



# DYNAMIC COMPAS

## USER'S GUIDE



# SOMMAIRE

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## **PREAMBLE**

This user's guide is a step by step guide to using the Dynamic COMPAS.

In it you will find:

- what is needed to install the software
- an explanation of how the Dynamic COMPAS can be used to manage a project.

It does not include a presentation of the Quality COMPAS method and the concepts behind it. This can be found in one of the following sources:

- the 'Quality COMPAS kit',
- the Dynamic COMPAS tutorial,
- the COMPAS System website ([www.compasqualite.org](http://www.compasqualite.org)),
- the various COMPAS System training sessions
- the Dynamic COMPAS help-desk, and
- numerous publications on the subject of quality within humanitarian aid.



# CHAPTER 1: PRESENTATION OF THE DYNAMIC COMPAS

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# 1 INTRODUCTION

## 1.1 *What is the Dynamic COMPAS?*

The Dynamic COMPAS is a knowledge management tool which enables information about a project to be recorded, archived and consulted. It will allow users:

- to develop accountability in concrete terms:  
*“To say what I do, to do what I say, and to prove it”.*
- to analyse and pool knowledge in order to constantly improve the service they bring to crisis-affected populations.

The Dynamic COMPAS is based on the Quality COMPAS, a **quality assurance method** specially designed for the humanitarian sector which can be used to pilot a project or to evaluate it. The Dynamic COMPAS deals with the management of the project cycle and is suitable for all humanitarian sectors in all contexts.

N.B. The Dynamic COMPAS is only one part of a global quality assurance approach. For more information on adopting a Quality approach see the Quality COMPAS website, <http://www.compasqualite.org> or contact Groupe URD.

## 1.2 *Who can use the Dynamic COMPAS?*

The Dynamic COMPAS is a tool for humanitarian programme managers and for evaluators of humanitarian action. To use the Dynamic COMPAS you need to have basic knowledge about project cycle management and the principles of quality assurance (Quality COMPAS method).

In order to get the most from the Dynamic COMPAS it is suggested that users should already be familiar with the Quality COMPAS method.

N.B. Using the Dynamic COMPAS does not replace the need to have qualified personnel nor does it remove the need to use specific technical tools for different sectors (food security, water and decontamination, etc.)

## 2 DESIGN

### 2.1 Types of window

The Dynamic COMPAS is organised using different types of window:

- **The main window** allows the user to move from one screen to another following the logical progression of work on a project (cf. the tree diagram below). The main window opens as soon as the application is launched. You are asked to identify yourself, to choose between project management and evaluation, what phase of the project you are working on, etc. There is only one main window.

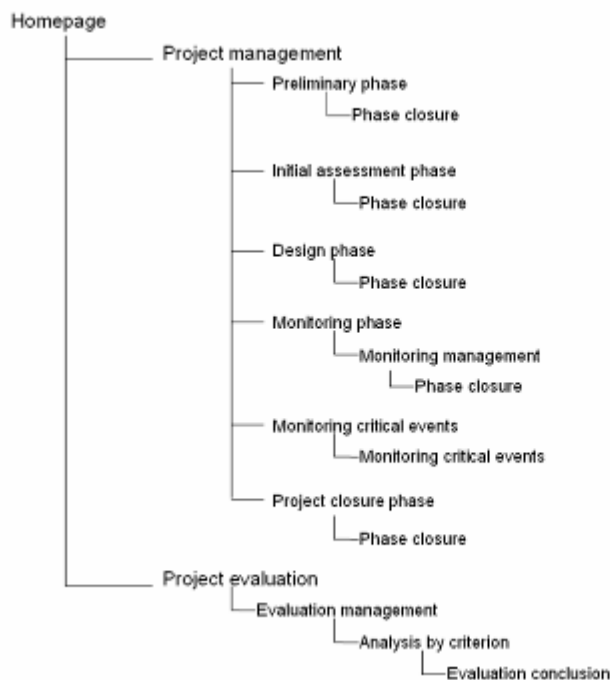
**Important:** If you close the main window, the Dynamic COMPAS closes. To return to your work, you need to identify yourself again.

- **Secondary windows** are reached from the main window or another secondary window. They contain specific work or consultation screens (answer key questions, consult project documents, consult the quality terms of reference, etc...). Several secondary windows can be open at the same time. Closing a secondary window does not close the application.

**Important:** It is preferable to close secondary windows once the work or consultation involved is finished in order to avoid having a large number of secondary windows open at the same time.

#### 2.1.1 The main window

- **A tree diagram of the Dynamic COMPAS main window**

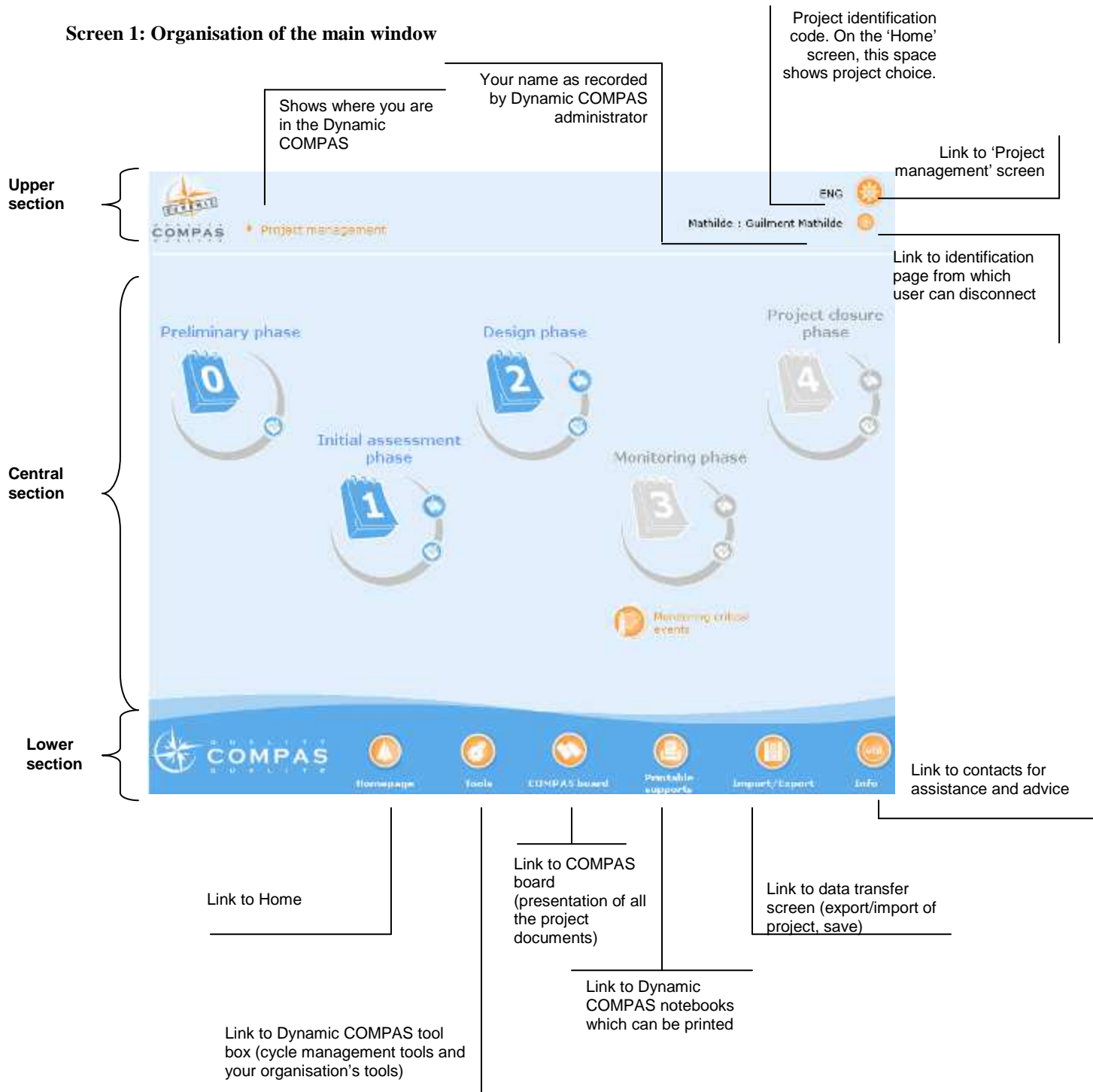


- **Organisation of the main window**

The main window is split into three sections (cf. Screen 1):

- **The upper section:** shows which user is connected, which project is being carried out and where they have reached on the tree diagram.
- **The central section:** is the work space.
- **The lower section:** has direct links to certain Dynamic COMPAS functions: return to Home, access to tool box, access to COMPAS board, etc.

Screen 1: Organisation of the main window

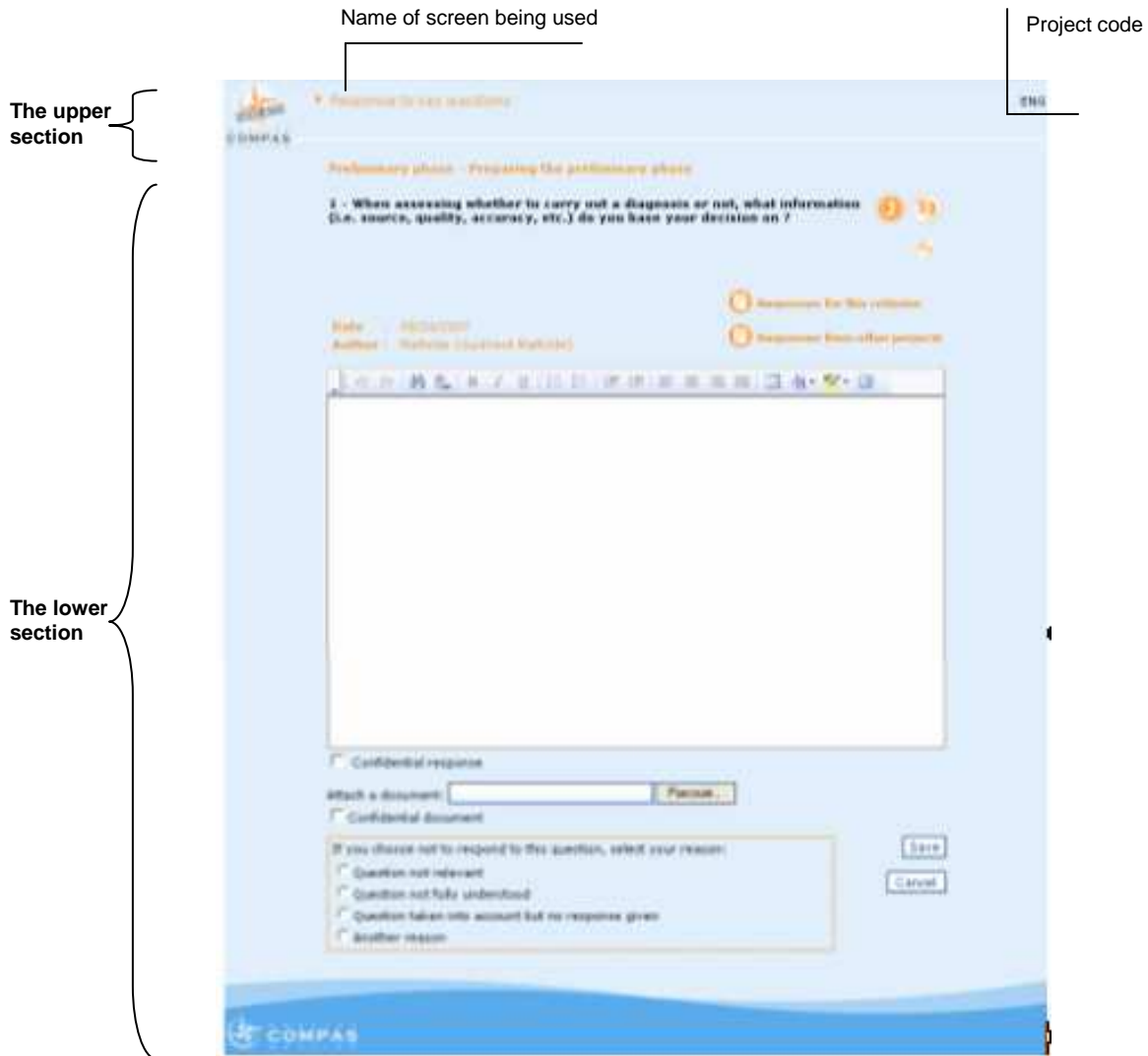


## 2.1.2 Secondary windows

Secondary windows have two sections (cf. Screen 2):

