result Add Indicator

Edit Indicator

Cancel Save as draft

1-Add indicator by selecting filters

Operational Manager

Implementing Partner - Contractor

My workplace > INTV-0000633 > Logframe

Welcome DIGIT-OPSY-FOXTROT
11:54 Belgium - Brussels (GMT+02:00)
11:54 Belgium - Brussels (GMT+02:00)

Intervention
Intervention for Demo

Manage Logframe

1

2

1-View LFM, current status, frequency of value reporting, timeline...
2-Manage your LFM

LOGFRAME ?

Intervention Logic

Current status

Frequency

Last update by

APPROVED ?

Every 1 Year

DIGIT-OPSY-FOXTROT DIGIT-OPSY-FOXTROT 26/07/2018 15:58:57 CET

Health status

Calculated ISSUES

Override * ON TRACK X

Reason * We are the bests

Open all


1. Overall Objective - Impact
Result 1


001 | 1. Indicator name 2

Access Indicator's page ?


FTOP: one single entry point for all external stakeholders...


Link: <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home>

 **Funding & tender opportunities**
Single Electronic Data Interchange Area (SEDIA)


English 

Register Login


 SEARCH FUNDING & TENDERS ▾ HOW TO PARTICIPATE ▾ PROJECTS & RESULTS WORK AS AN EXPERT SUPPORT ▾

select programme 


The Funding & Tenders Portal is the entry point (the Single Electronic Data Interchange Area) for participants and experts in funding programmes and tenders managed by the European Commission and other EU bodies.

Feedback 

Find calls for proposals and tenders

Search calls for proposals and tenders by keywords, programmes...  Search

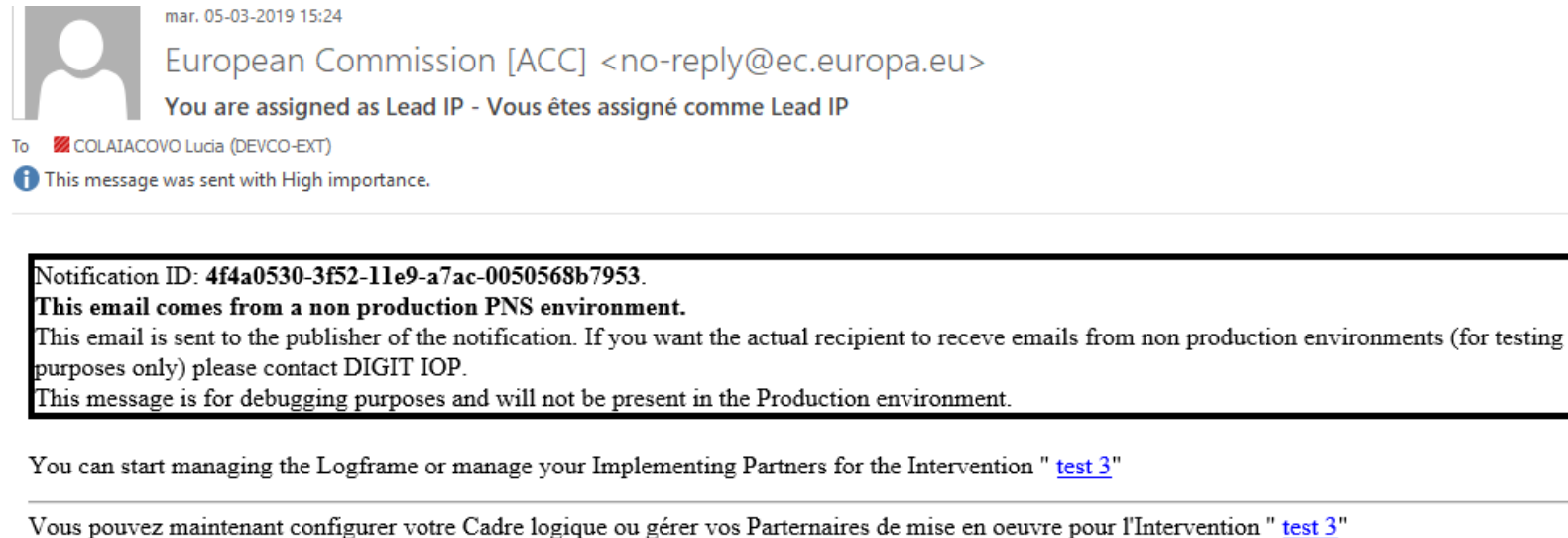
What are calls for proposals? > What are calls for tenders? > How to participate in 5 steps >

Calls for proposals by EU Programme 

3rd Health Programme	Asylum, Migration and Integration Fund	Consumer Programme	Creative Europe	Erasmus+ Programme	European Maritime and Fisheries Fund	HERCULE III	Horizon 2020 Framework Programme
Internal Security Fund Borders and Visa	Internal Security Fund Police	Justice Programme	Pilot Projects and Preparatory Actions	Programme for the Competitiveness of Enterprises and small and medium-sized enterprises	Promotion of Agricultural Products	Research Fund for Coal & Steel	Rights, Equality and Citizenship Programme

How to start using OPSYS - Implementing Partners

Step 1: Check your e-mail with the link to your Intervention. You receive the notification in your mailbox



Step 2: Click on the link and enter the Results portal. Check your portfolio of interventions.

OR

Step 3: you can add other Implementing Partners/Experts.

