

ONLINE PROJECTS SYSTEM for Consolidated and Flash Appeals

User Guide

OCHA – August 2011

<http://ops.unocha.org>

**Humanitarian Appeal**
CAP Consolidated Appeals Process Online Project System

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AppealYear:2011 Switch to year: [2011] [2010] [2009]

CURRENT APPEALS Total Appeals : 22

	Appeal Year	Appeal Title	Appeal Type
[View]	2011	2011 - A TEST APPEAL	Consolidated Appeals
[View]	2011	2011+ Kenya Emergency Humanitarian Response Plan	Consolidated Appeals
[View]	2011	Afghanistan 2011	Consolidated Appeals
[View]	2011	Central African Republic 2011	Consolidated Appeals
[View]	2011	Chad 2011	Consolidated Appeals
[View]	2011	Colombia 2011 2012	Other Appeals
[View]	2011	Democratic Republic of the Congo 2011	Consolidated Appeals
[View]	2011	Djibouti Drought Appeal 2011	Other Appeals
[View]	2011	Haiti 2011	Consolidated Appeals
[View]	2011	Mindanao Humanitarian Action Plan 2011	Other Appeals
[View]	2011	Namibia Flash Appeal (April - October 2011)	Flash Appeals
[View]	2011	Niger 2011	Consolidated Appeals
[View]	2011	occupied Palestinian territory 2011	Consolidated Appeals

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1. WHAT IS OPS?

The Online Projects System (OPS) is a web-based database that allows UN agencies and NGOs participating in consolidated or flash appeals to directly upload their projects and funding requests and update them during the course of the appeal year. The database has been designed with the aim of facilitating information-sharing and the appeal review process for humanitarian actors.

The database is the central repository for appeal projects. It is managed by the CAP Section in OCHA Geneva and it is linked to the Financial Tracking Service database and website that tracks funding requests and funding status of projects in inter-agency appeals.


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 consolidated/flash appeal process should be in contact with the OCHA office or with the cluster coordinators at the field level. To access the OPS go to: <http://ops.unocha.org/>

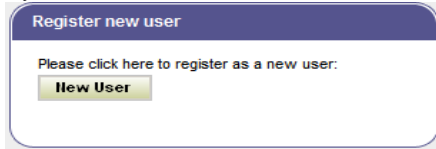
1.2 WHAT CAN YOU DO IN OPS?

- ✓ Organizations can upload their projects, edit them as needed both from the field and from the Headquarters, and update them anytime during the appeal year.
- ✓ All users may view each other's project, but edit only their own organization's.
- ✓ Cluster Lead Coordinator can review projects by cluster and click on the approval button to signal that a project has been accepted in the appeal.
- ✓ View/print summary and detailed PDF lists of projects by cluster, by organization, by location, by priority and by Gender marker.
- ✓ View/print PDF and WORD version of full project sheets (singly, selected group of projects or all projects in the appeal).
- ✓ View/print in excel format all appeal data.
- ✓ View/print in excel format the detailed geographical locations to allow who is doing what where analysis.

2. HOW TO ACCESS/REGISTER on OPS

First time in OPS?	Already registered in OPS?
<ol style="list-style-type: none">1. In order to upload, edit, or manage a project, you must first complete the registration process on the site. Click on New User to start the process.2. Create your account (indicate your e-mail, set your password).	<ol style="list-style-type: none">1. Click on Login as registered user2. Enter your e-mail and password3. If you have forgotten your password, you can re-set it by clicking on the "Forgot password?" link.4. If you need to correct your profile, click on "Edit Profile" at the top right corner of the screen, correct it, and submit a new request. The OPS administrator will send you by mail a new access link to be activated.
<p> If you work for OCHA and you already have a single sign-on account, login using your webmail information.</p> <ol style="list-style-type: none">3. Complete your USER PROFILE online (contact details, select your "role", select your organization).4. Submit the access request to the OPS administrator.5. Within 24 working hours, the administrator will send an access link to your e-mail.6. Check your e-mail and click on the access link to activate it.	

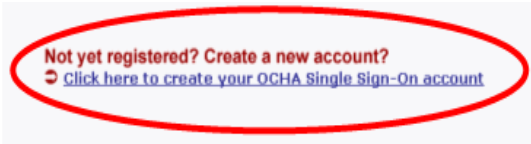
1) Click on New User



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"**.