- ❑ **The upper section:** shows which project is being run and the screen title.
- ❑ **The lower section:** is the work space

### Screen 2: Organisation of a secondary window



## 2.2 Dynamic COMPAS icons

<p><b>Administration</b> </p> <ul style="list-style-type: none"> <li> Manage projects</li> <li> Create a project</li> <li> Modify a project</li> <li> Manage users</li> <li> Create a user</li> <li> Modify a user</li> </ul>	<p><b>Management and Evaluation</b> </p> <ul style="list-style-type: none"> <li> Phase</li> <li> Key questions</li> <li> Phase report</li> <li> Validation</li> <li> Monitoring critical events</li> <li> Development of critical event</li> </ul>
<p><b>Data transfer</b> </p> <ul style="list-style-type: none"> <li> Export / Save data</li> <li> Import / Restore data</li> </ul>	<p><b>Other</b></p> <ul style="list-style-type: none"> <li> Tools</li> <li> Printable support materials</li> <li> COMPAS board</li> <li> Consultation of key questions</li> <li> Consultation of phase report chapters</li> <li> Dustbin</li> <li> Generate Word document</li> <li> Generate Excel document</li> </ul>
<p><b>Quality COMPAS Method</b></p> <ul style="list-style-type: none"> <li> Criterion</li> <li> Key process</li> <li> Contact</li> </ul>	

## 2.3 Screen colour code

The Dynamic COMPAS uses a three-colour code:

- **Grey** indicates that the work is **not yet possible** (the preceding stages have not yet been validated and/or closed)
- **Blue** indicates that the work is **available/being carried out**.
- **Orange** indicates that the work is **finished, validated, and/or closed**

These colours are used for all functions of the Dynamic COMPAS.

For example: to indicate that a response has been given to a key question, the icon changes

from:  to  .



## CHAPTER 2: INSTALLING AND RUNNING THE Dynamic COMPAS

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# 1 TECHNICAL FEATURES

For optimal use of the Dynamic COMPAS your computer or computer system needs to have certain characteristics.

The Dynamic COMPAS was developed using PHP5 / MySQL with an html interface. All the exchange data (export / import) uses an XML / ZIP format. A web browser such as Internet Explorer, Firefox, Camino, Opera, etc. is needed to run the Dynamic COMPAS.

The Dynamic COMPAS functions as a website, and uses the Apache web server. Its database functions using the MySQL database management system. These two servers use TCP/UDP ports to function. The Dynamic COMPAS is technically programmed to use the following ports by default:

- port 8080 for Apache
- port 3306 for MySQL (MySQL port by default)

These ports were chosen in order to avoid conflict with other applications such as Skype or the IIS web server. However, if there is conflict between ports, it is possible for a user with some technical know-how to reconfigure the ports used by the Dynamic COMPAS, by consulting and modifying `conf/_apache_mysql_port_conf.bat`. Another solution is to prevent the use of other software which uses these ports while using the Dynamic COMPAS.

For network use (allowing several people to work on the same Dynamic COMPAS), ports 8080 and 3306 need to be opened by the Firewall of the host PC.

A capacity of 85 Mo is needed to install the software on the hard drive. A project in itself does not need a lot of space. Space needed depends on the number and size of attachments. Every project can be exported. The resulting file contains the project characteristics and attachments.

The following characteristics are necessary for optimal use of the Dynamic COMPAS:

<b>Central processing unit:</b>	Pentium II minimum.
<b>Memory:</b>	The Dynamic COMPAS needs 32 Mo of RAM, but 64 Mo are recommended.
<b>Hard drive capacity:</b>	The Dynamic COMPAS takes up approximately 85 Mo on a hard drive.  The data takes up more space depending on the number of projects and attachments, and the amount of information added to the Dynamic COMPAS.
<b>Graphics resolution:</b>	VGA or better.
<b>Operating System:</b>	Windows 95, 98, NT, 2000, XP.

## 2 INSTALLING/UNINSTALLING THE SOFTWARE

### 2.1 Installing the software

1. Open the following web page:  
<http://www.compasqualite.org/fr/compas-dynamique/supports-compas-dynamique.php/>

2. Before downloading the software you have to register. Registered users receive Dynamic COMPAS updates and patches. (Note: once your email address has been recorded it is not necessary to re-register to download new versions of the software).

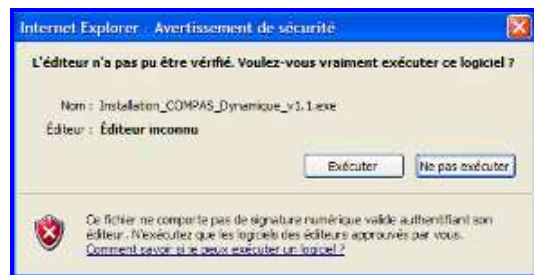


3. You can now download the software. The latest version will be available. Click on Download.

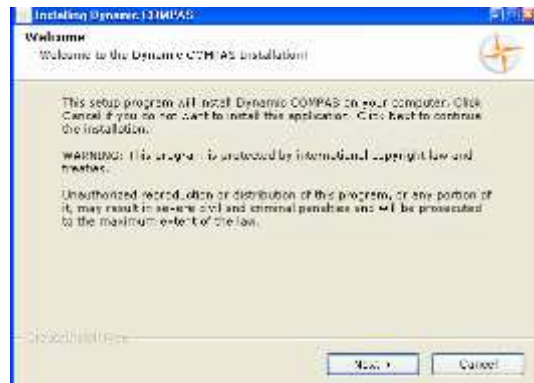
A window opens.  
Click on Save.



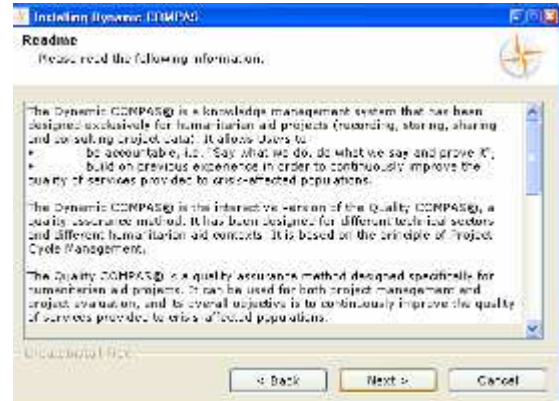
4. Another security warning window may appear. Ignore this window. Click on Run.



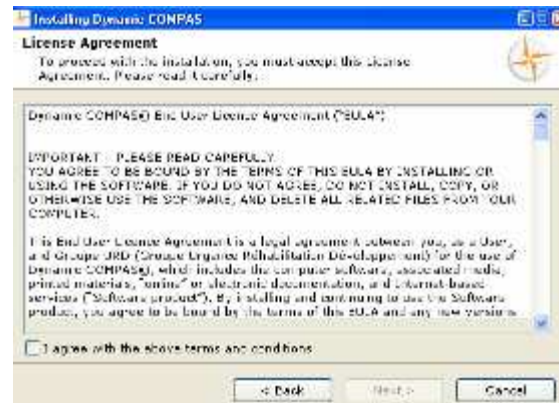
5. The following window appears. Click on Next.



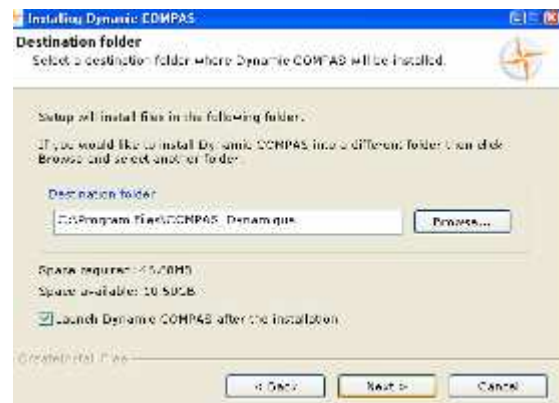
6. The following window appears.  
Click on Next.



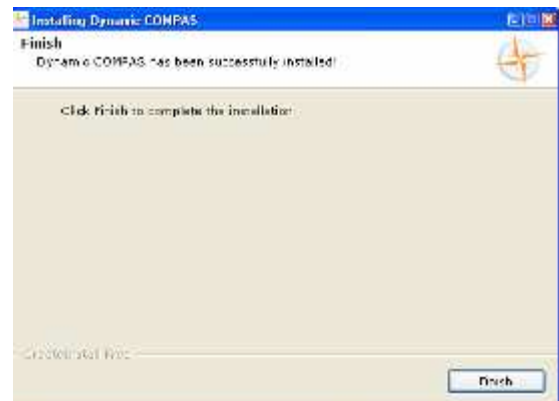
7. The following window appears.  
Read the license contract carefully  
before continuing.  
Tick the box to confirm that you accept  
the terms and conditions –“I agree with  
the above terms and conditions”.  
Then click on Next.




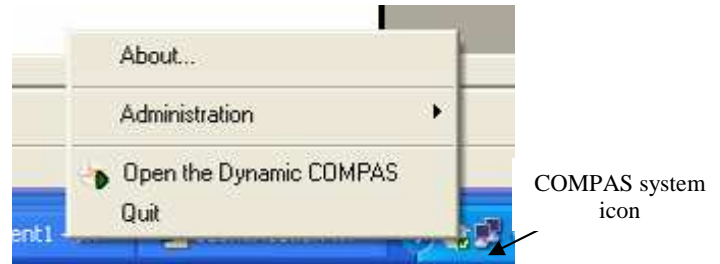
8. The following window opens.  
The Dynamic COMPAS software files  
are copied by default onto your  
computer's 'C:\Program Files' folder.



9. The files have now been copied onto  
your computer. The following window  
opens.  
The « Launch Dynamic COMPAS after  
the installation » box is ticked  
automatically.  
Click on 'Finish'.



10. A window with a black background opens automatically and then disappears. The COMPAS system icon  then appears in the taskbar. This icon opens a menu which allows you to open and close the software, as shown opposite.



11. The software will open by default on the web browser installed on your computer (Internet Explorer, Mozilla Firefox, etc.)

12. The final step in installing the software is the creation of a database where you will stock the data concerning your project each time you use the Dynamic COMPAS.

To do this click on [Next](#). The following message appears: "Database under installation... Please wait..."



