

Control in Jems

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Interact



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Topics

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**Gathering
requirements**

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in Jems**

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involvement
during
implementation**

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**Demo Control in
Jems**

Gathering requirements

Harmonised Implementation Tools



Developed by Interreg programmes for Interreg Programmes



Used for selection and monitoring of Interreg projects



Templates, checklists, methodologies, glossary

Gathering control requirements



HIT group on Control was kicked off in January 2021 taking into account input from previous control workshops (Bergen – May 2019, Bilbao – October 2019, online – December 2020)



HIT subgroup on Risk-Based sampling
(throughout 2021)



HIT subgroup on public procurement
(throughout 2021)

HIT group on Control Package

Outputs:

- Templates for:
 - Control certificate
 - Control report and Checklist
 - Public procurement Checklist
- Methodology for Risk-based management verifications

All final HIT control package outputs were published in HIT community by April 2022 (with only some legislation updates on Control report and Checklist on January 2023).

What is **Jems**



Harmonised tool based on HIT and Interreg collective knowledge



Developed by Interact with the help of a Core Group (7 programmes). Takes into consideration feedback and input of a larger User group (the 50 programmes that signed Jems licence agreement to test/use Jems)



Taking into consideration results of User tests, feedback and proposals (if relevant for Jems users community)

How is Jems being developed



Software development started in May 2020
and is still ongoing



Development in 2 weeks sprints/cycles

Every 2 weeks functional pieces of software are presented to public in online Sprint Review meetings. Feedback is provided on the spot or on Helpdesk and is integrated in future developments



Jems releases: 6 releases so far, 7th expected on 30 of June 2023

Including entire functional features (musts for having the job done)

Control relevant sections **in Jems**

Control report

Includes all controller work: Control report, Control checklists, Control certificate, Clarifications, basic handling of national controls on top of control work (if applicable), basic handling of appeals on control work (if applicable).

Will be delivered with Jems v.7 (30 June 2023). Section can be already fully tested in Jems demo instance and is described in Jems draft manual for v.7. We will see a short demo later, in this session.

Control institutions

Includes: setup of control institution, assignment of users to control institution and assignment of control institution to partners.

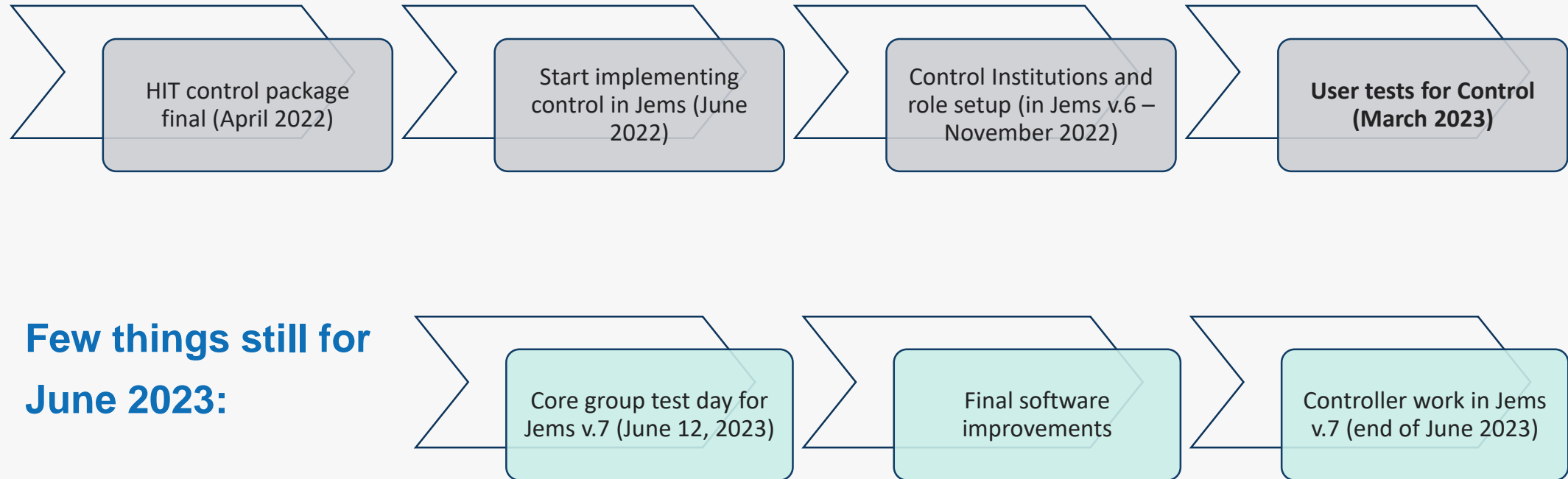
Was delivered with Jems v.6 (November 2022)

Role setup for control

Setup of roles for controllers coordinator and national controllers.