First Name: Laura
Last Name: Calvo
Email: calvo@un.org
Organisation *: Office for the Coordination of Humanitarian Affairs
[Click here to search for your organisation](#)
Phone Number *: +41 22 917 1874
Role *: Please select one from the list below

Select One	Role Name	Role Description
<input checked="" type="radio"/>	UN/NGO Field Programme Officer	If you belong to an appealing organisation (UN Agency/NGO) in the field that wishes to submit or revise a project, select "Field Programme Officer".
<input type="radio"/>	Field Cluster/ Sector Lead	If you are a Sector/Cluster lead in the field please select "Field Cluster/Sector Lead".
<input type="radio"/>	UN Resident Coordinator / Humanitarian Coordinator	
<input type="radio"/>	HQs UN agencies/ NGOs	If you are based at the UN Agency/NGOs headquarters and has a review function in the appeal process, please select "HQs UN agencies/NGOs".
<input type="radio"/>	OCHA field staff	
<input type="radio"/>	OCHA Desk Officer at HQ	
<input type="radio"/>	OCHA CAP - Geneva Section	

Country *: Switzerland

IF you can't find your organization?
a red message will appear with a link to "inform us". Fill in the online form. We will upload your organization in the OPS list and in the Financial Tracking Service. 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.

6) The OPS Administrator will evaluate the request and process it. Notification e-mail will be sent to the user, granting access and edit rights to the database. This may take up to a working day, so please create your account ASAP.

7) 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

UN or NGO Field Programme Officer	<p>You belong to an appealing organization (from United Nations or NGOs) based in the field and you want to upload a project in OPS.</p> <p>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.</p>
Field Cluster Lead	<p>You belong to an appealing organization (from United Nations or NGOs) based in the field, you have the function of Cluster Lead Coordinator.</p> <p>You have edit rights on your organization's projects as well as on other organizations' projects.</p> <p>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.</p>
HQs UN agencies or HQ NGOs	<p>You are based at a UN Agency/NGO headquarters and have a review function in the appeal process.</p> <p>You can view all projects but you can upload projects for your organization only. You can edit projects when they are in Draft status or when they are in HQ Review status. You can Reject/Restore Projects.</p> <p>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 HC</p>
United Nations Resident/Humanitarian Coordinator	<p>You will be able to edit all projects in the appeal and reject them if necessary. You do not have a specific button to approve projects.</p>
OCHA Field Staff	<p>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.</p>
OCHA Desk Officer at HQ	<p>You have a review function after the agencies HQs Review Phase with edit rights on all projects.</p>
OCHA CAP Geneva Section	<p>Database administrators with edit rights on all projects and delete function.</p>

3. APPEAL PROCESS AND OPS



The arrows at the top of the appeal page will indicate in which phase of the process the appeal is. 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 HQs have edit rights on draft projects, which allow registered users from the same organization but in different locations to work on the same project.

Cluster: the Cluster Lead Coordinators in the field convene the peer review process, review all projects submitted, and click "approve" or "reject". The Cluster Lead has to click on "Approve by Cluster" for a project to be included in the appeal.

A project that is in "Approved" or "Rejected" status cannot be changed by the appealing organization. Only the Cluster Lead Coordinator can re-open the project to "Draft" status by clicking on "edit" after cluster approval or by clicking on "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. The editing access is for convenience: Cluster Lead are not expected to edit others' projects without their permission, but after changes are agreed with the proposing organization, it may sometimes be convenient for them to ask Cluster Lead to do it for them.

Note: that 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 Appeal publication. During the appeal process, regardless of the phase, access to the OPS is never frozen. Therefore, organizations can upload draft projects at anytime during the process. However the process has strict deadlines and projects that are uploaded after these deadlines (each project has a project creation date at the bottom of the online form) will not be included in that appealing publication.

As per the standard IASC practice, Agencies and NGOs based at the headquarters will have a few days to review them, and do minor adjustments if necessary before publication.

Agencies HQs: when projects are in Agencies HQs phase, only Agencies or NGOs registered with the role of agencies/NGOs HQs will have edit rights to said projects.

No major changes are generally expected at HQ level. Should agencies/NGOs need to add a project in this phase or significantly amend a project (budget or content); the HC should be consulted again. A new project uploaded in the HQ review phase will be in "draft" status and will need to be approved by the Cluster Lead and reviewed by the HC in order to be accepted in the appeal.

OCHA HQ: 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 appeal publication. OCHA prepares projects before publications

CAP Publication: Projects are published on the Financial Tracking Service, where the public users will find a print on demand function to download individual projects sheets or the full compendium of projects for the appeal, including financial tables.

