### ONLINE PROJECT PLANNING SYSTEM (OPS)

**User Guide**

**OCHA – October 2014**

[http://ops.unocha.org](http://ops.unocha.org)

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#### CURRENT APPEALS

<table>
<thead>
<tr>
<th>Appeal Year</th>
<th>Appeal Title</th>
<th>Appeal Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>2015 TEST APPEAL</td>
<td>Consolidated Appeals</td>
</tr>
<tr>
<td>2015</td>
<td>2015 TEST APPEAL NEW LOGFRAME</td>
<td>Consolidated Appeals</td>
</tr>
<tr>
<td>2012</td>
<td>Afghanistan 2013</td>
<td>Consolidated Appeals</td>
</tr>
<tr>
<td>2013</td>
<td>Burkina Faso 2013</td>
<td>Consolidated Appeals</td>
</tr>
<tr>
<td>2013</td>
<td>Central African Republic 2013</td>
<td>Consolidated Appeals</td>
</tr>
<tr>
<td>2013</td>
<td>Chad 2013</td>
<td>Consolidated Appeals</td>
</tr>
<tr>
<td>2013</td>
<td>Democratic Republic of the Congo 2013</td>
<td>Consolidated Appeals</td>
</tr>
<tr>
<td>2013</td>
<td>Djibouti 2013</td>
<td>Consolidated Appeals</td>
</tr>
<tr>
<td>2013</td>
<td>Haiti Humanitarian Action Plan 2013</td>
<td>Consolidated Appeals</td>
</tr>
<tr>
<td>2012</td>
<td>Kenya Emergency Humanitarian Response Plan 2013</td>
<td>Consolidated Appeals</td>
</tr>
<tr>
<td>2013</td>
<td>Nepal 2013</td>
<td>Consolidated Appeals</td>
</tr>
<tr>
<td>2013</td>
<td>Nauru 2013</td>
<td>Consolidated Appeals</td>
</tr>
<tr>
<td>2013</td>
<td>Myanmar - Kachin Response Plan 2013</td>
<td>Other Appeals</td>
</tr>
<tr>
<td>2013</td>
<td>Myanmar - Rakhine Response Plan 2012,2013</td>
<td>Other Appeals</td>
</tr>
<tr>
<td>2013</td>
<td>Niger 2013</td>
<td>Consolidated Appeals</td>
</tr>
<tr>
<td>2012</td>
<td>occupied Palestinian territory 2013</td>
<td>Consolidated Appeals</td>
</tr>
<tr>
<td>2012</td>
<td>Philippines 2013</td>
<td>Consolidated Appeals</td>
</tr>
<tr>
<td>2012</td>
<td>Republic of South Sudan 2013</td>
<td>Consolidated Appeals</td>
</tr>
<tr>
<td>2012</td>
<td>SIMULATION KINORDOTAN Flap appeal 2013</td>
<td>Flash Appeal</td>
</tr>
<tr>
<td>2012</td>
<td>Somalia 2012</td>
<td>Consolidated Appeals</td>
</tr>
<tr>
<td>2012</td>
<td>Sudan 2013</td>
<td>Consolidated Appeals</td>
</tr>
<tr>
<td>2013</td>
<td>Syria Humanitarian Assistance Response Plan (SHARP) 2013</td>
<td>Other Appeals</td>
</tr>
<tr>
<td>2013</td>
<td>Syria Regional Refugee Response Plan (RRP) 2013</td>
<td>Other Appeals</td>
</tr>
<tr>
<td>2013</td>
<td>Yemen Humanitarian Response Plan 2013</td>
<td>Consolidated Appeals</td>
</tr>
<tr>
<td>2012</td>
<td>Zimbabwe 2013</td>
<td>Other Appeals</td>
</tr>
</tbody>
</table>
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BLANK PROJECT SHEET TEMPLATE ............................................... Error! Bookmark not defined.
1. WHAT IS OPS?
The Online Project Planning System (OPS) is a web-based database that allows UN agencies and NGOs participating in inter-agency planning processes (Strategic Response Plans or Emergency Action Plans) to directly upload their projects and funding requests for consideration during the planning phase, and update them during the course of the year. The database has been designed to facilitate information sharing and the review process for humanitarian actors.

OPS is the central repository for response plan and action plan projects. It is managed by the CHAP Section in OCHA Geneva and it is linked to the Financial Tracking Service (FTS) database and website that tracks funding requests and funding status of projects in inter-agency plans.

