

The Project Module (PM)

User Guide

Version 1.2

Last Updated: February 2023

Table of Contents

1	Introduction	1
1.1	Important Note: Using the Demo Environment	3
2	User Login and Registration [for Partners, Cluster and Plan Leads]	4
2.1	If you do not have an HID Account	4
2.2	If you do have an HID Account	4
2.3	Approving Access to HID and Logging into PM for the First Time	5
2.4	Granting Access to Cluster Leads [for Plan Leads]	7
2.5	Granting and Re-Assigning Project Ownership [for Partners and Plan Leads]	9
3	New Organizations Registration [for Partners and Plan Leads]	12
3.1	Submitting a Request to Register an Organization [for Partners]	13
3.2	Registering an Organization [for Plan Leads]	15
3.3	Classifying New Organizations with Type and Sub-Type at Registration [for Plan Leads]	17
3.4	Anonymization of Organizations at Projects Registration for Protection Reasons	29
4	Navigate Project Module Interface	32
4.1	Using Filters and Grouping Features for Reports	35
5	Project Registration and Submission [for Partners]	36
5.1	Creating a new Project	36
5.1.1	Step1: Basic Information	36
5.1.2	Step2: Select a Response Plan	38
5.1.3	Step3: Project Locations	45
5.1.4	Step4: Linking the Project to a Cluster's Framework	46
5.1.5	Step5: Project Budget	48
5.1.6	Step6: Project Review	49
5.2	Cloning an Existing Project	49
5.3	Reviewing Comments	52
6	Project Approval [for Cluster Leads]	53
6.1	How Cluster Leads Approve Projects	53
6.1.1	Multisector Project Approval	54
6.1.2	Project Activity Log	56
6.2	Adding Comments for Partners to Review	57
6.3	Changing the Status of Multiple Projects in Bulk	57
6.4	Who Can Change a Project's Status?	58
6.5	Who Can Edit a Project at Various Statuses?	59
6.6	Deleting a Project	59
7	Multisector / Multiorganization Projects Registration [for Partners]	60
7.1	Multiorganization Projects	60
7.2	Multisector/Multicluster Projects	60

7.3	Multiorganization and Multisector Projects	62
7.4	Multisector Project Implications on Funding Attributions in FTS	63
8	Publishing Projects [for Plan Leads].....	65
8.1	Reviewing Financial Requirements in Project Module	65
8.2	Reviewing Financial Requirements in Excel	66
8.3	Viewing Published Projects in HPC Tools.....	68
9	Reports and Downloads – [for Partners, Clusters and Plan Leads].....	70
9.1	Downloading Full and Summary Project Data in Excel	70
9.2	Download all Project Caseload and Disaggregated Data in Excel	71
9.3	Download all Project Indicator and Disaggregated Data in Excel	71
9.4	Downloading an Individual Project’s Data (pdf and Disaggregated Data)	73
9.5	Downloading Multiple Projects as a pdf File	73
10	Bulk Cloning Projects	76
11	Frequently Asked Questions [for Partners, Cluster and Plan Leads]	77
12	Additional Resources	81

1 Introduction

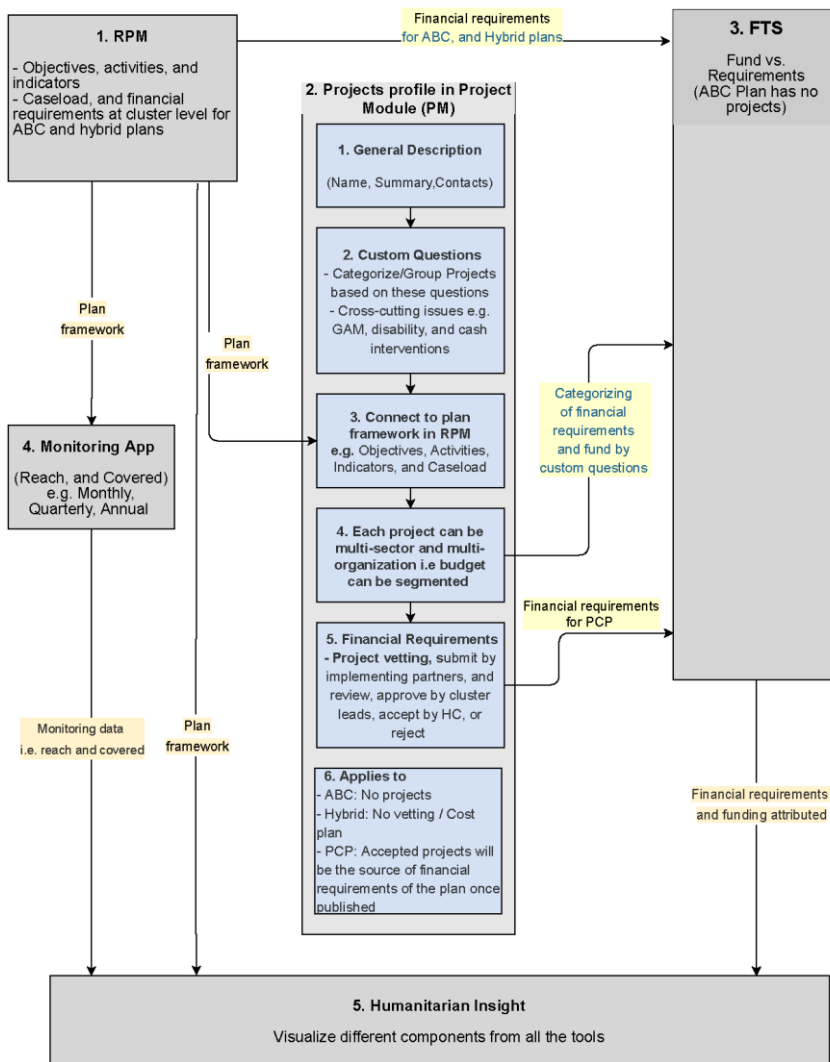
Welcome to the Project Module User Guide. Within this guide we have compiled all functions, tasks, requirements, and frequently asked questions related to the HPC Project Module and the use of the platform. Sections have been labeled in accordance with their relevance for specific actors (Example: User Login and Registration [for Partners, Cluster and Plan Leads]). The bracket next to a section will always denote who the content is relevant for. Additionally, all instructions in this document are accompanied by visuals to help demonstrate processes and instructions.

The Project Module (<https://projects.hpc.tools>) is part of the wider HPC tools. It enables partners to create projects (proposals) and submit them for review and approval for inclusion within response plans. Clusters activities and indicators are integrated in Project Module. This way partners can submit their projects against cluster indicator targets. Including a project in the HRP is not a guarantee of funding. However, the advantage of having projects in an HRP is that donors are likely to consider the project as well-coordinated.

All projects are developed by the cluster partners, they are then reviewed by Cluster Leads, and finally accepted by the Plan Leads or a Humanitarian Coordinator (HC).

The diagram on the following page shows in detail how the Project Module is integrated with the other HPC tools, i.e., RPM, FTS, and Humanitarian Insight:

Project Module (PM) Integration with other HPC tools



1.1 Important Note: Using the Demo Environment

If you are unfamiliar with any of the HPC tools, we strongly recommend using the demo environment rather than the production environment to test registering and approving projects. The demo environment exists as a safe space platform to try new things and get acquainted with all aspects of the tool. As such, the demo site behaves identical to the production environment and the data is copied from the Project Module production website on a daily basis. Therefore, all the steps and processes discussed in this guide can be attempted in the demo environment. The Project Module demo environment can be accessed through the following link: <https://demo.projects-hpc-tools.ahconu.org/map>. You can access the demo site for Project Module using the username and password [ochaphase2/ochaphase2] and then log in using your HID credentials.

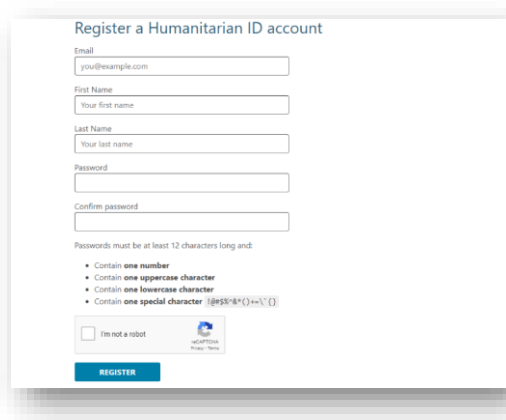
Environment	Function
Production	This is the live site that is accessible to all users.
Demo	This is the non-live version of RPM. The Demo environment lets administrators and field users test changes in a closed environment (without those changes affecting the Production version of the site). The Demo version of RPM is connected to Demo versions of Insight, PM, and FTS, allowing users to see how updates on RPM affect the other sites. The Demo site is synched to Production every day at midnight. At this time, any information entered into the Demo site will be deleted and replaced by the newest information from the Production site.
Stage	The Stage environment functions exactly like Demo, except it is officially reserved for Administrators (Field Support Unit). We sometimes use it to not interfere with the field if they are testing in Demo. If we freeze the Demo environment for a longer period, we can extend Stage to the field for testing purposes (although this is a rare case). Stage is occasionally used by the developers to test new features and patches. Overall, this environment is used rather infrequently
Development	The Development environment is only used by developers and is used for testing new features and patches. RPM Admins do not have access to this environment.

2 User Login and Registration [for Partners, Cluster and Plan Leads]

All users of the Project Module must log into the application with a Humanitarian ID (HID) account. Please make sure to activate your HID account before you log into the PM.

2.1 If you do not have an HID Account

1. Click on login, and then click *Register a new Humanitarian Id Account*.

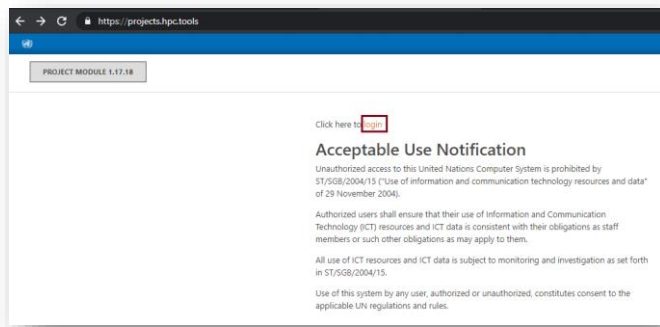


The screenshot shows a registration form titled "Register a Humanitarian ID account". The form includes the following fields: Email (with the placeholder "you@example.com"), First Name (with the placeholder "Your first name"), Last Name (with the placeholder "Your last name"), Password, and Confirm password. Below the password fields, there is a note: "Passwords must be at least 12 characters long and:" followed by a bulleted list of requirements: "Contain one number", "Contain one uppercase character", "Contain one lowercase character", and "Contain one special character" (with a regex example: "[@!\$%^&*()+=~`|]"). At the bottom of the form, there is a checkbox labeled "I'm not a robot" and a reCAPTCHA logo. A blue "REGISTER" button is located at the bottom center of the form.

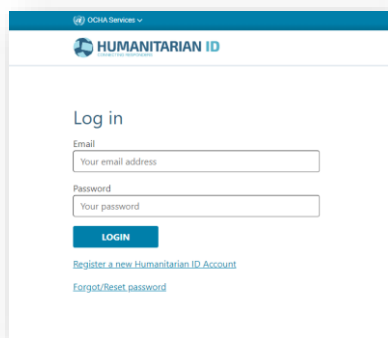
2. Fill out the details and click [Register]. You will then receive a confirmation email from HID to verify you address.
3. Open the email and click on the link.
4. Return to Project Module, log-in, then enter your email and password to finalize the registration process.

2.2 If you do have an HID Account

1. Click [login].



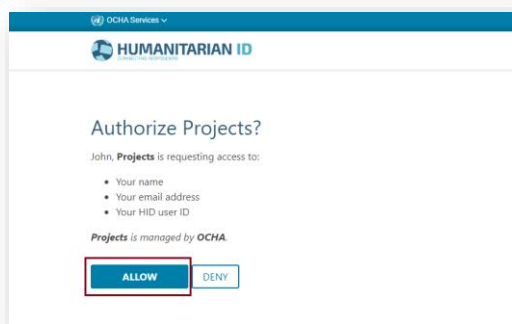
2. After clicking on the login button, you will be automatically directed to HID to enter your details:



3. The login button will thereafter re-direct you back to the Project Module.

2.3 Approving Access to HID and Logging into PM for the First Time

1. After logging into PM for the first time you will be asked if you want to allow HPC Project Module to access your HID details. Click [Allow].



- You will now see the *User Profile* screen. You must fill out your organization and the country in which you are working. Start typing into the box and the system will try to find a match for your organization and country. Note that you may select more than one country. When complete, click [save and continue] and you will be directed to the map screen.

The screenshot shows the 'Profile' form with the following fields and values:

- First name: John
- Last name: Smith
- Email: john.smith.pm.00@gmail.com
- Organization name*: United Nations Children's Fund
- Associated Response Plan Countries: Kenya REMOVE

Red boxes highlight the 'Organization name*' field and the 'Associated Response Plan Countries' field. A 'SAVE AND CONTINUE' button is visible in the top right corner.

- If you cannot find the organization you are looking for, then click on the link circled below, where you will be directed to a form to fill out.

Note: HPC Tools/Project Module database has over 12,000 registered organizations, operating globally at both the local and international level. Please always do an extensive search for your organization in the HPC/Project Module database, before sending in a new request to be registered. The possible search parameters are further explained in the section, [Organization Registration](#).

Note: If you are a Cluster Lead but have not yet been assigned as such for a plan, please contact a Plan Lead of that country. They will then add you. This process is explained in detail in the section, [Granting Access to Cluster Leads](#).

This screenshot is identical to the previous one, but with a red circle highlighting the text 'this form' in the asterisked note below the Organization name field: '* If you cannot find the organization in our system, please fill out **this form** and we will add a new organization record and inform you about it.'

- The OCHA Field Office will review your submission, add the organization for you and inform you by email. You will not be able to proceed until you have added this organization. This means you will have to return to the HPC Project Module after you have received this confirmation.

Organization Registration Request Form V3.0

Organization Name (Required)	
E-mail Address (Required)	
Phone Number (Required)	
Country (Required)	
Organization Name (Required)	
Organization Abbreviation (Required)	
Organization Name in Another Language (Optional)	
Website Address or Official Information Site (Optional)	
Organization Type (Required)	
Type of NGO (Required)	
Briefly provide your organization profile and your role (Optional)	
Where are you currently located (City/Country)? (Optional)	

Example:

PLEASE PROVIDE YOUR NAME
Anna

PLEASE PROVIDE YOUR E-MAIL ADDRESS
anna@ngo.org

PLEASE PROVIDE YOUR PHONE NUMBER
9999999999

PLEASE SPECIFY YOUR OPERATION COUNTRY
occupied Palestinian territories (oPt)

PLEASE PROVIDE THE NAME OF YOUR ORGANISATION
East Jerusalem Hospital Network

PLEASE PROVIDE THE ABBREVIATION OF YOUR ORGANISATION
EJHN

PLEASE PROVIDE THE NAME OF YOUR ORGANISATION IN ANOTHER LANGUAGE
East Jerusalem Hospital Network

IF YOUR ORGANIZATION CHANGED ITS NAME, PLEASE PROVIDE THE PREVIOUS NAME AND ANY RELEVANT DETAILS
[No name changes](#)

PLEASE PROVIDE YOUR ORGANISATION'S WEBSITE ADDRESS OR AN OFFICIAL INFORMATION SITE
www.EJHN.org

PLEASE SPECIFY YOUR ORGANISATION TYPE
NGO

TYPE OF NGO
"Local"

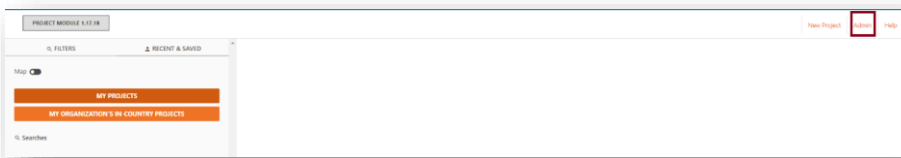
BELOW BRIEFLY PROVIDE YOUR ORGNISATION PROFILE AND YOUR ROLE
The East Jerusalem Hospitals Network is a network of six hospitals in East Jerusalem. The network was founded in 1997 with the support of Palestinian politician Faisal Hussein.

WHERE ARE YOU CURRENTLY LOCATED (CITY/COUNTRY)?
East Jerusalem, oPt

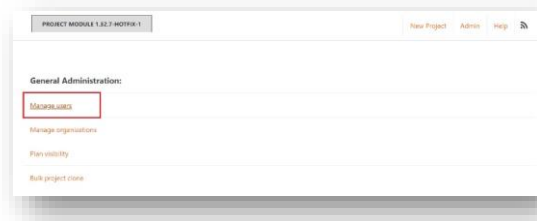
2.4 Granting Access to Cluster Leads [for Plan Leads]

Cluster Leads can approve/reject/return for edit projects that fall under their cluster. Additionally, Cluster Leads can edit their cluster framework information in RPM. First, however, Plan Leads need to grant Cluster Lead-level access to the respective cluster coordinators and cluster IMOs. To do so, follow these steps:

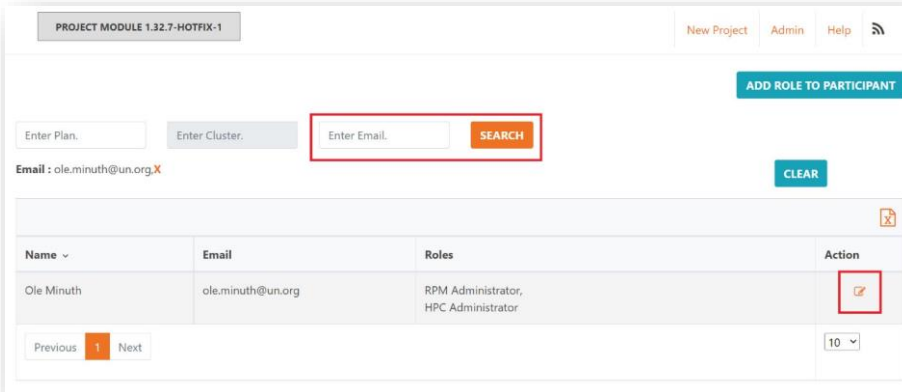
1. Go to Project Module and click *Admin*.



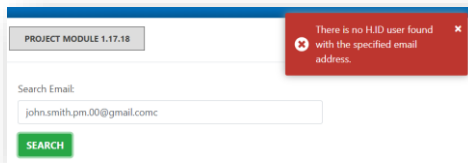
2. Then, click *Manage users*.



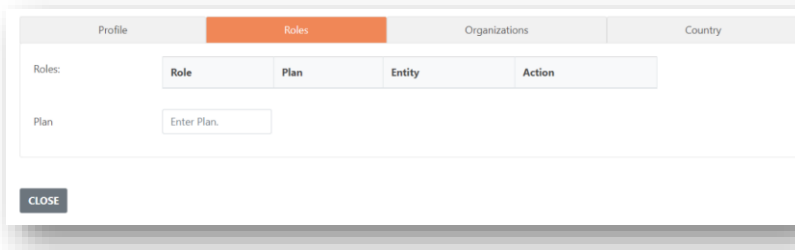
3. In the *Enter Email* box, type the email address of the person you wish to grant Cluster Lead-access to and click *Search*.
4. After the system has found the person, you are looking for, click on the little paper and pencil icon in the *Action* column.



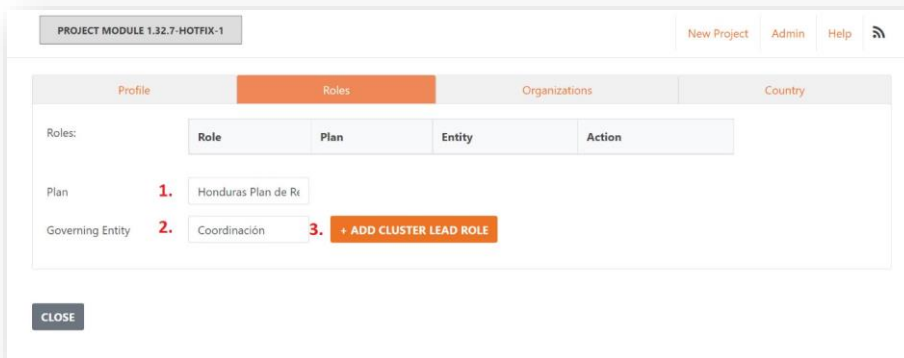
5. If the email address is not associated to an HID account, an error message will display. In this case: **Inform the user to create an HID account and to log in to HPC Tools (PM) for the system to recognize the newly registered HID.** If this is the case, follow the steps outlined in [User Login and Registration](#).



6. Otherwise, the system will redirect you to the *Editing Participant* page. On this page, please click on *Roles*.



7. Enter your plan name, select the appropriate cluster, then click *Add Cluster Lead Role*.



8. You should receive a message saying, “Account updated”. Please inform the new Cluster Lead that their role has now been assigned. Finally, click *Close*.

Note: If a contact wasn’t found while trying to grant access, there are two possible reasons why this may be the case. As such, there are two ways to solve the issue. These are:

1. Please double check with the individual that they created an HID with the email you are looking for. If they have not created an HID, please follow the steps outlined in the section, [User Login and Registration](#). If they created an HID with a different email address, kindly ask them to provide the correct email address.
2. If they did create an HID and did give you the correct email address, please ask them whether they have logged into Project Module using their HID. Only after logging into PM and approving the platform to use their HID, will the account and associated email be added to the PM roster. If they have not logged in to Project Module after creating their HID, please ask them to login. Afterwards you should be able to assign Cluster Lead status.