4. HOW TO UPLOAD/REVIEW A PROJECT

Select your Appeal from the list of appeals (make sure you choose the correct appeal year). Click on "View" to access the projects.

To familiarize yourself with the database you can open the TEST APPEAL. This is a dummy appeal, where you can test the functions of the database and upload a test project.

AppealYear:2011 Switch to year: [2011] [2010] [2009]

CURRENT APPEALS			Total Appeals : 22
	Appeal Year	Appeal Title	Appeal Type
[View]	2011	2011 - A TEST APPEAL	Consolidated Appeals
[View]	2011	2011+ Kenya Emergency Humanitarian Response Plan	Consolidated Appeals
[View]	2011	Afghanistan 2011	Consolidated Appeals
[View]	2011	Central African Republic 2011	Consolidated Appeals

To create a new project or to find an existing project in the Appeal Projects List:

Click here to view only your organization's projects

Click here to view all projects for this appeal

Click here to create and upload a new project and paste in the complete project

Original project in WHITE: the project has not changed since the Appeal Launch.

Project under revision in BLUE: the project is currently under revision

Revised project in ORANGE: the project has been officially revised after the Appeal Launch

Search Project : Search

To find a specific project, you can filter the projects table by project code, organization, title, sector, amount, status.

Legend:
 Original Project
 Project Under Revision
 Revised Project

	Project Code	Appealing Organization	Project Title	Sector	Total Original Request (US\$)	Total Current Request (US\$)	Total Request Under Revision (US\$)	Original Project Status	Under Revision Project Status
[Edit]	SOM-09/CSS/23314/R	WFP	Rehabilitation of road and ports in Somalia	LOGISTICS	10876535	10876535	10004108	Published by CAP	Draft
[Edit]	SOM-09/CSS/23316/R	WFP	Humanitarian Air Service in support of relief operations in Somalia	LOGISTICS	12100501	12100501	18255525	Published by CAP	Draft
[Edit]	SOM-09/F/23317/R	WFP	Emergency Feeding Operation	FOOD AID	392623202	452632640	0	Published by CAP	
[Edit]	SOM-09/H/23313/R	WFP	Emergency Nutrition Response in Somalia	NUTRITION	34141148	39359360	0	Published by CAP	
[Edit]	SOM-09/SNYS/24483	WFP	Awaiting allocation to specific project/sector	SECTOR NOT YET SPECIFIED	0	0	0	Published by CAP	

Click [Edit] to access the complete project form.

The Appeal Projects List 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 Total Original Request.
- c) **Total Request Under Revision:** displays any proposed \$ US budget revision to be approved by the Sector/Cluster Lead, the UN Humanitarian/Resident Coordinator, and reviewed by the appealing organization HQ.
- d) **Original Project Status:** indicates the various phases of a project in the appeal process. (Draft, Approved by Cluster, Rejected, Agencies HQs, OCHA desk, 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, OCHA desk, CAP Final Review phase, published by CAP)

4.1 FILLING OUT A PROJECT ONLINE FORM

When you create a new project, the system will open an empty online form to be filled. Fields with a red asterisk are mandatory. The project will not be saved if not all mandatory fields are 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.

Current Project Status : **Draft** Export and Print:

PROJECT DETAILS Last updated by: Laura Calvio(calvio@un.org) Last Updated: 19/07/2011::12:00:00 AM

Project Title * :

Temporary CAP Project Code :

4.1.1 APPEALING 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 their Budget Summary box.

Cluster Leads and OCHA staff can upload a project on behalf of another organization, and 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; make sure to copy and paste the budget into the new organization Budget Summary box.
- 4) Click on "Remove" next to the old organization that has to be deleted.

Please note that the Budget info is not automatically transferred when another organization is added and will be lost when clicking "Remove".

Appealing agency:

+ Add Appealing Agency		
Agency	Agency Abbrev.	
Office for the Coordination of Humanitarian Affairs	OCHA	[Remove]

Information icons: if you need clarifications while filling out the form, please consult the blue information icons.

Requested budget, per appealing agency:

Office for the Coordination of Humanitarian Affairs

Red asterisk is a mandatory field!

***Original Budget Summary**

US\$ (like 500000 or -500000 without commas)

4.1.2 BENEFICIARIES

Disaggregate women, children, and other groups from TOTAL wherever possible. Use the Beneficiaries Description field if you want to present data in a short narrative form.