13. Once the database is installed, the window opposite appears. You must now create the first Dynamic COMPAS user on your computer. To do this you must fill in the following sections: "Surname", "First name", "User name", "Password" and "Confirm the Password"

**Important:**  
The password should be no longer than 8 characters long.


The User name and Password will allow you to open the software. This information can be changed at any time.



14. The software is now installed and can be used.

Click on [Launch the Dynamic COMPAS](#).

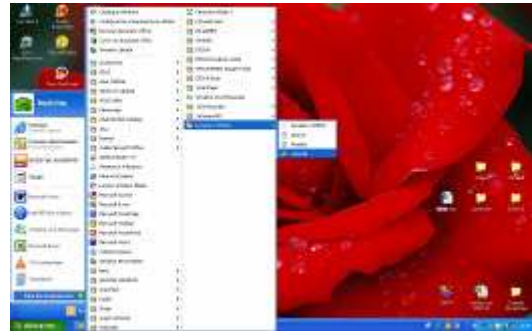


Subsequently, the application can be opened using the COMPAS system icon  in the taskbar or via 'Start → Programs → Dynamic COMPAS'

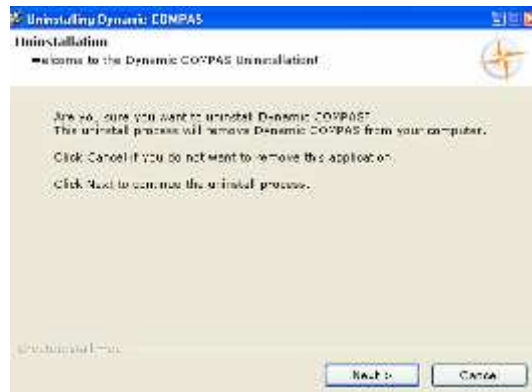
**For the following steps go to paragraph 4.1 Creating/modifying a project.**

## 2.2 Uninstalling the software

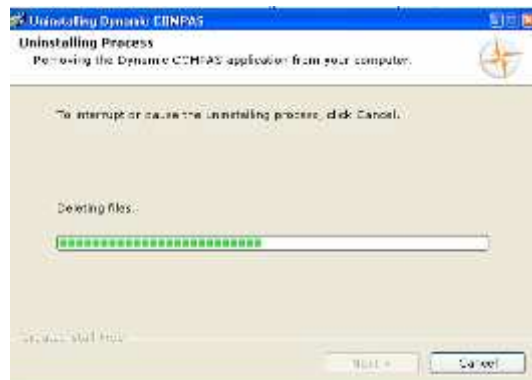
1. Close the application by selecting "Quit" in the lower toolbar menu
2. Go to: 'Start→Programs→ Dynamic COMPAS'.  
In the menu choose 'Uninstall', as shown on the screen opposite



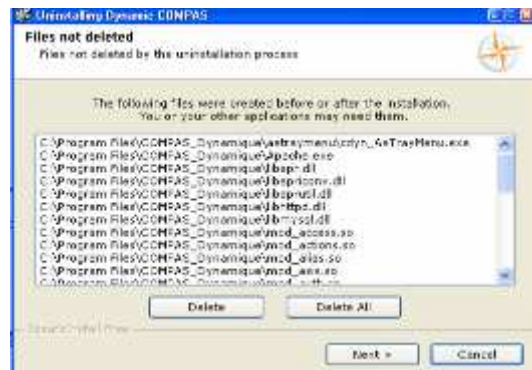
3. The window opposite appears.  
Click on Cancel if you do not wish to uninstall.  
Click on Next to continue uninstalling.



4. The following window appears.



5. Then the following window appears.  
Click on Delete All



6. The following window then appears. Click on 'Finish'. The software is now uninstalled.


**Note:**

Check that "Dynamic COMPAS" has disappeared from the 'Start→Programs' menu and that the icon is no longer on the desktop. If they are still there, remove them 'manually' by removing the Dynamic COMPAS file from the C:\Program files folder.



### 3 OPENING A SESSION




**Important** You can only open the Dynamic COMPAS if you are a 'user', that is to say, if you have a *user name* and *password*. (cf. 4.2 Entering/Modifying a user)  
Within an organisation, the user name and password are chosen by one or several administrators (called the 'super user') of the Dynamic COMPAS (cf. 4.3 Creating/modifying rights for a project).  
If you do not have a user name or password, contact the people in your organisation who are responsible for the use of the Dynamic COMPAS.

1. Open the Dynamic COMPAS by clicking on the COMPAS system icon  in the taskbar or by using the 'Start→Programs' menu.  
The following window appears (

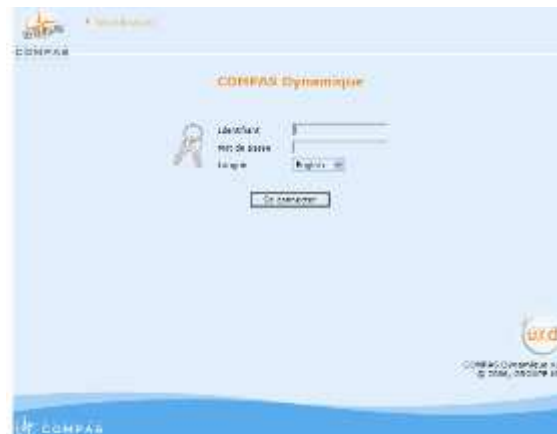
Screen 3).

2. Enter your user name and password and select the language you wish to work in (French, English or Spanish).  
For example:     User name: test  
                    Password: test  
                    Language: English
3. Then click on Se connecter.

4. This opens the Home page.
5. You can now choose between the following activities, by clicking on the icon:

-  **Project management**
-  **Consult the 12 Quality criteria**
-  **Project evaluation**

Screen 3: Identification



Screen 4: Home




## 4 ADMINISTRATION

For an administrator (super user), the procedure for opening a session is the same as that described above. However, an extra icon appears on the 'Homepage' (Screen 4).



Link to  
'Administration page'  
– List of users

To access the administration page from the Home page, click on  **Administration**. This opens the secondary window 'Administration – User list' (Screen 5).

### Screen 5: Administration – User list



Link to 'Administration – institution data'.  
Cf. 4.4

Link to 'Administration – Manage projects' Cf. 4.1

Link to 'Administration – Create a project'. Cf. 4.1

Link to 'Administration – Manage users'. Cf. 4.2.2

Link to 'Administration – Create a user'. Cf. 4.2.1

The Administration page allows you to:

- Create/modify a project
- Create/modify a user
- Define/modify what rights a user has regarding a project (consultation, editing, access to confidential information, etc.).

## 4.1 Creating/modifying a project

### 4.1.1 Creating a project

1. Once on the administration page click on  **Create a project**.

2. This opens the 'Administration – Create a project' page:

3. The project details can now be filled in (code, title, country, type of crisis, crisis process, step in the crisis, sector, start date, length, head of project, description). Only the first three headings (code, title, country) are compulsory when creating a project. The other headings can be filled in at a later stage.

4. Next, click on Create. Your project has now been created. It will now appear in the list of projects available on the 'Home' page.




### 4.1.2 Modifying a project

Information about a project can be added to or modified at any point.

1. Click on  **Manage projects**

2. The list of projects presently in your Dynamic COMPAS appears.

3. Click on the  icon for the project you want to modify.

4. This opens the 'Administration – Modify a project' screen (which is the same as the Create a project screen. Cf. 4.1.1 Creating a project).


5. Once you have made the modifications click on Modify. The project information is then modified.

**Note:** When validating project stages, there is a direct link to the 'Modify a project' page



## 4.2 Creating / modifying a user




### 4.2.1 Creating a user

1. Click on  **Create a user**.
2. The following secondary window opens: 'Administration – Create a user'.
3. Enter the relevant information (Surname, First name, User name, Password, Repeat password, Position).  
**Important: 8 characters maximum per line.**
4. Next you must define the rights of the new user (cf. 4.3.3. Creating/Modifying the rights of a user).
5. Then click on Create. The new user is added to the User list and can begin to use the Dynamic Compas.



### 4.2.2 Modifying a user

Information about a user can be modified at any point.

1. Click on  **Manage users**.
2. The list of users in your Dynamic COMPAS appears.
3. Click on the  icon for the user you wish to modify or on  if you wish to delete the user.
4. The 'Administration – Modify a user' screen appears (identical to the screen for creating a user). Cf. 4.2.1 Creating a user).
5. Make the modifications that you want to make then click on Modify.

## 4.3 Creating/modifying rights for a project

It is necessary to assign rights of each user.

These rights define which operations a user can carry out regarding:

- administration (creating/modifying a project, a user or user rights)
- each of the Dynamic COMPAS projects (project management and project evaluation)

**Note:** Rights can only be assigned by users who have administration rights.

### 4.3.1 Assigning rights to a user for the management of a project

The 'Administration –Create/Modify a user' windows give the list of projects recorded on the Dynamic COMPAS.

For each project, under the heading 'Rights/Project management', a user's rights regarding project management can be determined by ticking the relevant boxes:

- Consult:** to allow a user to consult project data.
- Edit:** to allow the user to enter and record project data (responses to key questions, phase reports, phase conclusions).
- Validate:** to allow the user to close a phase in order to move onto the next one.
- Access to confidential information:** to allow the user to consult the project data which has been labelled 'confidential' (cf. chapter 4 -1.6.2 Responses to key questions).

### 4.3.2 Assigning rights to a user for the evaluation of a project

The 'Administration –Create/Modify a user' windows give the list of projects recorded on the Dynamic COMPAS.

For each project, under the heading 'Rights/Project management', a user's project evaluation rights can be determined by ticking the relevant boxes:

- **Consult:** to allow the user to consult project evaluation data.
- **Edit/Create:** to allow the user to create a project evaluation and to enter and record the evaluation data (assessment of indicators, criterion-based summaries, evaluation conclusions).

### 4.3.3 Assigning administration rights

To give a user administration rights, tick the 'super user' box at the foot of the 'Administration - Create/Modify a user' windows.

## 4.4 Personalising your institution's data

1. Click on  **Institution data**.

2. This opens the 'Administration – Institution data' window (Screen 6).

## Screen 6: Administration – Institution data




### 4.4.1 Saving institution data

1. Complete the three sections (Name, Description, Details).
2. You can add your logo (it will appear in the 'Tools' page of your Dynamic COMPAS). To do this click on **Parcourir...**. Select your logo then click on Save. Your logo will appear. We recommend that you use a small logo (around 3 cm x 3 cm) so that the page layout is not affected.

### 4.4.2 Saving institution documents

You can save documents which will be accessible in the 'Tools' page of your Dynamic COMPAS (cf. chapter 7 - 2 TOOLS).

1. To save documents, click on **Parcourir...**. Select your document then click on 'Add document.' Your documents appear on the screen.
2. To delete a document, click on the  icon which appears next to the document.

## 5 EXCHANGING DATA

This function allows you to exchange projects, that is to say, to export and import projects with other people using the Dynamic COMPAS whether they are at the organisation's headquarters or in the field.