1.1 WHO CAN ACCESS OPS?
UN agencies and NGOs that would like to submit projects to an appeal or update them during the appeal year can access the database via a simple account creation. However, before uploading projects, organizations that are not familiar with the strategic planning process should be in contact with the OCHA office or with the cluster coordinators at the field level. To access OPS go to: http://ops.unocha.org/

1.2 WHAT CAN YOU DO IN OPS?
- Organizations can upload projects, edit them as needed either from the field or from headquarters, and update them anytime during the year.
- All users may view each other’s projects, but edit only their own organization’s projects.
- Cluster Coordinators can review projects for their cluster cluster and click on the approval button to signal that a project has been accepted for inclusion in the response plan.
- View/print summary and detailed PDF lists of projects by cluster, organization, location, priority, and gender marker.
- View/print PDF and Word versions of full project sheets (singly, selected group of projects, or all projects).
- View/print in excel format all information (in data fields) related to the projects.
- View/print in excel format the detailed geographical locations to facilitate analysis of who is doing what where.

2. HOW TO ACCESS/REGISTER on OPS

<table>
<thead>
<tr>
<th>First time in OPS?</th>
<th>Already registered in OPS?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. In order to upload, edit, or manage project information, you must first complete the registration process on the OPS site. Click on New User to start the process.</td>
<td>1. Click on Login as registered user.</td>
</tr>
<tr>
<td>2. Create your account (indicate your e-mail, set your password).</td>
<td>2. Enter your e-mail and password.</td>
</tr>
<tr>
<td>☚ If you work for OCHA and you already have a single sign-on account, login using your webmail information.</td>
<td>3. If you have forgotten your password, you can re-set it by clicking on the “Forgot password?” link.</td>
</tr>
<tr>
<td>3. Complete your USER PROFILE online (contact details, select your “role”, select your organization).</td>
<td>4. If you need to edit or correct your profile, click on “edit profile” at the top right corner of the screen, edit/correct it, and submit a new request. The OPS administrator will send you a new access link by email, which you will need to activate.</td>
</tr>
<tr>
<td>4. Submit the access request to the OPS administrator.</td>
<td></td>
</tr>
<tr>
<td>5. Within 24 working hours, the administrator will send an access link to your e-mail.</td>
<td></td>
</tr>
<tr>
<td>6. Check your e-mail and click on the access link to activate your account.</td>
<td></td>
</tr>
</tbody>
</table>
1) Click on New User

2) Create a new account
Click on “Not yet registered? Create a new account?”
If you already have an OCHA Single Sign-On account, login using your Webmail login information.

If you have forgotten your password, click on the “forgot password” link to re-set it.

3) Complete your USER PROFILE
Complete the user profile with your contact information. Indicate your phone with international code/prefix/number, select your organization by using the search link “Click here to search for your organization”, carefully read and select the appropriate role that you will have in the appeal process, select the country where you are based and click on “submit”.

Can’t find your organization?
If your organization is not already in the OPS system, a red message will appear with a link to “inform us”. Fill in the online form. We will upload your organization in OPS. Once the organization has been registered in the database (which may take up to one working day) you will receive a message indicating that you can now proceed with the online registration on OPS.

Please note that this is NOT the registration.

4) Click on Submit.

5) If you are requesting a role other than UN/NGO field programme officer, the OPS Administrator will evaluate the request and process it. A notification e-mail will be sent to the user with a verification link which will grant access and edit rights to the database. This may take up to one working day, so please plan accordingly.
6) Check your e-mail and activate the access link received by e-mail. The registration is NOT completed if the link is not activated.

Your name, e-mail, role, and organization will appear at the top of the database page after the registration and verification processes are completed. To change your profile, click on “Edit Profile”.