Beneficiaries*	: Type	Number (like 500000 or -500000 without commas)	Beneficiaries Description
TOTAL:		<input type="text"/>	200 children under 5

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 project are in multiple locations please select the options "multiple locations" in the dropdown menu and provide details on your project locations in the Enhanced Geographical Fields at the bottom of the project online form.

4.1.4 PROJECT DURATION

From start date to 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 that appeal year only.

4.1.5 ENHANCED GEOGRAPHICAL LOCATIONS

Enhanced Geographical fields (Click on Add/Edit to provide additional information on the project location) **[Add / Edit]**

The OPS offers pre-set lists of your appeal country's administrative levels that enable the selection of multiple locations.

The detailed geographical locations provided here would not be transferable to the financial tables, because the projects financial requirements and funding reports are seldom split to the various administrative levels; nonetheless, the enhanced geographical information will provide an essential tool for planning and analysis to the clusters. See example below for details.

First complete the uploading of all projects data and click on "save and stay" on your project.

After saving the project, 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. Select the locations of your project activities from the highest administrative level to the lowest.

In the example below, the administrative level for Central African Republic, include Region, Prefecture, Sub Prefecture, and Commune.

Click "Add" after your selection, and the information will be displayed in the box. Click on the X to remove the data if entered by mistake or in a later revision.

In this example, our project has activities in Damara, Mbata, and Mobaye.

Locations :

Région des Plateaux - Ombella M'Poko - Damara - Damara ✖

Région des Plateaux - Lobaye - Mbaïki - Mbata ✖

Région du Haut-Oubangui - Basse Kotto - Mobaye - 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.

1	A Cluster	B Region	C Province	D Organisation	E Project Co	F Project title
70	EMERGENCY SHELTER	Central	Kabul	ABR	AFG-11/S-NF/39578/R	Construction of 560 Shelters in Sorobi Distrect ,Kabul Province for returnee and IDP families
72	EMERGENCY SHELTER	Central	Parwan	ACT-Afghanistan	AFG-11/S-NF/39035/R	Shelter Assistance for 117 chronic vulnerable families of 2010 flash flood affected in Parwan province
73	EMERGENCY SHELTER	Central	Logar	ACT-Afghanistan	AFG-11/S-NF/39050/R	Relief Shelter Assistance for 137 most vulnerable flood affected families of 2010 in Logar province
92	EMERGENCY SHELTER	Central	Kapisa	CARE International	AFG-11/S-NF/39139/R	Effective risk reduction for flood affected households in Kohband and Mahmood Raqi districts of Kapisa province through community self-built housing, provision of potable drinking water and establishment of risk reduction committees.
100	EMERGENCY SHELTER	Central	unknown	IOM	AFG-11/S-NF/39152/R	Country-wide Humanitarian Assistance and Coordination
123	EMERGENCY SHELTER	Central	Parwan	TEARFUND	AFG-11/S-NF/39134/R	Humanitarian Relief Aid to Parwan disaster impacted families - Withdrawn

5. PROJECT SUMMARY TABLES

The Project Summary Tables provide an overview of the appeal overall requirements (see picture below) and the appeal requirements by cluster and by organization. They also keep track of the status of the projects revisions for the appeal.

Project Summary Tables				
My Organisation Projects		All Projects	Project Summary Tables	Create New Project
Total Projects:	No. of projects (incl. pending)	Total Original US \$	Total Approved Request US \$	Running Total Request (incl.pending approval)US \$
	120	549,680,117	718,630,252	718,630,252

- a) The **Total Original** is the amount appealed at the appeal launch (usually around November). It corresponds to the first column of the FTS tables (original requirements).
- b) The **Total Approved Request** is the amount that the appeal is requesting to date - it corresponds to the second column on FTS tables (revised requirements)
- c) The **Running Total Request** is what your appeal would be requesting if everything that is under revision is approved and accepted.

Summary overview

Include projects with types:

- All Projects (incl. pending approval)
- UnderRevision

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.

