OPS is for appealing organisations only
It is not intended for donors or journalists. These will have access to the projects on FTS once the Appeal has been published.

OPS Registration phase
Encourage organisations to register well in advance the projects uploading deadlines so that they can familiarize themselves with the database and we/you have time to resolve any technical or non-technical problem.

Be clear on roles, since the edit rights in the system depend on these
Field roles: are those responsible for preparing the appeal and its projects at the field level
- Appealing organisations should register as UN/NGO field programme officer. Please note that local NGOs whose main office is based in the field should register as "UN/NGO field programme officer" even if they consider themselves as the HQ of that NGO.
- ONLY Cluster Leads should register as such. Please send to CAP Section the list of your cluster leads before starting the OPS registration phase.
- OCHA Staff in the field have broad administrative rights and they can replace the cluster leads in their approving/uploading function if needed.
- The HC/RC can view (and edit if needed) all projects but does not have any approval button. The OCHA focal point should communicate by e-mail to the CAP section when the HC has completed his/her review of projects.

HQ roles: are responsible for reviewing and finalising the appeals for publication (HQs of UN agencies and NGOs, OCHA Desk officers, OCHA CAP section).

Registrations are not automatic and the access link has to be activated
When registering for access, after clicking the submit button a message will appear indicating that the administrator will verify it within 24h and will send an access link to be activated. The registrations are done manually and checked carefully to avoid mistakes in roles. It does not necessarily take 24h but there is only one person in Geneva verifying roles, and there are often a large number of competing issues for that person to deal with.

The users will get an access link by e-mail with some OPS guidance. In order to complete the registration, they need to activate the link – click on it or copy and paste the FULL link into their browser. After completing the registration process the user will be able to log in as "registered user" with the user name and password selected. If there is a need to change anything in the profile, the user can use the EDIT profile link in the OPS, make corrections and submit a new request for approval.

Registration for organisations not appearing on the organisations list on OPS.
Please note that there is an additional step for these organisations! If the organisation is new to the process, the organisation will most likely not be in our database and will not appear on the OPS organisations list. The user will not be able to complete the registration request but first will have to fill a separate form (datacol) on line to provide us with information, the CAP section will include the new organisation on the organisations list and inform the user who will have to proceed to the real registration. This could take a few days.

Please signal to us any new organisation to your appeal process, so that we can upload these new organisations before the registrations start and avoid delays.

Uploading of projects for other organisations
OCHA field staff and cluster coordinators can upload projects for other organisations.
- Create a project: by default the appealing organisation will be yours, so click on ADD appealing organisation, select it from the list and only after you have added it click on REMOVE your organisation.
- Proceed with uploading all mandatory project information.
- Save and close the project.

Uploading of projects: online project form
Users can cut and paste info into the on line project form, but they should be careful in:
- Avoiding commas in the numerical fields (budgets and beneficiaries figures)
- Exceeding max. number of characters indicating per field: if they have too many characters, the system will not let them save their project.

- Leaving mandatory fields (those with a red star) empty. The project cannot be saved. A message will indicate the missing fields.
- Budget lines cannot be expanded beyond the five provided, but are flexible in terms of content. Organisations can follow the suggested lines (staff costs, programme costs and admin costs) or fill as they deem appropriate.
- If the description of beneficiaries is in narrative form (5,000 children under 5 and 1,500 mothers), you can copy it directly in the beneficiaries description field

Deleting and rejecting projects
Only the CAP section can delete projects from the system. OCHA staff and cluster coordinators can REJECT projects. To help the transparency in the selection process the rejected project remains in the system until the HC final approval on financial figures. After that, CAP Section will delete all rejected projects.
- Be careful: a project which was in the original appeal cannot be rejected and deleted. It can only be 'withdrawn', meaning it's financial requirements are reduced to $0 or equivalent to funding received.

CAP process and the OPS arrows

APPEAL REVIEW PROCESS: Field Submission - Agencies / NGOs in the field upload their Appeal projects.