### 2.1 HOW TO SELECT YOUR ROLE in OPS

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UN or NGO Field Programme Officer</td>
<td>You belong to an appealing organization (United Nations or NGO) based in the field and you want to upload a project in OPS. You can view all projects but you can ONLY upload or edit projects for your organization. A project created by a Field Programme Officer will remain in DRAFT status until the Cluster/Sector Lead signals that it is reviewed and approved by the cluster/sector.</td>
</tr>
<tr>
<td>Field Cluster Lead</td>
<td>You belong to an appealing organization (United Nations or NGO) based in the field, and you have the function of Field Cluster Lead. You have edit rights for your organization’s projects, as well as for other organizations’ projects. You convene the peer review process of your cluster/sector’s proposed projects, and you will certify project approval by clicking “approve” on each project approved by the cluster/sector. You can also reject/restore projects. (Explained later in this guidance.)</td>
</tr>
<tr>
<td>HQs UN agencies or HQ NGOs</td>
<td>You are based at a UN Agency/NGO headquarters and have a review function in the appeal process. You can view all projects but you can only upload projects for your organization. You can edit projects when they are in Draft status or when they are in HQ Review status. You can reject/restore projects. If you upload a new project in Draft status during the HQ review phase, you will need to alert OCHA HQ Desk Officer and the CAP section by e-mail in order for the project to be approved by the Cluster Lead and by the Humanitarian Coordinator.</td>
</tr>
<tr>
<td>United Nations Resident/Humanitarian Coordinator</td>
<td>You will be able to edit all projects in the plan and reject them if necessary. You do not have a specific button to approve projects.</td>
</tr>
<tr>
<td>OCHA Field Staff</td>
<td>You are the database administrator at field level. You can view and edit all projects, upload projects on behalf of other organizations and approve/reject/restore projects on behalf of the Cluster Lead.</td>
</tr>
<tr>
<td>OCHA Desk Officer at HQ</td>
<td>You have a review function after the agencies HQs Review Phase with edit rights on all projects.</td>
</tr>
<tr>
<td>OCHA Geneva CAP Section</td>
<td>Database administrators with edit rights on all projects and delete function.</td>
</tr>
</tbody>
</table>
### Who can do what when

<table>
<thead>
<tr>
<th>Roles</th>
<th>Field Process</th>
<th>HQs process</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Draft</td>
<td>Approved by cluster</td>
</tr>
<tr>
<td><strong>UN/NGO Field Programme Officer</strong></td>
<td>Edit</td>
<td>View</td>
</tr>
<tr>
<td><strong>Cluster Lead</strong></td>
<td>Edit</td>
<td>Edit</td>
</tr>
<tr>
<td><strong>HC</strong></td>
<td>Edit</td>
<td>Edit</td>
</tr>
<tr>
<td><strong>OCHA Field</strong></td>
<td>Edit</td>
<td>Edit</td>
</tr>
<tr>
<td><strong>Agencies/NGO HQs</strong></td>
<td>Edit</td>
<td>View</td>
</tr>
<tr>
<td><strong>OCHA HQ</strong></td>
<td>View</td>
<td>View</td>
</tr>
<tr>
<td><strong>OCHA CAP</strong></td>
<td>Edit</td>
<td>Edit</td>
</tr>
</tbody>
</table>

3. **APPEAL PROCESS AND OPS**

The arrows at the top of the appeal page will indicate the different phases of the process. The phases will also determine the editing access to projects.

**Field Submission**: UN agencies and NGOs upload their projects. Projects uploaded are in “draft” status. Appealing organizations in the field or at HQ have edit rights on draft projects. This allows registered users from the same organization but in different locations to work on the same project.

**Cluster**: The Cluster Coordinators in the field convene the peer review process, review all projects submitted, and click “approve” or “reject” for each project. The Cluster Coordinator has to click on “approve by cluster” for a project to be included in the plan.

A project that is in “approved” or “rejected” status cannot be changed by the appealing organization. Only the Cluster Coordinator can re-open the project to “draft” status by clicking on “edit” after cluster approval or by clicking on the “Restore” button after rejection.

**Humanitarian Coordinator**: All projects should be in “approved by cluster” status. The appealing organizations cannot edit them while the HC reviews them. If the HC requires adjustments to projects, the Field Cluster Lead should open those projects to “draft” status by clicking “edit after cluster approval” and should insert the changes or request the appealing organization to make the required changes. Cluster Coordinators are not expected to edit others’ projects without their permission, but after changes are agreed with the proposing organization.

**Note**: After the HC review, projects are considered final. Field users will be able to view projects but will no longer be able to change projects in OPS until after the publication of the response plan. However, it is important to note that access to OPS is never restricted or frozen, and any, organization can upload a draft project at any time during the process, regardless of the phase. However the process has strict deadlines and a project that is uploaded after these deadlines (each project has a project creation date at the bottom of the online form) may not be included in the final publication. It is possible
that Cluster Coordinators will accept a project at a later stage.

As per standard IASC practice, UN Agencies and NGOs based at headquarters will have a review period during which minor adjustments may be made if necessary before publication.

**Agencies HQs:** When projects are in UN Agencies HQ phase, only individuals registered with the role of agencies/NGOs HQs will have edit rights for their projects.

No major changes are generally expected from HQs at this stage of the process. If an organization needs to add a project during this phase or significantly amend a project (budget or content); the HC should be consulted again (usually via the Cluster Coordinator or OCHA focal point). A new project uploaded in the HQ review phase will be in “draft” status and will need to be approved by the Cluster Coordinator and reviewed by the HC in order to be accepted in the plan.