Refresh summary overview

Project Status	# of projects (incl. pending)	Total Original US\$	Total Approved Request US\$	Running Total Request (incl.pending approval)US\$
Approved by Cluster/Sector	3	0	0	800,057
CAP Final Review Phase	1	0	0	0

Cluster/Sector	# of projects (incl. pending)	Total Original US\$	Total Approved Request US\$	Running Total Request (incl.pending approval)US\$
CLUSTER NOT SPECIFIED	4	0	0	0
COMMON SERVICES	1	19,985,980	21,117,110	21,117,110
COORDINATION	12	15,615,288	13,693,363	13,693,363
EDUCATION	10	172,723,819	6,646,083	6,646,083

Organisation	# of projects (incl. pending)	Total Original US\$	Total Approved Request US\$	Running Total Request (incl.pending approval)US\$
Food & Agriculture Organization of the United Nations	2	2,141,675	2,141,675	2,141,675
International Organization for Migration	4	4,285,890	3,865,852	3,209,143

Summary tables

- per Projects Status
- per Cluster/Sector
- per Organisation
- per Project location
- per priority

Detailed project list:

- per Projects Status
- per Cluster/Sector
- per Organisation
- per Project location
- per priority

Full printout of all projects

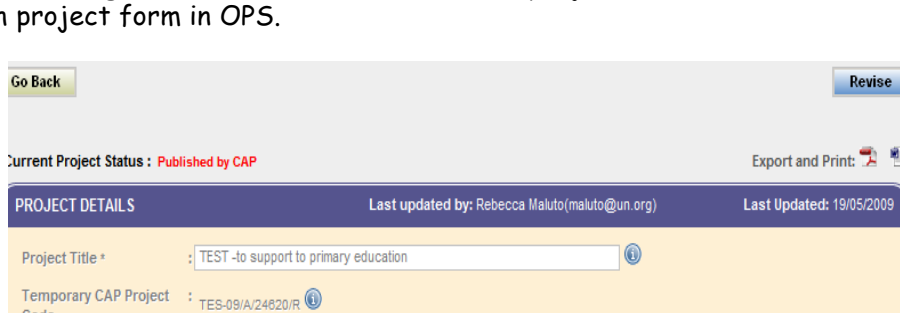
Grouped By cluster/sector

Download all project data in spreadsheet format

Download Enhanced Geographical Fields in excel format

6. REVISING A PROJECT AFTER THE APPEAL LAUNCH

After the CAP Launch, organizations that have submitted projects will see a REVISION 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, where the appealing organization can insert changes (budget and text). Only the appealing agency can initiate the revision of a project, a Cluster Lead 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).

This follows the same principle applied on the Financial Tracking Service tables: any modification to an original project or the inclusion of a new project after the appeal launch is considered as a "revision" of the original appeal. The requirements for those projects (new projects added after the appeal launch or revised projects after the appeal 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 of an original project. The revised blue copy of the project will have to be approved by the Sector/Cluster Lead, the UN Humanitarian/Resident Coordinator, and reviewed by the appealing organization HQ, if required.

Only when these approval review steps are completed the OCHA CAP section will accept the revised copy of the project, replacing the original project.

Officially revised projects become orange and will be under "Published by CAP" status.

During the approval process of a revised project, the public version of the project on FTS will remain the originally approved in the appeal; a revision copy will not be considered an official project until after the final review by the CAP section and its publication to the FTS site.

6.1 THE REJECT BUTTON IN A PROJECT REVISION

The REJECT button after the Appeal publication cannot be used to withdraw a project from the appeal. When a Project under revision is rejected, the PROPOSED revision is rejected; however, the original project will REMAIN in the Appeal. That is rejecting a blue copy does not automatically cancel the original project from the appeal, but it is only rejecting the revision of that project. To cancel/withdraw a project after the appeal launch 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 appeal, 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 a 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.

FTS Contributions : [\[View contributions recorded on Financial Tracking Service - FTS\]](#)

8. QUESTIONS AND ANSWERS

1) How can I get access to OPS?

You need to register on line on <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 clicked on Submit?
Did you see the message that the administrator will evaluate your request within 24h?
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 on OPS as registered user and click on the "forgot password" link next to the password box in the log in page.

4) I cannot find my organization in the organizations list

Search by typing the acronym, if nothing comes out; try with 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 the form and wait for the e-mail with further guidance.

5) I filled the form providing information about my organization but cannot access the database

You have filled a form, which is not the registration. You need to wait until you get an e-mail confirming that your organization has been uploaded in the organization list and you can now proceed with the registration on-line

6) Who can register in OPS from my organization?

You decide, OPS is flexible. 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, if you are based in the organization Headquarters (which are outside the appeal 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 appeal 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 name.

8) How can I share my project with my colleagues?

During the Appeal process, you can ask your colleagues to register on OPS or you can download a PDF or a word version of the project from OPS 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 that you can download.

If you have several projects in the appeal and you want to have them in PDF and Word format, got to the Project summary table, click on your organization name on the list of projects by organization. The system will provide a table listing all your projects. Download the PDF and WORD format of the projects sheets by clicking on the icons at the top of the table.