2.5 Granting and Re-Assigning Project Ownership [for Partners and Plan Leads]

Plan leads and project owners can grant and re-assign the ownership rights of a project. Ownership rights are necessary to edit, submit or clone a project. If a project focal point will soon be leaving an organization, they should grant project ownership to a colleague, a new focal point or a general organization email, this way the organization retains access to its projects. If a partner has had staff turnover and the original owner of a project no longer works with the organization or agency, the partner should reach out to a Plan Lead and specify the ID of the project they cannot access and the email address of the person that will be the new project owner. The Plan Lead can then grant ownership.

Granting ownership to a different user is quite simple and the steps are the same for Plan Leads and partners. :

1. Search for the project in the “Filters” tab of Project Module using the project ID.

Q FILTERS RECENT & SAVED

Map

2020 2021 2022 2023

RESPONSE PLAN

SECTOR

ORGANIZATION

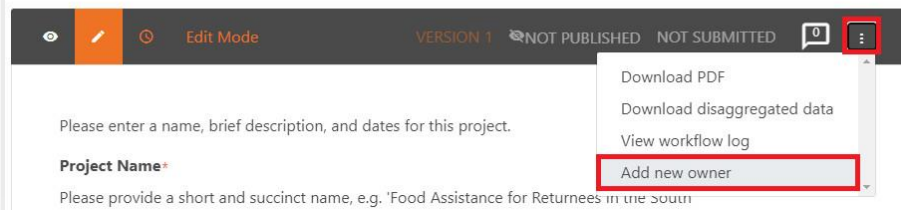
RESET SEARCH

Enter a project code
194743 SEARCH

2. After you've located the project in question, open the project to the review page. In the project review page, click on the three small dots at the top right of the black bar.
3. A drop-down menu will be opened automatically. Please select the option "Add new owner".

RBGD23-HEA-194743-1

Test



The screenshot shows a project management interface. At the top, there is a dark header bar with icons for eye, edit, and refresh, followed by the text "Edit Mode". To the right, it says "VERSION 1", "NOT PUBLISHED", and "NOT SUBMITTED". A dropdown menu is open, showing options: "Download PDF", "Download disaggregated data", "View workflow log", and "Add new owner". The "Add new owner" option is highlighted with a red box. Below the header, there is a text input field with the placeholder text "Please enter a name, brief description, and dates for this project." and a label "Project Name*" with a red asterisk. Below that is another text input field with the placeholder text "Please provide a short and succinct name, e.g. 'Food Assistance for Returnees in the South'".

4. All that remains now is to enter the email address of the new project owner and click on the orange "Add Owner" button to confirm these changes.
5. **Note:** The text field for the email address input is case sensitive, so it is key that you enter the email address exactly correct. Capitalizing a single letter that is not supposed to be capitalized will result in project ownership not being granted to the HID account of the new owner and will mean the partner will still not be able to access the project.

Project ownership list

Current owners

Ole Minuth

Add new owner

Email*

ADD OWNER

6. After you have added the email address, the partner will again be able to make changes to the project, submit it for review, or clone it.

3 New Organizations Registration [for Partners and Plan Leads]

This section is divided into 4 (four) parts.

1. **How to search for organizations:** This part gives instructions for Partners and Plans Leads on how to search for organizations in the HPC Database/list prior to registering a new project or registering a new actor that could not be found in the HPC list.
2. **Submitting a Request for Registration of a New Organization [for Partners/Plan Leads]**
3. **Registering a New Organization [for Plan Leads]**
4. **Classifying New Organizations with Type and Sub-Type at Registration [for Plan Leads/Administrators]**

This section offers Plan Leads/Administrators the Grand Bargain localization marker definitions for classifying organizations with correct types and sub-types listed in projects module. The section also offers instructions on how to apply the localization marker definitions to actors being registered and suggestions to consider for tricky cases of organizations plan leads might encounter.

HPC Projects Module database has over 12,000 organizations registered within, working globally at local and international levels. New organizations should therefore be registered one time and names re-used from year to year. When registering, plans lead, and administrators must ensure to enter all details about the organization as requested in the registration module.

Correct registration and classification of organizations allows better understanding of who is giving humanitarian aid and enables correct and consistent tracking of financial flows to the right organizations, globally. It allows the global humanitarian community to track their localization commitment to allocate 25 per cent of humanitarian funding to local and national actors globally and helps transform the humanitarian architecture to one that is more inclusive and just. OCHA headquarters will work closely with OCHA country offices to ensure the registration of organizations is bolstered.

Incorrect entries of organizations in HPC tools causes difficulties in financial tracking to clusters, donors, partners, and other stakeholders who use HPC data for decision making. Attribution of funding flows by the Financial Tracking Services (FTS) team becomes impossible when projects are registered against wrong organizations.

3. How to search organizations in Project Module database [for Partners/Plan Leads]

When registering projects in Projects Module, Partners should do an extensive search for their correct names in the database, before sending in a new request to be registered.

Upon receiving a registration request from the partner, the Plan Lead/Administrator's role is to double check the request before recording them into the database, to avoid double or incorrect registrations that could hinder the goal of registering actors in the HPC.

Partners and Plan Leads/Administrators should apply the following criteria at the different stages, to find the organization's name in the HPC database:

1. Use the official name of the organization as per the legal statutes of that organization.
2. Ensure you search with the correct spelling and with no errors in the name.
3. Search for the organization using its full name.
4. Search by narrowing down the name with key words.
5. For names in French, Spanish, Portuguese etc., try typing the name with or without accents.
6. Search using another language if the name in the first language used yields no results (French, English, Spanish)
7. In exceptional cases, search for the organization by applying its acronym. Noting that the database has over 12,000 actors registered there, some of which have similar acronyms.
8. Most international organizations are already in HPC database, if no results are got, do an advanced search to confirm, applying the above criteria.
9. In case of any confusion or questions about your organization's records in Projects Module, please contact the OCHA focal point.
10. Ensure to select the correct name of the organization for registering projects.
11. Upon exhausting the search criteria but no results are got, send a registration request through the Kobo user form.

3.1 Submitting a Request to Register an Organization [for Partners]

After a thorough search for your organization without finding it in the database, the partner should request it to be added by a Plan Lead.

To do so the partner will have to fill out a short KoBo form. Please follow this link (<https://ee.humanitarianresponse.info/x/2UPuchLH>) which will guide them to the form.

After filling out the form and submitting it, the partner's request will be reviewed by the Plan Lead assigned to the appeal partners would like to submit a project for.

The Plan Lead will then decide whether to accept or reject your request. When filling out the form, partners should follow each step and provide as much information as possible to allow the Plan Lead to correctly identify and verify the organization requesting to participate in the Humanitarian Plan.

When the form is filled out, the partner will 'Submit' or 'Save as draft' for later submission.

The image below illustrates the information requested of partners by the registration request form.

kbdo | Choose Language | English

Organization Registration Request Form V3.0

PLEASE COMPLETE THIS FORM TO REQUEST YOUR ORGANIZATION'S REGISTRATION ON PROJECT MODULE (GLOBAL PROJECT SYSTEM). This request language can be done in English, but you can change it to your preferred language from the "Change Language" field available at the top of the screen.

PLEASE PROVIDE YOUR NAME

PLEASE PROVIDE YOUR NAME ADDRESS

PLEASE PROVIDE YOUR PHONE NUMBER
with international calling code, ex: "+1 555 555 1212"

PLEASE SELECT YOUR ORGANIZATION COUNTRY

- Afghanistan
- Bangladesh_BD
- Bahrain_Bah
- Bangladesh_BD
- Cameroon
- Central African Republic (CAR)
- Chad
- Colombia
- Democratic People's Republic of Korea (DPRK)
- Democratic Republic of the Congo (DRC)
- El Salvador
- Ethiopia
- Guatemala
- Haiti
- Honduras
- Iraq
- Lebanon
- Libya
- Mali
- Mozambique
- Myanmar
- Niger
- Nigeria
- occupied Palestinian territories (oPt)
- Pakistan
- Somalia
- South Sudan
- Sudan
- Syria (Syrian Arab Republic)
- Ukraine
- Venezuela
- Yemen
- Zimbabwe
- Other

PLEASE PROVIDE THE ORIGINAL NAME OF YOUR ORGANIZATION

PLEASE PROVIDE THE ABBREVIATION OF YOUR ORGANIZATION

PLEASE PROVIDE THE NAME OF YOUR ORGANIZATION'S HEAD OFFICE ADDRESS

IF YOUR ORGANIZATION'S HEAD OFFICE NAME, PLEASE PROVIDE THE PROJECT NUMBER AND AWP BILL NUMBER TO LINK

PLEASE PROVIDE YOUR ORGANIZATION'S WEBSITE ADDRESS AND CONTACT INFORMATION


PLEASE SELECT YOUR ORGANIZATION TYPE

- NGO/CSD
- Private organization
- Multilateral Organization
- Red Cross/Red Crescent Organization
- Government
- Other

WHICH COUNTRY/PROVINCE/STATE/REGION ARE YOU REGISTERING?

WHERE ARE YOU CURRENTLY LOCATED TODAY?

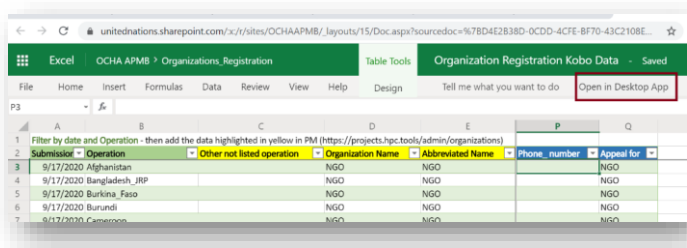
[Save Draft](#) [Submit](#)

Powered by 

3.2 Registering an Organization [for Plan Leads]

After a request to register an organization has been filled out, a Plan Lead should review the request and confirm whether the requesting organizations can be registered in the system or not. To do so, Plan Leads should follow these steps to complete the registration process.

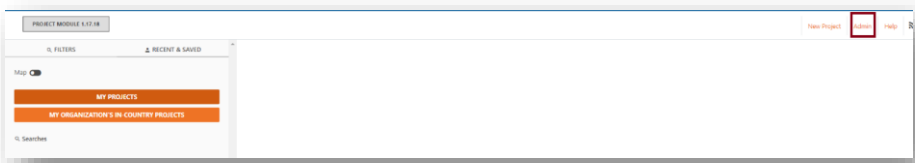
1. Open the [Organization Registration Kobo Data.xlsx](#) in desktop mode. You will notice that columns in the spreadsheet have been color-coded according to their function.



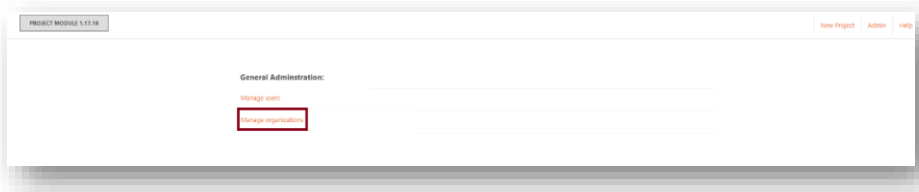
- **Green columns** include information on when the registration request was submitted and for which plan.
- **Yellow columns** contain the organization's details, including name, location, and organization type (among others)
- **Blue columns** contain the contact details of the person who submitted the request

Note: Please ask the HPC HQ (OCHA Geneva) to grant you access to this sheet if the above link doesn't work for you as a Plan Lead.

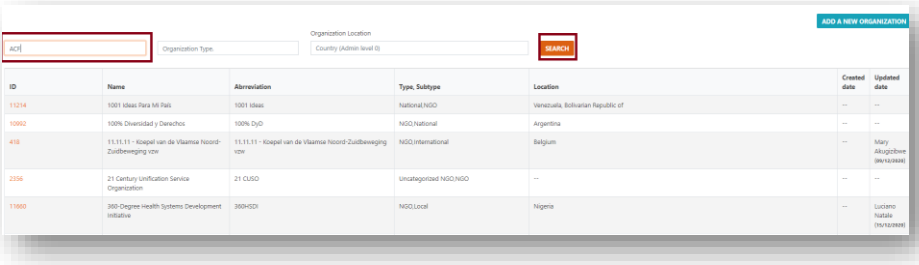
2. Refresh the data in the spreadsheet by right-clicking in any cell and selecting *Refresh*.
3. Once the spreadsheet has finished updating, filter by Submission Date and Operation to see which organizations have recently submitted registration requests for your plan.
4. To add a new organization to the HPC Tools database or to verify whether the requested organization already exists within the database, you will now need to use the Project Module.
5. Once you have opened Project Module, click the *Admin* tab in the top right corner (<https://projects.hpc.tools/admin/>).



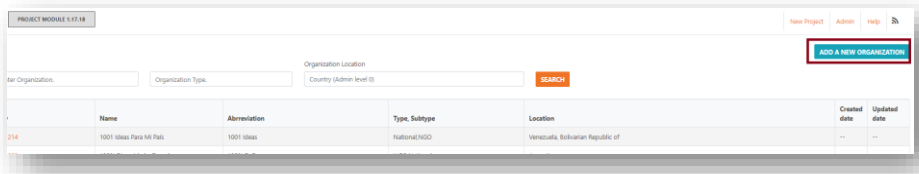
6. Click *Manage organizations*.



7. Type the name or the abbreviation and click the [Search] button.



8. If the organization exists, then please inform the partner, and provide them with the registered name.
9. If the partner organization’s name has changed slightly, then ask HPC HQ to update it.
10. If the organization does not exist in the system, click [Add new organization].



11. Once in the **Add organization** panel, fill out the details of the organization using the yellow columns of the Excel sheet that you exported from the Kobo website. Please follow these steps:
 1. Enter the **“Organization Name”**.
 2. Provide the **“Abbreviated Name”** of the organization.
 3. List the **“Organization Name in Native Language”**.
 4. **“Organization Location”**. Organization Location is Admin level 0 of the country. More than one country could be added.
 5. Please provide the **“Organization Website URL”** if available.

Then select the “**Organization type**”. Available types include Governments, Multilateral Organizations, NGOs, Private Organizations, Red Cross/Red Crescent Organizations, and others.

6. For certain types of organization, the sub-type is needed. Please select the appropriate “**Organization Sub-Type**” where needed.

7. When a particular organization type and sub-type is selected, the system will automatically generate a grouping under which the selected category falls, in accordance with the Grand Bargain standards. The automatic groupings are a) National and Sub-National State Actors, b) Local and National Non-State Actors, d) International Actors.

8. Then type the “**Parent Organization**”, if available.

9. Lastly, please provide a brief “**Organization Description**”.

10. Once done, click on **Save** to have your organization created and added to the list of organizations. See below the step-by-step process illustration:

PROJECT MODULE 1.32.3 New Project

1. Add Organization:
Organization Name *
Sahel SOS

2. Abbreviated Name *
SSOS

3. Name in Another Language
Sahel SOS

4.a ORGANIZATION LOCATION :
Country (Admin level 0)
Burkina Faso

4.b Country (Admin level 0)
Mali

5. LOCATION
Organization Website URL
Organization Website URL

6. Organization Type *
NGO

7. Organization Sub-Type(s) *
National

8. Parent Organization
Parent Organization

9. Organization Description
National NGO providing food assistance to population in North-West Burkina Faso and Mallian refugees in the area.

< BACK SAVE > **10.**

12. Before saving it, review the form and ensure all details are entered correctly. Pay particular attention to the “Organization Type and Sub-Type” as these will have important implications in HPC Tools Projects Module, Humanitarian Action and the Financial Tracking Services (FTS) for or against accurate and consistent financial tracking by global humanitarian actors and donors, and projects registration. If you are unsure about the organization type or sub-type, please consult the HPC Head Quarters team for Guidance. The main document guiding classification of organizations with correct types and sub-types is presented below:

3.3 Classifying New Organizations with Type and Sub-Type at Registration [for Plan Leads]

[Reference Document for classification](#)

Inter-Agency Standing Committee (IASC) - (HFTT) Localization Marker definitions of the Grand Bargain.¹ These are also presented in Table below. The marker definitions guide registration and classification of humanitarian responders and stem from the Grand Bargain commitment to support measure of direct and indirect funding to local and national responders.

Applying these definitions is therefore a key step in the registration process. By selecting the right organization sub-type, the humanitarian community is enabled to understand the participants in HRPs/Appeals and to correctly track funding flows towards local and national actors globally, towards realizing the localization agenda. In the table presented is a summary of the different sub-types of organizations to be selected in the HPC Tools Projects Module at the time of registration, with their definitions.

GB Standard Localization Marker definition (IASC HFTT)		
TYPE	SUB-TYPE	Definition
1: Local and National Non-State Actors Organizations engaged in relief that are headquartered and operating in their own aid recipient country and which are not affiliated to an international NGO. A local actor is not considered to be affiliated merely because it is part of a network, confederation, or alliance wherein it maintains independent fundraising and governance systems.	1.1 National NGOs/civil society organizations (CSOs)	National NGOs/CSOs operating in the aid recipient country in which they are headquartered, working in multiple subnational regions, and not affiliated to an international NGO. This category can also include national faith-based organizations.
	1.2 Local NGOs/CSOs	Local NGOs/CSOs operating in a specific, geographically defined, subnational area of an aid recipient country, without affiliation to an international NGO/CSO. This category can also include community-based organizations and local faith-based organizations.
	1.3 Red Cross/Red Crescent National Societies	National Societies that are based in and operating within their own aid recipient countries.
	1.4 Local and national private sector organizations	Organizations run by private individuals or groups as a means of enterprise for profit, that are based in and operating within their own aid recipient countries and not affiliated to an international private sector organization.
2: National and Sub-National State Actors State authorities of the affected aid recipient country engaged in relief, whether at local or national level	2.1 National governments	National government agencies, authorities, line ministries and state-owned institutions in aid recipient countries e.g., National Disaster Management Agencies (NDMAs). This category can also include federal or regional government authorities in countries where they exist.
	2.2 Local governments	Sub-national government entities in aid recipient countries exercising some degree of devolved authority over a specifically defined geographic constituency e.g., local/municipal authorities.
3: International Actors	3.1 Internationally affiliated organizations	Organizations that are affiliated to an international organization through inter-linked financing, contracting, governance and/or decision-making systems. This category does not include local and national organizations that are part of networks, confederations, or alliances wherein those organizations maintain independent fundraising and governance systems.
	3.2 Southern international NGOs	NGOs based in aid recipient countries that are not OECD member countries, carry out operations outside of the aid recipient country in which they are headquartered and not affiliated to an international NGO. The same organization can be classified as a national NGO/CSO when carrying out operations within the country in which they are headquartered.

	3.3 International NGOs	NGOs are not based in an aid recipient country and carry out operations in one or more aid recipient countries.
	3.5 International Red Cross and Red Crescent Movement	The International Committee of the Red Cross (ICRC) and the International Federation of Red Cross and Red Crescent Societies (IFRC), as well as Red Cross/Red Crescent National Societies operating outside of their own country.
	3.6 International private sector organizations	Organizations run by private individuals or groups as a means of enterprise for profit, that are not based in an aid recipient country and carry out operations in one or more aid recipient countries.
	3.4 Multilateral organizations	Agencies of the United Nations (UN) and other international organizations.

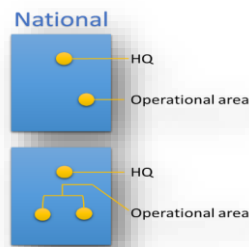
Applying the Grand Bargain Localization Maker Classification

The aim of this section is to illustrate to OCHA staff with images, tables, and examples how to decide what organization sub-type should be selected in the OCHA registration module when recording a new organization and applying the Grand Bargain standards. For special cases of organizations, please see suggestions provided in the next section.

4.1 Local and National Non-State Actors

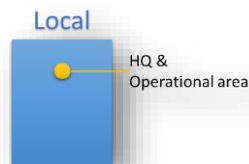
4.1.1 National NGOs/civil society organizations (CSOs): National NGOs/CSOs operating in the aid recipient country in which they are headquartered, working in multiple subnational regions, and are not affiliated to an international NGO. This category can also include national faith-based organizations.

Figure.1



4.1.2 Local NGOs/CSOs: Local NGOs/CSOs operating in a specific, geographically defined, subnational area of an aid recipient country, without affiliation to an international NGO/CSO. This category can also include community-based organizations and local faith-based organizations.

Figure. 2



Key notes on categories 1.1 and 1.2

Local and National NGOs/CSOs with names having words such as “International” or “Global”: These usually self-declare themselves as International NGOs when sending registration requests with OCHA. It is important to cross-check the organization’s website and apply the right category of local or national. An aspiration to become international does not make an NGO international.

Local and National NGOs with a name having the word “Foundation”: Sometimes such organizations can be mistakenly marked under the type/sub-type Private Organization. Having the name with the word Foundation does not automatically imply the organization is a private organization. Reference to the organization’s website and marker definitions for clarification is relevant.

4.1.3 Red Cross/Red Crescent National Societies: National Societies that are based in and working within their own aid recipient countries.

Examples: Angola Red Cross operating in Angola, Kenya Red Cross operating in Kenya, Venezuela Red Cross operating in Venezuela.