Role setup is possible from the beginning in Jems, special privilege for Control institution management was delivered with Jems v.6 (November 2022)

Control timeline in Jems



User test goal and participants

Target Group: Controllers (from testers pool)

Goal of the tests

Evaluate the usability of developed features

Usability of new workflows (Control)

Participants:

Heje (Estonia) – March 15th, 2023

Julija (Latvia) – March 16th, 2023

Vesna (Serbia) – March 21st, 2023



User test Test case

Intro

The test facilitator introduced the user to the test instance and the role user would perform.

Users were guided through various tasks and shared their screen while working.



Get familiarized with the test project

Look for information needed in order to perform control (e.g., budget, activities)



Start control of a partner report

Create a control report and understand if all information needed for starting work was available



Perform control work

Fill in control details, verify expenditure items, sample, deduct, park items, communicate to partner, fill in control checklist(s)

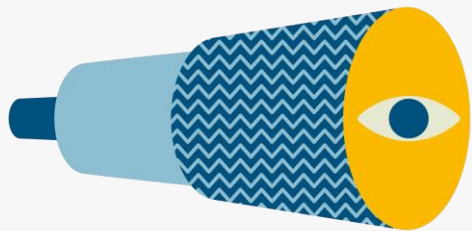


Finalise control work

Check overview of control work, fill in conclusions, finalise control work, issue control certificate and control report

User test Main problems identified

Users shared with us their thoughts while going through a control workflow in Jems



Info on AF budget/partner budget is difficult to find for a controller with no prior experience with the Jems.



Control report and partner report on same overview list led to navigation mistakes



Ordering of control report sections and some wording were not in line with controller workflow. Also, some of the wording was misleading or not self-explanatory enough.



Navigation between expenditure items (in control) and procurements is complicated



Issuing control certificate and finalization workflows are different across programmes, and Jems doesn't have enough room/text labels for programmes to explain them

User test main outcomes

Control report

Suggestions for reordering/renaming of some control report tabs, action buttons, plugin names, as well as additions of more explanatory labels in some sections

Requests for: export of expenditure verification list and control checklist; easier identification, link and access to partner procurements from expenditure item

Wishes: bulk download, filtering expenditure table, start control possible also from (inside of) partner report, notification when there are uploads in Control communication tab.

Partner report

Requests for: LoE export; easier access to partner procurements

Application Form

Suggestions for changing some labels in budget tables that are misleading (e.g. Unit costs – for only Unit costs for multiple cost categories) and make it more obvious where AF budget can be downloaded

User test Follow-up Actions



Immediate improvements

Changed names / improved user guidance in some sections already for Jems test version



Jems improvements for version 7

Created tickets to be implemented and ready for Jems release version 7



Jems improvements for the future

Noted additional improvements for future Jems versions



Feedback for User documentation

Noted down suggestion to explain in detail some of the functionalities

Thank you, **all who participated!**

For taking the time and joining test sessions

For testing regularly on your own

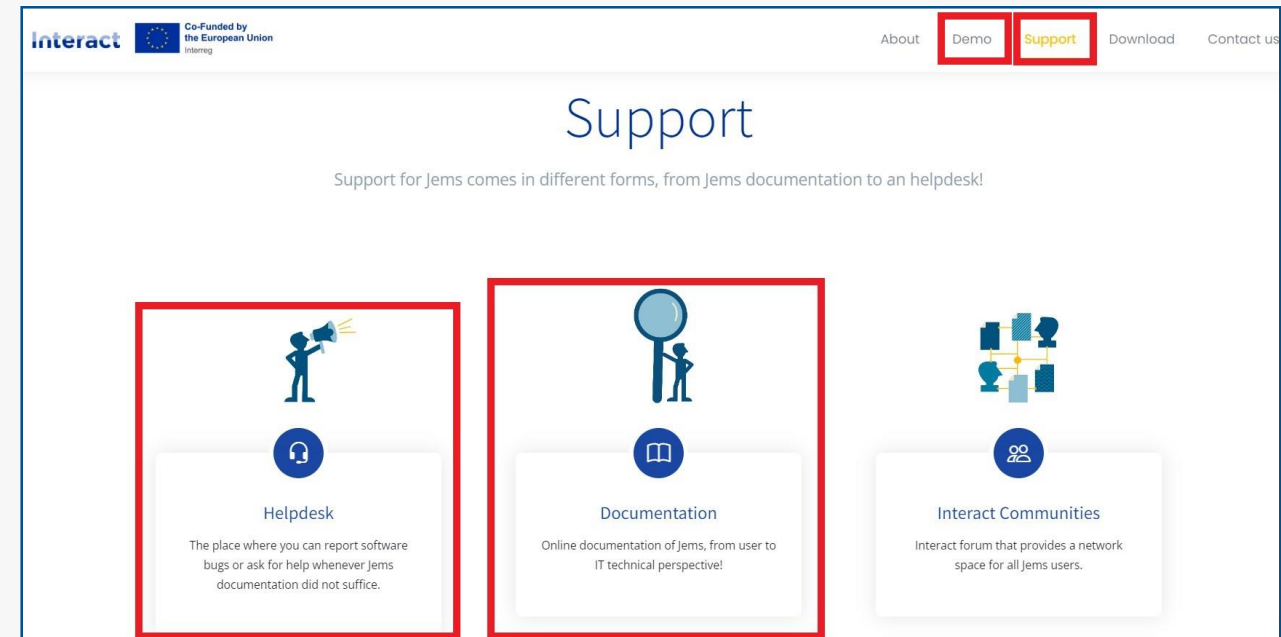
For supporting our tester pool with test users