**HC Final Review:** Only the Humanitarian Coordinator will be able to edit and approve projects during this stage. UN agencies and NGOs in the field and at HQs will be able to view projects but will no longer be able to edit them until the plan is published.

**CAP Publication:** Projects are published online via the Financial Tracking Service. Public users will find a print on demand function to download individual projects sheets or the full compendium of projects, including financial tables. Project sheets can also be accessed or downloaded by clicking on the blue project codes on FTS Table E.
4. HOW TO UPLOAD/REVIEW A PROJECT

Select your plan from the list (make sure you choose the correct year). Click on “view” to access the new project form or existing projects.

To familiarize yourself with the database you can open the TEST APPEAL 2014. This is a space where you can test the project submission form. No data uploaded in this space will ever be made public.

To create a new project or to find an existing project:

- Click here to view only your organization’s projects.
- Click here to view all projects for this plan.
- Click here to create a new project.

The list of projects also displays:

a) **Total Original Request** in US$ of a project at the date of the appeal launch.

b) **Total Current Request**: displays in US$ what is the project currently appealing for. If the project budget has been revised after the appeal launch, the amount will differ from the original request.

c) **Total Request Under Revision**: displays any proposed US$ budget revision under
consideration by the Sector/Cluster Coordinator, the UN Humanitarian/Resident Coordinator.

d) **Original Project Status:** indicates the various phases of a project in the process. (draft, approved by cluster, rejected, Agencies HQs, HC final review, CAP final review phase, published by CAP)

e) **Under Revision Project Status:** indicates the various phases of a proposed project revision in the process (Draft, Approved by Cluster, Rejected, Agencies HQs, HC Final Review, CAP Final Review phase, published by CAP)

4.1 **FILLING OUT AN ONLINE PROJECT FORM**
When you click on “create a new project”, the system will open an empty online form. Fields with a red asterisk are mandatory. The project will not be saved if all mandatory fields are not completed. Once you have completed the project form, don’t forget to SAVE the project! If you click “save and stay”, the project will be saved and you can download/view the project sheet in PDF or Word format by clicking on the icons “export and print” on the top of the project form.

The project will be saved in “draft” status and a project code will automatically be generated by the system.

![Project Form Screenshot]

4.1.1 **APPELLING ORGANIZATIONS**
The system automatically creates a project for your organization. A project can have multiple appealing organizations. Click on “+ add appealing agency” to add organizations. Each organization will have to fill out a separate budget summary box.

Cluster Coordinators and OCHA staff can upload a project on behalf of another organization, or can change the name of an existing organization by:
1) Clicking on “+ add appealing agency”.
2) Selecting the new appealing organization.
3) If the project has budget information inserted that has to be transferred to the new organization’s budget summary, make sure to copy and paste this information, into the new organization budgetsummary box. If you do not do this the budget information will be lost.

Click on “remove” next to the old organization that has to be deleted.

![Appealing Agency Screenshot]

4.1.2 **BENEFICIARIES**
Disaggregate women, children, and other groups wherever possible.
Use the beneficiaries description field if you want to present data in a short narrative form.

![Beneficiaries Screenshot]
4.1.3 LOCATIONS AND FTS FINANCIAL TABLES
This location field does not allow the selection of multiple locations, however will provide useful geographical information that can be transferred to the Financial Tracking Service. If your proposed project covers multiple locations, select the options “multiple locations” in the dropdown menu. Details should then be provided in the Enhanced Geographical Fields.

4.1.4 PROJECT DURATION
Enter the start date and end date of the project. Note that a project’s duration can exceed one year, however funds requested should only be the amount needed for the calendar year only (except in the case of an emergency action plan for a sudden-onset disaster, or a plan that begins after January 1).

4.1.5 ENHANCED GEOGRAPHICAL LOCATIONS

To provide enhanced geographical information:

a) Upload all required project data and click on “save and stay.

b) Click on “add/edit” button. The system will open a window that presents a summary of your project with a set of pre-filled drop down menus with the geographical administrative levels related to your appeal.

c) Select the locations of your project activities from the highest administrative level to the lowest.
In the example below, the administrative levels for Central African Republic, include region, prefecture, sub-prefecture, and commune.

d) Click “add” after your selection, and the information will be displayed in the box.
e) Click on the X to remove the data if entered by mistake or in a later revision.

In this example, the project proposes activities in Damara, Mbata, and Mobaye.