### Screen 7: Data exchange



Cf. part 5.1  
and part 5.2

Cf. part 5.3 and  
part 5.4

### 5.1 Exporting project data

1. Click on the  icon in the toolbar at the foot of the 'Home' page. This opens the 'Data exchange' window (Screen 7).
2. In the "Export project data" section, select the project that you wish to export in the menu.
3. You can choose to export the document with or without its attachments. To export it with the attachments tick the box 'Export attached files'.  
Next, you must choose which export option you want, by clicking either:
  - **For modification and/or validation** (you will no longer be able to modify your project on the Dynamic COMPAS until you have received the updated version).
  - **For consultation only** (Those who receive your exported file will not be able to modify its content, but simply consult it. You will still be able to modify it).
4. Click on . A confirmation window opens, "Are you sure?". Click on 'Yes'. The Dynamic COMPAS produces a '.cdyn' file: this is your exported project.




5. Select or save your file onto your computer. You can now transfer this file (by email or other means) to another Dynamic COMPAS user.

## 5.2 Importing project data

1. See instruction 1 in 5.1 Exporting project data.
2. In the 'Importing project data' section, choose the project that you wish to import from the '.cdyn' files saved on your computer.
3. Click on . A confirmation window opens up – 'Are you sure?'. Click on 'Yes'. The project is imported into your database. This project will now appear in the list of projects.

Warning: If you import a project with the same name as a project that is already in your database, the old project will be replaced by the new one.

## 5.3 Data backup

1. Click on the  icon at the base of the 'Home' page. The 'Data exchange' window opens (Screen 7). The options 'backup' and 'restore' are in the lower half of the screen.
2. Click on . Click on 'Save'. A confirmation window opens – 'Are you sure?' Click on 'Yes'. The Dynamic COMPAS produces an 'archive.zip': this is your backup.
3. Select or save the backup onto your computer. You can now save a hard copy of this file.



## 5.4 Restoring data

1. See instruction 1 in 5.3
2. In the Restore section of the screen, choose the 'archive zip' file that you wish to restore amongst the '.zip' files saved on your computer.
3. Click on . A confirmation window appears – 'Are you sure?' Click on 'Yes'. This restores your database. All the data can now be consulted via the Dynamic COMPAS.




## **CHAPTER 3: CONSULTING THE QUALITY REFERENCE FRAMEWORK AND QUALITY COMPAS FILES**

1	CONSULTING THE QUALITY REFERENCE FRAMEWORK	37
2	CONSULTING A CRITERION INFORMATION CARD (VIA THE QUALITY REFERENCE FRAMEWORK)	38
3	CONSULTING A KEY PROCESS INFORMATION CARD (VIA THE QUALITY REFERENCE FRAMEWORK)	39

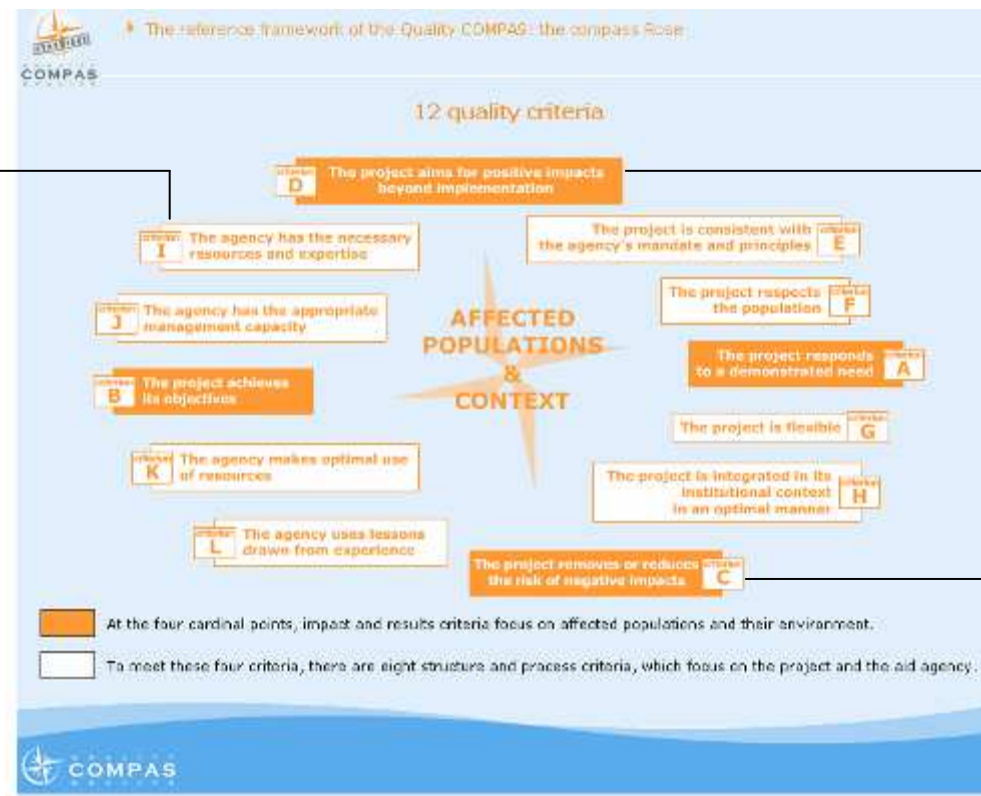


The COMPAS method is based on a reference framework of 12 quality criteria. The same reference framework is used both for project management and evaluation.

# 1 CONSULTING THE QUALITY REFERENCE FRAMEWORK

1. Click on **12 Quality criteria** or the  icon representing the Compass rose on the 'Home' page.
2. This opens 'The reference framework of the Quality COMPAS: the compass Rose' (Screen 8).

## Screen 8: The reference framework of the Quality COMPAS: the compass Rose



Criterion title (structure and process criteria) and its associated letter

Criterion title (impact and result criteria) and its associated letter.

Criterion letter.

## 2 CONSULTING A CRITERION INFORMATION CARD (via the Quality reference framework)

For each criterion of the Quality COMPAS Method, an information card outlining the main issues and containing a series of indicators can be consulted.

To consult a criterion information card, click on the criterion. The 'Criterion information card' then opens (Screen 9).

### Screen 9: Criterion information card

For example, to consult Criterion information card A, click on



The screenshot shows a web interface for the COMPAS Quality reference framework. At the top left is the COMPAS logo. The main heading is 'Criterion information card'. Below this, a navigation bar shows 'A : The project responds to a demonstrated need' as the selected criterion, with other letters B through L visible. The content area is divided into several sections:

- Text:** Evidently, responding to people's needs during an emergency or supporting a community that is unable to cope with the effects of a natural disaster or conflict (collapse of the local economy, decline in public services, etc.) is in itself the main justification for all humanitarian projects. It is by responding to a demonstrated need that agencies translate their very raison d'être into concrete action, justifying fundraising efforts, and individual and institutional commitment (and risk taking). One of the most important issues at stake is understanding people's real needs. This entails bringing together the agency's expertise and perception of the situation and the affected population's expectations and requests. From the affected population's viewpoint, and indeed all stakeholders, this criterion justifies an aid agency's presence in the field. It is the most important motivating factor for individuals and actors alike.
- Quality indicators:** Difference between targeted needs and population groups and people's "real" needs; Difference between target needs and project objectives.
- Key process:** People's needs are identified and managed; The origins of people's needs are analysed and taken into account; The project responds to clearly defined needs; The decision not to address all of the identified basic needs can be notified.
- Critical events:** People show a general lack of interest in the project (i.e. large proportion of beneficiaries withdraw from the project, low attendance rates in project activities and meetings, etc.); People repeatedly ask for help with other needs; People find alternative uses for project equipment or services (i.e. goods are sold, disposed of, exchanged, changed, etc.).

The COMPAS logo is visible at the bottom left of the page.

### 3 CONSULTING A KEY PROCESS INFORMATION CARD (via the Quality reference framework)

A key process is a set of activities which need to be carried out to ensure that project results conform to quality criteria. Each criterion can be broken down into key processes. The Quality COMPAS method includes 46 key process information cards, grouped into 7 sections, i.e., Definition, Anecdotes, Why it is important, Why it is difficult, Warnings, Tips and Critical points.

1. To consult a Key Process Information Card, first open the Criterion Information Card (cf. 2 Consulting a Criterion information card).
2. Next, click on the key process that you wish to consult. This opens the Key Process Information Card.  
For example, to consult Key Process Information Card A1, click on **People's needs are identified and monitored** on Criterion Information Card A.

The Key Process Information Card opens (Screen 10).

#### Screen 10: Key Process Information Card

The screenshot shows the interface of the Key Process Information Card. At the top, there is a header with the COMPAS logo and the text 'Key process information card'. Below this, there is a navigation bar with 'A - The project responds to a demonstrated need' and a list of letters 'B C D E F G H I J K L'. Underneath, 'A1 - People's needs are identified and monitored' is selected, with a list 'A2 A3 A4' to its right. The main content area is divided into sections: 'Introduction', 'Anecdotes', and 'Why it is important'. The 'Introduction' section contains text about humanitarian responses and needs assessment. The 'Anecdotes' section includes two examples: 'Angola, 2002' and 'Albania, 1999'. The 'Why it is important' section contains a bulleted list of key points.

COMPAS  
Key process information card

A - The project responds to a demonstrated need • B C D E F G H I J K L

A1 - People's needs are identified and monitored • A2 A3 A4

Introduction

Humanitarian responses generally focus on the provision of basic subsistence needs, such as public health, food, medical and shelter programmes. However, communities often have a wide variety of needs, some requiring non-material assistance, such as education, protection, psychological care, etc. This raises the moral question of who should be responsible for deciding which needs are essential or important: the aid agency or the community? And who in particular within the community?

Needs assessment should distinguish between expressed needs, which may be influenced by previous interaction with the humanitarian system (i.e. relationship between aid provider/aid recipient, knowledge of what agencies "usually" provide, etc.), and real needs.

Once the needs assessment is terminated and priorities have been set, it is important to establish whether the population, controlling authorities or other agencies are already in the process of providing a response for any of these needs and identify those that still require a response. Finally, it is important to identify whether the population has the capacity to respond to any of these needs itself.

Anecdotes

**Angola, 2002.** Aid agencies were surprised at how often IDP populations asked for help in building an ondjango (community meeting place), as they felt that other, more pressing, needs had been identified. However, building an ondjango meant that the population would have somewhere to meet, thus restoring the community's sense of identity in its new location, or on return. Dignity and a sense of identity may be just as important for crisis-affected populations as more practical considerations.

**Albania, 1999.** Following NATO bombardments in Kosovo and the resulting displacement of the Kosovar population towards neighbouring countries, emergency camps were set up in Albania for Kosovar refugees. However, many of the camps remained unoccupied, since nearly 70% of the refugees found alternative solutions, preferring to stay with relatives or friends rather than in the camps. Insufficient analysis of local coping mechanisms meant that considerable amounts of resources were wasted.

Why it is important

- A detailed analysis of each context should produce relevant tailor-made solutions rather than poorly adapted standardised responses.
- Local capacities must be taken into account in order to avoid unnecessary duplication or weakening of existing coping mechanisms. This also improves programme relevance and efficiency
- People's needs are complex and tend to evolve over time. To maintain programme relevance it is essential that needs continue to be monitored throughout the project.



## CHAPTER 4: MANAGING A PROJECT

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**Important** To manage a programme, the project details must already have been entered in the Administration page (cf. chapter 2 - 4.1 Creating/modifying a project). To do this, you have to have the relevant administrative rights or you have to contact the Dynamic COMPAS administrators in your organisation.

# 1 WORKING THROUGH THE PROJECT CYCLE PHASE BY PHASE

## 1.1 Starting a project

1. On the Home page, select your project from the list.

**Important**

The projects on this list are those which have been recorded on your computer and for which you have rights (cf. chapter 2 -4.3 Creating/modifying rights for a project). If a project which should be on the list does not appear, check that your rights for this project have been properly assigned.