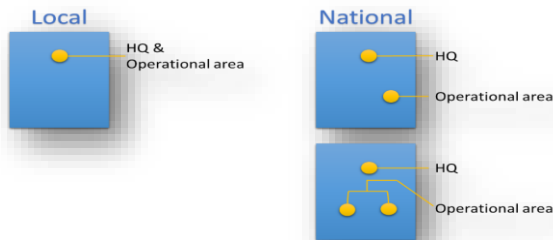
Keynote on category 1.3

A national Red Cross/ Red Crescent Society which carries out operations abroad and its own country of headquarters shall be considered and categorized as International. E.g., Belgian Red Cross operating in multiple aid recipient countries.

4.1.4 Local and national private sector organizations: Organizations run by private individuals or groups as a means of enterprise for profit, that are based in and working within their own aid recipient countries and not affiliated to an international private sector organization.

Examples: corporations, cooperatives, commercial enterprises, or businesses and associated philanthropic foundations and charities directly funded and/or governed by business, private hospitals and medical centers, private academic institutes, and universities.

Figure 3



Key notes on category 1.4

Sometimes local and national NGOs/CSOs with the word “Foundation” in their name can be mistakenly marked under the type/sub-type Private Organization/Foundation.

Having the word “Foundation” within an organization’s name does not automatically imply the organization is a private sector entity. Reference to the organization’s website and marker definitions for clarification is relevant in such cases.

4. 2. National and Sub-National State Actors:

State authorities of the affected aid recipient country engaged in relief, whether at local or national level. This includes:

4.2.1 National governments: National government agencies, authorities, line ministries and state-owned institutions in aid recipient countries e.g., National Disaster Management Agencies (NDMAs). This category can also include federal or regional government authorities in countries where they exist.

Examples: Government of South Africa, Government of Belgium, Norwegian Agency for Development Cooperation, USAID, FCDO.

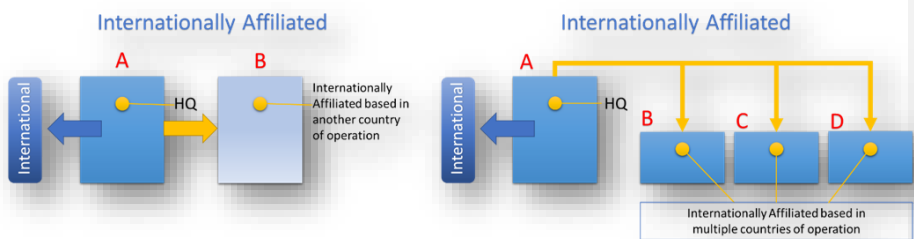
4.2.2 Local governments: Sub-national government entities in aid recipient countries exercising some degree of devolved authority over a specifically defined geographic constituency e.g., local/municipal authorities

Examples: Keyseri Metropolitan Municipality (Turkey), Governorate of Sirnak (Turkey)

4.3. International Actors

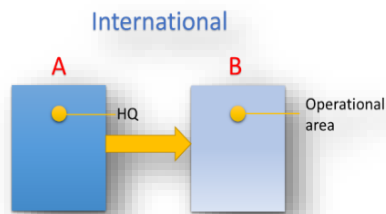
4.3.1 Internationally affiliated organizations: Organizations affiliated to an international organization through inter-linked financing, contracting, governance and/or decision-making systems. This category does not include local and national organizations that are part of networks, confederations, or alliances wherein those organizations keep independent fundraising and governance systems.

Figure 5



4.3.2 International NGOs: NGOs not based in an aid recipient country and carrying out operations in one or more aid recipient countries.

Figure 6



Key Notes on Category 3.1 and 3.1

The categories “International NGO” and “Internationally Affiliated NGO” may apply differently to some organizations depending on the legal and governance structure of each organization, and initial formal agreements reached between an organization’s Head Quarter with OCHA services. (See the four forms of classification in Annex 1)

4.3.3 Agencies of the United Nations (UN) and other international organizations.

This category refers to all IGOs/multilateral organizations created by treaty, involving two or more nations, to work in good faith, on issues of common interest. In the absence of a treaty, an IGO/multilateral organization does not exist in a legal sense. Such entities can be UN Agencies or other multilateral organizations.

Examples of UN Agencies: United Nations Children Fund (UNICEF), United Nations High Commission for Refugees (UNHCR), Food Agricultural Organizations (FAO), World Food Programme (WFP).

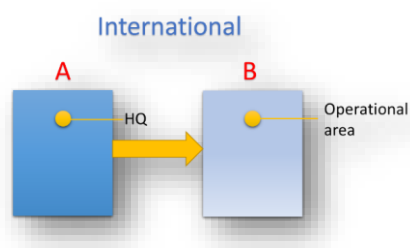
Examples of other international/multilateral organizations referred to here are: European Commission, African Union, World Bank, African Development Bank, Asian Development Bank etc.

In HPC Tools, the Type: Multilateral Organizations was created, with Sub-types 1) UN Agencies 2) Other Multilateral Organizations.

4.3.4 International Red Cross and Red Crescent Movement: The International Committee of the Red Cross (ICRC) and the International Federation of Red Cross and Red Crescent Societies (IFRC), as well as Red Cross/Red Crescent National Societies working outside of their own country.

4.3.5 International private sector organizations: Organizations run by private individuals or groups as a means of enterprise for profit, that are not based in an aid recipient country and carrying out operations in one or more aid recipient countries.

Examples: Multinational corporations, cooperatives, commercial enterprises, or businesses and associated philanthropic foundations and charities directly funded and/or governed by business, private hospitals and medical centers, private academic institutes, and universities.



4.5. Pooled Funds

This category applies to HPC Tools/FTS, and it is usually applied when recording pooled funds contributing funding and they include:

4.5.1 Global Pooled Funds: For example, Central Emergency Relief Fund (CERF)

4.5.2. Regional Pooled Funds: For example, Burkina Faso, Regionally Hosted Pooled Fund for Central and West Africa.

4.5.3 Country-Based Pooled Funds (CBPF): For example, Nigeria Humanitarian Fund, Ethiopia Humanitarian Fund, Afghanistan Humanitarian Fund.

5. Suggestions to Consider When Classifying Organizations

Given the experience that HPC database has gone through to review and categorize 12,000 entities as per the Grand Bargain definition, the suggestion is for country offices and plan leads to consider the following when staff meet tricky cases of organizations, to identify and apply the correct organization sub-type or category of the Grand Bargain to them:

1. Local and National Organizations in the donor countries

OCHA systems track funding flows from the sources and recipients of the humanitarian response funds. First-time registration of organizations into the HPC database includes all organizations supplying and/or receiving humanitarian financing. The Grand Bargain definitions apply to both sources and recipients of funding.

Secondly, there are organizations which work in the donor countries within a specific geographically defined subnational area or multiple subnational areas of that donor country, with neither any affiliation to an international organization nor operations outside the donor country.

Such organizations would normally serve the needs of migrants and other persons in need within their communities in the donor country. They are classified as local or national NGOs/CSOs or local/national private sector organizations, depending on the geographical coverage of their operations within the country where they are headquartered.

2. Forms of International and Internationally Affiliated NGOs

The table below gives a description of the different forms of international and internationally affiliated organizations and suggests how the Grand Bargain classification applies to them.

The application of categories “International NGOs” and “Internationally Affiliated NGOs” is not usually straight forward.

Before registering and classifying an organization with either of the two categories, one must research, review, and understand the governance and structures of each individual international organization. One should also review the precedent on similar organizations in the OCHA databases and how the definitions/classifications were applied.

Depending on the governance, structures and precedent in the databases, the classification of International and internationally Affiliated organizations shall be applied in one of the 4 ways: -

I. International Organizations with a centralized structure.

Most international organizations will register a single name/office to stand for all their multiple operations/presence in both the headquarter country and aid receiving country. Here their headquarters office shall be registered as the organization’s central office.

No country offices shall be registered independently from the Headquarter.

Consequently, all funding records and projects in the multiple countries of the organization’s operation shall use that central Headquarters' name in the OCHA databases.

Examples of such organizations include: The Norwegian Refugee Council, International Rescue Committee, Save the Children.

They are classified as International Organizations.

Most international organizations use this structure in the HPC.

Figure 7

HQ+Operations

Save the Children

II. International Organizations with Head Quarters and other Multiple Independent Offices in a non-aid recipient country which directly conduct operations in multiple aid recipient countries

Only the Head Quarters and independent offices of these organizations in the non-aid recipient countries shall be Registered.

Its operational offices in the aid recipient countries shall not be registered, unless the legal structure of such organization clearly stipulates otherwise, and with agreement from the Head Quarters of that organization.

The HQ and independent offices in a donor country shall be classified as International NGOs following the marker definitions.

Examples of organizations with this type of structure include Oxfam, International Medica Corps (IMC), Handicap International – Humanity and Inclusion, and War Child.

Figure 8

HQ

IO

HQ + Independent Office(s) in non-aid recipient countries

Observation

You might receive a request from such an international NGO's country office asking to be registered independently as a separate entity in that country for the purpose of registering projects as participants in an HRP/Appeal or sending a proposal for funding. In such cases, be reminded that not all country offices' personnel of the NGO are fully aware of the legal governing structure of their organization or have knowledge of agreements reached between their HQs with OCHA.

Always review the organization's structure first and refer the requesting party to it. This information will always be got from the organization's website or review earlier agreements between the HQ of such an organization with OCHA if available. Where there is doubt, OCHA can coordinate links with the organization's headquarters for clarification.

III. International organizations with a Head Quarter in a donor country and operational offices registered as independent entities in multiple aid recipient countries. These still bear the same name and have inter-linked financing and governance.

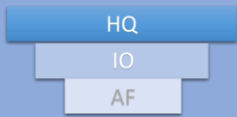
Register and classify the Head Quarter office based in a donor country as international.

Register the operations in country offices as Affiliated.

In HPC Tools, when you have classified the country offices as affiliated, tag the headquarters office as a parent organization to ease easy triangulation of the funding to these international organizations.

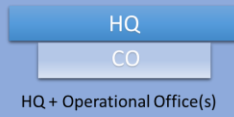
Examples of organizations with this type of structure include CARE, CARITAS, World Vision.

Figure 9



Level 1: HQ
 Level 2: Independent Office(s) in non-aid recipient countries
 Level 3: Operational Office(s) in aid recipient countries

Figure 10

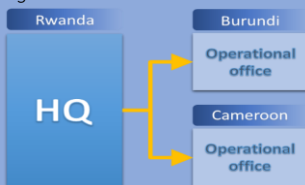


I.V) Organizations Headquartered in an aid recipient country and with multiple operations in other aid recipient countries not necessarily working in cross-border operations or regional refugee or migrant response.

These organizations have been defined by the Grand Bargain as Southern International Organizations. However, OCHA maintains only a single classification of “International Organizations” to refer to organizations working in more than one country. Therefore, OCHA classifies such organizations as international.

Figure

11



3. Partnerships or bilaterally agreed consortium of organizations for joint projects or joint applications for funding in an HRP/Appeal.

Such partnerships or consortiums are usually agreed at the start of a humanitarian Program Cycle for purposes of implementing joint projects in HRP/Appeal and/or for joint submission of a project proposal for funding for example; UNHCR, a UN agency send for registration a joint project with International Rescue committee (IRC). Both organizations might be already registered in OCHA databases.

The first-time registration of such joint request if ingested would appear as UNHCR/IRC. Such registration is difficult to classify and creates difficulties in financial tracking. *Such joint registrations of organizations are not permitted.*

The joinder of two independent organizations is not creation or registration of a formal/legal entity and should therefore not be registered in OCHA databases. The databases shall only ingest legal entities.

While joint projects or joint appeals are recommended, at registration of the participating parties in HRP/Appeal or Grants application, a breakdown of financial requirements under a joint project should be supplied and each organization registered independently. E.g., UNHCR for project XYZ has 50% and its partner IRC 50% as mutually agreed between the parties.

In HPC Tools/FTS, this principle also applies to donors jointly financing a project/activity within a given response plan. A breakdown of funding from each party must be reported and recorded against each individual entity.

Each organization in the partnership or consortium should be registered independently of the other in the database(s) and categorized according to the Grand Bargain Localization Marker definitions.

Registering joint organizations not only limits classification but also financial tracking against each organization.

4. Initiatives and programs of international organizations:

These are not registered as independent entities or classified independently from the organizations implementing them. Moreover, there is no Grand Bargain definition that supports initiatives, programs, or projects but their implementing organizations.

5. Organizations who changed names over the years:

Update the names of organizations in the database if there is any change or consult with the organization whether past projects or financial records should be kept under the old name and if new records should be recorded with a new name.

6. Merger of organizations:

A+B=AB. e.g., [The Achelis Foundation](#) + [The Bodman Foundation](#) formed [The Achelis & Bodman Foundation](#). Both were in the HPC database as separate entities, and have funding attributed to them previously.

Consult with such organizations whether they prefer their historical data to be under earlier names before the merger or whether it should be combined.

If the two former names should be combined, HPC Tools allows for a technical merging of the organization's data. Once the technical merging has been completed, update the old name with the new name of the organization and classification, referring to the localization marker definitions.

7. Scale-up of organization's operational presence

Organizations may develop and expand their operational presence within one country and/or beyond. The onus is upon organizations taking part in an HPC to inform OCHA of their scale-up for their organizational data to be revised and for re-classification from one category to another as per the Grand Bargain definitions.

OCHA staff may also make updates upon organization's data if aware of the organization's changes from credible sources before the organizations have informed OCHA of changes about them. Confirmation can be looked for in writing, by the OCHA staff from the organization in question.

8. The ACT Alliance Members

ACT Alliance member organizations include national, local, and international organizations globally. The ACT Alliance approach is unique from other international organizations and networks or Affiliates to International organizations described by the Grand Bargain localization marker definitions.

ACT Alliance members Co-brand with the name [ACT Alliance](#) according to the co-branding policy of the organization.

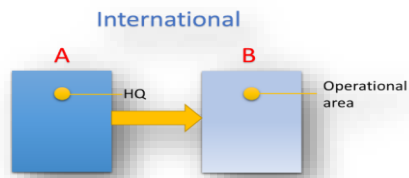
For example, ACT Alliance/Canadian Lutheran World Relief, ACT Alliance/DanChurchAid, ACT Alliance/Christian Commission for Development in Bangladesh.

At registration, ACT Alliance member organizations who have operations in multiple aid recipient countries shall take a single name to stand for all the multiple operations in several countries.

Such organizations shall be classified as International.

In HPC Tools, ACT Alliance secretariate will be tagged as a parent organization to ease triangulation of funding flows towards these organizations.

Example: [ACT Alliance/Canadian Lutheran World Relief](#)



On the other hand, ACT Alliance members headquartered and working in one country shall be treated as Internationally Affiliated because of their inter-linked financing and governance with the ACT Alliance in Switzerland.

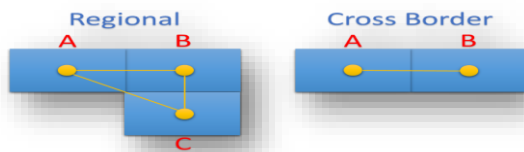
For example: ACT Alliance/Christian Commission for Development in Bangladesh is Internationally Affiliated to ACT Alliance.

9. Organizations working in Regional and Cross-Border Response

These organizations can be classified as National or International depending on their nature.

Therefore, in exceptional cases when registering organizations in regional response contexts like in the Syria Regional Response Plan, Syria Cross-Boarder, Somalia Cross-Boarder, South Sudan, and Venezuela Regional Responses, the following considerations should be made and criteria to decide what category an organization falls under should be applied;

Figure 12



Organizations in Regional and Cross-Border Response	OCHA Recommended Criteria
<p>Examples of organizations working in regional refugee and/or migrant and/or cross-border contexts:</p> <p>a) Organizations registered and working in crisis countries but due to insecurity in headquarters country start working from across the border in a neighboring country. Or merely start another operation in a neighboring country to meet needs of displaced populations e.g., Syrian NGO working across the border in Lebanon or Turkey, Somali NGO working from Dadaab Refugee Camp in Kenya.</p> <p>b) NGOs set up by nationals of a humanitarian crisis country in a neighboring country to support operations inside their country of origin and in the neighboring country of registration. Organizations founded by Syrians in Turkey to meet needs of Syrian refugees in Turkey and needs in Syria.</p> <p>N.B. These scenarios are visible in the Syria Regional Response Plan (RRP), Somalia Response, South Sudan RRP.</p> <p>c) NGOs registered and headquartered in western countries (OCED member countries), run by refugees or citizens of an affected country in diaspora to support humanitarian needs in their country of origin. <i>This category is different from Diaspora remittances provided by individuals.</i></p>	<p>HPC Tools/FTS will classify organizations in cross-border or regional response as “national” if they meet at least two of the criteria below:</p> <ul style="list-style-type: none"> i. Existence of a headquarters in a crisis country or neighboring country within the same region. ii. Level of emergency or insecurity in headquarters country resulting to exit and provision of services on distance from neighboring country. iii. Proximity to a crisis or humanitarian response (Geographically). The organization must be undertaking humanitarian activities in the crisis country and/or in support to exclusively communities of the crisis country, from another country within the same region. iv. Nature of registration in the country of operation. v. General nature of the operational environment in the affected country and region. <p>FTS classifies scenario a & b described in the first column of this table as national.</p> <p>On the other hand, scenario c is classified as an “International Organization” because the headquarters is outside of the crisis region/neighboring countries.</p>

Note: The criteria for classifying organizations in regional and cross-border organizations was created after an extensive study of organizations in the Syria Cross-Border Response, in collaboration with OCHA Syria office and Localization focal point, the Venezuela regional response, South Sudan response, and the Somalia response. Consideration was made to NGO standards by a) the Syria Humanitarian NGO Platform and the League of Syrian Networks for organizations in cross-border response, b) Partnership Steering Committee Terms of Reference for member organizations in Syria Cross-Border response.

3.4 Anonymization of Organizations at Projects Registration for Protection Reasons

Background

The foundation of the Humanitarian Response Plan (HRP) are individual “projects” submitted by humanitarian organizations, outlining what they hope to do the following year to meet the needs identified in the response plan in line with the response strategy developed in each sector. These projects are uploaded to the HPC Projects Module, and their funding is tracked through the Financial Tracking Service (FTS). These systems are important for accountability to people affected people in each response plan, to donors, and the global humanitarian community, and are also used for fundraising, advocacy, and strategic planning. These systems are public and can be viewed online.

While public disclosure of projects on the HPC Tools - Projects Module and FTS, is a requirement to ensure full accountability and efficient planning, it is recognised that in a few exceptional cases, public disclosure may be a legitimate source of protection concerns for some organizations operating in some highly political contexts such as the Syria cross-border, Venezuela, Somalia, Occupied Palestinian Territory, and others.

When such partners can make a compelling case that they cannot disclose their projects publicly but would nonetheless like to be part of the HRP, they can be anonymized.

These partners must agree to fully disclose their project information confidentially within clusters/sectors in their sub-national region and at the country level for the purpose of project vetting, monitoring, and financial tracking, and with the OCHA financial tracking focal point for the purpose of financial tracking on FTS.

The humanitarian leadership will also have access to this information if desired, as they are responsible for the humanitarian operation in each country/context. An anonymous project will then be uploaded on the HPC Projects Module with a coding system that will enable linking the anonymous project with the partner for the purpose of financial tracking.

The general rule is anonymization will be activated only in exceptional cases due to security reasons faced by an organization carrying out humanitarian work within a country or cross-border context. Until 2022, Syria and Venezuela had been the only countries that considered project anonymization for humanitarian response plans, even though humanitarian actors work in many situations that are similarly insecure.

How should anonymization be decided at country level?

Appealing organisations that wish to include anonymous projects requires the approval of the humanitarian leadership which must be obtained before project submission depending on where they are located – it cannot be granted at the last minute. Acute security/protection concerns should be the only acceptable reason for a project to be anonymized.

What information can be anonymized?

The only information that can be anonymous for a specific project is the organisation name and/or specific project location.

How is the information anonymised?

Once a request by a partner to anonymize a project has been granted by humanitarian leadership in each context, the partner shall inform the OCHA focal point for instructions on how to register the project to be anonymised.

The anonymized projects will then be registered and displayed in the HPC Projects Module, Humanitarian Action, and the Financial Tracking Services (FTS) under one of the following names depending on the Type, Sub-Type the anonymizing organization falls:

1. International NGOs (Confidential)
2. National NGOs (Confidential)
3. Red Cross/Red Crescent Societies (Confidential)
4. UN Agencies (Confidential)

Can an organization have both anonymized and normal projects?

Yes, anonymization is project based, not actor based. Only projects that meet the criteria may be anonymized. Therefore, the same organization could have anonymized projects as well as non-anonymized projects.

When does anonymization occur?

Anonymization occurs when appealing organisations submit projects on HPC Projects Module. Anonymization must be granted before the submission of a project – it cannot be applied retroactively.

Project information is **not** anonymous, as it is needed for the review process and for the sector coordinators at sub-national, regional, or country level to understand the full breakdown of project requirements in their sector. It is only anonymized when final, approved projects are uploaded to the HPC Projects Module.

It is important to note that organizations with anonymized projects on the HPC Projects Module continue to have an obligation to pro-actively and continuously provide information on the funding status of that project to either the sector coordinator and/or OCHA at sub-national, regional, or country levels. This will ensure that the funding status of that project is correctly indicated in FTS.

At the end of projects registration, the plan lead shall provide a list of all anonymized projects to OCHA Geneva focal point to ensure funding status of anonymized projects is correctly indicated in FTS. This information shall be handled with confidentiality by OCHA Geneva focal points.