Everyone is welcome to test and provide feedback!

Check out Jems portal <https://jems.interact-eu.net> for:

- **Documentation:** User manual, Technical manual, Video tutorials
- **Demo** instance of Jems: where you can test yourself
- **Helpdesk:** where you can directly provide feedback.



Before you reach out to Jems team:

Make sure you first:

Did you look up certain section in User Manual/Technical manual?

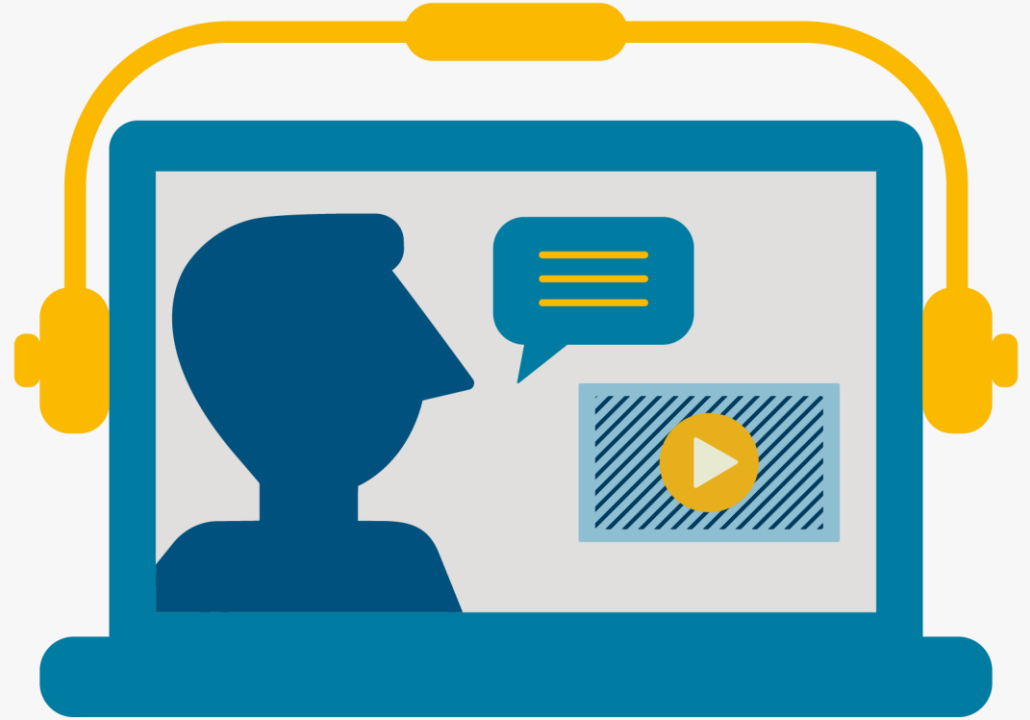


Did you check the video tutorials?

Did you try to find your question in FAQ (Frequently asked questions)?

The screenshot shows the Jems v7 Draft user manual website. The top navigation bar includes the Jems logo, 'Jems Portal', 'Helpdesk', 'Interact', a version dropdown set to 'v7 Draft', and a search bar. A left sidebar menu lists: Release notes, Technical manual, User manual, Tutorials, Support (expanded), Deviations from HIT, Frequently Asked Questions (FAQ), Download - Packages & Code, Helpdesk - Request support, and JemsCloud. The main content area is titled 'Manual' and features the Jems logo with the tagline 'Joint electronic monitoring system'. A yellow warning box at the bottom states: 'This is a draft manual for Jems v7, existing documentation might change. Jems is right now going through an alignment of visuals with Interact corporate identity, therefore visuals/screenshots will be different from final documentation. The final manual will be released around Jems v7 release date (~June).'

Control demo in Jems



Cooperation **works**

All materials will be available on:

Interact connections