

# CAP ON-LINE PROJECTS SYSTEM MANUAL

OCHA - October 2008  
<http://ocha.unog.ch/caprojects>

Humanitarian Appeal  
CAP Consolidated Appeals Process

Project Database

Robert Smith (smith50@un.org) | Office for the Coordination of Humanitarian Affairs | OCHA CAP - Geneva Section | [Logout] | [Edit Profile]

Home  
All Appeals

Please select an appeal:

CURRENT APPEALS Total Appeals : 16

	Appeal Year	Appeal Title	Appeal Type
[View]	2009	Central African Republic 2009	Consolidated Appeals
[View]	2009	Chad 2009	Consolidated Appeals
[View]	2009	Democratic Republic of Congo 2009 Humanitarian Action Plan	Consolidated Appeals
[View]	2009	Haiti Flash Appeal 2008	Flash Appeals
[View]	2009	Iraq 2009	Consolidated Appeals
[View]	2009	Kenya Emergency Humanitarian Response Plan 2009	Other Appeals
[View]	2009	Nepal Common Appeal for Transition Support 2009	Consolidated Appeals
[View]	2009	occupied Palestinian territory 2009	Consolidated Appeals
[View]	2009	Somalia 2009	Consolidated Appeals
[View]	2009	Sri Lanka Common Humanitarian Action Plan 2009	Consolidated Appeals
[View]	2009	Sudan Work Plan 2009 (Humanitarian/Early Recovery Component)	Consolidated Appeals
[View]	2009	Tajikistan Humanitarian Appeal 2008-2009	Other Appeals
[View]	2009	Uganda 2009	Consolidated Appeals
[View]	2009	West Africa 2009	Consolidated Appeals
[View]	2009	Zimbabwe 2009	Consolidated Appeals
[View]	2008	Central African Republic 2008	Consolidated Appeals

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## SUMMARY:

- Organisations upload their draft projects for inclusion in the CAP by creating an account, logging in, and then filling in the project information on the web form. (The information is similar to what was requested on the old CAP project sheets.)
- Users may view each other's projects, but may edit only their own organisation's.
- Projects are peer-reviewed in the cluster/sector. After peer review, the cluster/sector lead clicks a button in the system to signal that the projects are approved by the cluster/sector.
- Agency headquarters review their projects on line, and edit them as needed. Projects are considered approved by agency HQs once the deadline has passed.
- The system will generate PDF versions of projects (singly, or selected groups of projects, or all projects in an appeal) for download and printing by any user. Printing and shipping by OCHA CAP Section of full compendia of appeal projects (Volume 2 in the previous system) will be on demand.
- Organisations can and should update their projects on line at any time during the year.

## INTRODUCTION

The On-line 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.

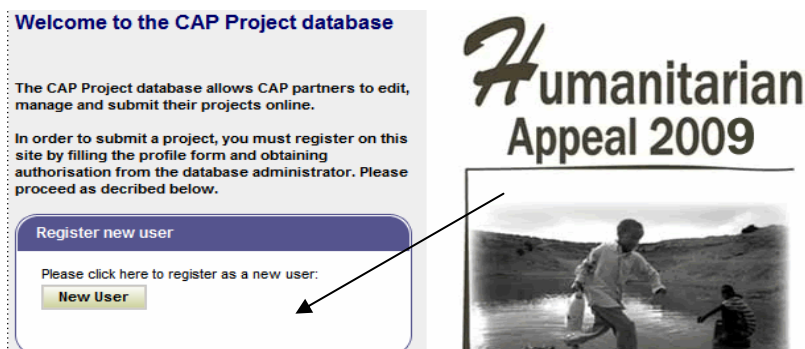
UN agencies and NGOs that would like to submit projects to an appeal can access the database via a simple account creation, upload their project(s) for sector/cluster review, and edit them during the course of the year if required.

The database will gradually replace the current printed version of the appeal projects volume and allow users to print the appeal projects and project compendia on demand.

To access the OPS go to: <http://ocha.unog.ch/caprojects>.

## REGISTRATION

In order to upload, edit or manage a project, you must register on the site. Click on **New User**.



Welcome to the CAP Project database

The CAP Project database allows CAP partners to edit, manage and submit their projects online.

In order to submit a project, you must register on this site by filling the profile form and obtaining authorisation from the database administrator. Please proceed as described below.

Register new user

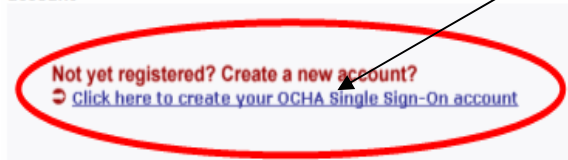
Please click here to register as a new user:

New User

Humanitarian Appeal 2009

A) Create an OCHA **Single Sign-On account** following the instructions.

- Users without account: please click on the link below the next login form to create a new account



Not yet registered? Create a new account?

Click here to create your OCHA Single Sign-On account

B) If you already have an OCHA Single Sign-On account, login using your WEBMAIL login information.



OCHA Single Sign-On Passport

Home Logout

Login to OCHA Contact Management (OCM)

Please enter your registered email address and password:

Email:

Password:  [Forgot password!](#)

(OCHA users: use your WEBMAIL password)

View/change my profile information

Login

## USER PROFILE

Fill in your phone number, organization, and your role in the CAP process in your **User Profile**.

### USER ACCOUNT PAGE

#### User Profile

Please update your profile below. Your request will be evaluated by the Projects Database Administrator. You will receive a notification email as soon as your request is processed.

**First Name** Laura

**Last Name** Calvio

**Email ID** calvio@un.org

**Phone Number \***

**Role \***

**Organization \***   
Click here to search

**Please select your Role and your Organisation.**  
The roles reflect the standard IASC appeal review process and the main figures involved.