2. Next, click on  **Project Management**.

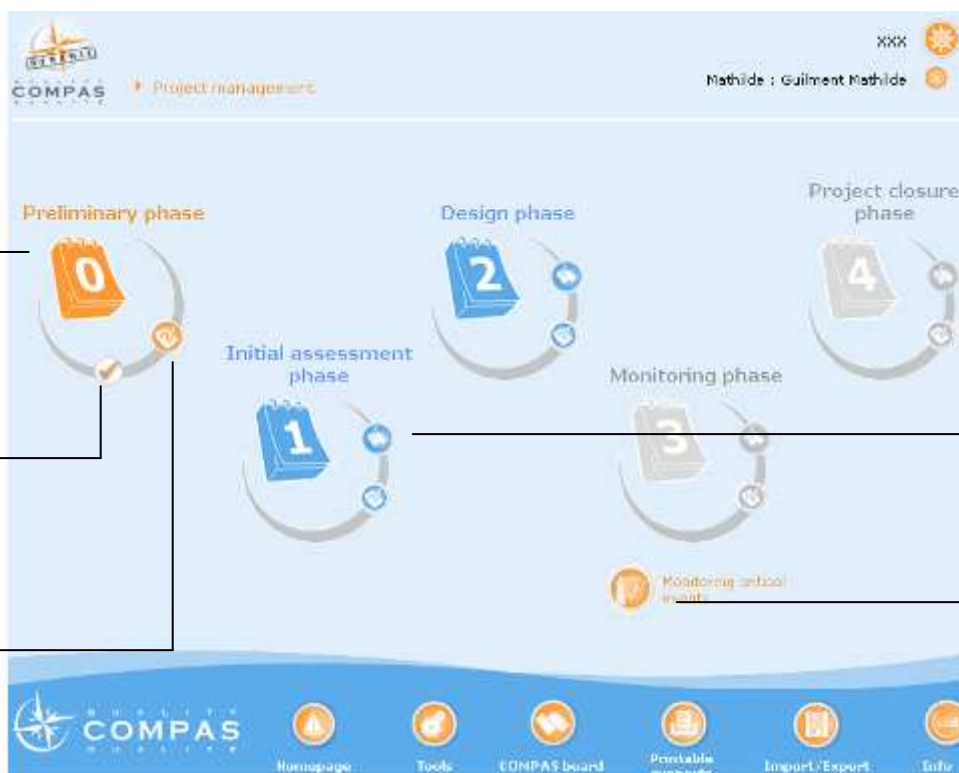
This opens the 'Project management' screen. It shows the 5 phases of the project cycle and what stage has been reached.

**Screen 11: Project management**

Link to project phase  
Here: phase T0

Link to phase conclusion. This icon only appears once the phase has been validated.

Link to list of key questions and responses to them



Link to phase report

Link to critical event monitoring form

## General rules for working on phases of the project cycle

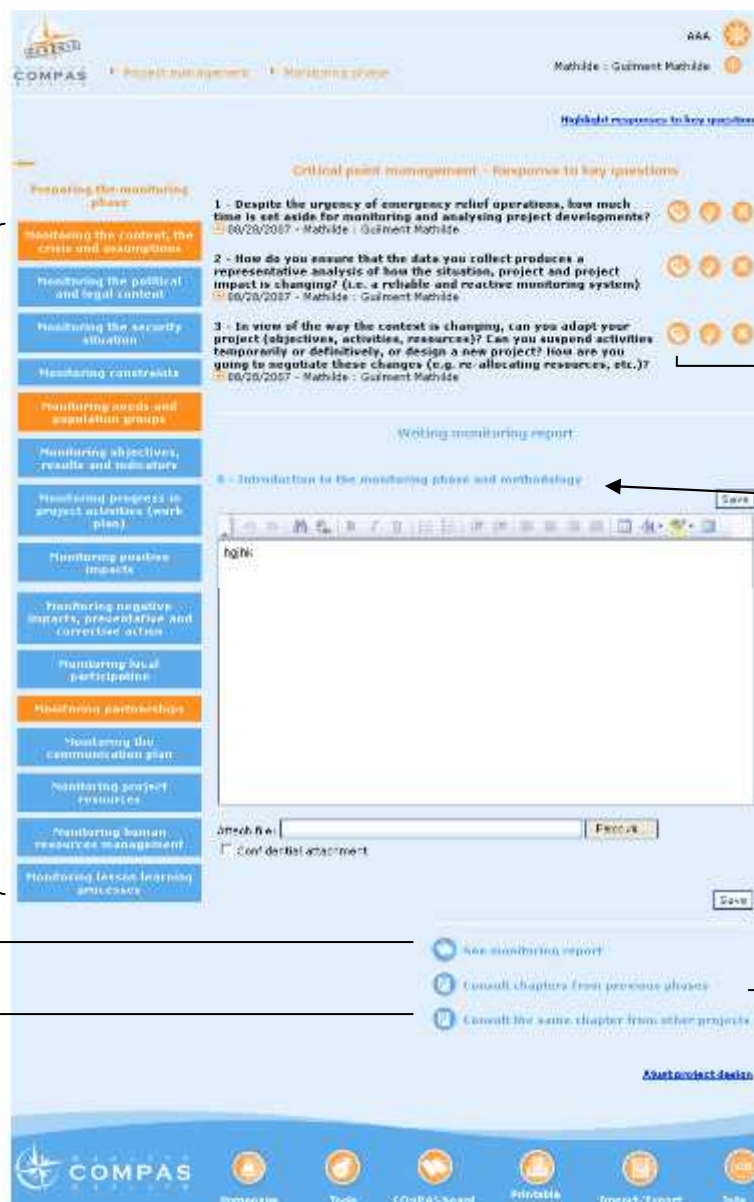
To begin working on a phase, click on its icon (blue-coloured phase – cf. chapter 1 - 2.3 Screen colour code).

**Important:** Once a phase has been validated and closed, the related information can no longer be changed and can only be consulted.

**Note:** For the monitoring phase, as much monitoring as is judged necessary can be done. For more information about the monitoring stage, go to chapter 3 of this guide.

## 1.2 Layout of project management screens

### Screen 12: Project management – Monitoring phase



Step currently being carried out

The different steps in the phase

Link to phase report. Here: Monitoring report.

Link to the same chapter in other projects.

Link to highlight response by author or by date

Key questions for the step in the current phase

Link to 'Response to key question' form

Report chapter title





Section for writing report chapter for this step.

Link to consult chapters from preceding phases which correspond to the same criterion

**Note:** The same layout is used for all phases of the project except the preliminary phase for which there is no writing section.

### 1.3 Answering a key question

**Note:** The Dynamic COMPAS allows you to adopt the Quality COMPAS quality assurance method. For further information on *key questions* (definition, etc.), see our documents on the Quality COMPAS method.

1. On the 'Project management' page (cf. Screen 12), click on  ,to the right of the key question, if you want to give a personal answer, or on  , if the question has been taken into account, or  if the question is not relevant.
2. If you click on  , this opens the 'Response to key questions' page (Screen 13).

#### Screen 13: Response to key questions

Key question

Section for writing response to key question

Answer options

Link to Criterion information card

Link to Key process information card

Link to consult answers to this project's other key questions

Link to consult answers to this key question for other projects

3. You can now enter your response in the space provided or click on one of the other answer options:
  - Question not relevant
  - Question not fully understood
  - Question taken into account but no response given
  - Another reason

It is also possible to attach documents to your response.

If you want your response to remain confidential and only to be consulted by users who have the right to do so, click on the corresponding box.

4. Then click on Save.

**Important** If you forget to click on Save and you close the window, your response will be lost.

**Note:** It is suggested that you close the 'Response to key questions' window after you have completed it in order to avoid having too many windows open at one time.

## 1.4 Writing the phase report


At each step of a phase it is possible to write a chapter of the phase report. In doing so, you will stay up to date with your phase report writing (initial assessment report, project design report, monitoring report, closure report).

1. On the main page of a phase (cf. Screen 12) there is a box for writing each chapter. The title of each chapter is indicated above the box.  
It is also possible to attach documents to your text. If you want your response to remain confidential and only to be consulted by users who have the right to do so, click on the corresponding box.
2. Next click on Save.

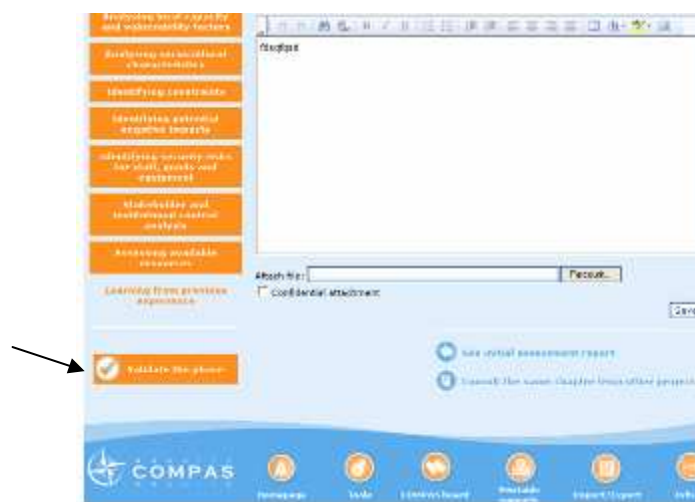
**Important** If you forget to click on Save and you leave the page your text will be lost.

## 1.5 Validating/closing a phase

A phase can only be validated and closed once all the work on the phase has been done, i.e. all the key questions have been dealt with and all phase report chapters have been completed. The colour code makes it possible to see where you have reached in the project. To validate a phase

all the 'Response to key questions' icons have to be orange: , as do all the steps in the phase (cf. Screen 12: example 'monitoring of needs').


1. When a phase is completed as described above, a 'Validate the phase' option appears on the screen as shown below.

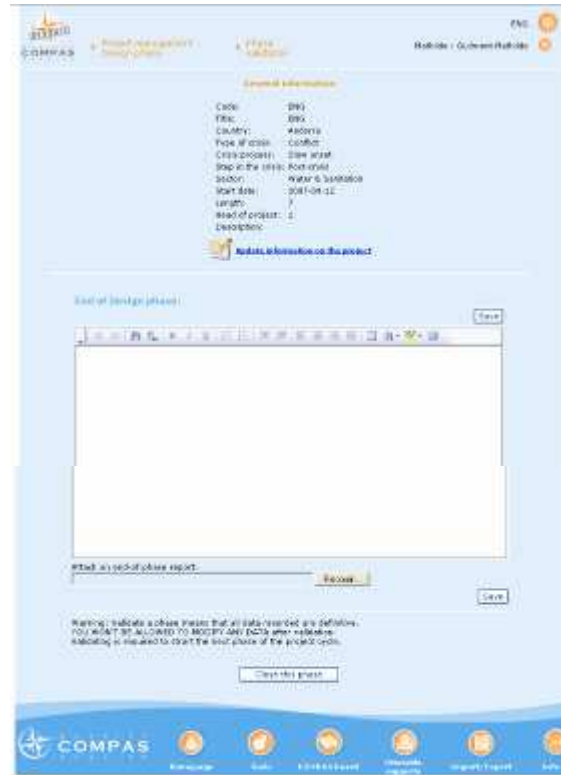


Screen 14: Project management – Design phase – Phase validation

- Click on 'Validate the phase'. This opens the secondary window opposite (Screen 14).

