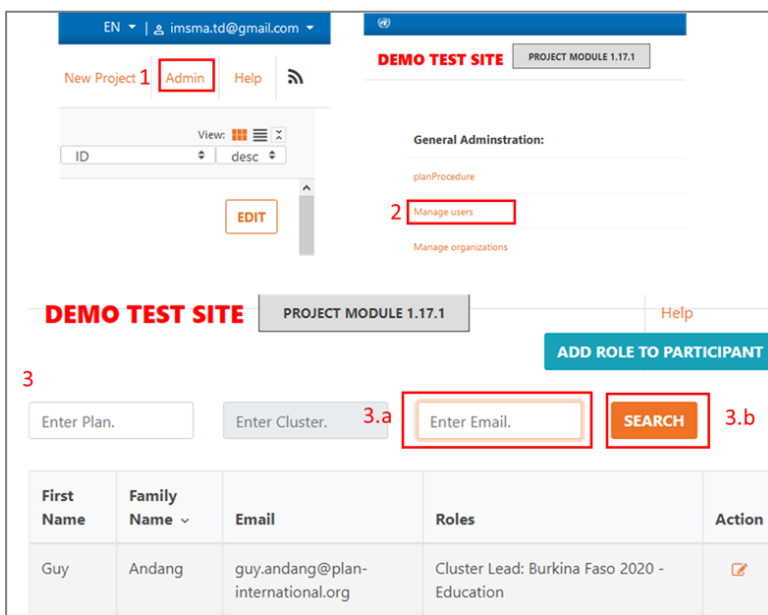



## How Plan Leads can grant access to Cluster Leads

1. **Plan Lead** checks if participant is registered on Humanitarian ID
2. To grant access to a cluster lead go to [Project module](#) home page, click on “**Admin**” in the upper right corner to open the “**General Administration**” window.
3. click on “**Manage users**”; Type the email address in “**Enter Email**” box and hit “**Search**”;
4. if you can’t find the user, it means she/he is nor registered with Humanitarian ID, ask him/her to create HID. If you can find him then go to the next step to grant access to a participant:



First Name	Family Name	Email	Roles	Action
Guy	Andang	guy.andang@plan-international.org	Cluster Lead: Burkina Faso 2020 - Education	

5. Grant access to a participant Type in the plan name that you are leading in “**Enter Plan**” box.
6. You will see the list of all Cluster leads displayed. If you can’t find the individual you are looking for to grant access, then Click “**Add role to participant**” to add her/him.
7. In the search window that shows, Type the email address in “**Enter Email**” box and hit “**Search**”; it will get you to her/his profile, the click on “**Roles**”

8. In "Enter Plan" box, type the name of the plan, in "Entity", select the Governing entity (Cluster) you want to grant her/him access and click "Add cluster lead role"; the role is granted.

The screenshot shows a user profile page with a 'Roles' tab. On the left, there is a search bar for email with a 'SEARCH' button. The 'Roles' table has columns for Role, Plan, and Entity. The 'Plan' field is set to 'Burkina Faso 2020' and the 'Entity' field is set to 'Entity.'. A dropdown menu is open under the 'Entity' field, showing a list of clusters. A red arrow points to the '+ ADD CLUSTER LEAD ROLE' button.

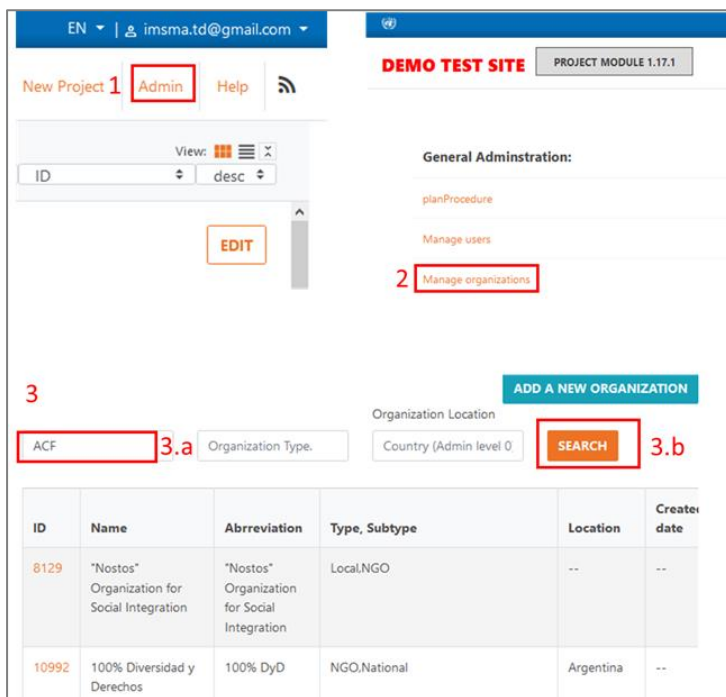
## How to manage organization Registration Requests