Who has access to anonymized information?

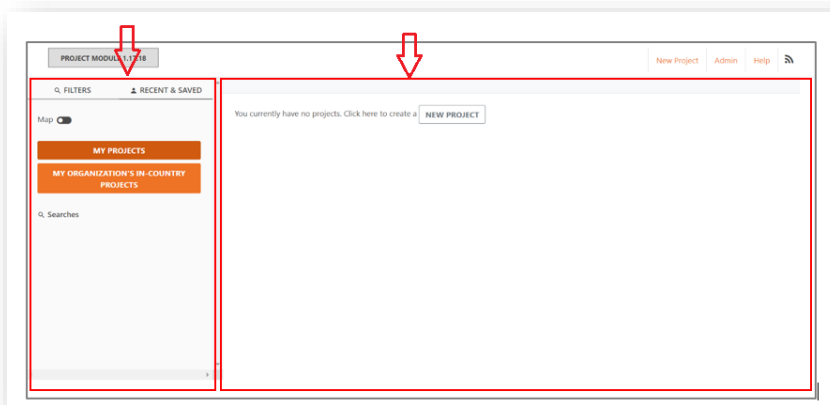
Anonymized information will be available to cluster/sector coordinators at the sub-national, regional, and country level for the sector under which the appealing organization is submitting the project, the humanitarian leadership and OCHA staff supporting financial tracking (based either the country offices or Geneva).

Cluster/Sector coordinators have access to the information because it is a fundamental aspect of their coordination work which they cannot do otherwise. The humanitarian leadership requires it as they are ultimately accountable for the humanitarian operation. The OCHA financial tracking focal point(s) require it to track humanitarian funding in each context, which is necessary for accountability, fundraising, and planning purposes.

Information on projects that are implemented in individual organization's areas of work need also to be available to the Inter-Cluster Coordination Group (ICCG) for operational purposes as per the information-sharing protocols agreed in each context.

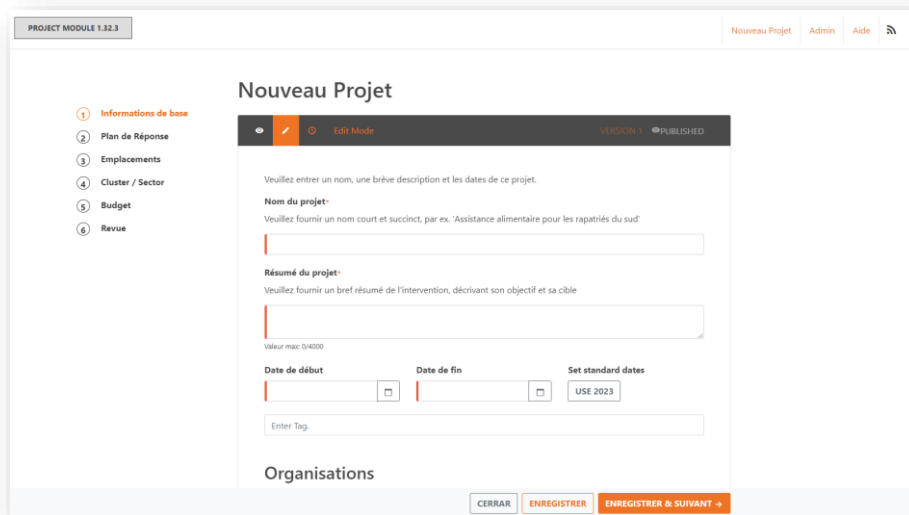
4 Navigate Project Module Interface

Once you are successfully logged in to Project Module, the application will automatically display the projects which you have created. This is your “home screen”. The main screen is split into two vertical areas. On the left, there are several options for filtering by year, operations, organizations, or projects. On the right side of the screen is the list of projects based on your search parameters.



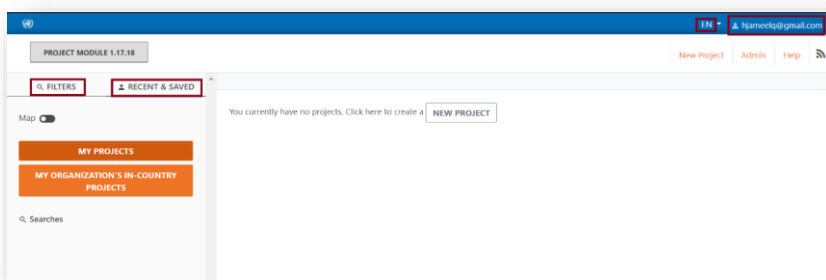
Some additional information that appears in the screen is:

1. **Your Account (top right of screen)**: Click here to access your user profile or logout of the system.
2. **“EN”**: Language selection. Click here to change the language display of the application.
 - The available languages are English (EN), French (FR), Spanish (ES), Portuguese (PT), Russian (RU), and Ukrainian (UK).
 - The language setting will affect the general interface of PM, most notably the home page, and the search panel on the left.
 - The language setting will also be reflected when creating a new project. If, for example, you set your language setting to be French and then were to create a new project, all questions and text fields would be in French (see screenshot below).



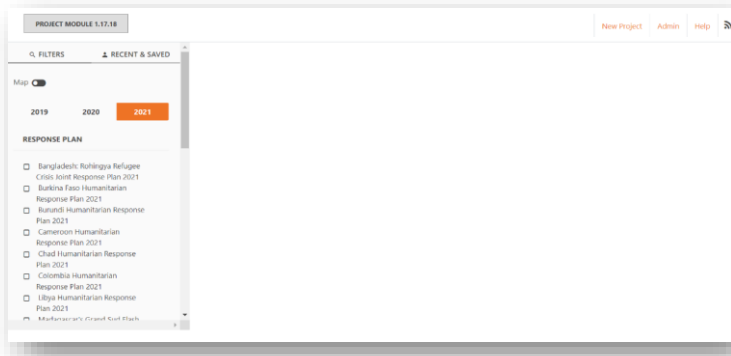
3. “Recent and saved” tab which is automatically selected by default:

- My projects – list of all projects that you have created. This is the default view after logging in or clicking on the “Project Module” header in the top left-hand corner.
- My organization’s in-country projects – list of all projects that have the same organization and country as your profile.
- My cluster’s projects – if you are a Cluster Lead, then this will list all projects that belong to your cluster.

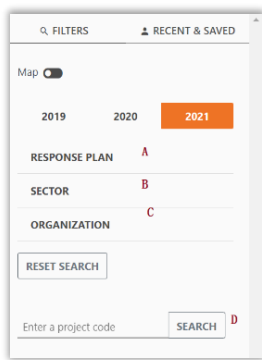


4. “Filters” tab. Click this to search by various parameters.

- Select a year. The default is the current year, but additional years can be selected.

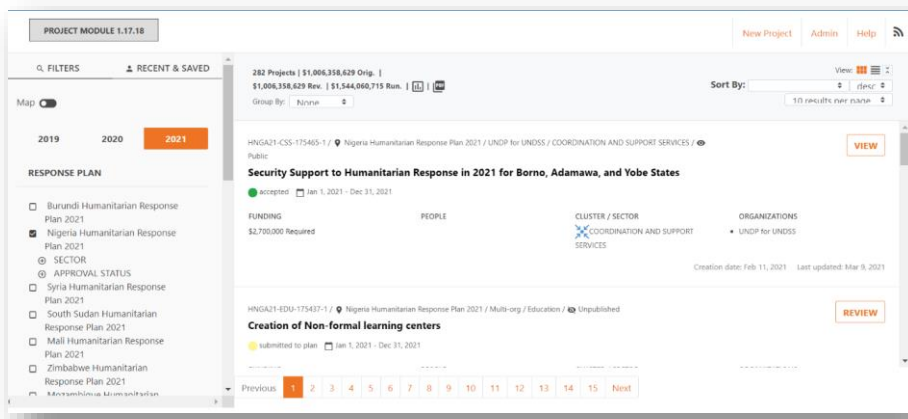


- After selecting a year, select at least one of the other options beneath it to retrieve results.



- Response Plan: For each plan you can also select additional fields such as the field cluster or approval status to filter by, which are unique to that plan only
- Sector: Global sectors you want to filter by. Note that this is different from the plan's clusters, which can be found inside each plan by clicking on the plan first.
- Organization: Type in the name or abbreviation of an organization to add it to the search parameters.
- Search: Type in the project code or ID to find it directly

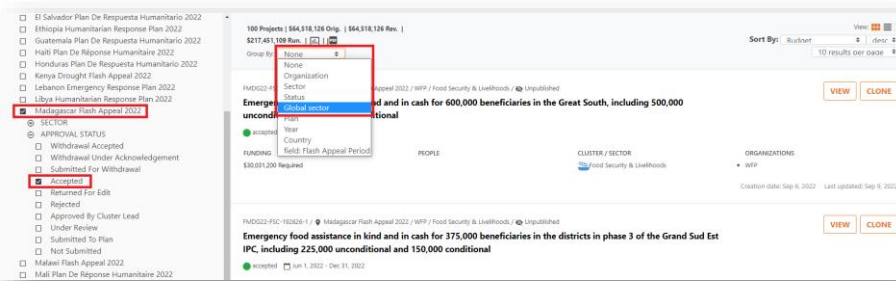
5. After selecting some parameters, the results section will display all projects matching your search:



4.1 Using Filters and Grouping Features for Reports

The filter options can be quite useful to produce reports and overviews. If, for example, you would like to review financial requirements for accepted projects, grouped by cluster, this can be done quite easily.

1. To view the accepted financial requirements for a plan, first select the plan from the panel on the left.
2. After you have selected the plan, choose *Accepted* under *APPROVAL/STATUS*. As such, you will only see the requirements of accepted projects.
3. Finally, group the requirements of projects by selecting *Global Sector* or *Global Cluster* from the drop-down menu.



The resulting summary table below shows the number of accepted projects and their total requirements per global cluster.

The screenshot shows a summary table with the following columns: 'By Global Cluster', '# of Projects', 'Original Requirements', 'Revised Requirements', and 'Running Requirements'. The table lists various clusters and their corresponding financial requirements.

By Global Cluster	# of Projects	Original Requirements	Revised Requirements	Running Requirements
Coordination and support services	2	\$54,583	\$54,583	\$54,583
Education	11	\$1,712,500	\$1,712,500	\$4,254,500
Emergency Shelter and NFI	4	\$274,167	\$274,167	\$2,674,167
Emergency Telecommunications	3	\$156,250	\$156,250	\$856,250
Food Security	26	\$2,510,833	\$2,510,833	\$167,368,033
Health	24	\$2,647,292	\$2,647,292	\$11,165,742
Logistics	1	\$0	\$0	\$1,000,000
Nutrition	7	\$4,250,000	\$4,250,000	\$19,650,000
Protection	2	\$0	\$0	\$985,000
Protection - Child Protection	4	\$210,833	\$210,833	\$530,833
Protection - Gender-Based Violence	5	\$250,001	\$250,001	\$950,001
Water Sanitation Hygiene	11	\$2,451,667	\$2,451,667	\$7,962,000

4. The *Running Requirements* column will always list the up-to-date financial requirements, as the original requirements may have changed during the course of a plan.

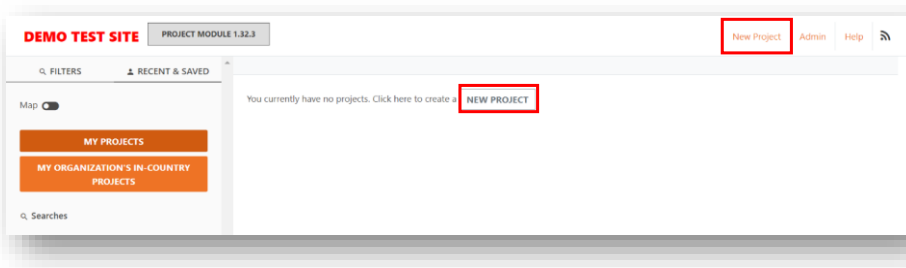
5 Project Registration and Submission [for Partners]

There are two ways a project can be registered in Project Module. A project can be **newly created** by a partner organization, or a project can be **cloned** from a previous year's/plan's project.

5.1 Creating a new Project

Creating a new project is an easy and common way of registering projects in Project Module. To do so, please follow six simple steps. Each of these steps will be explained in detail in the following sections. Every new project registration begins with entering basic information about the project.

To create a new project, click the “New Project” button on the top-left of the screen or on your home page. The Project Sheet should appear.



5.1.1 Step1: Basic Information

The first step of the project creation process contains basic project information such as title, description, dates, organization, implementing partners and contact details.

1. Enter the Project Name and a short Project Summary describing the project's purpose and target.
2. Enter the start date and end date.
 - Use the selector icon in each of the fields to select specific dates.
 - Alternatively, if the project simply spans a whole calendar year, click one of the buttons [Use 2018] or [Use 2021] and it will be prefilled from 1 January to 31 December of that year.

New Project

VERSION 1 PUBLISHED

Please enter a name, brief description, and dates for this project.

Project Name*
Please provide a short and succinct name, e.g. "Food Assistance for Returnees in the South"

Project Summary*
Please provide a short summary of the intervention, describing its purpose and target

Start Date End Date Set standard dates

Enter Tag

Organizations
Enter the names of all organizations and implementing partners that will be participating in this project.

Appealing Organizations*
Organization(s) receiving primary funding for this project
Click to select suggested organization(s) or search for others in below box
Office for the Coordination of Humanitarian Affairs

Enter additional organization

If you can't find the organization in the list, [please inform us using this link](#)

Implementing Partners
Organization(s) assisting in project implementation with funding provided by the appealing organizations

Primary Contact
Enter the primary contact details for this project. Additional contacts may be also added. Please note that these details will be publicly visible so do not enter in any details that should be kept private.

Name*
Email*
Phone Number*

ADD ANOTHER CONTACT

CLOSE SAVE SAVE & NEXT

3. Enter the Organizations:

- At least one organization is required.
- By default, your organization is automatically suggested for this project. You may also add additional organizations by typing into the *Enter additional organization* box (either by name or abbreviation). The system will try to find a match to your entry and preselect it.
- If you cannot find a match, click on the link beneath the text field and you will be directed to a separate form to fill out. We will review your submission and add the organization for you and inform you by email.
- You may add more than one organization. Type the name of the organization into the *organization name* text field and select the option which matches, and it will be added to your list. Note that if you select multiple organizations, you will be required to specify the budget requirements for each organization in the *Budget* section of the form.
- Click on the "x" icon next to an organization to remove it.

4. Enter the Implementing partners:
 - Fill this text field in if the appealing organization provides funds to other organizations who will assist in the implementation of this project.
5. Enter the Contacts:
 - At least one contact is required. If there are additional contacts that need to be added, click on the [add another contact] link.

Note: Any required fields are highlighted with a red left hand border. The save buttons will not be available until all required fields have been filled out.
6. Click [Save and next] to proceed to the next section.
7. After clicking save, a project code will be assigned to the project and displayed in the toolbar.

5.1.2 Step2: Select a Response Plan

1. Open the dropdown list and select the plan to which you wish to associate your project.
2. After selecting a plan, you will be asked to identify which sector your project belongs to. Select the relevant ones. Note that if you select more than one cluster, you will be asked to provide the budget breakdown for each cluster. In some cases, a cluster may be further broken down into sub-clusters, i.e., protection Area of Responsibilities (AoRs), in which case you should select which sub-cluster(s) your project relates to. If you choose more than one AoR, you will be asked to provide a budget breakdown for each choice.

HNGA21 - Nigeria Humanitarian Response Plan 2021
Jan 1, 2021 - Dec 31, 2021

Select Sectors
If unsure of which cluster/sector to select, please consult with relevant cluster/sector coordinators.

- COORDINATION AND SUPPORT SERVICES
- Camp Coordination and Camp Management
- Early Recovery and Livelihoods
- Education
- Emergency Shelter and NFI
- Emergency Telecommunications
- Food Security
- Health
- Logistics
- Nutrition
- Protection
 - Housing, Land and Property
 - Gender Based Violence
 - Mine Action
 - Protection
 - Child Protection
- Water and Sanitation

3. Next, proceed to the *Plan Fields*. Required fields are marked with a red border on the left-hand side of the field. These questions are not standard. Rather, they are determined by each country team and vary from one plan to another.

Plan Fields

1 - Needs *
Please describe the assessed needs the project will address through its activities.

Max length: 0/4000

2 - Activities *
Note that you will record your activities and targets in data format further below, drawing from the sector lists. This text field is your opportunity to explain to potential donors why you have chosen these activities and targets, your modalities and technologies, and any other necessary convincing detail.

Max length: 0/4000

3 - Categorizations

3.1 - Strategic Focuses *
The 2021 HRP proposes to characterize most activities and projects in relation to the few key strategic focuses. Please select the one focus from the list below that best characterizes your project.

3.2 - Category *
For purposes of continuity with 2020's categorization system, please select the category of humanitarian problems that this project mainly addresses (physical and mental well-being; living standards; or coping mechanisms)

3.3 - Other categorization

4 - Multi-Year Projects

4.1 - Please check this box if this is a multi-year project

IASC Gender with Age Marker (GAM)

- Partners should ensure gender mainstreaming is included at every step – design, implementation, monitoring and evaluation – with the aim of promoting equality between women, men, children, the elderly and adults. All partners are required to identify the Gender with Age Marker (GAM) code for your project, by using the GAM system. 1. To identify the GAM code for your project, please click on the survey link in the Project Module, as shown below, and fill out the survey.

5 - GAM

Each draft HRP project is to be rated with the IASC Gender with Age Marker. It involves an online questionnaire that will take you about 15 minutes to complete. In the end, the questionnaire generates a score and a reference number (GAM code) which you should then enter in the two fields below. To access the questionnaire, please open the [here](#).

5.1 - Please provide the GAM code *

This code is generated using the survey above.

Max value: 0/15

5.2 - IASC Gender with Age Marker (GAM) *

2. Once you have completed the survey, it will generate a “Project Gam Reference Number” and a “GAM Code”.

▼ **Project GAM Reference Number**

Your Project GAM Reference Number is:

G880476140

Please write this reference number down. You will need it to be able to recall your GAM report, and to be able to enter additional information (e.g. during or after the end of your project) in the future.

GAM Code: 4 (M)

The project intends to contribute to gender equality, including across age and/or disability groups

- 3. Enter the GAM code and GAM reference number into the GAM field in Project Module.

5 - GAM

Each draft HRP project is to be rated with the IASC Gender with Age Marker. It involves an on-line questionnaire which will take you about 15 minutes to complete. At the end, the questionnaire generates a score and a reference number (GAM code) which you should then enter in the two fields below. To access the questionnaire, please open this [here](#).

5.1 - Please provide the GAM code *

This code is generated using the survey above.

G880476140

5.2 - IASC Gender with Age Marker (GAM) *

4 (M): The project will significantly contribute to gender equality, including across age groups. ▼

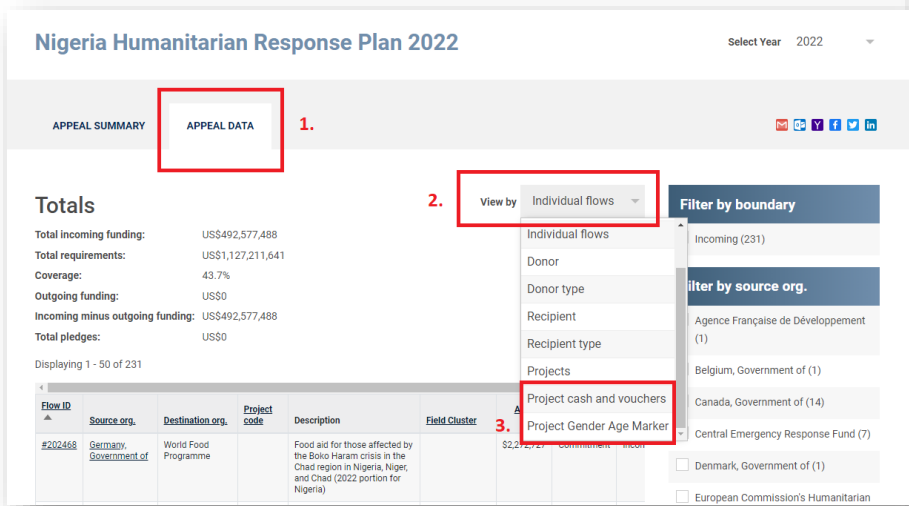
5.1.2.1 Financial Tracking of Projects’ Custom Questions

Tracking grouped project questions:

Project questions, such as the Gender and Age Marker – **GAM**, will be tracked in FTS. It is, therefore, possible to display the financial requirements and funding for the responses to the **GAM** question. To view this overview table, please access [FTS first](#), before searching for your response plan.



1. Once you have reached your response plan, click on “Appeal Data” to open the data overview page of the plan.
2. The “View by” field opens a drop-down menu. This menu lets you choose how you want to display the data associated with your response plan.
3. At the very bottom of the drop-down menu, there are options for viewing data by grouped projects.
 - For the example plan used, Nigeria 2022, projects can be grouped by **GAM** score or by Cash and Voucher Assistance.



If you select to view by “Project Gender Age Marker”, you will be presented with a data overview table such as this:

Totals

Total incoming funding: US\$492,577,488
Total original requirements: US\$1,127,211,641
Total current requirements: US\$1,127,211,641
Coverage: 43.7%
Total pledges: US\$0

View by Project Gender Age Marker

Filter by appealing org.

