10 OPS TIPS FOR CLUSTER COORDINATORS

1. <u>OPS remains open to *draft* projects at all time, even after Response Plan publication</u>. What is important is all appealing agencies meet the deadlines of the process, as agreed and communicated. To find out if a cluster's deadline has been respected, scroll down to the bottom of the project sheet and you can see the date it was originally created.

2. <u>Learn to navigate with the project colours</u>:
   - Projects with a <u>white</u> background: Published projects with no modification
   - Projects with a <u>blue</u> background: Projects that are currently under revision (could be significant change or could be only in one of the fields).
   - Projects with an <u>orange</u> background: Projects that have been revised

3. <u>Tables for process management</u>: The PDF summary tables are useful to help manage the cluster review process. You can find these tables by clicking the tab "Project Summary Tables", scrolling down, and looking on the right-hand side. You may also download an Excel table to assist in the process.

4. <u>Rejecting and approving projects</u>: As a field cluster coordinator, you have edit rights on your organization's projects as well as on other organizations' projects. You will certify project approval following peer review by clicking **"approve"** on each project approved by the cluster/sector. **If you do not click "approve", the project remains in DRAFT status and will not be included in the appeal.**

   If a project is not approved, you must click on the reject button. (A project rejected by mistake can be restored to DRAFT status by clicking "**restore**".) Note that if a **project under revision (i.e. in blue) is rejected**, <u>the original project will remain in the appeal.</u> Rejecting a blue copy does not cancel the project from the appeal, but it is only rejecting the revision of that project.

5. <u>Opening projects in new window</u>: If you right click on the word "edit" in front of the project code on the list of projects, you can open the project in a new tab or a new window. This is convenient when going down a list of projects so you don't have to sort or search for them each time you finish working on one of them. Make sure and save your changes in the new tab or window, and then close it. Then you can refresh the main window you were working in to see the change(s) you made (in status, for example).

6. <u>Location and priority (i.e. category)</u>: These are required fields so do not leave them blank. To help you see which ones may still require information at the end of the cluster review process, download the <u>detailed summary project list per location.</u>

7. <u>Comments box</u>: You may want to use the comments box to communicate with the appealing agencies or to include a standard explanatory message for all rejected projects.

8. <u>Duplicate projects</u>: Duplicate projects are common in revisions. If an organization has more than one project in your cluster, please check the project titles and activities and make sure that they have not uploaded a new project instead of revising an existing one. If there are two projects from the same organization with similar names, please edit the title to make the distinction clear.

9. <u>Budgets</u>: Please remember that budgets should be <u>gross</u> requirements, not net requirements. You may want to have OCHA's Financial Tracking Service (FTS) tables handy during the cluster review process to note which organizations might need a reminder to report (or ask their HQs to report) funding to FTS. As well, there is a link to FTS in each project sheet, beneath the budget. Clicking this link will open a window which shows the funding for that project, if any.

10. <u>Withdrawing projects</u>: To cancel/withdraw an existing project from the appeal:
    - If the project has not received any funding as recorded on (FTS): the revised requirements of the project should be set to 0 then add in the project title " withdrawn" and add a sentence in the budget breakdown: The project has been withdrawn.
    - If the project has received some funding, revised requirements should match the current funding recorded in FTS. You can check your project funding on OPS, by clicking on the link provided after the budget.

The full OPS Guide is available for download at: http://ops.unocha.org