The information will be displayed on the project sheet (click on the PDF/Word icon) at the top of the online project form. It will also be available on the Project Summary Tables page in Excel format.

4.1.7 ENHANCED GEOGRAPHICAL FIELDS EXCEL DATA AND CLUSTER ANALYSIS
The EGF excel on the Project Summary Tables displays the detailed geographical locations of each project, with pre-set filtering options that will allow users to easily view who is planning to do what and where.

In reviewing the projects proposals during the early phase of an appeal preparation or revision, Cluster leads can use this tool to ensure that the proposed projects in the appeal are meeting the assessed priorities needs and geographical areas without gaps and duplications in the response.

The funding requirements are not displayed on this excel to avoid double counting. A project could have multiple locations and be listed on different excel lines but as it only has one global requirement, that is not disaggregated by location, this would be repeated on every project line, thus inflating the amount, i.e. double counting.

Please note the highlighted pink cells. Having the old location data transferred to the EGF file, makes it easy to see if the same location data exists. This was not the case in the past; you then had to compare two different excel files to see this information?
<table>
<thead>
<tr>
<th>Cluster</th>
<th>Region</th>
<th>Prefecture</th>
<th>Sub-Prefecture</th>
<th>Commune</th>
<th>Organisation</th>
<th>Project Code</th>
<th>Project title</th>
</tr>
</thead>
<tbody>
<tr>
<td>EARLY RECOVERY</td>
<td>Region des Kougou</td>
<td>Ouaka</td>
<td>Bamban</td>
<td>Bambaro</td>
<td>JUTEDEC</td>
<td>CAF-13ER050231R</td>
<td>Support in the socio-economic reintegration of victims of crisis Bambaro and Aindao</td>
</tr>
<tr>
<td>EARLY RECOVERY</td>
<td>Region du Haut-Obangu</td>
<td>Basse Kotto</td>
<td>Aindao</td>
<td>Aindao</td>
<td>JUTEDEC</td>
<td>CAF-13ER050231R</td>
<td>Support in the socio-economic reintegration of victims of crisis Bambaro and Aindao</td>
</tr>
<tr>
<td>EARLY RECOVERY</td>
<td>OLD LOCATION</td>
<td>Yaoundé</td>
<td>Yaoundé</td>
<td>Yaoundé</td>
<td>NOA</td>
<td>CAF-13ER070727R</td>
<td>Capacity development of community-based organizations in Yaoundé, Yaoundé, Yaoundé</td>
</tr>
<tr>
<td>EARLY RECOVERY</td>
<td>OLD LOCATION</td>
<td>Basse Kotto</td>
<td>Basse Kotto</td>
<td>Basse Kotto</td>
<td>RENOD</td>
<td>CAF-13ER070914R</td>
<td>Projet de mise en place d’un atelier de fabrication de savon artisanal à Aindao (Sous-prefecture d’Aindao), Basse Kotto</td>
</tr>
<tr>
<td>EARLY RECOVERY</td>
<td>Region des Kougou</td>
<td>Nana-Gribizi</td>
<td>All areas of the admin level</td>
<td>All areas of the admin level</td>
<td>Solidarités</td>
<td>CAF-13ER0505777</td>
<td>Supporting economic recovery in Nana-Gribizi Prefecture through capacity building of agricultural federations, community-based organizations and national NGOs</td>
</tr>
<tr>
<td>EARLY RECOVERY</td>
<td>OLD LOCATION</td>
<td>Multiple locations</td>
<td>Multiple locations</td>
<td>Multiple locations</td>
<td>UNDP</td>
<td>CAF-13ER050275R</td>
<td>REMASAT recovery as well as its national antenna for the rest of communication in prevention HIV/AIDS, Tuberculosis and Malaria</td>
</tr>
<tr>
<td>EARLY RECOVERY</td>
<td>Region du Bas-Obangu</td>
<td>All areas of this admin level</td>
<td>All areas of this admin level</td>
<td>All areas of this admin level</td>
<td>UNOPS</td>
<td>CAF-13ER050715R</td>
<td>Improvement project of security sector in Bangui city</td>
</tr>
<tr>
<td>EARLY RECOVERY</td>
<td>Region des Plateaux</td>
<td>Emba-MTopo</td>
<td>All areas of this admin level</td>
<td>All areas of this admin level</td>
<td>UNOPS</td>
<td>CAF-13ER050712R</td>
<td>Improvement project of security sector in Bangui city</td>
</tr>
<tr>
<td>EARLY RECOVERY</td>
<td>Region du Ferkot</td>
<td>Haute Kotto</td>
<td>Yalanga</td>
<td>Yalanga</td>
<td>VITALITE PLUS</td>
<td>CAF-13ER0507003R</td>
<td>Support income generating activities for women associations and internally displaced people in Haute Kotto</td>
</tr>
<tr>
<td>EARLY RECOVERY</td>
<td>Region du Ferkot</td>
<td>Haute Kotto</td>
<td>Blos</td>
<td>Blos</td>
<td>VITALITE PLUS</td>
<td>CAF-13ER0507003R</td>
<td>Support income generating activities for women associations and internally displaced people in Haute Kotto</td>
</tr>
<tr>
<td>EARLY RECOVERY</td>
<td>Region du Ferkot</td>
<td>Haute Kotto</td>
<td>Blos</td>
<td>Doba-Mboudou</td>
<td>VITALITE PLUS</td>
<td>CAF-13ER0507003R</td>
<td>Support income generating activities for women associations and internally displaced people in Haute Kotto</td>
</tr>
</tbody>
</table>