- Action Against Hunger (5)
- ActionAid International Nigeria (1)
- Action Health Incorporated (1)
- African Humanitarian Aid International (2)
- Against All Odds Foundation (1)
- Agency for Technical Cooperation and Development (2)
- All for Peace And Dignity (1)
- Alliance for International Medical Action (1)
- BOAID Humanitarian Foundation (2)
- Care Aid Support Initiative (1)

[Show more](#) ▼

Filter by appealing org. type

- NGO (153)
 - Affiliated (3)
 - International (68)
 - Local (23)
 - National (59)
- UN agency (34)

Displaying 1 - 11 of 11

Project Gender Age Marker [▲]	Original requirements US\$	Current requirements US\$	Funding US\$	Coverage %	Pledges US\$
0: There is no evidence that the project will contribute towards gender equality.	13,853,219	13,853,219	1,408,515	10.2%	0
1 (M): The project does not intentionally contribute to gender equality.	17,724,710	17,724,710	11,885,656	67.1%	0
1 (T): The project aims to principally promote gender equality without the necessary gender equality measures.	900,000	900,000	0	0.0%	0
2 (M): The project addresses age differences but does not intentionally contribute to gender equality.	2,644,000	2,644,000	1,225,967	46.4%	0
2 (T): The project addresses age differences and aims to promote gender equality but without the necessary gender equality measures.	5,586,391	5,586,391	1,219,041	21.8%	0
3 (M): The project will contribute to gender equality but without full attention to age groups.	102,727,951	102,727,951	10,158,741	9.9%	0
3 (T): The project is principally about promoting gender equality without full attention to age groups.	34,715,099	34,715,099	989,498	2.9%	0
4 (M): The project will significantly contribute to gender equality, including across age groups.	869,333,467	869,333,467	237,653,783	27.3%	0
4 (T): The project is principally about promoting gender equality, including across age groups.	44,347,993	44,347,993	318,792	0.7%	0
N/A: The project does not have any contact with or direct influence on the affected population, and the programming actions are not linked.	35,378,811	35,378,811	18,045,546	51.0%	0
Not specified	0	0	209,671,949	0.0%	0

The table displays original requirements, current requirements, funding received, coverage percentage, as well as pledges for each **GAM** score. This table can be further specialized and modified for additional insight by using the filters available on the right side of the table.

Tracking non-grouped project questions:

All other types of project questions can be also tracked in FTS. To display these questions and the data associated, select **Projects** from the “View by” drop-down menu.

Now, a small button just to the left of the download button lets you customize the resulting overview table. Here you can select whatever custom question you are interested in.

Totals View by Projects ▾

Total incoming funding: US\$1,236,531,216
 Total current requirements: US\$3,085,141,872
 Coverage: 40.1%
 Total pledges: US\$0

Displaying 1 - 280 of 280

Project code	Description	App	Funding US\$
Not specified	n/a	n/a	256,624
HETH22-CSS-190300-1	Information Management Support to Humanitarian Responders in Ethiopia	iMM	498,323
HETH22-CSS-189909-1	Tracking internally displaced persons, returnees, and migrants through the Displacement Tracking Matrix (DTM)	Inte Org; Mig	301,339
HETH22-WSH-189965-1	Emergency WASH response for drought affected communities at Borena Zone, Oromia Region, Ethiopia	Acti Nee	450,447
HETH22-AGR-190377-1	Agricultural Seed Activity Project (ASAP) II	Cat Ser	000,000
HETH22-AGR-190564-1	Agricultural recovery for drought and conflict affected multi-regional community in Ethiopia	GOA	688,396
HETH22-NUT-190409-1	Emergency Nutrition Response for Drought affected and Displaced Communities in Oromia and Somali Regions	GOA	064,743

Customize table ✕

- 8.3 - Amhara
- 8.2 - Afar
- 8.1 Addis Ababa
- 9.1.1 - Please provide an estimated [%] of the total project budget that will address the drought.
- 9.1 - Does your project address humanitarian needs as result of the drought?
- 5.2.7 - Is a complaints and feedback

UPDATE TABLE

The resulting table will list requirements and funding for every project and the answer to the selected custom question. This feature can be used to run useful financial analysis for different contexts. For example, this way it would be possible to analyze how much funding went to drought response related projects in Ethiopia, in 2022.

Totals

View by Projects

Total incoming funding: US\$1,236,531,216
 Total current requirements: US\$3,085,141,872
 Coverage: 40.1%
 Total pledges: US\$0

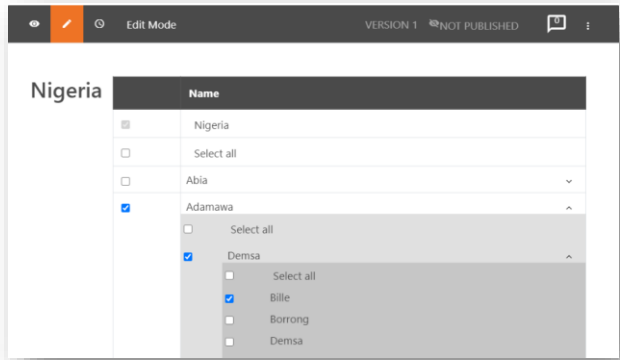
Displaying 1 - 280 of 280

Project code	Description	Appealing org.	Cluster	Current requirements US\$	Funding US\$	9.1 - Does your project address humanitarian needs as result of the drought?	9.1.1 - Please provide an estimated [%] of the total project budget that will address the drought.
Not specified	n/a	n/a	n/a	0	847,256,624	n/a	n/a
HETH22-CSS-190300-1	Information Management Support to Humanitarian Responders in Ethiopia	iMMAP	Coordination	1,500,000	1,498,323	true	10
HETH22-CSS-189909-1	Tracking internally displaced persons, returnees, and migrants through the Displacement Tracking Matrix (DTM)	International Organization for Migration	Coordination	3,800,000	301,339	true	20
HETH22-WSH-189965-1	Emergency WASH response for drought affected communities at Borena Zone, Oromia Region, Ethiopia	Action for the Needy in Ethiopia	Water, Sanitation and Hygiene	450,447	450,447	true	100
HETH22-AGR-190377-1	Agricultural Seed Activity Project (ASAP) II	Catholic Relief Services	Agriculture	5,000,000	2,000,000	true	100
HETH22-AGR-190564-1	Agricultural recovery for drought and conflict affected multiregional community in Ethiopia	GOAL	Agriculture	2,925,000	688,396	false	
HETH22-NUT-190409-1	Emergency Nutrition Response for Drought affected and Displaced Communities in Oromia and Somali Regions	GOAL	Nutrition	1,615,000	2,064,743	true	100

Note: The above financial analysis will only be possible if funds were attributed directly to projects, otherwise it will be listed as “Not specified”.

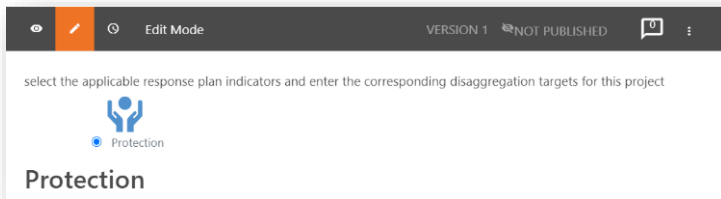
5.1.3 Step3: Project Locations

After selecting a plan in Step2, the country will be preselected. Use this step to specify any lower administration levels by clicking on the relevant checkboxes.



5.1.4 Step4: Linking the Project to a Cluster's Framework

1. If more than one cluster was selected in step 2, then you can switch between the selected clusters to add the caseload and cluster activities and targets.



2. In this step, you can set a project's caseload target in relation to the cluster's caseload target (set in RPM), and you can add the target disaggregated data – you just need to check the *include disaggregation and targets* check box.

Protection

CASELOADS

Enter the target amounts for this cluster. If a metric or location is not applicable for this cluster, leave the target field blank.

CLPRO/BF1 -

Location	In Need	Targeted	Project Target
All Locations	4,076,551	2,471,984	<input type="text"/>

Include disaggregation and targets

	Combination-idp-<1-Girls		Combination-idp-<1-Boys		Combination-idp-1-5-C	
	plan	project	plan	project	plan	project
Demisa	158		102		1,546	
Fufore	10		8		495	
Garye	10		6		106	
Girei	102		87		1,455	
Gombi	103		70		710	
Guyik	30		19		297	
Hong	177		167		511	
Jada	5		4		58	

3. Additionally, if the selected cluster has a logical framework, you can select which elements your project will contribute to and by how much. For example, if the logical framework consists of objectives or activities and indicators, then in this step you can select which activities this project will contribute to by selecting the relevant indicators on the logical framework and specifying the project's target value.

CLPRO/CO1

To stop or mitigate the harm caused to persons who have suffered violence, coercion, exploitation, serious neglect or discrimination, and to restore - as much as possible - the person's capacity to live safe and dignified life

Indicator	Description	Unit	Plan Target	Project Target
<input type="checkbox"/> 1.1	Child Protection: Number of unaccompanied and separated girls and boys reunified with their families	Children	505	<input type="text"/>
<input type="checkbox"/> 1.10	General Protection: Number of women, girls, boys and men who received legal assistance or counselling related to a protection incident (violence, coercion, abuse, discrimination, detention)	People	690,967	<input type="text"/>

4. In addition, if the indicator has a disaggregation model defined at the cluster level, then you can also specify how the project's target is broken down according to the same disaggregation model. Select the checkbox *include disaggregation and targets* to display a dynamic table to fill in this information.

1.3 Child Protection: Number of girls and boys affected by protection risks who receive specialized support services. Children 4,549

Include disaggregation and targets

	Priority		Combination-idp-<1-Girls		Combination-idp-<1-Boy	
	plan	project	plan	project	plan	project
Demsa	NaN		0		0	
Fufore	NaN		0		0	
Ganye	NaN		0		0	
Girei	NaN		0		0	
Gombi	NaN		0		0	
Guyuk	NaN		0		0	
Hong	NaN		0		0	
Jada	NaN		0		0	

5.1.5 Step5: Project Budget

1. Type in the total project cost of the project.
2. In the section *line items*, you can detail how the total amount is broken down. Click on [add another line item] to add as many lines as needed. Click on the “x” icon to remove lines that are not needed.
3. Type the amount for each budget line in the *Cost* column and the % total will be calculated for you. Alternatively, type into the % column and the cost amount will be calculated for you.
4. If you change the total project cost, then the individual line items’ costs will be automatically updated using the percentage values.

My new project

VERSION 1 NOT PUBLISHED NOT SUBMITTED

Enter the total cost, line items, and allocations by cluster and organization for this project.

Project Cost USD

\$ 100,000

I understand that by submitting this project proposal my organization will be expected to report on funding received to the Financial Tracking Service (FTS, fts@un.org, or fts.unocha.org) on a regular basis for coordination purposes.

[View funding to this project on FTS](#)

Line Items	Cost or % of Total		
Item A	\$ 30,000	30 %	x
Item B	\$ 30,000	30 %	x
Item C	\$ 40,000	40 %	x
e.g. contracts, overhead, etc	\$	0 %	x
Total	\$100,000	100 %	

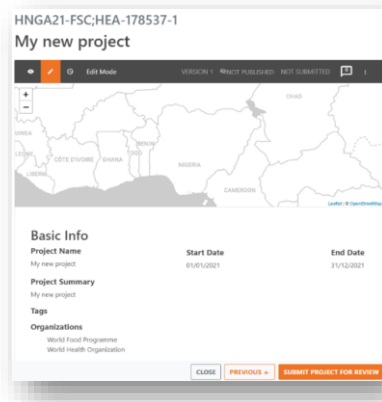
[ADD ANOTHER LINE ITEM](#)

5. Note that the total sum of the rows must equal the total project cost. If it is not equal, it will be highlighted in red, and you will not be allowed to proceed to save.
6. It is also necessary to tick the checkbox to confirm that updates on funding to the project will be reported to FTS.

5.1.6 Step6: Project Review

In the final step, all the data you have entered for this project can be viewed in an overview page.

1. Carefully review all of the information to make sure that it is correct. You can click [Previous] to go back and make further modifications if needed.
2. When the project is ready, it needs to be made available for the Cluster Leads to review. You can submit the project to the plan in the final step, after reviewing the project details, by clicking on the [Submit Project for Review] button.



3. After submitting your project, the Cluster Leads will then be able to review your project and approve it. While it is in status *Submitted to plan*, you will not be able to edit your project details any further. However, you can change it back to *Not submitted* if you wish to make any amendments. You can find out more about editing rights by consulting the table [Editing Rights at Various Project Stages](#).

5.2 Cloning an Existing Project

As an alternative to creating a new project from scratch, it is also possible to clone a previously created project. This feature is particularly useful for multiyear projects which continue implementing from a previous year. For these types of projects, cloning can be an efficient way of populating project information quickly.

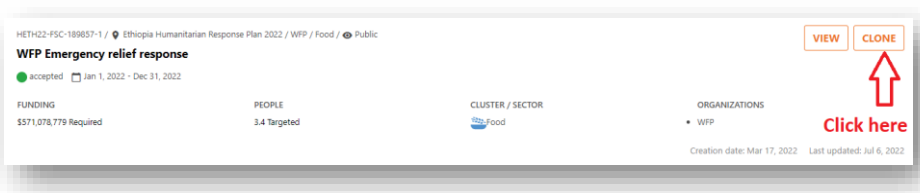
However, please note that cloned projects still need to be revised before they can be submitted. Specifically, you will still have to input the project target and budget, as these will need to be calculated for the new year.

Additionally, the questions assigned to a project in [Step2: Select a Response Plan](#), will be cloned as well. If new questions were added for the new plan or old questions removed, these changes will not be reflected in the cloned project.

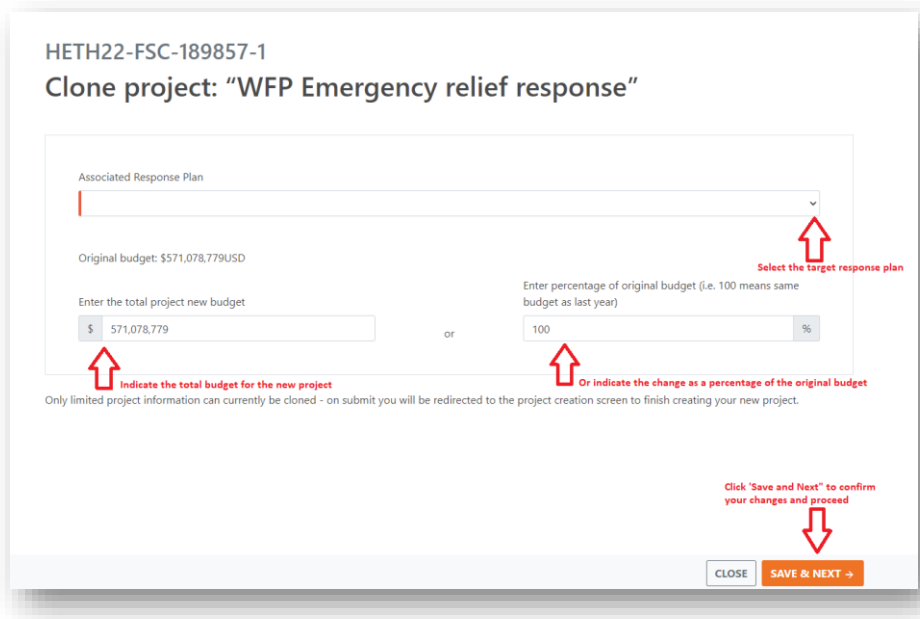
Note: If you change the order of questions on the project sheet, the answers will still be cloned and assigned to the question, as long as the alphabetical text of the question remains the same. For the

new question to be considered a match to the old question, the Latin alphabet characters (the question text) need to be the same. This means that you are free to change the case of the characters, and that both special characters and leading digits can be omitted or added. This will not hinder cloning in any way, so long as the question text remains identical.

1. To start the cloning process, click on the [Clone] button that is next to the [View] button on a project.



2. Next, update the date range or indicate the year for which you want to implement the new project. Click [Save and Next] when done.
3. On the following page, indicate the response plan for which you want to clone the project.
4. Indicate the budget of the new project. You have two possible options for this.
 - You can enter the new budget as a number.
 - You can enter the new budget as a percentage of the source project’s budget.
5. By clicking [Save and Next] you confirm your changes and move to the next page.



- You will now be taken to the *Basic Info* section of the project sheet. Review this information to ensure that it is up to date and make any changes as necessary. When you are finished, click [Save and Continue].
- Follow this same procedure for all other sections of the project sheet. **Important:** when cloning projects, you must enter new targets for your cluster/sector caseloads. These are not copied from the source project.

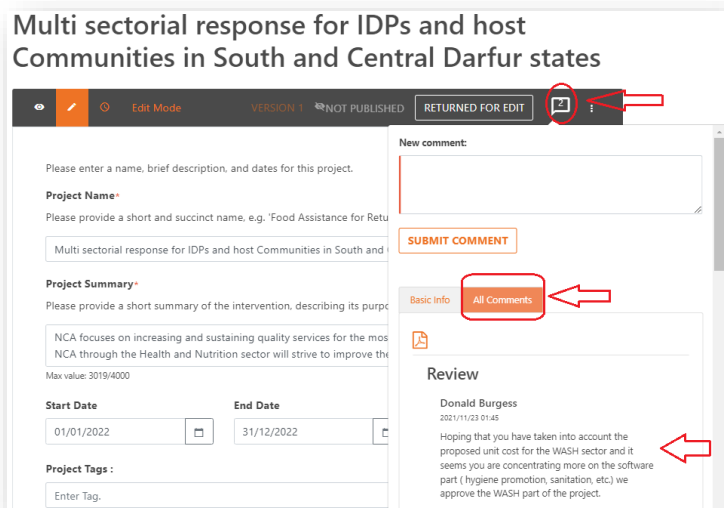


- After you have entered the target numbers for the cluster/sector, continue until you get to the review stage of the page. Here you need to make sure all information is entered as you intended.
- Lastly, click on [Submit Project for Review] to add it to the plan. The Cluster Lead will only be able to approve submitted projects, so this step is critical.



5.3 Reviewing Comments

If a project's status is *Returned for Edit*, then organizations and partners need to revise the project and resubmit their changes based on the comments sent from the Cluster Leads. You can view the comments that were made by Cluster Leads as shown in the diagram below:



For an overview of project roles and their rights at various projects stages, please consult the table [Editing Rights at Various Project Stages](#).

6 Project Approval [for Cluster Leads]

6.1 How Cluster Leads Approve Projects

Cluster Leads can approve projects that have been submitted to the plan. To do so, navigate to the relevant project(s) and conduct the following preliminary checks.

1. First ensure the organization names used by project owners are correct and consistent across the plan.
2. Compare the current list of participating actors with the previous year's list to ensure there are no errors and/or incorrect entries of projects upon wrong organizations, and for consistency across years. If an error is noticed, contact the project owner for revision of the project and organization.

Note: Incorrect entries of projects and organizations in HPC tools causes difficulties in financial tracking by clusters, donors, partners, and other stakeholders who use HPC data for decision making.

After you have completed these checks, proceed to add the project to review.

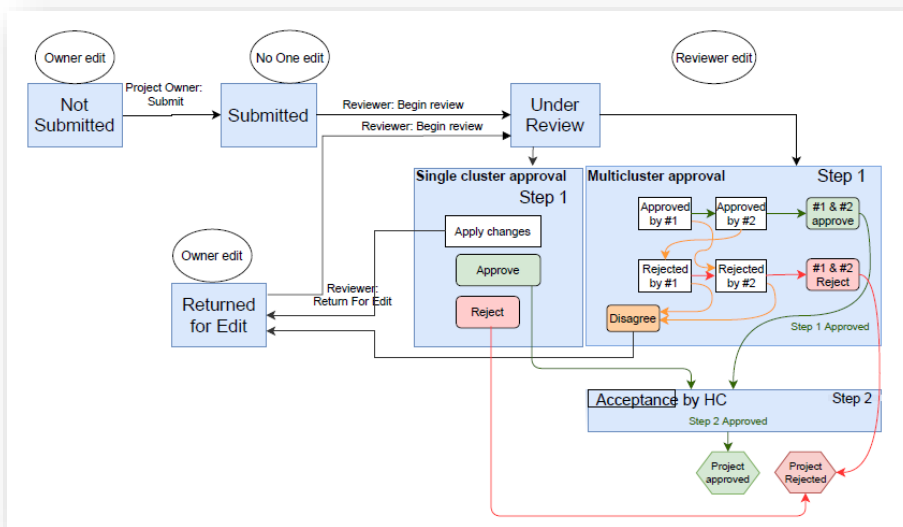
3. Click on the status name *Submitted to Plan* and select *Add to review*.



4. The options to change the status of this project are then displayed. Select one of them to change the status. They are:
 - **Approve project as Cluster Lead** – this moves the project on to the next stage for further approval if relevant. For multi-sector projects, this will involve approval from the other relevant cluster/sector leads. For single-sector projects, this will involve approval from the Humanitarian Coordinator via the plan lead.
 - **Reject project as Cluster Lead** – this rejects the project from the plan. The project remains as read-only for the project owner. Note that as Cluster Lead, you can also change this back to *Return to under review*.
 - **Return for edit** – this returns the project to the owner for further edits. They can then resubmit the project to the plan for review again.