The window contains:




- a section with information about the project (cf. chapter 2 - 4.1 Creating/modifying a project)
  - a box to write a conclusion for the phase.
- Write your conclusion in the box provided. You can also attach a phase report.
  - When you click on  , the 'Project modification' window opens. This allows you to update the project information.
  - Click on Save.
  - Then click on 'Close this phase'. The phase is now validated. You can no longer modify the project information.



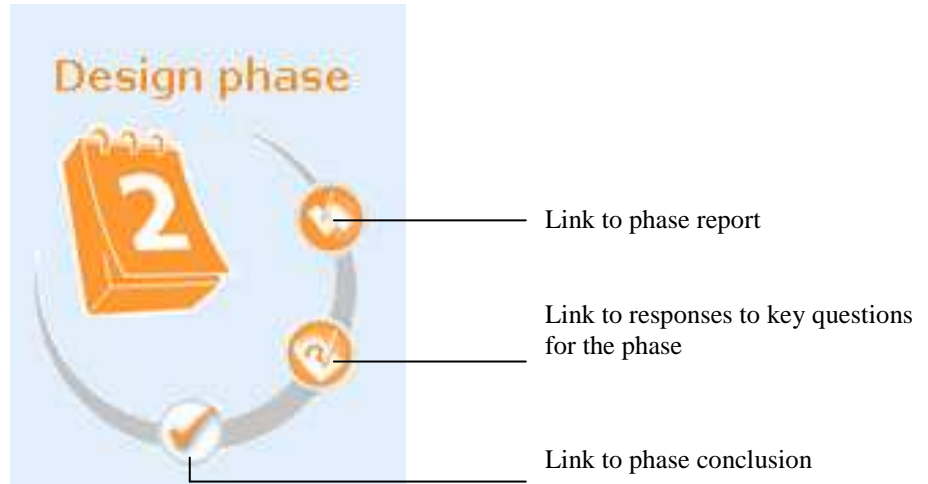
- The following screen appears. Click on [Begin next phase](#).



## 1.6 Consulting project data and exporting it in Word format

On the 'Project management' screen, each phase is surrounded by a semi-circle with two or three icons on it (cf. Screen 15). Before a phase is opened the icons are grey, when it is being worked on they are blue and when it is completed they are orange. The third icon only appears when the phase is validated (  = phase report,  = key question,  = validation).

Screen 15: Consultation of project data




### 1.6.1 Phase reports


On the 'Project management' screen click on  . This opens a secondary window, 'See project documents' (Screen 16).


Screen 16: See project documents




1. To read a particular chapter, click on the **chapter title**.
2. To read the whole document click on [Display all](#).
3. To export the document using Word, click on  [Create Word document](#).

## **1.6.2 Responses to key questions**

To read responses to key questions, click on . This opens the secondary window, 'Go to responses to key questions' (cf. Screen 25).

1. For consultation options, go to chapter 6 -2 Consulting responses to key questions.
2. To export the document in Word format, click on  [Create Word document](#).

## **1.6.3 Comments and conclusion for phase**

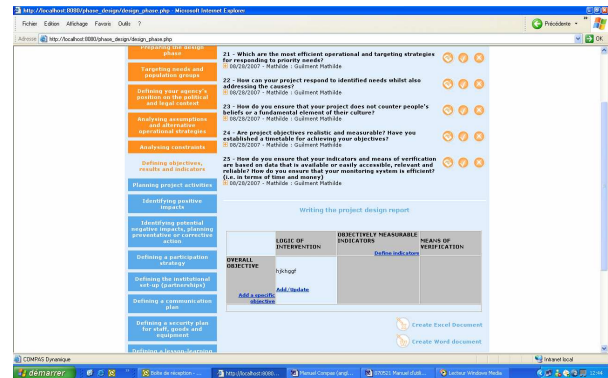
On the 'Project management' screen, click on the  icon (this icon only appears when a phase has been closed). This opens the secondary window, 'Comments and conclusion for phase'.

## 2 PROJECT DESIGN

**Important:** This section only deals with the functions which are specific to the project design phase. For functions which are common to all phases (Responding to a key question, Writing a chapter of a phase report, Validating/Closing a phase), see paragraph 1- Working through the project cycle phase by phase.

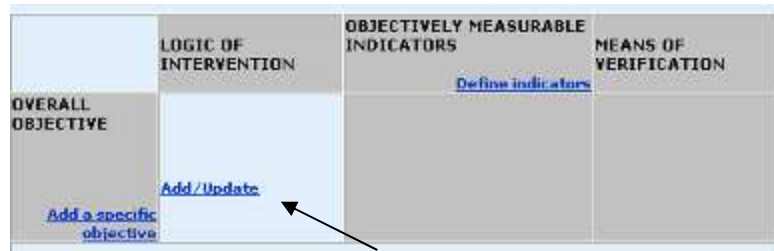
### 2.1 Creating your logical framework

Go to 'Project management – Project design phase'. Click on 'Defining objectives, results and indicators' in the left-hand column. A new screen appears. You can now create your logical framework in the section provided.



#### 2.1.1 Creating/updating your overall objective

1. Click on [Add/Update](#) as shown opposite.



2. A box appears below the table.

3. Enter your overall objective and then click on Save.

4. Your overall objective now appears in the corresponding section of the logical framework.



5. It is possible to make changes to your overall objective by clicking on [Add/Update](#).

#### 2.1.2 Creating/updating a specific objective

1. Click on [Add a specific objective](#) in the 'Overall objective' box as shown opposite.



2. A box appears below the table.
3. Enter a specific objective. You can give it a code (optional). Then click on Save.
4. The specific objective now appears in the corresponding section of the logical framework.



5. You can change or remove this specific objective by clicking on [Modify](#) or [Delete](#).

### 2.1.3 Creating/modifying your indicators

1. Click on [Define indicators](#) in the 'Objectively measurable indicators' section.

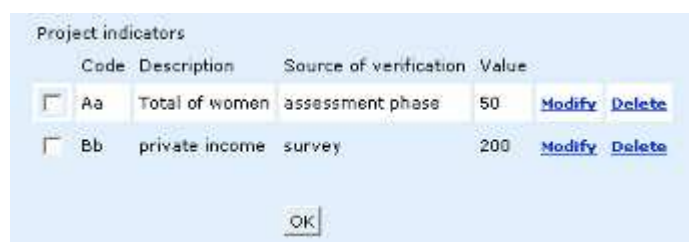


2. This opens the window opposite.
3. You can now define all the indicators of your logical framework. Complete the following information, 'Code' (optional), 'Description', 'Source of verification' and 'Value'. Then click on Add. Close the window.



4. Finally, you have to assign indicators to the specific objectives and expected results. To do this, click on [Add/Update](#) in each box of the **Objectively measurable indicators** column of the logical framework.

5. The previously defined list of indicators appears below the table. Select the indicators by clicking on the corresponding square, then click on OK. The indicators appear in the column of the logical framework.





6. Repeat this operation for each specific objective and expected result.

## 2.2 Producing an ECHO single form for the project at the design phase

The Dynamic COMPAS allows you to present your project using the ECHO single form.

**Important** The information that you have entered for the design phase will only partially fill the ECHO single form. Further information is needed to complete it.


1. To access the ECHO single form click on the  icon, on either the 'Project design' or the 'Project management' windows.
2. Click on  [Generate the single form](#) at the foot of the page.
3. This opens a single form Word document.

### 3 MONITORING OF THE PROJECT

**Important:** This section only deals with the functions which are specific to the monitoring phase. For functions which are common to all phases (Responding to a key question, Writing a chapter of a phase report, Validating/Closing a phase), see paragraph 1- Working through the project cycle phase by phase.

#### 3.1 To begin monitoring

While the project is being run, the monitoring phase lasts for as long as it takes to carry out all the necessary monitoring.

1. On the 'Project management' screen, click the 'Monitoring phase' icon . This opens the 'Monitoring management' screen opposite (Screen 17).
2. The 'Start date' is automatically filled in with the present day's date. This should be changed if necessary.
3. Click on Begin monitoring.

Screen 17: Project management – Monitoring management



4. The screen opposite appears. Click on Monitoring in progress to start.
5. This opens the monitoring phase screen.



### 3.2 Monitoring of indicators

When you designed the project, you created the logical framework (Cf. 2.1 Creating your logical framework) and determined the indicators.

1. On the 'Monitoring phase' screen click on 'Monitoring of objectives, results and indicators'. This opens the screen opposite.
2. The list of indicators appears with the information that was entered during the design phase ('Code', 'Description' and 'Value'). To carry out monitoring of the indicators use the space provided.  
You can consult the logical framework of the project by clicking on [Objectives, results and indicators](#).
3. Then click on Save



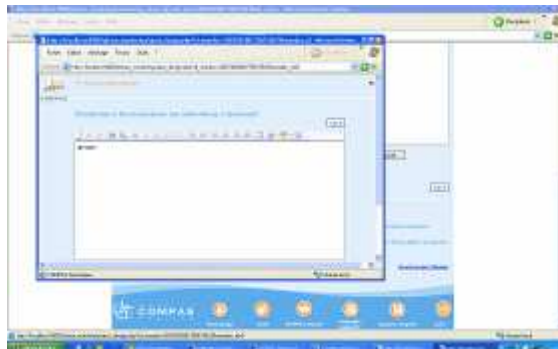
### 3.3 Adjusting project design during the monitoring phase

Monitoring sometimes makes it clear that the design of a project needs to be adjusted. The Dynamic COMPAS allows you to make adjustments to each chapter of the project design.

1. From the 'Monitoring phase' screen, it is possible to adjust the design of each step by clicking on [Adjust project design](#).



2. A secondary window like the one opposite opens. The title of the chapter to be adjusted is indicated above the text box.
3. Make the necessary changes to the chapter. You can also attach a document.
4. Click on Save. This creates a new project design document.

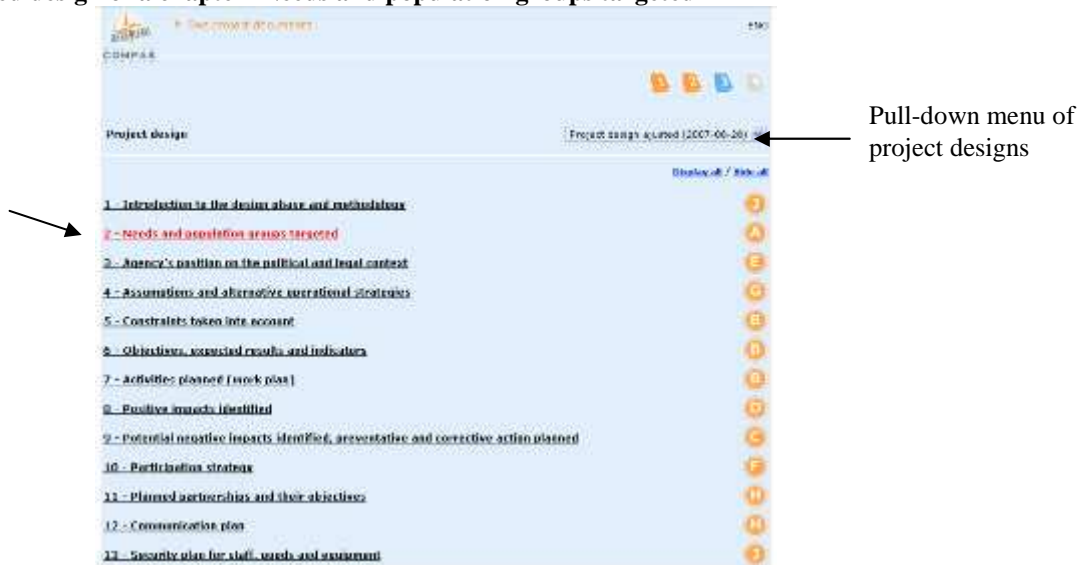


- To consult the new design, go to the 'Project management' screen. Click on 'See project design report' icon  .