*CARLY RECOVERY: CARLY Regional Early Recovery Project*
5. PROJECT SUMMARY TABLES
The Project Summary Tables provide an overview of the plan’s overall requirements, as well as summaries by cluster and organization. They also keep track of the status of project revisions.

<table>
<thead>
<tr>
<th>Total Projects:</th>
<th>Number of projects (incl. pending)</th>
<th>Total Original US $</th>
<th>Total Approved Request US $</th>
<th>Running Total Request (incl. pending approval) US $</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Organisation</td>
<td>120</td>
<td>5,408,800,117</td>
<td>718,830,262</td>
<td>718,830,262</td>
</tr>
<tr>
<td>All Projects</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Summary</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create New Project</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

a) The **Total Original** is the amount when the plan is launched (usually around late November or early December). It corresponds to the first column of the FTS tables (original requirements).

The **Total Approved Request** is the amount that the plan is requesting to date - it corresponds to the second column on FTS tables (revised requirements).

c) The **Running Total Request** is what your plan would be requesting if everything that is under revision is approved and accepted.

You can filter the tables by selecting either ALL Projects in this appeal, or Project Under revision only. You can also choose to view only projects in a specific project status. Remember to click Refresh summary overview once you have selected your filtering criteria, in order to refresh the tables.

---

You can filter the tables by selecting either ALL Projects in this appeal, or Project Under revision only. You can also choose to view only projects in a specific project status. Remember to click Refresh summary overview once you have selected your filtering criteria, in order to refresh the tables.

---

Summary overview

- Include projects with types:
  - All Projects (incl. pending approval)
  - Under Revision

- Include projects with status:
  - Draft
  - Approved by Cluster/Sector
  - HQ Review Phase
  - OCHA HQ Phase
  - CAP Final Review Phase
  - Publish by CAP
  - Rejected by Cluster/Sector

You can filter the tables by selecting either ALL Projects in this appeal, or Project Under revision only. You can also choose to view only projects in a specific project status. Remember to click Refresh summary overview once you have selected your filtering criteria, in order to refresh the tables.

---

Summary tables

- per Projects Status
- per Cluster/Sector
- per Organisation
- per Project Location
- per priority
- per Gender Marker
- per Subset Of Appeal

Detailed project list:

- per Projects Status
- per Cluster/Sector
- per Organisation
- per Project Location
- per priority
- per Gender Marker
- per Subset Of Appeal

Full printout of all projects

- Grouped by cluster/sector

Summary of projects

Full project data

Enhanced geographical fields

- Per Cluster/Sector
  - Admin Level 1

Per Location

- Admin Level 1

Global Matrix
6. REVISING A PROJECT AFTER THE APPEAL LAUNCH
After the global launch of all plans, organizations that have submitted projects will see a “revise” button appearing at the top of each project form in OPS.

Click on the revise button, to initiate a revision of a project. The system creates a copy (a form with a light blue background) of the original project. The appealing organization can then insert changes (budget and text). Only the appealing agency can initiate the revision of a project, a Cluster Coordinator cannot initiate a project revision on behalf on another organization.

The original Project Budget Summary (first box) will be blocked for editing. Insert budget changes in the Revised Budget Summary (the second budget box). Any revisions or new projects added after the launch are considered “revised/current requirements” and should be indicated in the Revised Budget Summary.

Save the project after adding changes. The project under revision (blue copy) will be saved as a “draft”.

A project under revision will have to go through the same approval steps as a project submitted during the initial planning phase. The revised blue copy of the project will have to be approved by the Cluster Coordinator, the UN Humanitarian/Resident Coordinator, and reviewed by the appealing organization’s HQ, if required.