The following diagram illustrates the project submission and approval process:



6.1.1 Multisector Project Approval

Any projects that include multiple clusters or sectors have a slightly different approval process. The workflow generally follows this stream:

1. The partner creates a project. This includes selecting the different clusters the project will be active in and adding detailed targets against plan framework objectives/activities and indicators. During the creation stage, the project is in *Not Submitted* status.
2. Once finished, the partner will submit the project, at which point it is in *Submitted* status.
 - When the project registration timeframe, specified by each cluster, is complete, the Cluster Leads need to select which projects to review. As such, a Cluster Lead will need to change the status of projects from *Submitted* to *Add for Review*. The status of selected projects can be

changed to *Add for Review* in bulk. Changing the status in bulk is explained in detail in the section, [Changing the Status of Multiple Projects in Bulk](#).

3. Cluster Leads can either *Approve*, *Reject* or *Return for Edit*. When a project is *Returned for Edit*, partners can apply changes recommended by their corresponding clusters. Only the cluster sent back for edit will be editable at this time.
4. The status of the project is then determined as follows:
 - Once a Cluster Lead has added the project for review, other Cluster Leads who need to approve the project won't need to add it to review again, as they will see the project is already *Under Review*.
 - If one cluster returns a project for edit, then the overall project status will be *Returned for Edit*. During this time, the cluster who returned the project for edit will not be able to change their status. However, any other clusters involved in the project will still be able to review the project sheet and *Approve*, *Reject*, or *Return for Edit*. Once the partner has finished making edits to the cluster or clusters that have returned the project for edit, they will resubmit the project, at which point it will be in *Under Review* status again.
 - Once a cluster has approved a project, that cluster's individual status will be changed to *Approved*. At this point, they will no longer be able to edit the project details. If there are other clusters who have not yet approved the project, the overall project status will remain *Under Review*.

The screenshot shows a web interface for a project titled "HBDI22-NUT;PRO-194823-1" with the subtitle "Community reintegration project in Kirundo province focused on returnees, host community members and IDPs". On the left, a navigation menu lists: 1 Basic Info, 2 Response Plan, 3 Locations, 4 Cluster / Sector, 5 Budget, and 6 Review (highlighted in orange). The main content area features a map of the region with a "REVIEWER HISTORY" panel on the right. The "Overall Project Status" is "UNDER REVIEW" (highlighted in a red box). The "Individual Cluster Status" for "Nutrition" is "APPROVED BY CLUSTER LEAD" (also highlighted in a red box). Below the map, the "Basic Info" section shows "Project Name" and "Start" and "End Date" fields. At the bottom right, there are "CLOSE" and "PREVIOUS <" buttons.

- If some Cluster Leads approve the project and others reject it, the overall status of the project will be *Returned for Edit*. The partner needs to either update the clusters' information for the Cluster Lead to approve it or remove the cluster that rejected it, so that the project will have full agreement. In any case, the partner needs to resubmit the project so that a cluster lead can

add it to review again. At this point, the cluster that rejected the project will have their status returned to *Awaiting Review* and the overall project status will be *Under Review*. The cluster that initially rejected the project now has the chance again to *Approve, Reject, or Return for Edit*.

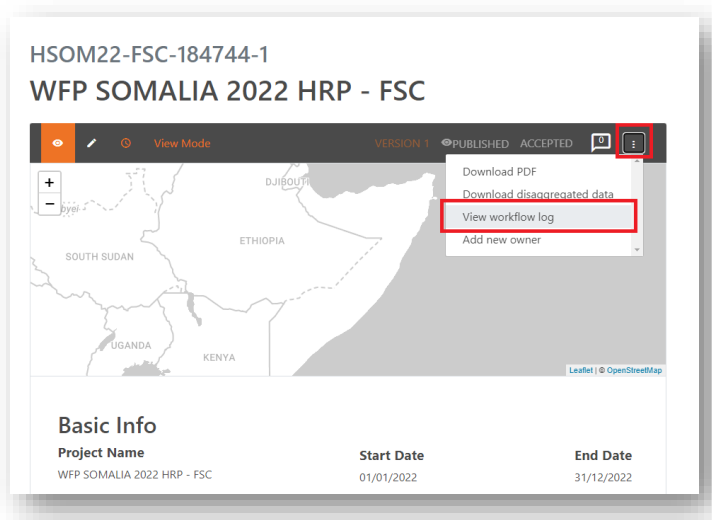
- The project must be approved by all clusters for its overall status to change to *Approved*. The order in which clusters approve the project does not make a difference.
- If both clusters reject a project, the overall status of the project will be *Rejected*.
- The diagram on the previous page highlights the approval process in more detail.

Note: If a plan lead approves, returns or rejects a multi-sector project, it will approve, return or reject all sectors. A plan lead cannot approve, return or reject just a single sector. The review chosen by the plan lead will also overrule any previous review given by a sector lead. Plan leads should use caution when dealing with multi-sector projects. It may be a good practice to create a second HID account with sector lead access only, if a plan lead needs to approve, return or reject a single sector and does not want to disrupt and overrule prior reviews by the sectors.

6.1.2 Project Activity Log

The Project Activity Log allows clusters to easily track changes made to a project's status, as described below:

1. Click [View] on your desired project. The overview page opens.
2. On this overview page, click on the three small dots, at the far right of the black bar. A small window will open.
3. Click on [View workflow log].



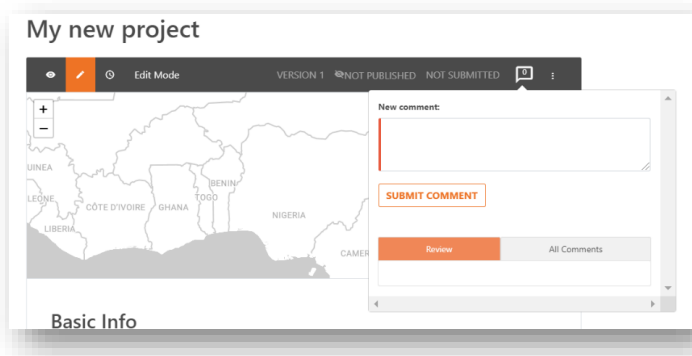
4. This will open the Project Activity Log, that can be used to track the changes made to a project's status.

6.2 Adding Comments for Partners to Review

Cluster leads can add comments to the project to be reviewed by the organizations. Partners will then be able to review the comments and make needed changes to their projects. Below is a description how to do so:

1. Click on the comments icon to add and view the list of comments.
2. Enter your comment in the *New comment* box.
3. When you are finished, click [Submit Comment].

Note: The number of comments added to the project will be displayed in the icon itself.

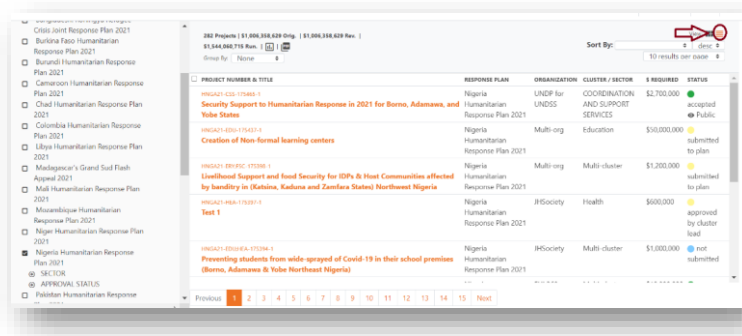


For an overview of user roles and their rights at various project stages, please consult the tables at the end of this chapter ([Workflow and Edit Rights for Submitted Projects](#) | [Editing Rights at Various Project Stages](#)).

6.3 Changing the Status of Multiple Projects in Bulk

As a Cluster or Plan Lead, you can change the status of multiple projects at the same time, “in bulk”.

1. First, perform a search for the list of projects that you want to change (e.g., all projects that are *approved by cluster lead*).
2. Then, click this hamburger icon to switch the list of results to table view.

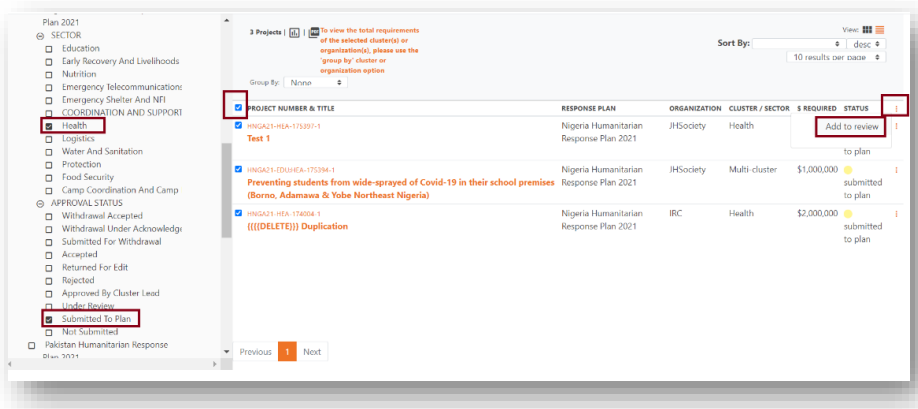


5. Select the projects whose status you wish to change by checking the checkbox on the left-hand side of each project.

- Click the overflow menu icon (three vertical dots) in the table header. This will display the different status options available to you.
- Select the status you wish to change the projects to.
Note: The projects you select must all have the same status in order for you to bulk change their status. If not, then this overflow menu will not permit you to change the status of the projects.

As a practical example of bulk changing project status, assume you are a health Cluster Lead and you want to add all health-related projects that have been submitted your plan to review. Follow these steps:

- Select your plan from the list on the left-hand side of the screen.
- From the Sector filters, select the Health cluster
- From the Approval Status filters, select *Submitted to plan*.
- From the panel in the middle, click the box beside *Project Number & Title* to select all projects.
- Click on the 3 dots to open the dropdown menu and select *Add to review*.



6.4 Who Can Change a Project's Status?

The following table illustrates the different roles and permissions for moving projects between different statuses:

Who wants to change project status?	What is the CURRENT project status?	What are possible NEXT project statuses?
Project owner (Partner)	Unsubmitted	S/he can Submit or Delete the project
	Submitted	S/he can Unsubmit the project
	Returned for edit	S/he can Unsubmit , or Send back for review by cluster lead
Cluster Lead	Submitted	S/he can Add to Review the project
	Under Review	S/he can Approve , Reject , Return for Edit the project
	Rejected	S/he can Return to under review the project
Plan Lead	Unsubmitted	S/he can Submit or Delete the project
	Submitted	S/he can Unsubmit , or Add to Review the project

	Under Review	S/he can Approve, Reject, or Return for edit the project
	Approved	S/he can Approve, Reject, or Return for edit the project
	Accepted	S/he can Return to approved the project
	Rejected	S/he can Return to under review the project
	Returned for edit	S/he can Send back for review, or Unsubmit the project

Note: If you do not have rights to edit a project, you may still view it, but in *read only* mode.

6.5 Who Can Edit a Project at Various Statuses?

The table below illustrates the different roles and permissions for editing projects at different statuses:

Commented [BDW1]: Can we double check this table? Can a cluster lead edit a project that is unsubmitted? Do they have the ability to unsubmit a project?

Who wants to edit the project?	Project status						
	Not Submitted	Submitted	Returned for edit	Add to review	Approved	Accepted	Rejected
Project owner (Partner)	Yes	No	Yes	No	No	No	No
Cluster Lead	Yes	No	No, s/he needs to add it to review or un-submit it to edit it	Yes	No	No	No
Plan Lead	Yes	No	No, s/he needs to add it to review or un-submit it to edit it	Yes	Yes	No	No

6.6 Deleting a Project

Plan Leads and project owners both have the ability to delete a project. However, this is only possible when a project is in *Unsubmitted* status.

7 Multisector / Multiorganization Projects Registration [for Partners]

Projects can be created and submitted either by a single organization and a single cluster or can be multiorganization and/or multisector projects. Multiorganization or multisector projects imply that multiple different sectors/clusters or organizations will be part of that effort. As a result, there is a few special considerations partners need to be aware of when creating these types of projects.

7.1 Multiorganization Projects

1. If multiple organizations are implementing activities that fall under one cluster, then all the organizations need to be added in *Step1 Basic Information* of the project form. Additionally, the budget breakdown needs to be added per organization in *Step5 Project Budget*, after completing *Steps 2, 3, and 4*.
2. Add the budget for each organization in the *Cost* column and the % total will be calculated for you. Alternatively, you can type the corresponding value into the % column and the cost amount will be calculated for you. If you change the total project cost, then the individual line items' costs will be automatically updated using the percentage values.

Note: The default percentages will be equally split between the selected organizations if the breakdown is not provided.

Note: The total budget for all organizations should match the overall project budget. The system will alert you on that by turning the summary total bar from green to red, and you will not be allowed to proceed to save.

Budget Breakdown		RESET TO DEFAULT PERCENTAGES	
World Health Organization	\$ 50,000	50	% ↻
World Food Programme	\$ 50,000	50	% ↻
Total for Organizations	\$ 100,000	100	%

Your budget lines must add up to your total project cost.

3. The approval process for multiorganization projects follows the same process as single organization projects. For more information, see chapter [Publishing Projects](#).

7.2 Multisector/Multicluster Projects

If a single organization is implementing activities that fall under different clusters, then the organization needs to be added in *Step1 Basic Information* of the project form just as you would for a regular project. Afterwards, the project's creator needs to do the following:

1. Select all the relevant clusters/sectors in *Step2 Response Plan*.
2. After completing *Step3 Locations* move to *Step4 Cluster / Sector*. For each selected sector/cluster, add the project's targets against the caseloads, activities and indicators established in the cluster framework. See the illustrated screenshot below for further details.

Food Security and Livelihoods Education

Check indicating part of the framework is selected and used

CaseLOADS

Enter the target amounts for this cluster. If a metric or location is not applicable for this cluster, leave the target field blank.

CLFSC/BF1 - FSL Caseload

Location	In Need	Targeted	Project Target
All Locations	950,000	750,000	120,000

Project target for each of selected sectors caseload

Include disaggregation and targets

	Total	
	plan	project
Ancuabe	39,000	5,000
Balama	26,000	5,000
Chilure	62,000	62,000
Cidade De Pemba	120,000	0
Ibo	5,000	0
Macomia	40,000	
Mecufi	14,000	
Meluco	8,000	

Add disaggregated project target caseload

Cluster Objectives

CLFSC/CO1

Provision of Life-saving food assistance to acutely food insecure population including displaced population and immediate host communities

Indicator	Description	Unit	Plan Target	Project Target
1.1	# of IDPs assisted disaggregated by age & gender; MT/value of food provided	People	750,000	80,000

Add total project target for each of selected indicator

Include disaggregation and targets

	Male		Female		Total	
	plan	project	plan	project	plan	project
Ancuabe	19,110	7,000	19,890	6,000	39,000	
Balama	12,480	2,000	13,520	5,000	26,000	

Add disaggregated project target

- When you have completed *Step4*, move to *Step5 Project Budget* and add the budget for each selected sector in the *Cost* column (the % total will be calculated for you). Alternatively, type into the % column and the cost amount will be calculated for you. If you change the total project cost, then the individual line items' costs will be automatically updated using the percentage values.

Note: The default percentages will be equally split between the selected organizations if the breakdown is not provided.

Note: The total budget for all organizations should match the overall project budget. The system will alert you on that by turning the summary total bar from green to red, and you will not be allowed to proceed to save.
- The approval process for multisector projects is explained in detail in the section titled [Multisector Project Approval](#).

7.3 Multiorganization and Multisector Projects

If multiple organizations are implementing activities together, that fall under different clusters and want to jointly submit projects, it is important that the organizations closely follow these steps:

1. Select all participating organizations in *Step1 Basic Information* of the project form.

Check indicating part of the framework is selected and used

CASELOADS

Enter the target amounts for this cluster. If a metric or location is not applicable for this cluster, leave the target field blank.

Location	In Need	Targeted	Project Target
All Locations	950,000	750,000	120,000

Project target for each of selected sectors caseload

Add disaggregated project target caseload

	Total	
	plan	project
Ancuabe	39,000	5,000
Baiama	26,000	5,000
Chiure	62,000	62,000
Cidade De Pemba	120,000	0
Ibo	5,000	0
Macomia	40,000	
Mecufi	14,000	
Meluco	8,000	

Cluster Objectives

CLFSC/CO1

Provision of Life-saving food assistance to acutely food insecure population including displaced population and immediate host communities

Indicator	Description	Unit	Plan Target	Project Target
1.1	# of IDPs assisted disaggregated by age & gender; MT/value of food provided	People	750,000	80,000

Add total project target for each of selected indicator

Add disaggregated project target

	Male		Female		Total	
	plan	project	plan	project	plan	project
Ancuabe	19,110	7,000	19,890	6,000	39,000	
Baiama	12,480	2,000	13,520	5,000	26,000	

2. Select all the relevant sectors/clusters in *Step2 Response Plan*.
3. After completing *Step3 Locations* move to *Step4 Cluster/Sector*. In this step for each selected sector/cluster add the projects targets against clusters framework caseloads and indicators.
4. Move to *Step5 Project Budget* and add the budget breakdown by sector and organization in the *Cost* column and the % total will be calculated for you. Alternatively, type into the % column and the cost amount will be calculated for you. If you change the total project cost, then the individual line items' costs will be automatically updated using the percentage values.

Note: The default percentages will be equally split between the selected organizations if the breakdown is not provided.

Note: The total budget for all organizations should match the overall project budget. The system will alert you on that by turning the summary total bar from green to red, and you will not be allowed to proceed to save.

Budget Breakdown				RESET TO DEFAULT PERCENTAGES
World Food Programme ^	\$ 50,000	50.00	%	↻
Food Security	\$ 25,000	50.00	%	↻
Health	\$ 25,000	50.00	%	↻
Total for World Food Programme	\$50,000	100%		
World Health Organization ^	\$ 50,000	50	%	↻
Food Security	\$ 25,000	50.00	%	↻
Health	\$ 25,000	50.00	%	↻
Total for World Health Organization	\$50,000	100%		
Total for Organizations	\$ 100,000	100 %		

Your budget lines must add up to your total project cost.

For information on how multi-organization and/or multi-cluster projects are approved and published, please refer to the previous chapter and/or the section on [Multisector Project Approval](#).

7.4 Multisector Project Implications on Funding Attributions in FTS

In FTS, financial contributions towards a project can be recorded for any of the appealing organizations separately. Donors or recipients can provide a funding contribution report to FTS. If a breakdown per sector or per organization is provided, FTS will attribute funding to those specific organizations within the project. An individual flow will be created for each contribution report per organization and per sector.

If a funding breakdown is not provided, FTS will use the auto-calculate function to equally distribute the funding against all appealing organizations (in case of multi-organizations project), or all sectors (in case of multi-sector projects).

Note: FTS cannot attribute funding towards an organization that is mentioned as an *Implementing Partners*. Funding can only be attributed towards appealing organizations (organizations part of a project).

Note: FTS does not attribute funding based on geographical locations. If a project is split across multiple locations, the funding will be reflected against the project for all locations and not some of them. We can mention specific locations in the funding description.

If you added an organization as an implementing partner, then requirements will need to be added for it in *Step5 Project Budget*.

Therefore, if you don't want to earmark the funding for an organization, don't add it as appealing agency in *Step1 Basic Information* of the project sheet. Instead, choose one appealing agency, and enter the rest in the *Implementing partners* text field. *Implementing partners* don't have financial implications.

If you are implementing a multi-organization project for one sector with combined requirements, FTS can attribute funding against any/all organizations that are part of the list of “appealing organizations”. The screenshot below shows a multi-organization project with an overall funding requirement of \$15.9m and overall funding availability of \$16.1m.

Project code ▲	Description	Appealing org.	Cluster	Original requirements US\$	Current requirements US\$	Funding US\$	Pledges US\$
FPSE21-FSC-183047-2	Post-conflict food assistance to those who remain displaced or have lost their livelihoods.	Catholic Relief Services Danchurchaid / Danish Demining Group Service Civil International OXFAM World Food Programme	Food Security	0	15,904,749	16,060,723	0

Funding to various organizations in a multi-organization project appears individually for each contribution. Note that all flows in the screenshot below have the same HPC Projects code:

#237473	France, Government of	World Food Programme	FPSE21-FSC-183047-2	GAZA - Country Strategic Plan for food assistance to the poor and severely food insecure population in the West Bank and the Gaza Strip	Food Security	\$609,756	Paid Contribution	Incoming
#237822	occupied Palestinian territory Humanitarian Fund	Catholic Relief Services	FPSE21-FSC-183047-2	Gaza Emergency Response: Emergency Cash Assistance for Families in Crisis	Food Security	\$539,594	Paid Contribution	Incoming
#239599	Danish Emergency Relief Fund	Danchurchaid / Danish Demining Group	FPSE21-FSC-183047-2	Post-conflict food assistance to those who remain displaced or have lost their livelihoods.	Food Security	\$58,720	Paid Contribution	Incoming
#240839	Germany, Government of	World Food Programme	FPSE21-FSC-183047-2	GAZA - Emergency food assistance in the Palestine Territories for vulnerable people (2021 portion)	Food Security	\$5,548,780	Paid Contribution	Incoming

8 Publishing Projects [for Plan Leads]

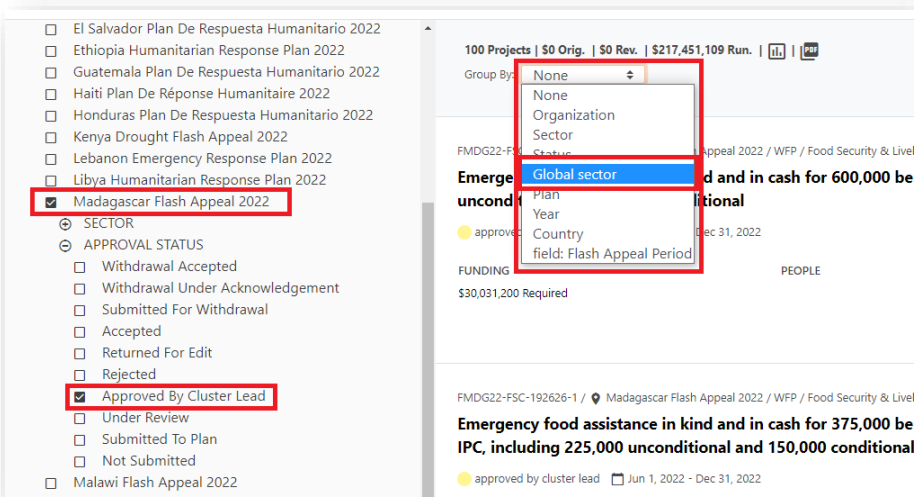
There are two ways projects registered in Project Module can be published. This depends entirely on the plan costing type (Project-costed or Unit-costed), which is set early on during the planning phase of the HPC. Plan Leads have several key contributions in the process of publishing a Project-costed plan. However, before publishing any project, please observe the following preliminary checks:

1. Before projects are moved to the status accepted in Project Module, please cross-check that there are no errors or incorrect approvals by cluster leads, within the list of participating organizations in the plan. This check should be done before project(s) are *Accepted* for publication.
2. If useful, conduct a comparison between the previous year's final list and the current year to ensure consistency of the organization's records across years.
3. Finally, consult with the clusters about the organization's name. Should errors or inconsistencies be noted, Plan Leads or Cluster Leads then need to revise the project with the correct organization on behalf of the project owner but in consultation with him/her.