- The secondary window, 'See project documents' opens (Screen 18). In the pull-down menu in the top right-hand corner, choose the project that you have just adjusted. The chapter that you have changed appears in red as shown below.



Screen 18: Adjusted design of a chapter 'Needs and population groups targeted'



### 3.4 Producing an ECHO single form for the project at the monitoring phase

The Dynamic COMPAS allows you to present your monitoring results using the ECHO single form. This can, for example, be used for the interim report which ECHO requests.

**Important** The information that you have entered for the design phase will only partially fill the ECHO single form. Further information is needed to complete it. The form is generated in a format that is adapted to Word 2000. Certain changes will have to be made if another version of Word is used.

- To create the ECHO single form, go to the Monitoring Report by clicking on the  icon either on the 'Monitoring phase' screen or the 'Project management' screen.
- Click on  [Generate the single form](#) at the foot of the page.
- This opens the single form in Word format.

### 3.5 Closing a monitoring phase which is only partially complete

It is possible to close a monitoring phase which is only partially complete, in order to focus on certain aspects like the monitoring of indicators.

It is not necessary to complete all the questions and chapters in the monitoring phase. If you decide to click on 'Complete the monitoring' (shown below), the phrase, 'Question not taken into account in this monitoring' appears automatically in all the sections that have not yet been filled.



### 3.6 Validating the monitoring report


1. Once the monitoring is complete, the 'Validate monitoring report' box appears as shown opposite.




2. Click on 'Validate the monitoring report'. The secondary window below opens. A conclusion can be written in the box provided, and a report attached.
3. Click on Save
4. Finally, click on 'Validate monitoring report'. Your report is now validated. You can no longer modify the information saved for **this** piece of monitoring.



5. Once you have validated the monitoring, the 'Monitoring management' screen appears once more.

The  icon now appears next to the relevant piece of monitoring. Click on this icon to read the monitoring conclusions. Another link, [consult](#) also appears. Click on this link to read the monitoring report.


6. It is now possible either to close the monitoring phase by clicking on  **close this phase**, which appears at the bottom of the screen, or to leave it open in order to carry out further monitoring at a later stage.



## 4 MONITORING OF CRITICAL EVENTS

Monitoring of critical events is a section which allows you to apply the principle of critical events management while running your project.

### 4.1 Monitoring critical events

1. Go to the 'Project management' screen and click on  . This opens the 'Project management – Monitoring critical events' window.
2. Enter the type of critical event monitoring that you wish to carry out in the 'Description' box. The 'Start date' is automatically filled in with the present day's date. This can be changed if necessary.
3. Click on Create.
4. The window opposite appears. Click on [in progress](#) to begin.
5. This opens the 'Monitoring critical events' window (Screen 19).



**Screen 19: Monitoring of critical events**

Flags representing the frequency with which a critical event has taken place.





Critical events which can affect the quality of the project regarding the criteria above. Here, criterion A



Box to write comments and details about the critical event

A number of critical events are linked to each criteria.

6. For each critical event, four flags represent the frequency with which the critical event has taken place:


-  : Has not taken place
-  : Has rarely taken place
-  : Has sometimes taken place
-  : Has often taken place

7. Comments and details can be added in the box to the right of the critical event.

8. Click on Save.

9. Once you have added all your comments, click on Validate at the bottom of the page. This validates your critical events monitoring. You can no longer change this information.

**4.2 Consulting monitoring of critical events**


1. Go to 'Project management – Monitoring critical events'. Click on  **Summary**.

**Screen 20: Project management – Monitoring critical events**



- This opens the screen opposite.  
You can consult the last 4 examples of critical event monitoring carried out on the project.



- Clicking on the  icon opens a window containing the information that has been entered regarding a particular critical event during the project (date, value, comments/details).

## **CHAPTER 5: EVALUATING A PROJECT**


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# 1 CREATING/CONTINUING AN EVALUATION

## 1.1 Creating an evaluation

1. On the 'Homepage', select the project that you wish to evaluate from the list in the top right-hand corner.

2. Next, click on  **Project evaluation**. This opens the 'Evaluate the project – Evaluation management' screen shown opposite (Screen 21).

**Important** If you are unable to create an evaluation of the project, check that you have been assigned evaluation rights for this project (cf. chapter 2 - 4.3 Creating/modifying rights for a project).

3. In the 'Description' box, enter the type of evaluation that you wish to carry out. The 'Start date' is automatically filled in with the day's date. This can be altered if necessary.

4. Click on Create.

5. The screen opposite appears. To begin working on your evaluation click on [evaluation in progress](#).

Screen 21: Evaluate the project – Evaluation management



## 1.2 Continuing an evaluation

Follow the same instructions as described for creating an evaluation. On the 'Evaluate the project – Evaluation management' page, select the evaluation that you wish to work on and click on [evaluation in progress](#).

## 2 WORKING CRITERION BY CRITERION

### 2.1 Layout of evaluation pages

Screen 22: Evaluate the project – Analysis by criterion

Link to 'Project evaluation – Evaluation management'

Link to evaluation of other criteria

Link to key questions

Link to development of critical event

Link to evaluation document

Criterion to evaluate

Quality indicators for this criterion

Key processes for this criterion

Critical events for this criterion

Box to summarise the evaluation of this criterion.

To go to the evaluation of another criterion, click on the corresponding letter from the list in the top right-hand corner.

### 2.2 Assessing quality indicators and key processes by criterion

In the Quality COMPAS method, each criterion is linked to a number of indicators. Each criterion also corresponds to a number of specific key processes – activities to be carried out in order to meet the criterion. With the Dynamic COMPAS, the user evaluates to what extent a criterion has been met by assessing both quality indicators and key processes.

For each quality indicator and key process, choose between the following four levels of assessment:

- ++: fully meets the criterion
- +: meets the criterion (room for improvement)
- : partially meets criterion
- : does not meet criterion

## 2.3 Writing a summary for each criterion

The assessment of indicators is not enough to provide a pertinent evaluation. Indeed, it is the explanation of this assessment which makes it possible to reach conclusions, make recommendations and generally give meaning to an evaluation. The Dynamic COMPAS provides a space to write a summary for each criterion.

1. Enter your summary and comments for each criterion in the box provided (cf. Screen 22). You can also add attachments to your summary.
2. Click on Save.

## 3 FINALISING YOUR EVALUATION REPORT


It is only by looking at all the criteria together that a complete picture can be established concerning the quality of a project. Tensions and links between criteria mean that it is very important to write a final summary which presents the most important findings and the main recommendations.

1. On the 'Project evaluation – Evaluation management' screen, click on [validate the evaluation](#).
2. This opens the window opposite, 'Evaluate the project – Validate the evaluation' (Screen 23).
3. Enter your summary, conclusions, and recommendations in the box provided. Documents can also be attached.
4. Click on Save.
5. Then click on 'Validate the evaluation report'. Once validated it is no longer possible to change the information it contains.

Screen 23: Evaluate the project – Validate the evaluation



6. The window 'Evaluate the project – Evaluation management' reopens.

The  icon now appears indicating that the evaluation has been validated. You can consult the conclusions of the evaluation by clicking on this icon.

The link [Consult](#) also appears. Click on this link to consult the evaluation by criterion.



## **CHAPTER 6: CONSULTING PROJECT MANAGEMENT MEMORY**

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# 1 CONSULTING THE COMPAS BOARD

The COMPAS board is a table in which all the documents related to a project are organised either by:

- quality criterion
- phase of the project cycle

The COMPAS board makes it possible to consult all the documents of a project on one screen.


On a main window, click on the  icon at the bottom the screen.

This opens the 'COMPAS board' secondary window, shown below (Screen 24).

## Screen 24: COMPAS board

In this example, the project is in the monitoring phase but no monitoring has yet been carried out.

Project cycle phase and phase report



Phase	Initial assessment	Design	Monitoring & evaluation	Closure
A	Needs analysis and needs identified	Needs and objectives groups targeted	Monitoring needs and population groups	Identified needs of project closure (per population group)
B	Objectives, expected results, and activities	Activities planned (work plan)	Progress made in achieving objectives and achieving results	Progress made in inserting objectives and achieving results of project closure
C	Constraints identified	Constraints taken into account	Monitoring constraints	Constraints identified at project closure
D	Technical expertise resources identified	Potential resource needs/identified, to coordinate and coordinate action planned	Monitoring potential negative impacts, difficulties, and/or correction actions	Technical inputs of project closure, procedures and corrective actions
E	Level, capacity and vulnerability factors	Positive aspects identified	Monitoring positive impacts	Positive impacts of project closure
F	Political and legal context	Agency's position on the rights of and legal context	Monitoring the political and legal context	Agency's position on the political and legal context at project closure
G	Formalised 'data transfer' taken into account	Participation strategy	Use of participatory in the project	Use of participatory at project closure
H	Contract and agreements	Advantages and alternative operational strategies	Monitoring the contract, the rules and agreements	Contract and agreements at project closure
I	Stakeholder and institutional context analysis	Planned partnerships and their objectives	Partnership of partnerships	Partnerships of project closure
J	Communication plan	Communication plan	Monitoring the communication plan	Communication plan at project closure
K	Budget resources (local and abroad)	Budget and budget available	Follow-up of budget and budget available	Final budget statement, check/closure management at project closure
L	Introduction of the diagnostic phase and methodology	Introduction to the design phase and methodology	Introduction to the monitoring phase and methodology	Introduction to the project closure phase and methodology
M	Human resources, organisation chart, description of responsibilities	Human resources management (staff turnover, capacity management, etc.)	Human resources management (staff turnover, capacity management, etc.)	Human resources management at project closure
N	Security risks for staff, goods and equipment	Security plan for staff, goods and equipment	Monitoring the security situation	Security situation and risk management at project closure
O	Lessons learnt from previous experience	Lessons of quality methodological references, lessons learnt strategy (evaluation, phase transitions, phase transitions, etc.)	Lessons learnt methodology (evaluation, prog. discussion, etc.) and accuracy of main findings	Lessons learnt methodology at project closure, accuracy of main findings

The 12 criteria of the COMPAS Rose

Orange = completed      Grey = not yet done

Annotations:

- Link to phase report for all criteria
- Link to all the chapters related to this criteria, for all phases
- Link to chapter on criterion D in the project design document

To consult a chapter, click on the chapter title (completed chapters are in orange. Cf. chapter 1 - 2.3 Screen colour code). More than one can be opened at a time. By positioning the cursor on the chapter title you can reposition chapter windows on the screen so that you can see them at the same time.




## 2 CONSULTING RESPONSES TO KEY QUESTIONS

Key questions can be consulted on two levels:

- for the current project
- for other projects entered in your data base


### 2.1 For the current project

1. Go to 'Response to key questions' (cf. Screen 13), and click on  Responses for this criterion.

2. This opens the secondary window 'Go to responses to key questions' below (Screen 25).

#### Screen 25: Go to responses to key questions

In this example the search is being carried out for 'all criteria', 'all key processes', the 'project design phase' only, and 'all responses'.