How to start using OPSYS - **Implementing Partners**

Step 4: Create or edit the logframe

You can now start encoding the logframe or edit the one created by the Operational Manager.

Step 5: Submit the logframe for revision and approval

Once you have finished encoding the logframe, you have to send it to your Operational Manager for approval. The Operational Manager can ask you to review the logframe.

Step 6: Add and submit current values

When the logframe has been approved (status must be "Approved"), you can add the current values and submit them to the Operational Manager. The Operational Manager can request the revision of the values submitted.

CONTRACT AND PROCUREMENT



Contract and procurement Key Functionalities



Actors and Processes of Contracts managed in Indirect Management are not represented in this slide

Contract and procurement module: Key improvements



- ☐ **Structured preparation of dossiers (tender / grant) and according to the same approach for all types of contracts**



- ☐ **Electronic submission, with structured data**



- ☐ **Electronic signature of contracts**



- ☐ **Automated generation of contracts**



- ☐ **System provides guidance to the users**

***Véronique Lena**, Team Leader, Change Management, DEVCO R4*

CHANGE MANAGEMENT

Change Management as a facilitator

- OPSYS focal points in each delegation – monthly coaching through webinars
- Testing phases with colleagues at each key moment of the development of the application (results, interventions and tomorrow contracts)
- Embedded guidance in the application (documentation and e-learning)
- Continuous support by the Change Management team on operational issues (ex: how to create an intervention). Address an email to: EuropeAid-OPSYS-USER-SUPPORT-COMMUNICATION@ec.europa.eu
- Preparation of tutorials including quizzes covering all processes developed in Release 3 (for internal and external users)

Key milestones for 2019

- OPSYS Information sessions during Regional seminars (thematic and/or FCA)
- Half-day OPSYS hands-on training during FPI Days
- OPSYS workshop and stands during Cooperation Days (13-16 May 2019)
- Two-days Seminar with OPSYS Focal Points, HoC and HoFCA (20-21 May 2019)
- OPSYS Information session, stands and live demos during European Development Days (18-19 June 2019)
- OPSYS Information session to FWC SIEA and Audit consortia (June/July 2019)
- From July 2019: all OM and FCA colleagues will perform the tutorials.

Guidance: WIKIs

- It will allow the users (internal and external) and OPSYS focal points to **stay informed** on changes and news on the upcoming releases.
- It is the primary source of **user support** in the use of OPSYS.
- It contains **step-by-steps** to guide the user through the most common actions.
- It contains **Frequently Asked Questions** and **e-learning videos** to support the use of the system

Link to WIKI for the Internal users: [My workplace](#)

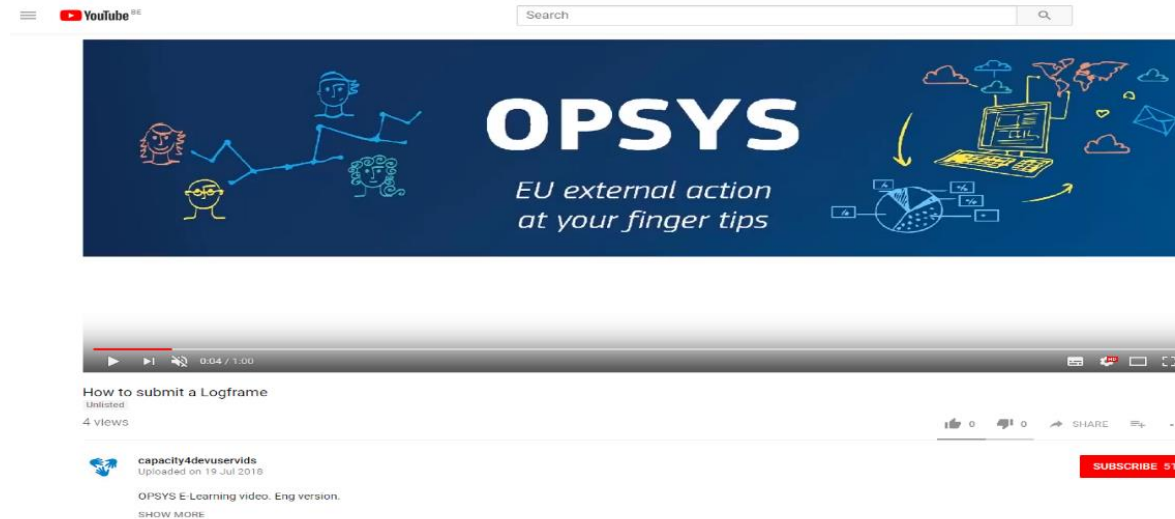
Link to WIKI for the External users: [Welcome to the portal](#)

e-Help



- Navigating on OPSYS you will find helpful hints to help you.
- By clicking on the “question mark” the user can access short texts explaining the task to be performed.
- Every e-Help request will redirect **to a dedicated page in the WIKIs**, both for internal and external users.

e-Learning videos



- To familiarise yourself or if you have problem performing certain steps in the system, a **series of short videos** has been produced to guide you, step-by-step, through the most common actions on OPSYS.
- The e-learning videos can be found in the WIKIs. You can directly access them

[E-learning videos for Internal users](#)

[E-learning videos for External users](#)

Stay tuned

Join the OPSYS Capacity4Dev group to be updated with the latest news! OPSYS group is open to both internal colleagues and external partners



<https://europa.eu/capacity4dev/opsys>

Watch and share OPSYS presentation videos by opening the hyperlink:

