

Enhanced Framework for Implementing Partnership with UNHCR



# PARTNER USER GUIDE



## **UNHCR Partner Portal – Phase 1**

Version 1.1

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## 1 Introduction

## **1.1 What is Partner Portal**

UNHCR has embarked on the development and adoption of the Enhanced Framework for Implementing with Partners. The purpose of the Framework is to outline for UNHCR policies, procedures and guidelines for project partnerships. The aim is to strengthen the operational effectiveness, accountability and partnerships for delivering best results for refugees and persons of concern.

The Portal is a facility to support the Framework for Implementing with Partners. It is a web -based innovative and interactive tool for enhanced communication between UNHCR and Partners on project partnerships. The main purpose of the Portal is to strengthen UNHCR Partnerships to achieve the best protection and solutions for refugees and other persons of concern.

The Portal provides a simplified and personalized access and makes interactions easy and convenient, no matter where you are located and whether you:

- \* want to get an overview of project level collaboration between a Partner and UNHCR,
- presents information through Call for Expression of Interest and Concept Notes for participating in a UNHCR operation,
- inform yourself on UNHCR policies, procedures and guidance,
- enhance your colleagues' knowledge and skills related to the Framework for Implementing with Partners,
- inform UNHCR about your organization, or
- participate in debate with other peer organisations.

UNHCR data on Partners are outdated and incomplete. The Portal also provides an accurate and updated to-date data bank that is self-presented and maintained by Partners and widely accessible within UNHCR.

## 1.2 Main feature

The Portal is the first of its kind in UNHCR history. It is a "living instrument" and its benefits can be further enriched through the users and innovations. It will be introduced in phases to smoothly integrate into UNHCR processes. Additional features will be introduced to support UNHCR and Partners for more effective application of the Framework for Implementing with Partners. The first phase provides the following:

- Easy and self-managed access.
- Presentation of main profile of Partner organizations.
- Platform for presenting UNHCR Calls for Expression of Interest for partnership in UNHCR funded-projects.
- Initiating and proposing Concept Notes for participating in UNHCR-funded projects.
- Instant overview of current and historical UNHCR-Partner project-level collaboration.
- Up-to-date information on fund disbursements to respective Partners for project implementation.
- Access to knowledge and learning hub on UNHCR policies, procedures and guidance, publications, etc.
- Easy and guaranteed access to applications for pre-qualification for procurement, pooled accounts, etc.

- Instant invitations to UNHCR-organized workshops, meetings and conferences.
- Speedy connection and communication through notification by e-mail.

## **1.3 How to use this document**

The term 'Portal' will be used in this document to refer to the UNHCR Partner Portal. This User Guide provides instructions to users from organizations in partnership with UNHCR to complete tasks in the Portal. It includes step-by-step instructions for using key features such as:

- navigating in the Portal;
- editing organizational profiles;
- creating and editing country profiles;
- creating and managing user accounts;
- submitting Concept Notes in response to Calls for Expression of Interest; and
- registering participants for conferences.

This Guide should be used in conjunction with the Portal help functionality referenced with "?" in each section header of the Portal and with the partnership guidelines published in the Portal under the **Knowledge Hub**/ **Material** section.

In addition, Smart Guide a user friendly support with visual walkthrough the process and easily portable (User productivity Kit-a size of cash-card) is also made available by contacting <u>epartner@unhcr.org</u>.



## **1.4 Technical requirements**

The Portal operates only on line without saving any information on the computer. The recommended minimum system requirements are:

- an Internet connection;
- a screen with a minimum resolution of 1024 x 768;
- Internet Explorer 8.0 (or above). Other web browsers may work but have not been tested. If you encounter issues with previous versions of browsers, we recommend that you first upgrade to the minimum browser version indicated before contacting UNHCR; and
- Windows XP/7 (or above). Other operating systems may work but have not been tested.

## 2 User Interface

### 2.1 Site map

#### 2.1.1 Public pages

- I. Landing page
  - A. About Partner Portal
  - B. Working together
  - C. Register as a partner
  - D. News
    - i. Calls for Expression of interest
    - ii. Events
  - E. Login
  - F. Register

#### 2.1.2 Partner site content

The content below is the content of the Portal for all partner's roles.