The screenshot shows the COMPAS software interface. At the top, there is a search form with the following fields: 'Criteria' (set to 'All criteria'), 'Key process' (set to 'All key processes'), 'Phase' (set to 'Design phase'), and 'Filter responses' (set to 'All responses'). A 'Search' button is located below these fields. An arrow points from the text 'The project design phase has been selected' to the 'Design phase' dropdown menu. Below the search form, the search results are displayed under the heading 'Phase: Design phase'. The results are organized into a section titled 'Design phase' and include a list of key questions with their respective IDs and status (e.g., 'Valid').

Search form (selection of criteria, key processes, phases and responses)

Search results

The project design phase has been selected


The **key question** search can be carried out:

- by criterion
- by key process
- by phase
- with or without displaying responses

3. Click on Search.


**Note.** Click on [Search form](#) to make the search form disappear or re-appear.

## 2.2 For other projects

1. Go to 'Response to key questions' (cf. Screen 13) and click on  Responses from other projects.
2. This opens the secondary window, 'Responses from other projects', shown below (Screen 26).

### Screen 26: Responses from other projects

In this example, the search is being carried out on key question n°2 for the monitoring phase and the monitoring preparation chapter.



Search form (sélection of country, type of crisis and operational sector)

List of projects saved in your data base (for which the current user has consultation rights)

Search results

The project search can be carried out:

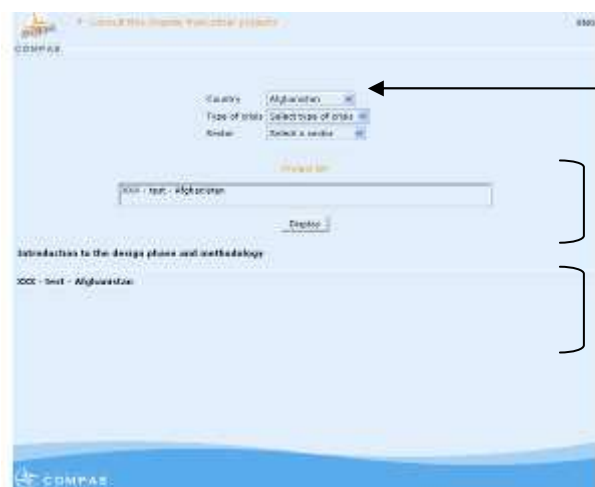
- By country
- By type of crisis
- By operational sector

3. The 'Project list' displays all the projects that correspond to your criteria. Select the projects that you wish to consult.

NB. To select more than one project, continue to press the Ctrl key.

4. Click on Display

Cf. Example: consultation of projects in Afghanistan (opposite)



Afghanistan has been selected

The list of projects in Afghanistan


1 project has been selected from the list

### 3 CONSULTING CHAPTERS FROM PHASE REPORTS

Consultation of chapters from phase reports can be done on two levels:

- For the current project: you consult chapters from preceding phases for the same criterion.
- For other projects saved in your data base: you consult the same chapter in other projects.

#### 3.1 For the current project

1. Go to 'Project management – Phase...' and click on  [Consult chapters from previous phases](#) (below the report box).

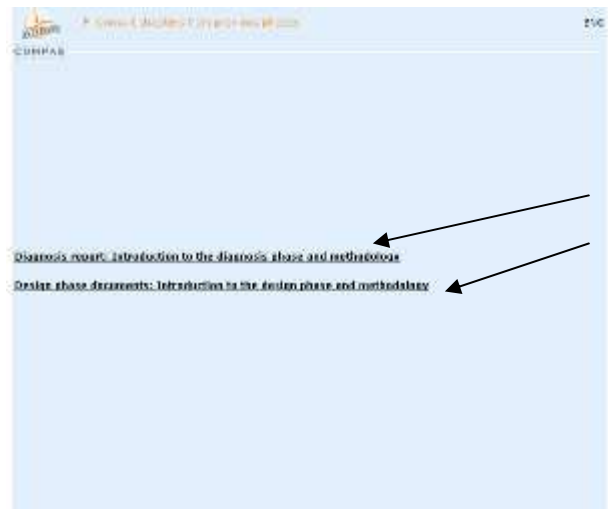
2. This opens the secondary window, 'Consult chapters from previous phases' (Screen 27).

In this example, the chapter is 'Monitoring of needs', criterion A. This means the user can consult chapters from previous phases which are connected to criterion A:


- Diagnosis report: 'Problems analysed and needs identified'
- Design phase documents: 'Needs and population groups targeted'

3. To read the chapters click on the underlined titles.

Screen 27: Consult chapters from previous phases



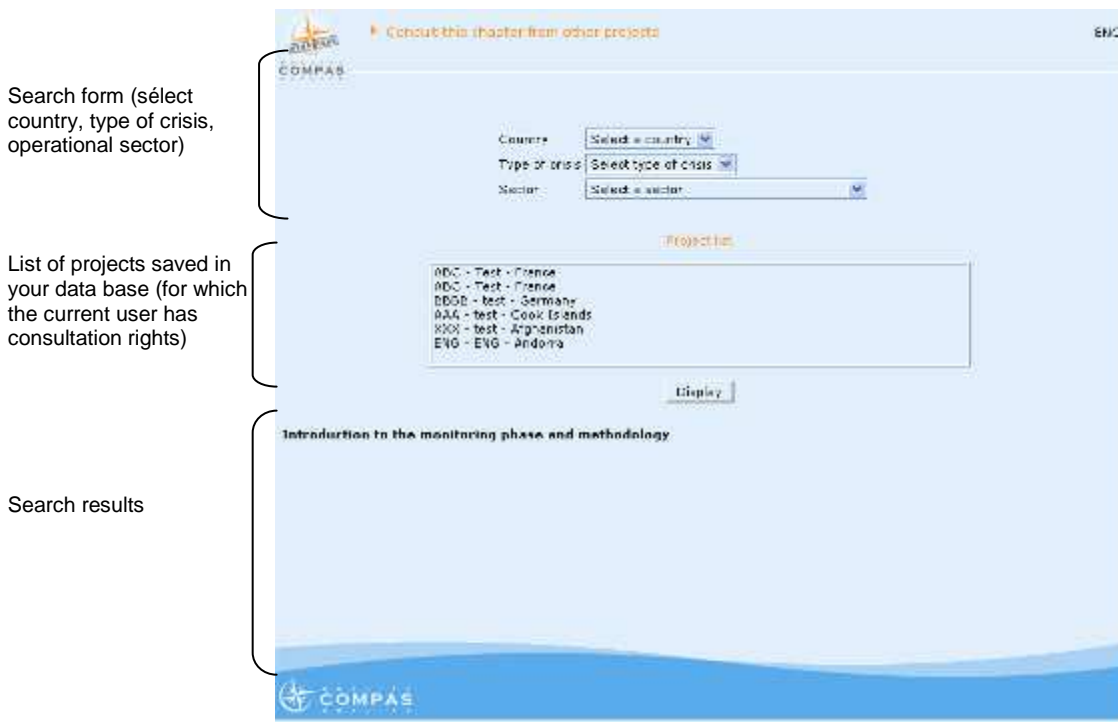
#### 3.2 For other projects

1. Go to 'Project management - ...phase'. Click on  [Consult the same chapter from other projects](#) (below the report box).

2. This opens the secondary window 'Consult this chapter from other projects' (Screen 28).

In the example, the chapter is 'Introduction to the monitoring phase and methodology'. The user can therefore consult this chapter in other projects.

**Screen 28: Consult this chapter from other projects**



Search form (select country, type of crisis, operational sector)

List of projects saved in your data base (for which the current user has consultation rights)

Search results

The project search can be carried out by:

- Country
- Type of crisis
- Sector

3. All the projects that correspond to your search criteria appear in the 'Project list'. Select the projects that you wish to consult.

NB. To select more than one project continue to press the Ctrl key.

4. Click on Display

Cf. The example opposite concerns projects in Afghanistan



Afghanistan has been selected

List of projects in Afghanistan

1 project has been selected from the Project list

## **4 CONSULTING THE DEVELOPMENT OF CRITICAL EVENTS**

During the management of a project: Cf. chapter 4 - 4.2 Consulting monitoring of critical events.  
During the evaluation of a project: cf. chapter 5



## **CHAPTER 7: Dynamic COMPAS SUPPORT MATERIALS**

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# 1 PRINTABLE SUPPORT MATERIALS

The Dynamic COMPAS support materials allow the user to manage or evaluate a project phase by phase in accordance with the principles of Quality Assurance. They have been specially created to be downloaded and **printed**.

The printable support materials include:


- 5 notebooks for the management of a project, i.e. one notebook for each phase of the project cycle
- 1 notebook for the monitoring of critical events
- 1 notebook for the evaluation

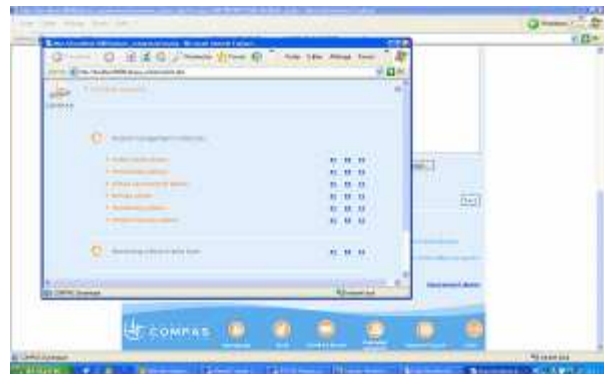
A user guide for project management notebooks can also be downloaded or printed.

These printable support materials are for 'Project teams' and for anyone else involved in making decisions for the project.

## Screen 29: Printable support materials




1. Click on  in the toolbar at the bottom of the Homepage. This opens the secondary window, 'Printable support materials' (cf. Screen 29).
2. Choose the document that you wish to use by clicking on:
  - [EN](#): for the English version
  - [FR](#): for the French version
  - [ES](#): for the Spanish version
3. The following window gives you the choice of whether to Open or to Save the document.



## 2 TOOLS

### 2.1 Consulting your organisation's documents

1. Click on the  icon in the toolbar at the bottom of the Homepage. This opens the secondary window, 'Tools' (cf. Screen 30).

#### Screen 30: Tools

Link to the organisation's tools  
(cf. chapter 2 – 4.4.  
Personalising your  
institution's data)


Link to project cycle tools to  
be downloaded



2. The organisation's own documents (cf. chapter 2 – 4.4. Personalising your institution's data) appear in the section headed, 'Your agency's documents and tools'. Click on the document you want to consult.
3. A window opens giving you the choice of either Opening or Saving the document.


### 2.2 Consulting Project Cycle management files

Project cycle management files can be consulted at any time.

1. Click on the  icon in the toolbar at the bottom of the Homepage. The secondary window, 'Tools' opens (cf. Screen 30).
2. Choose the document that you wish to use by clicking on:
  - [EN](#) for the English version
  - [FR](#) for the French version
  - [ES](#) for the Spanish version
3. A window opens giving you the choice of either Opening or Saving the document.

Links to these files appear at 'strategic' moments in the management of the project.

For example, during the initial assessment phase, at the chapter headed 'Analysing problems, identifying needs', there is a direct link to the 'Problem tree' which can be

accessed by clicking on the  icon next to the chapter heading, as shown opposite.