Once these approval steps are completed, OCHA’s CHAP Section can take the necessary steps to ensure that the new project is added or that they revised project replaces the original one.

Officially revised projects become orange and will appear under “Published by CAP” status.

During the approval process of a revised project, the public version of the project on FTS will remain the one originally accepted in the plan.

6.1 THE REJECT BUTTON IN A PROJECT REVISION
After plan publication, the “reject” button cannot be used to withdraw a project from the plan. When a project under revision is rejected, the proposed revision is rejected; however, the original project will remain in the plan. In other words, a rejecting a blue copy does not automatically cancel the original project. It does however, reject the revision of that project. To cancel/withdraw a project after plan finalization, please refer to the guidelines provided below.

7 WITHDRAWING A PROJECT AFTER THE APPEAL LAUNCH
If an organization wants to cancel/withdraw an existing project from the plan, there are two options:

a) If the project has not received any funding as recorded on the Financial Tracking Service (FTS): the appealing organization should set the revised requirements of the project to 0 then add in the project title “withdrawn” and add the following sentence in the budget breakdown: “The project has been withdrawn”.

b) If the project has received some funding: revised requirements should be adjusted to match the current funding recorded in FTS.

You can check your project funding on OPS, by clicking on the link provided after the budget box.
Each organization should select a gender marker code from the drop-down. All codes will be reviewed and adjusted as necessary during the cluster review process. For more information, contact the OCHA focal point or the Cluster Coordinator.

**8 OTHER PROJECT FIELDS**

Some plans may have customisable drop downs for to record country-specific information. The example above shows two custom fields added for this plan. This section will not be displayed if it is not being used in a particular country.
9. QUESTIONS AND ANSWERS

1) How can I get access to OPS?
You need to register online at http://ops.unocha.org/
Download the User Guide and follow the instructions.

2) I have registered on OPS but did not get access, what should I do?
Before contacting the Help Desk please, make sure that the following actions have been taken:
Did you create your account, fill your profile and click on “submit”?
Did you see the message that your request has been received? If you have any role other than UN/NGO
field programme officer, have you waiting at least one day to receive confirmation?
Did you check your mail and activate the link that you have received by mail?

3) I forgot my password, do I need to-register again?
Go to OPS as registered user and click on the “forgot password” link next to the password box on the
log in page.

4) I cannot find my organization in the organizations list.
Search by typing the acronym. If the name does not appear, try typing the full name of your organization.
If your organization name still does not appear, click on the link in red “click here to inform us”. This
will not complete the registration, but will enable our administrators to verify and add your organization
to the search. Fill out the form and wait for an e-mail with further guidance.

5) I filled the form providing information about my organization but cannot access the database.
You have filled out the form, but that is not the same as completing the registration. You need to wait
until you get an e-mail confirming that your organization has been uploaded in the organization list
before proceeding with the on-line registration process.

6) Who can register in OPS from my organization?
OPS is flexible so you can decide. You can have one registration for your organization with one password
that you can share internally as appropriate, or you can have your colleagues registering with
individual e-mails and passwords. Just be careful in selecting the correct roles in your profile. If you are
based in the field it is UN/NGO field programme officer, and if you are based in the organization
headquarters (which are outside the plan country), you should register as HQs agencies/NGOs.

7) I don’t find my project or how do I know that my project has been saved?
Click on “view” next to the plan where you have uploaded your project, Your project should appear in
“my organization projects”. You can also find it if you click on “all projects” and if you click on
“project summary table”, under your organization’s name.

8) How can I share my project with my colleagues?
During the planning process, you can ask your colleagues to register on OPS or you can download a
PDF or Word version of the project and send it by e-mail.
Click on your project and open the on-line project form, at the top you will find the PDF and Word
icon.
If you have several projects in the appeal and you want to have them in PDF or Word format, go to the
project summary table, click on your organization’s name on the list of projects by organization. The
system will provide a table listing all your projects. Download the PDF or Word format of the project
sheets by clicking on the icons at the top of the table.
When the process is over and the plan is published, you can find projects on FTS. Financial tables and
a print on demand function will be available on the FTS page for each plan.

9) I cannot edit my project anymore.
Access/edit rights vary according to the different phases of the process. Check the status of the project
and the arrows at the top of the plan’s page. If the project has been reviewed by the Cluster Coordinator
and is in “approved by cluster” status, the appealing organization (at field or at HQ level) cannot change
it anymore, because the project has to be reviewed by the Humanitarian Coordinator. If the project is in
HQ phase, only agencies at HQ level can access it because individuals with field roles no longer have
access. In this phase, only OCHA (desk officers in New York and the CHAP section) can edit them.