- I. Knowledge Hub
  - A. Framework
  - B. What's New
  - C. Material
- II. My Profile (Default for Organization user)
  - A. Dashboard
  - B. Profile
    - i. Identification
    - ii. Mandate/mission
    - iii. Governance/Ethics
    - iv. Funding
    - v. Collaboration
    - vi. Manage/Support Project implementation
    - vii. Other Information
  - C. Country Operations
  - My Profile (Default for Country Users)
    - A. Dashboard
    - B. Profile
      - i. Identification
      - ii. Funding
      - iii. Capacity and Experience
      - iv. Linkage with Persons of Concern
      - v. Other Information
  - C. Organization Operations
  - Calls for Expression of Interest
    - A. Latest
      - i. Review/apply to CfEl
    - B. Search
      - i. Review/apply to CfEl
- V. Conferences
  - A. Search Registration
- VI. Administration
  - A. User Management

III.

IV.

- B. Document Management
- C. Reports

## 2.2 User interface controls

This section gives an overview on typical functionality used throughout the Portal. It contains information on typical screen controls such as the help text viewer, details on the header, the document upload control, and typical buttons throughout the application.

#### 2.2.1 Help text

In the Portal, a Help text is included in each section header to provide business and functional information for users unfamiliar with the Portal.

| Partner Summary             | ? |
|-----------------------------|---|
| Figure 2.2.1 Section header |   |

The Help text is accessed by clicking on the '?' icon, which is highlighted in red in figure 2.2.1 above. Once '?' is selected, a pop-up will appear providing the help content for the particular section.

#### 2.2.2 Typical User interface items

Typical buttons used in the application are:

- **SUBMIT** button to submit a profile or Concept Note. Submitting a profile will change the profile status to submitted, with the current date as the submission date, and will activate the visibility of the profile for UNHCR users.
- CANCEL button to cancel the current operation and leave the page without saving changes.
- **DELETE** button to delete a record selected.
- SAVE button to save changes on the current section or screen.
- **NEXT** or **PREV** buttons to move backward or forward from the current page and save changes done in the current page.

The Profile Title bar contains information on the profile currently viewed. Please refer to figure 2.2.2 below.

99 % complete

Country Profile: New Test User - Nigeria

Figure 2.2.2 Profile title bar

Title bar contains the following:

- Left side (grey area) percentage (%) complete of the Partner profile or submission date
- Center (green area) the Partner organization's legal name, with the country name if the profile is a country profile.
- Right side (grey area) the status of the Partner's profile: *Not saved, Saved*, or *Submitted*. *Not Saved/Saved* are used when editing the profile with the percentage on the left side, and *Submitted* is used with the submission date on the left side after the **SUBMIT** button is pressed.

If the profile is in draft mode (Wizard), the percentage complete will be displayed on the left side of the title bar, and the *Not Saved* or *Saved* status on the right side.

Saved

Once the profile is completed and submitted, the left side of the title bar will display the date of submission and the *Submitted* status on the right side.

#### 2.2.3 Mandatory Fields

In the Portal, mandatory fields are identified with '\*' next to them. Refer to the example in figure 2.2.3. All mandatory fields should be filled in before submitting a Profile or Concept Note to a Call for Expression of Interest.

#### 2.2.4 Document Upload functionality

The document upload functionality is used in various locations in the Portal such as Registration, Profiles, Document Management, and Calls for Expression of Interest.