Once you have completed your review and are satisfied that all project information is correct, you can proceed to publish the project. To do so, please conduct a check of the current financial requirements of the plan by global cluster. This can be done directly in Project Module, or in a downloaded Excel sheet.

8.1 Reviewing Financial Requirements in Project Module

1. To view the accepted financial requirements for a plan in PM, first select the plan from the search panel on the left.
2. After you have selected the plan, choose to filter by *Approved by Cluster Lead* under *APPROVAL/STATUS*. As such, you will only see the requirements of accepted projects.
3. Finally, group the requirements of projects by selecting *Global Sector* or *Global Cluster* from the drop-down menu.



The resulting summary table shows the number of accepted projects and their total requirements per global cluster.

By Global Cluster	# of Projects	Original Requirements	Revised Requirements	Running Requirements
Coordination and support services	2	\$54,583	\$54,583	\$54,583
Education	11	\$1,712,500	\$1,712,500	\$4,254,500
Emergency Shelter and NFI	4	\$274,167	\$274,167	\$2,674,167
Emergency Telecommunications	3	\$156,250	\$156,250	\$856,250
Food Security	26	\$52,510,833	\$52,510,833	\$167,368,033
Health	24	\$2,647,292	\$2,647,292	\$11,165,742
Logistics	1	\$0	\$0	\$1,000,000
Nutrition	7	\$4,250,000	\$4,250,000	\$19,650,000
Protection	2	\$0	\$0	\$985,000
Protection - Child Protection	4	\$210,833	\$210,833	\$530,833
Protection - Gender-Based Violence	5	\$250,001	\$250,001	\$950,001
Water Sanitation Hygiene	11	\$2,451,667	\$2,451,667	\$7,962,000

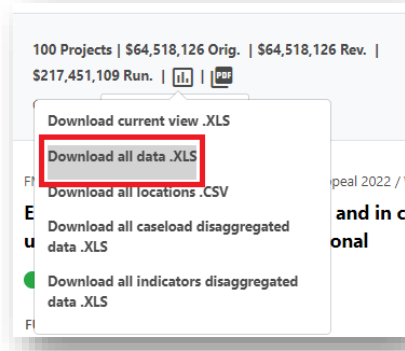
- The *Running Requirements* column will always list the up-to-date financial requirements, as the original requirements may have changed during the course of a plan.
- Confirm the financial breakdown by global clusters are the accepted budget figures by the HC/HCT. Additionally, confirm that the overall total running requirements are the accepted figures.
- Once the financial requirements are confirmed, Plan Leads will need to change the status of *Approved* projects to *Accepted* in bulk (if you are unfamiliar with this process, please refer to the section, [Changing the Status of Multiple Projects in Bulk](#)).

Note: Despite being *Accepted*, the projects still need to be published. Only when a plan has been fully finalized and set to *Published*, will all *Accepted* projects also be tagged as *Public* and will be visible and accessible in both FTS and Hum-Insight.
- Inform OCHA HQ that the projects are ready to be published from your side. The team will then proceed with the publication process on their end.

8.2 Reviewing Financial Requirements in Excel

You can also review the financial requirements in Excel via a PivotTable. After having created your overview table, the review and confirmation procedure is identical.

- First and foremost, ensure all relevant projects fall under the *Approved by Cluster Leads* status. This can be done quite easily with a filter (see chapter [Navigate Project Module Interface](#)).
- Click on the Export icon and then from the dropdown menu, click on download all data.



Note: it might take some time to finish downloading, as these are large Excel sheets.

- Open the downloaded Excel file.
- Select all data in the “Projects” sheet (Ctrl-A), go to the Insert tab and create a pivot table.
- Add “Budget GC” to the Rows field.
- Add “Budget Value” to the Values field.
- Add “Status” to the Filter field and filter for “Approved by Cluster Lead”.
- Add “LatestVersion” to the Filter field and filter for “True”. **Note:** This step is especially crucial if a project has been revised.

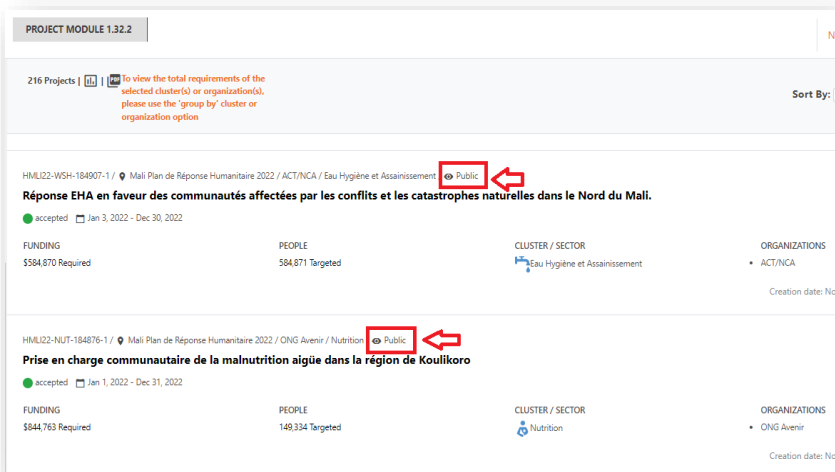
	A	B	C
1	Status	approved by cluster lead	
2	LatestVersion	true	
3			
4	Row Labels	Sum of Budget Value	
5	Coordination and support services	54,583	
6	Education	4,254,500	
7	Emergency Shelter and NFI	2,674,167	
8	Emergency Telecommunications	856,250	
9	Food Security	167,368,033	
10	Health	11,165,742	
11	Logistics	1,000,000	
12	Nutrition	19,650,000	
13	Protection	985,000	
14	Protection - Child Protection	530,833	
15	Protection - Gender-Based Violence	950,001	
16	Water Sanitation Hygiene	7,962,000	
17	Grand Total	217,451,109	
18			

9. Confirm the “Grand Total” value and the break down by global cluster are the accepted budget figures by the HC/HCT.
10. Once the financial requirements are confirmed, Plan Leads will need to change the status of *Approved* projects to *Accepted* in bulk (if unfamiliar, please refer to, [Changing the Status of Multiple Projects in Bulk](#)).
Note: Despite being *Accepted*, the projects still need to be published. Only when a plan has been fully finalized and set to *Published*, will all *Accepted* projects also be tagged as *Public* and will be visible and accessible in both FTS and Hum-Insight.
11. Inform OCHA HQ that the projects are ready to be published from your side. The team will then proceed with the publication process on their end.

8.3 Viewing Published Projects in HPC Tools

After HPC HQ has published the projects, the now public *Published* projects are displayed in different HPC Tools as illustrated in the following screenshots:

In Project Module



In FTS

fts.unocha.org/appeals/1052/projects

fts Financial Tracking Service

Totals View by: **Projects**

Total incoming funding: US\$418,568,991
 Total original requirements: US\$1,127,211,641
 Total current requirements: US\$1,127,211,641
 Coverage: 37.1%
 Total pledges: US\$0

Displaying 1 - 188 of 188

Project code	Description	Appealing org.	Cluster	Current requirements US\$	Funding US\$	Pledges US\$
Not specified	n/a	n/a	n/a	0	191,627,457	0
HNGA22-FSC-PRO-187197-1	Emergency Food Security and Livelihood assistance to vulnerable and conflict affected households in north east Nigeria	Food & Agriculture Organization of the United Nations	Protection Food Security	55,000,000	4,397,707	0
HNGA22-HEA-187236-1	Supporting Disease Surveillance, Outbreak and Response with Provision of Life saving Essential health services and Health system Strengthening to fragile, conflict affected and vulnerable population in North East Nigeria.	World Health Organization	Health	9,061,970	19,668,159	0
HNGA22-PRO-187125-1	Provision of Child Protection Services	United Nations Children's Fund	Protection	17,018,809	755,563	0
HNGA22-CSS-186042-1	Operation and Maintenance of Humanitarian Hubs and Enhancing Displacement and Mobility Needs Tracking, Inter-sectorial Needs	International Organization for Migration	COORDINATION AND SUPPORT SERVICES	6,346,766	2,301,605	0

In Hum-Insight

Projets

For more details, view on [fts](#)

PROJECT CODE	PROJECT NAME	ORGANIZATIONS	PROJECT TARGET	REQUIREMENTS
HNER22-SHL-187316-1	Renforcement de la préparation, de l'alerte et de la réponse en cas de chocs multirisques dans les zones fragiles afin d'assurer une réponse locale la plus rapide possible, au Niger	Cooperazione Internazionale - COOPI	93,310	\$1.5m
HNER22-SHL-187334-1	Appui à l'amélioration de l'accès aux abris d'urgence et aux biens non alimentaires à travers le transfert monétaire en faveur des populations vulnérables dans les régions de Diffa, Maradi et Tillabéry.	Développement Endogène Durable et Innovation	8,920	\$437k
HNER22-SHL-187356-1	Assistance en abris et biens non alimentaires pour 1 000 ménages des déplacés internes du département de Ouallam, région de Tillabéry	GOAL	7,000	\$0.7m

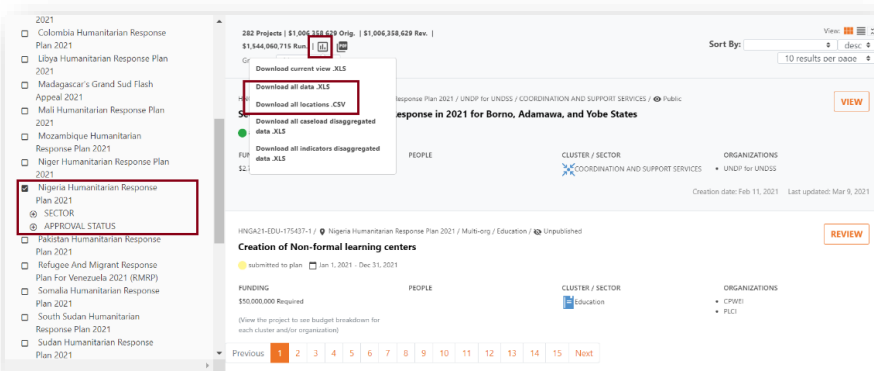
CLUSTER	PARTENAIRES	PROJETS	FUNDING COVERAGE	FUNDING	REQUIRED
Abris/NFI	11	14	<div style="width: 79%;"></div>	\$1.6m	\$35.9m
Coordination	2	2	<div style="width: 100%;"></div>	\$1.8m	\$5.5m
Eau, Hygiène et Assainissement	15	20	<div style="width: 75%;"></div>	\$1m	\$20m
Education	12	15	<div style="width: 80%;"></div>	\$5.6m	\$21.1m
Nutrition	14	15	<div style="width: 93%;"></div>	\$25.9m	\$99.6m
Protection	24	28	<div style="width: 86%;"></div>	\$15.9m	\$52m
Réponse aux réfugiés	11	16	<div style="width: 69%;"></div>	\$22.2m	\$106.5m

9 Reports and Downloads – [for Partners, Clusters and Plan Leads]

The Project Module produces several downloadable reports either in pdf or Microsoft Excel format. They can be downloaded by all users.

9.1 Downloading Full and Summary Project Data in Excel

1. Select the plan from the response plan filter box.
2. The below icon allows you to download the current summary view of projects, all data related to the projects as an Excel, or all location data of projects as a “csv file”.

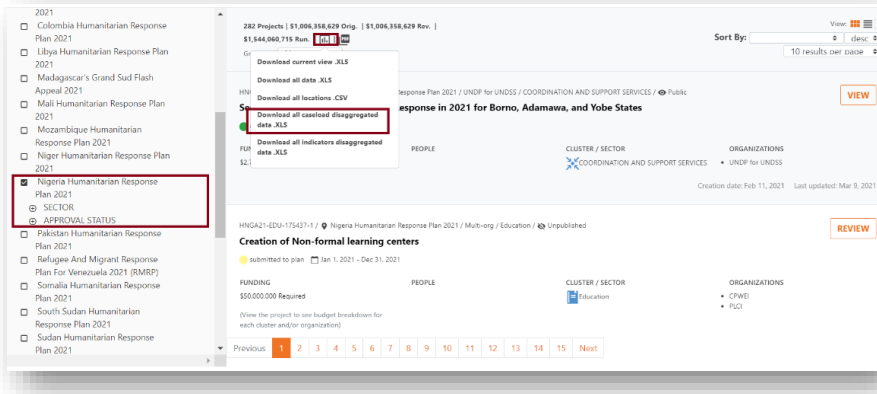


3. The *Download all data.xls* option will include all custom fields related to a plan and will separate out a project with multiple clusters and/or organizations into multiple rows. It will also include two extra worksheet tabs which has the caseload values for each project, and separately all the indicators and targets for each project.

Sl	Plan name	Name	Code	Version	Source project ID	Tags	Latest version	Published	Status	On
2	161330 Nigeria Humanitarian Response Plan 2021	Fostering Relationship between Women & Police Gender Desk Officers through Dialogue	HNGA21-PRD-161330-1	1				true	accepted	
3	161620 Nigeria Humanitarian Response Plan 2021	Promoting Safe Water, Sanitation and Hygiene Practices in Monguno, Jere and Bui LGAs in Borno State	HNGA21-WOH-161620-1	1		COVID-19		false	rejected	
4	161646 Nigeria Humanitarian Response Plan 2021	Prevention, Response and Mitigation of GBV among the most affected population in MMC and Monguno	HNGA21-PRD-161646-1	1		COVID-19		true	submitted to plan	
5	161726 Nigeria Humanitarian Response Plan 2021	Path Way to Choice: Delaying the Age of Marriage Through Education and Lifeskills for out of school girl	HNGA21-EDU-PRD-161726-1	1				true	submitted to plan	
6	161726 Nigeria Humanitarian Response Plan 2021	Path Way to Choice: Delaying the Age of Marriage Through Education and Lifeskills for out of school girl	HNGA21-EDU-PRD-161726-1	1				true	submitted to plan	
7	166497 Nigeria Humanitarian Response Plan 2021	Enhancing Digital Learning Across affected communities in Jere, Konduga and Maiduguri	HNGA21-EDU-166497-1	1		PRP, COVID-19		true	accepted	
8	172922 Nigeria Humanitarian Response Plan 2021	test	HNGA21-EDU-NUF-PRD-	1				true	false	not submitted
9	172922 Nigeria Humanitarian Response Plan 2021	test	HNGA21-EDU-NUF-PRD-	1				true	false	not submitted
10	172922 Nigeria Humanitarian Response Plan 2021	test	HNGA21-EDU-NUF-PRD-	1				true	false	not submitted
11	172922 Nigeria Humanitarian Response Plan 2021	test	HNGA21-EDU-NUF-PRD-	1				true	false	not submitted
12	172922 Nigeria Humanitarian Response Plan 2021	Building vulnerable school children resilience through the provision of integrated educational services	HNGA21-EDU-172922-1	1		PRP		true	accepted	
13	172922 Nigeria Humanitarian Response Plan 2021	Protecting and promoting Mental Health and psychosocial wellbeing of conflict affected population in	HNGA21-PRD-172922-1	1				true	accepted	
14	172922 Nigeria Humanitarian Response Plan 2021	Protecting and promoting Mental Health and psychosocial wellbeing of conflict affected population in	HNGA21-PRD-172922-1	1				true	accepted	
15	172922 Nigeria Humanitarian Response Plan 2021	Protecting and promoting Mental Health and psychosocial wellbeing of conflict affected population in	HNGA21-PRD-172922-1	1				true	accepted	
16	173022 Nigeria Humanitarian Response Plan 2021	Integrated Livelihood program for enhanced recovery, increased resilience and sustainable stabilization	HNGA21-ERY-173022-1	1				true	accepted	
17	173126 Nigeria Humanitarian Response Plan 2021	Specific and sensitive health emergency response for host and displaced populations in Borno State, Nig	HNGA21-HEA-NUF-PRD-	1				true	accepted	
18	173126 Nigeria Humanitarian Response Plan 2021	Specific and sensitive health emergency response for host and displaced populations in Borno State, Nig	HNGA21-HEA-NUF-PRD-	1				true	accepted	
19	173126 Nigeria Humanitarian Response Plan 2021	Specific and sensitive health emergency response for host and displaced populations in Borno State, Nig	HNGA21-HEA-NUF-PRD-	1				true	accepted	
20	173242 Nigeria Humanitarian Response Plan 2021	Equitable Access to protective quality and inclusive Education in Borno State	HNGA21-EDU-173242-1	1		PRP		true	accepted	
21	173242 Nigeria Humanitarian Response Plan 2021	Safe Access to Fuel and Energy in Northeast Nigeria Through an Integrated Humanitarian and Market	HNGA21-FSC-173242-1	1		PRP		true	accepted	
22	173306 Nigeria Humanitarian Response Plan 2021	Strengthen Resilience building through Livelihoods improvement for IDP, Returnees and Host communit	HNGA21-ERY-173306-1	1				true	accepted	
23	173306 Nigeria Humanitarian Response Plan 2021	Rebuilding the Livelihoods of the most vulnerable households to recover from the Socio-economic impac	HNGA21-ERY-173306-1	1				true	accepted	
24	173342 Nigeria Humanitarian Response Plan 2021	Improved and safe Access to inclusive learning for girls and children affected by conflict in Borno State	HNGA21-EDU-173342-1	1		COVID-19, PRP		true	accepted	
25	173446 Nigeria Humanitarian Response Plan 2021	Supporting the rights of girls and women through Menstrual Hygiene Management (MHM) in North East	HNGA21-WOH-173446-1	1				true	rejected	
26	173446 Nigeria Humanitarian Response Plan 2021	Hygiene Promotion in IDP Camps and Host Communities in North East	HNGA21-WOH-173446-1	1				true	false	not submitted
27	173522 Nigeria Humanitarian Response Plan 2021	Enhancing Inclusive, Quality, Protective Education for Out of School Children in Camps and Host Comm	HNGA21-EDU-173522-1	1		PRP		true	accepted	
28	173522 Nigeria Humanitarian Response Plan 2021	ENHANCING WASH IN NORTH EAST NIGERIA	HNGA21-WOH-173522-1	1				true	accepted	
29	173542 Nigeria Humanitarian Response Plan 2021	Inclusive WASH Aid for Building Resilience of Conflict Affected Populations in Northeast Nigeria	HNGA21-WOH-173542-1	1		PRP, COVID-19		true	accepted	
30	173642 Nigeria Humanitarian Response Plan 2021	Provision of scholastic materials and Leather sandals to support Access to Inclusive Education for displa	HNGA21-EDU-173642-1	1		PRP, COVID-19		false	rejected	
31	173742 Nigeria Humanitarian Response Plan 2021	Emergency WASH in schools in Monguno (LGA) of Borno State	HNGA21-WOH-173742-1	1				true	accepted	
32	173842 Nigeria Humanitarian Response Plan 2021	ITC support to US Children and FIV in targeted communities of Borno and Yobe states	HNGA21-NUF-173842-1	1		COVID-19, PRP		true	accepted	
33	173902 Nigeria Humanitarian Response Plan 2021	Livelihoods stabilization and income recovery for conflict affected women and other vulnerable Groups	HNGA21-ERY-173902-1	1		PRP, COVID-19		false	rejected	
34	173922 Nigeria Humanitarian Response Plan 2021	Alternative Teaching and Learning Support (ATLLS) for Out of School children living in IDP Camps amok	HNGA21-EDU-173922-1	1		PRP, COVID-19		true	accepted	
35	173922 Nigeria Humanitarian Response Plan 2021	Promotion of Community-based child protection services to Children Associated with the Boko State Arm	HNGA21-PRD-173922-1	1		PRP, COVID-19		true	accepted	
36	173922 Nigeria Humanitarian Response Plan 2021	Enhancing the delivery of quality protection services by improving the protection environment and supp	HNGA21-PRD-173922-1	1		PRP		true	accepted	

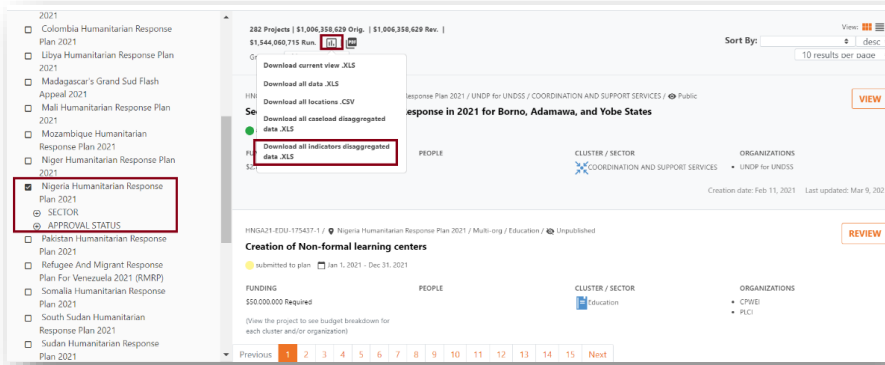
9.2 Download all Project Caseload and Disaggregated Data in Excel

1. Select the plan from the response plan filter box.
2. The below icon allows you to download all project and cluster caseload data in XLS format, with disaggregated caseload data in a separate tab.