10) I cannot save my project.
    When you cut and paste your information into the OPS online form, please make sure:
       -not to insert commas in numerical fields (budgets and beneficiaries figures)
=not to exceed the maximum number of character for text fields
-not to forget to fill in the mandatory fields (those with a red star)
HELP!

For assistance and reporting problems with the database please contact: cap@un.org

HELP-LINE during the strategic planning period Working Hours: Mon-Fri 10-18 GMT +1 time

Mr. Luciano Natale,
Tel. +41 22 917 1761
cap@un.org
**Project Title**  
*Be concise. Capture the essence of the project*

**CAP Project Code**  
*If NEW project, leave blank – code number is assigned by OPS  
If REVISED, use existing project code (see FTS or OPS tables)*

**Appealing Agency(ies)**  
*Name(s) of appealing organisation(s) in bold and capital letters, followed by acronym in parentheses ( )  
e.g. WORLD HEALTH ORGANIZATION (WHO)  
In OPS, use the search box to find your organization’s name.  
The project can have more than one appealing agency, but each must have its own budget.*

**Requested budget, per appealing agency: (REVISED or NEW BUDGET)**

<table>
<thead>
<tr>
<th>Cost A</th>
<th>e.g. staff</th>
<th>10,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost B</td>
<td>e.g. inputs</td>
<td>30,000</td>
</tr>
<tr>
<td>Cost C</td>
<td>e.g.</td>
<td></td>
</tr>
<tr>
<td>Cost D</td>
<td>e.g.</td>
<td></td>
</tr>
<tr>
<td>Cost E</td>
<td>e.g. administration</td>
<td>1,000</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td><strong>41,000</strong></td>
</tr>
</tbody>
</table>

*In OPS the system will calculate total automatically.*

**Classification**

| Sector | Choose ONE cluster name from list used in your 2012 CAP.  
Or select the cluster from the OPS drop-down menu |

| Objective | A summary in a sentence or two of what the project aims to achieve. This should relate directly to one of the cluster objectives.  
(maximum 2000 characters) |

**Project Location.**  
*One location selection is possible, for multiple locations select the option “multiple location” and provide the detailed information in the Enhanced Geographical Location Field at the end of the project form*

**Beneficiaries**  
*Disaggregate women, children, and other groups from TOTAL wherever possible.*

<table>
<thead>
<tr>
<th>Total</th>
<th>Number</th>
<th>Description</th>
</tr>
</thead>
</table>
|       | 1000   | [always individuals, not households] Individuals.  
Or 200 Children under 5 and mothers, and 1500 IDPs and.... |

<table>
<thead>
<tr>
<th></th>
<th>200</th>
<th>Children</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>100</td>
<td>Women</td>
</tr>
</tbody>
</table>
|       | 50     | Other groups (specify)  
community health promoters |

**Implementing Partners**  
*List partners, only in the sense of those whom you will subcontract – not those with whom you will coordinate. (It’s assumed you’ll coordinate laterally with the rest of the cluster.) e.g. Ministry of Health, Oxfam*

**Project Duration**  
*From when to when does the project run? Note that a*
(dd/mm/yyyy): project’s duration can exceed one year. However, funds requested should be the portion needed for **2012 only**. e.g. 01/07/2012– 31/12/2012

<table>
<thead>
<tr>
<th>Needs, Activities and Output Description</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Needs</td>
<td>Maximum 4000 characters</td>
</tr>
<tr>
<td>Activities or Outputs</td>
<td>Maximum 4000 characters</td>
</tr>
<tr>
<td>Indicators and Targets</td>
<td>Maximum 4000 characters</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Priority</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority</td>
<td>Choose ONE Priority from list used in your 2012 CAP as agreed with your cluster lead</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Additional Project Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Contact Name:</td>
<td>Joe Schmoe</td>
</tr>
<tr>
<td>Project Contact e-mail:</td>
<td><a href="mailto:Joe.Schmoe@unxyz.org">Joe.Schmoe@unxyz.org</a></td>
</tr>
<tr>
<td>Project Contact e-mail:</td>
<td><a href="mailto:Joe.Schmoe@unxyz.org">Joe.Schmoe@unxyz.org</a></td>
</tr>
<tr>
<td>Project URL:</td>
<td>Add link to your project homepage if such exists</td>
</tr>
<tr>
<td>Agency Project Code:</td>
<td>Add your internal project id/code if such exists</td>
</tr>
</tbody>
</table>