There are many requests to add new organizations to our system, there is a process that we should we follow once we receive such requests:

1. **Appealing Organization** could not submit a project because they could not find their organization as shown below:

The screenshot shows the 'Organizations' search interface. It has a search bar with 'JEDW' entered. Below the search bar, it says 'No Results Found' and provides a link: 'If you can't find the organization in the list, please inform us using this link'. There are also sections for 'Appealing Organizations' and 'Implementing Partners'.

2. **Plan leads (OCHA)** will run advanced search whether the organization exists or not based on the below recommended steps:
  - Go to Project module home page
  - Click on "Admin" in the upper right corner to open the "General Administration" windows,
  - Click on "Manage Organization".
  - Type the name or the abbreviation and click "Search"; if the organization exists, no need to add it again



*Hint: If you could not find the organization by name, try by abbreviation or search for its website and get the name, sometimes you can find the name by searching for a keyword in the organization name, try to search by name, keyword of the name, and abbreviation to avoid any duplication in our system*

3. If the **Plan lead** found it, then they need to inform appealing organization about the right spelling.
4. If the **Plan lead** could not find it, they need to inform The **Appealing Organization** to send a request to register using this form: Kobo ["Organization Registration Form - Sep 2020"](#) Which is accessible from the below screenshot:

**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

JEDW

**No Results Found**

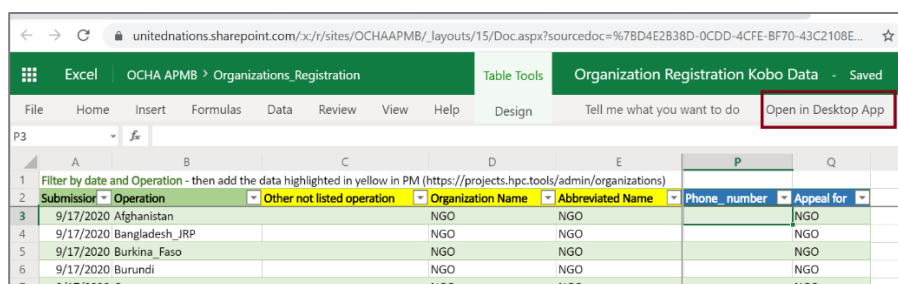
If you can't find the organization in the list, please inform us using this link