Field Submission → Cluster → Hum. coordinator → Agencies HQs → OCHA HQ → CAP publication

The arrows at the top are supposed to guide users on the different CAP process phases. The phases will also determine the access to projects.
- Projects are uploaded in the **Field Submission** phase. Uploaded projects are in DRAFT status.
- Projects in DRAFT can be edited by the appealing organisation in the field and by its HQ. (UNICEF field and UNICEF NY can for example work on the same project.)
- In the **Cluster** phase projects are reviewed by the Cluster Leads. At the end of this phase, Cluster Leads approve /reject projects. Projects will be in Approved By Cluster Status.
    - o Access to OPS cannot be 'frozen', therefore organisations can upload DRAFT projects at any time. However you can see the project creation date at the bottom of the project on-line form. If the project has been uploaded after your deadline, simply reject it.
- In the **Humanitarian Coordinator** phase, the HC/RC reviews/edit projects or requests changes to be made.
- The projects, which are now in approved by cluster status, cannot any longer be accessed by the appealing organisations. If necessary, the cluster coordinators can click on a button "EDIT by cluster/ sector lead" to re-open the project to DRAFT status and let the appealing organisations access it with edit rights. Cluster leads will have to click on the "APPROVE by cluster" button again once the requested changes have been inserted by the organisations.
- After HC/RC approval, CAP Section will move projects to **Agencies HQs**. Agencies at HQ level have several working days to review and amend projects as per our standard IASC practice. No significant changes are allowed at this level without HC approval in writing.
- At this phase, only staff at HQ level have edit rights. ALL FIELD ROLES will no longer have edit rights, just view rights.
    - o For example only UNICEF in NY (those in UNICEF HQ that have registered with the role of "HQs UN agencies/NGOs") will be able to edit projects.
- After the HQ review time, CAP Section will move the projects to OCHA HQ. In this phase only the CAP Section and OCHA desk officers will have edit rights to the projects.
- In the final phase, projects will be blocked for access to all users except the CAP Section to allow finalisation, financial tables preparation and publication on FTS.

'Problems' and frequently asked questions…
Be specific on any technical problem that you report, send us any error messages that you get so that we can pass these to the IT section and find the appropriate solution. There are a number of problems that are not strictly technical and that you will able to immediately solve. These are the most common questions that we get and how you can answer them.

1) Can you give me OPS access?
You need to register on line on http://ops.unocha.org/

2) I have registered on OPS but did not get access
Your follow up questions to verify that no step is missing:
- 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 organisation in the organisations list
Search by typing the acronym, if nothing comes out, try with the full name of your organisation.
- If your organisation name still does not appear listed below the search, click on the link that will appear in a red message "click here to inform us".
- This will not complete the registration, but will enable our administrators to verify and add your organisation.
- Fill the form and wait for the e-mail with further guidance.

5) I filled the form providing information about my organisation 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 organisation has been uploaded in the organisation list and you can now proceed with the registration on-line

6) Who can register in OPS from my organisation?
You decide, OPS is flexible. You can have one registration for your organisation, 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. Remember:
- If you are based in the field it is UN/NGO field programme officer
- If you are based in the organisation HQ (outside the appeal country), you should register as HQs agencies/NGOs.

7) I can'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 organisation projects". You can also find it if you click on "All projects" and if you click on "Project Summary table", under your organisation name.

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

9) I cannot edit my project anymore
Access/edit rights vary according to the different phases of the process. Check the arrows at the top of the appeal list.
- If the projects have already been reviewed by cluster coordinators and are in 'APPROVED by cluster' status, the appealing organisation (at field or at HQ level) cannot change them anymore, because these have to be submitted to the HC for the final review of the appeal requirements.
- If the projects are in HQ phases, only agencies at HQ level can access them, the field roles no longer edit them.
- If projects are in OCHA HQ phase, only OCHA can edit them.