- If you belong to an appealing organisation (UN Agency/NGO) in the field that wishes to submit a project, select **"Field Programme Officer"**.
- If you are a sector/cluster lead in the field please select **"Field Cluster/Sector Lead"**.
- 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"**.

If you cannot find your **organisation**, please send a request to us by filling in the on-line request form. We will upload your organisation in the OPS and in the Financial Tracking Service. Once the organisation has been registered in the database (which may take up to one working day) you will receive a message indicating that you are able to access the database.

Once the profile is **completed and submitted**, the OPS Administrator will evaluate the request and process it. **A 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.

Your name, e-mail, role and organisation 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**

Project Database

Laura Calvio (calvio@un.org) | Office for the Coordination of Humanitarian Affairs | OCHA CAP - Geneva Section | [Logout] | [\[Edit Profile\]](#)

## CREATING A NEW PROJECT OR EDITING AN EXISTING PROJECT

Select your Appeal from the list of current appeals and click on **View** to access a table with all the projects.

Please select an appeal:

CURRENT APPEALS			Total Appe
	Appeal Year	Appeal Title	Appeal Type
<a href="#">[View]</a>	2009	Central African Republic 2009	Consolidated Appeals
<a href="#">[View]</a>	2009	Chad 2009	Consolidated Appeals
<a href="#">[View]</a>	2009	Democratic Republic of Congo 2009 Humanitarian Action Plan	Consolidated Appeals
<a href="#">[View]</a>	2009	Haiti Flash Appeal 2008	Flash Appeals
<a href="#">[View]</a>	2009	Iraq 2009	Consolidated Appeals

To find an existing project *in the Appeal Projects table and/or* create a new project:

Click here to view only your organisation'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 information.

APPEAL PROJECTS

My Organisation Projects
All Projects
Project Summary Tables
Create New Project

Search Project :  Search

(by Project code, Appealing Organisation, Project title, Sector, Project status)

	Project Code	Appealing Organisation	Project Title	Sector	Total Project Request (US\$)	Project Status
<a href="#">[Edit]</a>	CEN-08/SH/20162	OCHA	testing for HQ	SHELTER AND NFI	3	Rejected

Create new project

To find a specific project, you can filter the projects table by any column title

To edit or update a project please click **EDIT**. You will access the complete project form.

## FILLING OUT OR EDITING A PROJECT FORM

Please note that fields with a red star 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!**

Go Back
Save & Close
Save & Stay

Current Project Status : Draft Export to PDF and Print:

PROJECT DETAILS
Last updated by: Laura Calvio(calvio@un.org)
Last Updated: 02/10/2008

Project Title \* :  i

Temporary CAP Project Code :  i

Appealing agency:

+ Add Appealing Agency

Agency	Agency Abbrev.	
United Nations Children's Fund	UNICEF	<a href="#">[Remove]</a>

Requested budget, per appealing agency:

	US\$ <small>(like 500 or -500 without commas)</small>
*Budget Summary for United Nations Children's Fund	
staff	<input type="text" value="5000"/>
inputs	<input type="text" value="10000"/>

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

Mandatory red star!

You can copy (ctrl+C) and paste (ctrl+V) text or numbers into the fields in the on-line project form.

## ROLES AND EDITING RIGHTS

### FIELD UN Agency/NGO Programme Officer

- As FIELD UN Agency/NGO Programme Officer your edit rights are restricted to your organisation's projects. 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.

### FIELD cluster/sector lead

- As FIELD cluster/sector lead you have edit rights on your organisation's projects as well as on other organisations' projects. You convene the peer review process of your cluster/sector's proposed projects, and 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", it remains in DRAFT status and will not be included in the appeal!**

The Field cluster/sector lead will also be able to edit or reject a project - before and after cluster approval - in particular following discussions with the HC. (The editing access is for convenience: you are not expected to edit others' projects without their permission, but after changes are agreed with the proposing organisation, it may sometimes be convenient for them to ask you to do it for them.)

A rejected project can be restored by a cluster/sector lead to DRAFT status by clicking **RESTORE**.

**Please always remember to click on "approve by Cluster" for a project to be included in the appeal!**

### OCHA Field Officer

- As OCHA Field Officer you will have the same rights as a cluster/sector lead and RC/HC.

### Resident Coordinator/Humanitarian Coordinator

- As Resident Coordinator/Humanitarian Coordinator you will be able to edit all projects in your appeal and reject them if necessary.

A rejected project can always be restored by the RC/HC to **DRAFT status** by clicking **RESTORE**.

**A DRAFT status project will still need to be APPROVED by a Cluster Lead to be accepted in the Appeal!**

### FIELD USERS: PLEASE NOTE!

When your appeal's Final Field Draft is sent to the CAP Section in Geneva for HQ review and CAP section finalisation, **field users will no longer be able to change projects** until after the Appeal publication.

The uploading of projects (in draft status) will still be possible but the approval and reject functions will be frozen until the APPEAL is open again for changes after its publication.

## **UN agency/NGO HQ Reviewer**

As a UN agency/NGO HQ reviewer, you will be able to edit projects for your organisation only. You can upload a new project in DRAFT status during the HQ review phase, but you will need to alert OCHA HQ Desk Officer and the CAP section **by e-mail** in order for a draft project to be processed by the system.

### **HELP!**

For assistance and reporting problems on the database please  
contact: [cap@un.org](mailto:cap@un.org)

### **HELP-LINE during the Appeal period (Oct-Nov 08):**

Mr. Luciano Natale,  
Tel. +41 22 917 1761  
[cap@un.org](mailto:cap@un.org)