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

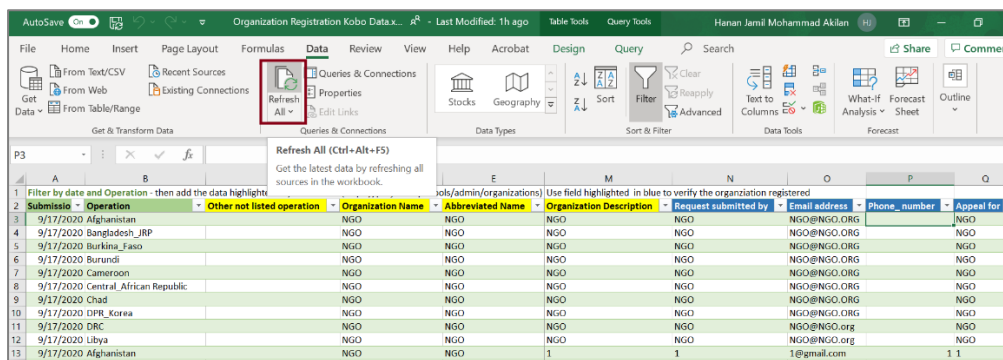
Organisation Registration Form - Sep 2020	Example:
PLEASE PROVIDE YOUR NAME	<b>PLEASE PROVIDE YOUR NAME</b> Anna
PLEASE PROVIDE YOUR E-MAIL ADDRESS	<b>PLEASE PROVIDE YOUR E-MAIL ADDRESS</b> anna@ngo.org
PLEASE PROVIDE YOUR PHONE NUMBER	<b>PLEASE PROVIDE YOUR PHONE NUMBER</b> 99999999999
PLEASE PROVIDE YOUR OPERATION COUNTRY	<b>PLEASE PROVIDE YOUR OPERATION COUNTRY</b> OPT
PLEASE PROVIDE THE NAME OF YOUR ORGANISATION	<b>PLEASE PROVIDE THE NAME OF YOUR ORGANISATION</b> East Jerusalem Hospital Network
PLEASE PROVIDE THE ABBREVIATION OF YOUR ORGANISATION	<b>PLEASE PROVIDE THE ABBREVIATION OF YOUR ORGANISATION</b> EJHN
PLEASE PROVIDE THE NAME OF YOUR ORGANISATION IN ANOTHER LANGUAGE	<b>PLEASE PROVIDE THE NAME OF YOUR ORGANISATION IN ANOTHER LANGUAGE</b> East Jerusalem Hospital Network
PLEASE PROVIDE YOUR ORGANISATION'S WEBSITE ADDRESS	<b>PLEASE PROVIDE YOUR ORGANISATION'S WEBSITE ADDRESS</b> www.EJHN.org
PLEASE SPECIFY YOUR ORGANISATION TYPE	<b>PLEASE SPECIFY YOUR ORGANISATION TYPE</b> NGO
TYPE OF NGO	<b>TYPE OF NGO</b> "Local ...."
PLEASE SPECIFY THE APPEAL IN WHICH YOU WOULD LIKE TO SUBMIT THE PROJECT FOR	<b>PLEASE SPECIFY THE APPEAL IN WHICH YOU WOULD LIKE TO SUBMIT THE PROJECT FOR</b> OPT
BELOW BRIEFLY PROVIDE YOUR ORGNISATION PROFILE AND YOUR ROLE	<b>BELOW BRIEFLY PROVIDE YOUR ORGNISATION PROFILE AND YOUR ROLE</b> 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)?	<b>WHERE ARE YOU CURRENTLY LOCATED (CITY/COUNTRY)?</b> OPT

5. **Plan leads** can check the submitted requests:

- a. Using the online excel which connects to KOBO and it has a real time data of organizations that sent requests to be registered at this [link](#) which can be accessed by your UN account
  - ✓ Open the excel sheet in desktop mode and refresh data as illustrated in the below screen:



- ✓ Once the document is opened using excel desktop, go to "Data" tab, and click "Refresh all". The document cannot be edited – it is read-only.



- ✓ Filter by “Operation” and “Date” – Green Column fields
- ✓ The Blue columns can be used to verify the requests
- ✓ Use Yellow Columns to add a new organization on the project module, that can be accessed from the admin interface which is available only for plan leads as illustrated below in steps:

### 6. Adding a new organization by using project module

- Go to [Project module](#) home page
- Click on “Admin” in the upper right corner to open the “General Administration” windows,
- Click on “Manage Organization”
- Click on “Add new organization”

Fill out the organization using the excel sheet that you exported from the kobo website and add the details.

Give a full attention to add the right details including its type that will have its reflection in PM, and FTS, and it is listed below:

Here is the full list of organization types (**in bold**) and sub-types, as well as the descriptions of sub-types pasted below”

#### NGOs

- Local NGOs: 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.
- National NGOs: 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.
- International NGOs: NGOs not based in an aid recipient country and carrying out operations in one or more aid recipient countries.
- Affiliated NGOs: 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.
- Uncategorized

#### Red Cross/Red Crescent

- International Society: IFRC and ICRC
- National Societies: National Societies that are based in and operating within their own aid recipient countries.

#### Private Organizations/Foundations

- 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.

- International national 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.

**Government**

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.

- Click save...