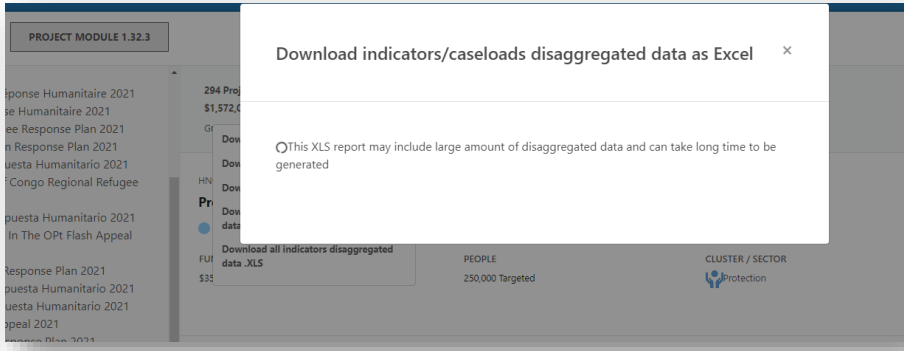


9.3 Download all Project Indicator and Disaggregated Data in Excel

1. Select the plan from the response plan filter box.
2. The below icon allows you to download all project and cluster indicator data in XLS format, disaggregated indicator data in a separate tab.



3. These spreadsheets can be very large, so you will see the following message pop up.

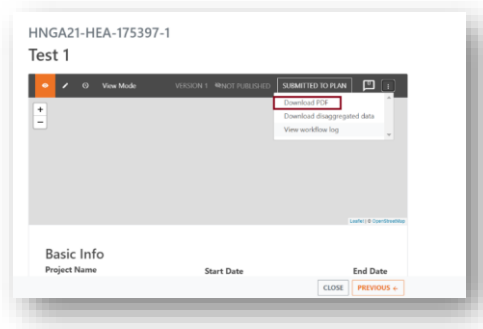


4. After the report is downloaded, you will see an Excel sheet similar to the following screenshot:

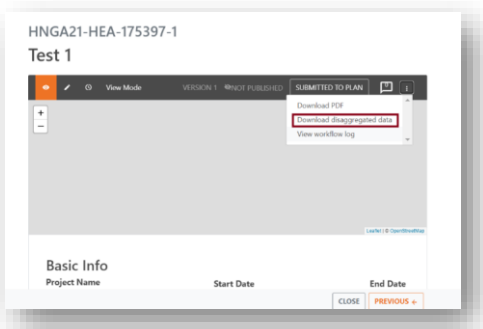
A	B	C	D	E	F	G	H	I	J	K	L	M
1	Project code	Status	Published	Latest Ver	Attachme	Caseload	Cluster	Disaggreg	Disaggreg	Disaggreg	Sector tar	Project target
2	HNGA21-F	submitted	false	true	PRO/BF1		Protection	NG008013	Jere	Combinat	14925	1500
3	HNGA21-F	submitted	false	true	PRO/BF1		Protection	NG008013	Jere	Combinat	10803	1000
4	HNGA21-F	submitted	false	true	PRO/BF1		Protection	NG008013	Jere	Combinat	14973	1000
5	HNGA21-F	submitted	false	true	PRO/BF1		Protection	NG008013	Jere	Combinat	14925	1500
6	HNGA21-F	submitted	false	true	PRO/BF1		Protection	NG008021	Maiduguri	Combinat	17437	1000
7	HNGA21-F	submitted	false	true	PRO/BF1		Protection	NG008021	Maiduguri	Combinat	15493	500
8	HNGA21-F	submitted	false	true	PRO/BF1		Protection	NG008021	Maiduguri	Combinat	21503	5000
9	HNGA21-F	submitted	false	true	PRO/BF1		Protection	NG008021	Maiduguri	Combinat	12800	1000
10	HNGA21-F	submitted	false	true	PRO/BF1		Protection	NG008024	Monguno	Combinat	13679	2679
11	HNGA21-F	submitted	false	true	PRO/BF1		Protection	NG008024	Monguno	Combinat	11518	1518
12	HNGA21-F	submitted	false	true	PRO/BF1		Protection	NG008024	Monguno	Combinat	19867	1000
13	HNGA21-F	submitted	false	true	PRO/BF1		Protection	NG008024	Monguno	Combinat	14308	3700
14	HNGA21-F	submitted	false	true	PRO/BF1		Protection	NG008024	Monguno	Combinat	8644	2300
15	HNGA21-E	submitted	false	true	EDU/BF1	overall	Education	NG008021	Maiduguri	Combinat	0	600
16	HNGA21-E	submitted	false	true	EDU/BF1	overall	Education	NG008021	Maiduguri	Combinat	28640	300
17	HNGA21-E	accepted	true	true	EDU/BF1	overall	Education	NG008013	Jere	Combinat	7803	500
18	HNGA21-E	accepted	true	true	EDU/BF1	overall	Education	NG008013	Jere	Combinat	6243	500
19	HNGA21-E	accepted	true	true	EDU/BF1	overall	Education	NG008013	Jere	Combinat	22443	500
20	HNGA21-E	accepted	true	true	EDU/BF1	overall	Education	NG008013	Jere	Combinat	22689	500
21	HNGA21-E	accepted	true	true	EDU/BF1	overall	Education	NG008013	Jere	Total	146744	2000
22	HNGA21-E	accepted	true	true	EDU/BF1	overall	Education	NG008016	Konduga	Combinat	2692	500
23	HNGA21-E	accepted	true	true	EDU/BF1	overall	Education	NG008016	Konduga	Combinat	2201	500
24	HNGA21-E	accepted	true	true	EDU/BF1	overall	Education	NG008016	Konduga	Combinat	2407	500
25	HNGA21-E	accepted	true	true	EDU/BF1	overall	Education	NG008016	Konduga	Combinat	2544	500
26	HNGA21-E	accepted	true	true	EDU/BF1	overall	Education	NG008016	Konduga	Total	47003	2000
27	HNGA21-E	accepted	true	true	EDU/BF1	overall	Education	NG008021	Maiduguri	Combinat	6675	500
28	HNGA21-E	accepted	true	true	EDU/BF1	overall	Education	NG008021	Maiduguri	Combinat	5584	500
29	HNGA21-E	accepted	true	true	EDU/BF1	overall	Education	NG008021	Maiduguri	Combinat	21480	500
30	HNGA21-E	accepted	true	true	EDU/BF1	overall	Education	NG008021	Maiduguri	Combinat	23053	500
31	HNGA21-E	accepted	true	true	EDU/BF1	overall	Education	NG008021	Maiduguri	Combinat	909	500
32	HNGA21-E	accepted	true	true	EDU/BF1	overall	Education	NG008021	Maiduguri	Total	136046	2000
33	HNGA21-E	accepted	true	true	ERY/BF1	Overall	Early Recc	NG002001	Demsa	Combinat	0	0
34	HNGA21-E	accepted	true	true	ERY/BF1	Overall	Early Recc	NG002001	Demsa	Combinat	0	0
35	HNGA21-E	accepted	true	true	ERY/BF1	Overall	Early Recc	NG002001	Demsa	Combinat	0	0
36	HNGA21-E	accepted	true	true	ERY/BF1	Overall	Early Recc	NG002001	Demsa	Combinat	0	0
37	HNGA21-E	accepted	true	true	ERY/BF1	Overall	Early Recc	NG002001	Demsa	Combinat	0	1
38	HNGA21-E	accepted	true	true	ERY/BF1	Overall	Early Recc	NG002001	Demsa	Combinat	0	0

9.4 Downloading an Individual Project's Data (pdf and Disaggregated Data)

1. To view the options for downloading a single project's data, open the project you are interested in and click the reports menu in the tool bar. From here you can download the current project as a pdf file.



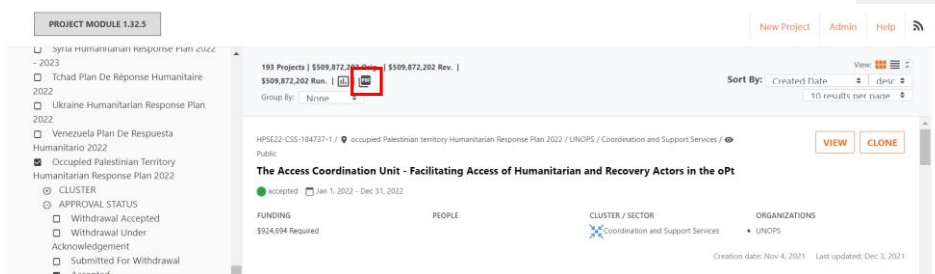
2. Additionally, you can also download the project's indicators and any disaggregated data for the indicators and caseload.



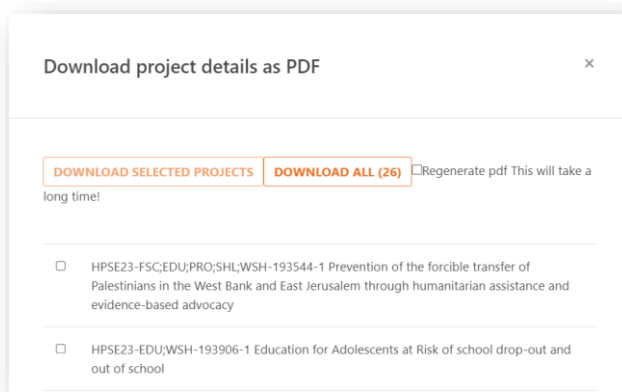
9.5 Downloading Multiple Projects as a pdf File

It is also possible to bulk download a plan's projects as individual pdf files. To do so, follow these steps:

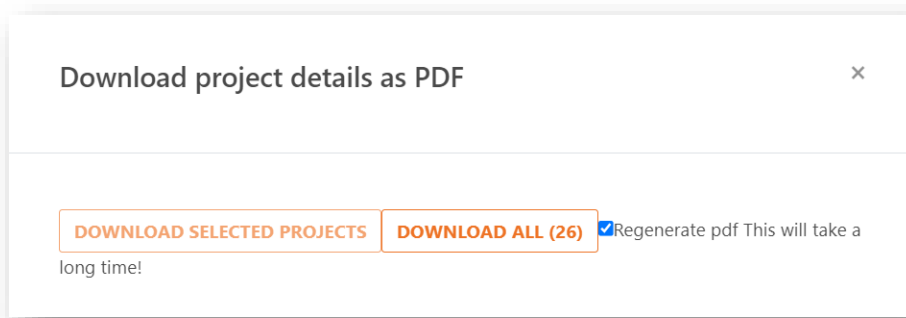
1. Filter your plan for the projects you wish to download (by cluster, status, etc.) or select all.
2. Click the pdf icon.



3. A window will appear. Select the projects you want to print by checking the checkbox next to each project and then click on the [Download Selected Projects] button. Alternatively, click the [Download all (<number>)] button to download all projects from your filtered list of projects.



4. If you experience an error, refresh the page, filter the projects in the same manner and try again, this time with the "Regenerate pdf. This will take a long time!" checkbox ticked



5. As the checkbox label suggests, regenerating PDFs will take a long time. Therefore, if you download 100 projects at once, you may see the error message, "Oops! There was an

error downloading the file. Please try again, or report this to an administrator". Ignore this error message and let the process finish. You will see the "progress bar" showing how many projects are done, e.g. "Preparing file 63/100"...etc.

6. When the download is completed, a folder should appear with all the downloaded projects.

10 Bulk Cloning Projects

Bulk cloning projects is a new feature that is available if a field office expresses such a desire. It essentially follows the same process as [individual project cloning](#), but in bulk. This feature is particularly important for multiyear plans which continue implementing projects from a previous plan. This can be an efficient and fast way of populating the projects for a plan. However cloned projects still need to be revised by the partners (the original project owners) before submitting them. This needs to be done to include updated information, like targets and budgets. Before cloning any projects, please take into consideration that you may need to calculate the new year's targets and budget.

For now, the bulk cloning feature is available only to administrators. If you have decided in agreement with the clusters to bulk clone projects, please reach out the HPC HQ team via your country's designated Teams channel. They will need to check the possibility and validity of cloning a large number of projects and ensure this is done in line with the HPC guidance.

Note: [Individual project cloning by partners](#) is recommended over bulk cloning for both accuracy and speedy process. Bulk cloning will copy the budget from the cloned year which means partners still need to revise the budget items manually, while individual cloning of projects will ask partners to enter the overall project budget at the beginning. This way the [budget items in step 5](#) will be automatically calculated and populated.

11 Frequently Asked Questions [for Partners, Cluster and Plan Leads]

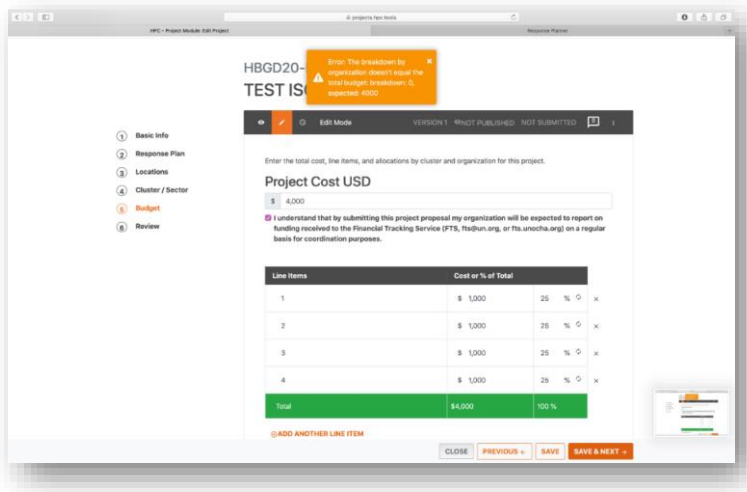
Question 1. All operations have a timeframe for submitting and vetting projects. As such, is there a mechanism to control access for submitting new projects in the PM?

Answer: Clusters should each be allowed to decide themselves when to stop taking projects submitted on or before the deadline. The mechanism to do this is to move all the 'Submitted' projects they want to consider to 'under review' status, and then they can happily either ignore, or consider, any projects coming thereafter. At the end of the process each cluster can say they, for example, reviewed 120 projects, of which they accepted 80 and rejected 40, and here are the other 10 projects that were submitted after the deadline - they're still there, everyone can see them, but they remain in 'submitted' status because the cluster chose not to review them.

Question 2. Can Project Module be closed?

Answer: Project Module is a global platform so all operations can submit projects at any time (i.e., the system doesn't prevent anyone from continuously submitting projects). The process that needs to be followed is that Cluster Leads select to review and approve only projects that have been submitted prior to the specified deadline. After vetting is complete, we prevent clusters from further revising projects (i.e., when the approval process is done). This we do from our end by changing the plan status to be 'None'.

Question 3. My organization is receiving the following error message when creating a separate budget line that equals the total budget, what should we do?



Answer: This issue is most probably caused by the fact that changes made in an earlier step affect the information in later steps. As such, the inconsistencies in the data need to be revised. To do so we

recommend you always consider clicking on *Step1 Basic Information* then press [Save and Next] until *Step6 Project Review*. The button [Save and Next] has an embedded functionality to ensure consistencies on the open step before opening the next step.

Question 4. Can rejected projects be reviewed?

Answer: Rejected projects remain accessible and viewable in the Project Module (i.e., they won't be deleted). This is done so that Plan and Cluster Leads will be able to get a list of projects by status if needed. In case a project is rejected by mistake, the project owner can contact the relevant Cluster or Plan Lead and request they change the status from "rejected" to "return for edit". It can then, once again, enter the regular, review and approval process.

Question 5. Can I, as Project owner/partner, make corrections to projects after they have been approved by a Cluster/Sector Lead?

Answer: No, if a project has been approved by the Cluster Lead, the owner can no longer edit it. Please communicate your desire to make changes to the Cluster Lead before or while the project is in revision. Also, please check the [Project Status Edit permissions](#) table which explains who can make changes to a project at any given stage.

Question 6. I'm a Cluster Lead and the *Add to review* option is not available to me in Project Module.

Answer: If the project revision is done, then indeed clusters will no longer be able to change the project's status. If the revision state is still ongoing, contact your Plan Leads to see if you have been granted the Cluster Lead role in the system.

Question 7. Does creating projects in Project Module need access permission?

Answer: All partners have access and can create their own projects in Project Module as long as they have a Humanitarian ID without restrictions – there is no need to have special permission to do so.

Question 8. How can I download data for all projects?

Answer: There are five options to export the project data to Excel. These are:

1. Download current view: this will download only the filtered and grouped data.
2. Download all data: download the list of projects data, indicators and caseloads. Please note that one project might have more than one record in some cases such as budget is broken down by more than one organization.
3. Download all locations: download list of projects by location.
4. Download all caseloads disaggregated data will generate an Excel sheet that is broken down by plan caseload.
5. Lastly, download all indicators disaggregated data will generate an Excel sheet that displays projects broken down in detail by each indicator they target.
 - Note: these downloads can be quite large. It is thus not unusual for the download process to take several seconds.

For a more detailed overview of the download process please refer to the chapter titled [Reports and Downloads](#).

Question 9. We have a multi-organization project, but we don't want to earmark the funding per organization, is that possible in the system?

Answer: If you don't want to break down the requirements by agency you should refrain from adding multiple agencies as appealing agency on Step1 Basic Information of the project sheet. Instead, choose one appealing agency, and enter the rest in the Implementing partners text field.

If you have multiple appealing agencies, we require you to break down the requirements to display accurate requirements and funding by organization on FTS.

So, you can either have one appealing agency, with one budget and as many implementing partners as you need. Or you can have several appealing agencies with a budget each. FTS won't display requirements for the implementing partners. It only displays funding for appealing agencies. If funding is reported to a multi-agency project, FTS will attribute it to the agency concerned.

For a more detailed answer, please refer to the section titled [Multiorganization Projects](#).

Question 10. How do I download a project's disaggregated data?

Answer: Open the project to which you want to download the disaggregated data and then select download disaggregated data.



Question 11. The plan is not populated with the data of all clusters as some clusters are slower than others in providing their information. Will that block clusters who completed their plans from starting to add their projects?

Answer: Clusters which already added their plans can add their projects even though other clusters do not yet have their plans finalized. However, the best scenario is to have all clusters submit their plans and then start adding projects.

Consider the following example: a partner wants to create a new multicluster or multisector project for which only one cluster has completed its plan. As such, the information from the other cluster(s) is incomplete and won't be added to this project. This is, of course, not what you want to have happen. However, if you are sure and you still want to publish a plan before all clusters have finalized their setup, you can do that after taking the above points into consideration. If you choose to do so, communicate this to coordination colleagues and we will support you in your strategy.

Question 12. Why can projects not be edited? A Cluster Coordinator alerted me that it is impossible to review projects in PM despite being able to do so before.

Answer: When a plan is published in RPM, the revision state gets set to “None”. This will lock both the plan and the attached projects. So, the publication of revised cluster caseloads will lock the projects. As a result, it can happen that the field can’t continue the approval process. If this occurs, inform the colleagues in Geneva, who can change the revision state and allow for progress to continue in Project Module.

Question 13. Is it possible to update an organization name or update information in Project Module without having to re-open an existing or create a new project?

Answer: Unfortunately, this is only possible for Project Module administrators. If you feel it is necessary to update an organization’s name, please reach out to the HPC HQ team in Geneva.

Question 15. We have projects in our Plan whose owner has left the organization. Is there a way to change the owner of the projects?

Answer: The project owner is the person who can edit projects and can assign ownership status to others. Ideally, ask this person to transfer ownership of a project over to another colleague before they leave the organization. If the owner has left your organization without reassigning ownership, you can request to be granted ownership of a project by a Plan Lead. To do so, please reach out to one of the OCHA focal points in the country and request to be assigned project owner status. They will only need the email under which your HID is registered. However, the field for this process is case sensitive so please make sure to send them your exact email address. Additionally, it may be a wise idea to use a generic organization email, to which all employees have access, to avoid this situation. This could be particularly useful if you have had large staff turnover or expect to have large turnover.

12 Additional Resources

- [Project Module \(PM\) User Guide](#)
- [Planning Bridge Tools Guide](#)
- [HPC Tools APIs Wiki](#)