| ser Management      | Add Documents  |  |  |  |                               |  |   | C     |
|---------------------|--|--|--|--|-------------------------------|--|---|-------|
| Document Management | Name *   |  |  |  |                               |  |   |       |
| ports               | Category *   | Please select  | V  |  |                               |  |   |       |
|                     | Country  | Afghanistan  | ~  |  |                               |  |   |       |
|                     | Document *   |  | Browse   |  |                               |  |   |       |
|                     | Comments   |  |  |  |                               |  |   |       |
|                     | CANCEL UPLOAD  |  |  |  |                               |  |   |       |
|                     |  |  |  |  |                               |  |   |       |
|                     | Name   | Uploaded on  | Document type  | Uploaded by  | Size                          | Comments   | Country   |       |
|                     | Name<br>Ogranigram InPro.pdf   | Uploaded on<br>3/27/2014 2:15:32 PM                                  | Document type<br>Organization Chart                    | Uploaded by mbenhabiles@gmail.com                                | Size<br>1872 KB               | Comments Uploaded during profile creation/edit   | Country<br>Switzerland                              |       |
|                     |  | •  |  |  |                               |  | -   |       |
|                     | Ogranigram InPro.pdf   | 3/27/2014 2:15:32 PM   | Organization Chart                                     | mbenhabiles@gmail.com  | 1872 KB                       | Uploaded during profile creation/edit  | Switzerland   |       |
|                     | Ogranigram InPro.pdf<br>2011-annual-report_for-web_Smb.pdf                         | 3/27/2014 2:15:32 PM<br>3/27/2014 2:15:55 PM                         | Organization Chart<br>Other                            | mbenhabiles@gmail.com<br>mbenhabiles@gmail.com                   | 1872 КВ<br>5327 КВ            | Uploaded during profile creation/edit<br>Uploaded during profile creation/edit   | Switzerland<br>Switzerland<br>Switzerland           | ELETE |
|                     | Ogranigram InPro.pdf<br>2011-annual-report for-web Smb.pdf<br>Test-upload document | 3/27/2014 2:15:32 PM<br>3/27/2014 2:15:55 PM<br>3/28/2014 1:34:33 PM | Organization Chart<br>Other<br>Administrative Document | mbenhabiles@gmail.com<br>mbenhabiles@gmail.com<br>unhcr\benhabil | 1872 КВ<br>5327 КВ<br>5327 КВ | Uploaded during profile creation/edit<br>Uploaded during profile creation/edit<br>Document uploaded with full visibility | Switzerland<br>Switzerland<br>Switzerland<br>Iraq C | elete |

Figure 2.2.3 Document Management section

Only documents with a size under 10 Megabytes can be uploaded onto the Portal using the Document Management Section. Refer to figure 2.2.3 above.

To upload a document, click on **BROW SE** and search for the document on your drive. Fill in the mandatory fields, then click **UPLOAD** to save the selected document on the Portal. After the upload is completed, the document will appear in the list of documents with all detailed information and a **DELETE** button, allowing you to remove the document from the Portal if necessary. You can only delete documents you have uploaded.

Note: In profiles, several sections require to upload documents. Documents uploaded in profiles will appear in the Document Management section with a comment 'Uploaded during profile creation/edit'. However, these documents will not have the **DELETE** button. To delete a document uploaded in the profile, you must go to the profile page and click the **DELETE** button next to the document name.

## **3** Partner functionality

This section explains the functionality displayed to Partners in the Portal.

#### 3.1 Partner user accounts and roles

Three different roles exist for partner users: Organization Primary User, Organization User and Country User.

#### Organization Primary User

The Organization Primary User has full access to all functionalities defined in the Portal for Partner organizations. This role is automatically granted to the person registering the organization in the portal. The roles and responsibilities of an organization's primary user relate to his / her organization and are as follows:

- Organizational registration in the portal
- Organizational profile editing
- Creation of country profiles
- Country profile editing
- Creation and maintenance of user accounts
- Document management at both organizational and country levels
- Submission of Concept Notes at organizational HQ level
- Participant registration for conferences

#### Organization User

Created by the Organization Primary User, Organization User accounts are similar to the Organization Primary User only for editing the organization profile but cannot create/edit country profiles or create and administer user accounts. The roles and responsibilities of an Organization User account are as follows:

- Organizational profile editing
- Country profile viewing
- Document management for the organizational profile
- Submission of Concept Notes at the organizational HQ level

#### Country User

Created by the Organization Primary User, Country User accounts require to be attached to an existing country profile (refer to 3.5.1 User Management). Each Country User can only edit his/her own country profile. The roles and responsibilities of a Country User account are as follows:

- Country profile editing for the attached country
- Organizational profile viewing
- Other country profile viewing
- Document management for the attached country profile
- Submission of Concept Notes for the attached country profile

## 3.2 Organization Primary User Self-registration

Below is the welcome page of the Portal. All Partners are directed to it for registration or login.