When the process is over and the appeal is published, you can find projects on FTS. Financial tables and print on demand will be available on the appeal country page.

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 appeal list. If the project has been reviewed by the Cluster Lead 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 HC. If the project is in HQ phases, only agencies at HQ level can access it, the field roles no longer edit projects in HQs review phase. In this phase, only OCHA (desk officer and CAP 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 mandatory fields (those with a red star)

HELP!

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

**HELP-LINE during the Appeal and Mid-Year Review period
Working Hours: Mon-Fri 10-18 GMT +1 time**

**Mr. Luciano Natale,
Tel. +41 22 917 1761
cap@un.org**

PROJECT SHEET TEMPLATE

with explanation text in green and example text in blue

Project Title	<i>Be concise. Capture the essence of the project</i>		
CAP Project Code	<i>If NEW project, leave blank – code number is assigned by OPS If REVISED, use existing project code (see FTS or OPS tables)</i>		
Appealing Agency(ies)	<i>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.</i>		
Requested budget, per appealing agency: (REVISED or NEW BUDGET)			
<i>OPS offer only five (5) budget lines, to keep the information manageable. If your organization's standard format has more than 5, just combine some of the smaller ones.</i>	<i>Cost A e.g. staff</i>	<i>10,000</i>	
	<i>Cost B e.g. inputs</i>	<i>30,000</i>	
	<i>Cost C e.g.</i>		
	<i>Cost De.g. ...</i>		
	<i>Cost E e.g. administration</i>	<i>1,000</i>	
	TOTAL	41,000	
<i>In OPS the system will calculate total automatically</i>			
Classification			
Cluster	<i>Choose ONE cluster name from list used in your 2012 CAP. Or select the cluster from the OPS drop-down menu</i>		
Project Location.	<i>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</i>		
Objective	<i>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)</i>		
Beneficiaries <i>Disaggregate women, children, and other groups from TOTAL wherever possible.</i> <i>Or</i> <i>Use the description field if you want to present data in a short narrative form.</i> <i>In OPS, do not put commas between digits!</i>	Total	Number	Description
		<i>1000 [always individuals, not households]</i>	<i>Individuals. Or 200 Children under 5 and mothers, and 1500 IDPs and</i>
	Children	<i>200</i>	
	Women	<i>100</i>	
	Other groups (specify)	<i>50</i>	<i>community health promoters</i>
Implementing Partners	<i>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</i>		
Project Duration <i>(dd/mm/yyyy):</i>	<i>From when to when does the project run? Note that a 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</i>		
Needs, Activities and Output Description			
Needs	<i>Maximum 4000 characters</i>		
Activities	<i>Maximum 4000 characters</i>		
Outputs or outcomes	<i>Maximum 4000 characters</i>		
Priority			
Priority	<i>Choose ONE Priority from list used in your 2012 CAP as agreed with your cluster lead</i>		
Additional Project Information			
Project Contact Name:	<i>Joe Schmoe</i>		
Project Contact e-mail:	<i>Joe.Schmoe@unxyz.org</i>		
Project Contact Phone:	<i>Tel. +41 22 XXXXXXX</i>		
Enhanced Geographical Locations			
<i>In OPS, select all the locations of your project from the highest to the lowest administrative levels.</i>			

BLANK PROJECT SHEET TEMPLATE

Project Title			
CAP Project Code			
Appealing Agency(ies)			
Requested budget, per appealing agency: (REVISED or NEW BUDGET)			
<i>If more than one appealing agency, each must have its own budget.</i> <i>1st Agency name:</i>	Budget summary		US\$
	A		
	B		
	C		
	D		
	E		
	TOTAL		
<i>2nd Agency name:</i>	Budget summary		US\$
	A		
	B		
	C		
	D		
	E		
	TOTAL		
Classification			
Cluster			
Project Location			
Objective		<i>maximum 2000 characters</i>	
Beneficiaries	Total	Number	Description
	Children		
	Women		
	Other groups (specify)		
Implementing Partners			
Project Duration			
Needs, Activities and Output Description			
Needs		<i>maximum 4000 characters</i>	
Activities		<i>maximum 4000 characters</i>	
Outputs or outcomes		<i>maximum 4000 characters</i>	
Priority			
Priority			
Additional Project Information			
Project Contact Name:			
Project Contact e-mail:			
Project Contact Phone:			
Enhanced Geographical Locations			