Fig 3.2 Partner Portal Landing Page

Only one Organization Primary User account can register the organization in the Portal. To start the self-registration process, as the Organization Primary User, you should click the *Register* icon, highlighted in figure 3.2 above by the note bubble 3.2.A. Refer to Self-Registration in section 3.2.1 below for details.

To log in to the application, you should click on the *Login* icon, highlighted in figure 3.2 above by the note bubble 3.2.B. Refer to section 3.2.2 below for details.

#### 3.2.1 Self-Registration

To access the Portal, you must first request registration in the Portal by completing the on-line registration form, fill in the mandatory fields with your individual professional information and submit it for activation.

You will not be able to access the Portal until the UNHCR Portal Administrator has activated your account. Once activated, any subsequent request for registration from the same organization will be rejected.

Once the registration has been completed and activated, as the Organization Primary User, you will have the responsibility to create any additional user accounts within your organization.

Organizational self-registered users are referenced in this document as the Organization Primary User, as opposed to Country Users who will be responsible for maintaining a specific country profile.

| 6 | Partner Registration  |  |  |  |
|---|---|--|--|--|
|   | Identifying the Organization and Creating an ID                               |  | 0  |  |
|   | Text to be here to give users instructions as well as the help file. This sho | ould be editable so the client can update from time to time through th | ne backend (database, resource files, or etc)* |  |
|   | Legal Name "  |  |  |  |
|   | Other Name  | Country *  |  |  |
|   | Last Name *   | First Name *   |  |  |
|   | Email *   | Position *   |  |  |
|   | Upload Organization constitution document* No docum                           | nent uploaded  |  |  |



Field descriptions for the self-registration process are explained in the table below.

| Field                           | Description   |  |  |  |  |
|---------------------------------|---|--|--|--|--|
| Legal Name                      | Name as legally established when the organization was constituted.        |  |  |  |  |
| Country                         | Country of origin of the organization                                     |  |  |  |  |
| Other Name                      | Name by which the organization is know if different from above legal name |  |  |  |  |
| First Name                      | First name of the Organization Primary User                               |  |  |  |  |
| Last Name                       | Last name the Organization Primary User                                   |  |  |  |  |
| Position                        | Position of the Organization Primary User                                 |  |  |  |  |
| E-mail                          | E-mail address of the Organization Primary User                           |  |  |  |  |
| Upload Registration<br>Document | Upload the organization's constitutional documents                        |  |  |  |  |

## 3.2.2 Login Process

Once all mandatory fields for the self-registration are entered, you should press the **SUBM IT** button. The '**Define your password**' section will appear to create and initialize the password you will be using to access the Portal. Refer to figure 3.2.2. below.

Steps in initially setting the password:

- 1 In the '**Password**' field, enter the password.
- 2 In the 'Confirm Password' field, re-enter the same password to verify and confirm.
- 3 Click on **CREATE USER**, then a pop-up window will appear notifying you that an email with further instructions will shortly be sent to the email address shown in the **Username** field.

Note: The password must have at least eight (8) characters, including one (1) Capital letter, one (1) non-alphanumeric character (e.g. %,#,@,...) and a number. You can click and maintain on the eye located on the right side of the field to display the password you have entered.

| ext to be here to give use<br>r etc)* | ers instructions as well as the help file. This sho | ould be editable so the client can update from  | n time to time through the backend (database, resource files, |
|---------------------------------------|---|---|---|
|                                       |   | Info  | x   |
| Username<br>Password *                | sandipawakale2011@gmail.com                         | Your Partner Profile User ID<br>successfully requested. You<br>shortly receive an email with<br>instructions. Please click OK,<br>close your browser. | will<br>n further   |
| Confirm Password *                    | ATE USER  |   | ОК  |



Go to your email account. You will see that the Portal Authentication service has sent you a message to validate your email address. Click on the link indicated in the message, and you will be redirected to the validation page of the Portal. Click on the **OK** button to validate your email address.

Once the registration request is completed and received by UNHCR, UNHCR will conduct a vetting process. Should your organization qualify to register on the Partner Portal, a notification will be sent to your email address inviting you to access the Portal. If the registration request is not validated, a notification will be also sent to inform you that the access to the Partner Portal has been denied.

## 3.3 Create, Edit and View Profiles

Once your Organization Primary User account has been activated, you can log in to the Portal, and start creating profiles.

#### 3.3.1 Login

To access the Portal, click on the **Login** button on the Partner Portal Welcome page. A small Login window will open up, where you will enter the email address and password used during registration, and then click on the **Login** button. Refer to fig 3.3.1.

|   |   | 🖉 Login 🍴 💋 Register     |
|---|---|--------------------------|
| Welcome to                                  | o Partner Portal  |                          |
| About Partner Portal     S Working Together | Le Registering as a Partner                                   | www.unhcr.org            |
|   | Login * Partner ID Password Login Register - Forgot Password? | Contact Us<br>Disclaimer |

Figure 3.3.1 Login Page

#### 3.3.2 Forgot Password?

In case you forgot the password you have defined during registration, you have the possibility to reset it yourself. Note that no user has the possibility to reset another user's password.

The steps to reset a partner user password are:

- 1. Go to the Login pop-up window and click on 'Forgot Password?' Refer to figure 3.3.1 above.
- 2. In the **User name** text box of the forgotten Password Account page, enter the email address used to register and click on the **SUBMIT** button. Refer to figure 3.3.2 below.
- 3. A message is sent to your email account with directions to access the change password page where you can reset your password.

| Partner P                  | Password Recovery Process  | Password Recovery Process      Forgotten Password Account | Partner P |
|----------------------------|--|---|-----------|
|                            | Forgotten Password Account         Image: Contemport of the second s | Forgotten Password Account                                |           |
|                            | Forgotten Password Account         Image: Contemport of the second s | Forgotten Password Account                                |           |
|                            | Forgotten Password Account         Image: Contemport of the second s | Forgotten Password Account                                |           |
| Forgotten Password Account |  |   |           |
|                            | User name *  | User name *   | 0         |

#### Figure 3.3.2 Forgotten Password Account page

#### 3.3.3 Global Compliance

To demonstrate the commitment of common values, when accessing the Portal for the first time, you must declare compliance with UNHCR global compliance criteria as presented below in figure 3.3.3.

Once you have selected **Yes** to all statements of the declaration and ticked the box on the bottom of the page, the **ACCEPT** button will be activated. Once you click the **ACCEPT** button, the system will allow you to proceed further with the organizational profile wizard.

Answering **No** to any of the questions will not allow you to proceed any further. At this stage, if you do not agree with any of the statements, the only available option will be to **DECLINE** the Global Compliance, and access to the Portal will be denied.

| The purpose of these declarations is to determine whether the prospective partner is committed to and shares the core values o<br>concern. UNHCR will partner with organizations and entities (non-profit) that are committed to the core values of UNHCR and its<br>persons of concern. An organization must answer 'yes' to all five declarations in order to be a partner with UNHCR.   |                      |  |
|--|----------------------|--|
| Please carefully read the text below and accept or decline its terms.  |                      |  |
| Declaration  | Possible<br>answer   | Guidance provided to<br>user                         |
| By answering yes, the organization confirms that is not sanctioned by the UN Security Council Committee on Sanctions pursuant to resolution 1267 (1999) a<br>resolutions of the Security Council targeting terrorism or that the organization has supported, directly or indirectly, individuals and entities sanctioned by the C<br>or any other involved any other manner that is prohibited by a resolution of the United Nations Security Council adopted under Chapter VII of the Charter of ti<br>Nations. | committee 🔿 No       | UN 1267 website                                      |
| By answering yes, the organization confirms that it is has not been charged with or been complicit in corrupt activities, including crimes against humanily and<br>and has not been involved in the past with such activities that would render the organization unsuitable for dealing with UNHCR or working with refugees and<br>persons of concern.   |                      |  |
| By answering yes, the organization commits that it will not discriminate against any persons of concern, regardless of their race, religion, nationality, political gender or social groups.   | opinion, OYes<br>ONo | Applicable conventions<br>and UNHCR<br>documentation |
| By answering yes, the organization commits to abide by the Principles of Partnership.  | ⊖ Yes<br>⊖ No        | Principles of Partnership                            |
| By answering yes, the organization confirms that it is willing to comply with all clauses of the UNHCR project partnership agreement when undertaking UNHC projects.   | R funded O Yes       | Standard clauses of a project agreement              |
| As a representative of my organization, I accept the terms of UNHCR and I declare my organization in conformance with all of the partnership preliminary   | selection criteria.  |  |

After accepting the terms of UNHCR Global Compliance, you will have access to create the organizational profile in the Portal.

#### 3.3.4 My Profile - Organization

The Organizational profile is located under the menu **My Profile**. After accepting the terms of the UNHCR Global Compliance, the Partner Portal application will take you directly to the Organizational profile wizard. In each of the profile pages, you must fill in all mandatory fields on one page in order to be allowed to move to the next page.

The Organization profile pages are:

- Identification,
- Mandate/Mission,
- Governance/ Ethics,
- Funding,
- Collaboration,
- Manage/Support Project Implementation,
- Other Information.

A completion percentage (%) of a profile is displayed on the left side of the title bar of the wizard.

When the completion percentage reaches 99%, you can submit the profile by pressing the **SUBMIT** button. Once submitted, the status of the profile changes to '**Submitted**' (displayed on the right side of the title bar) and the current date as the date of submission replaces the completion percentage on the left side of the title bar. It is only at this point that the profile becomes accessible to authorized UNHCR users.

#### 3.3.4.1 Identification submenu

This submenu allows you to record the organization's identification information as detailed below.

#### Organization Information

Organization

Figure 3.3.4.1.1 shows the **Organization Information** section on the **Identification** page. The **Organization Legal Name** and **Other Name** are automatically filled (prepopulated) with the information entered during registration.

| Progress          |                                |            | Partner Profile: Help U              | ser                 |                            | Saved |
|-------------------|--------------------------------|------------|--------------------------------------|---------------------|----------------------------|-------|
|                   | (?) Knowledge Hub              | My Profile | (?) Calls for Expression of Interest | L Conference        | s <b>Lo</b> Administration |       |
| 🟠 🕨 Organiz       | ation Profile 🕨 Identification |            |                                      |                     |                            |       |
| Identification    | Organization Info              | rmation    |                                      |                     |                            | 0     |
| Mandate/Mission   | Legal Name *                   | Help User  |                                      |                     |                            |       |
| Governance/Ethics | Other Name *                   | HUSER      | Туре                                 | e of Organization * | International NGO          | V     |
| Governance/Eulics | Other Name                     |            |                                      |                     |                            |       |

FieldRequiredDescriptionLegal NameYesPrepopulated, entered at the time of registrationOther NameYesPrepopulated, entered at the time of registrationTypeofYesUse the drop down to select the type of your organization

#### Registration of Organization in Country of Origin

Figure 3.3.4.1.2 shows the **Registration of the Organization in the Country of Origin** section in the **Identification** page. The country of origin is the country where the organization's headquarters is located

| Collaboration          | Registration of Organization in Country of Origin          | 0                             |
|------------------------|--|-------------------------------|
| Manage/Support         | Year of establishment in country of origin *               | 2000                          |
| Project Implementation | Is the organization registered in the country of origin? * | • Yes O No                    |
| Other Information      | Registration Number *                                      | 12345678910111213141516171819 |
| Country Operations     | Registration Date *  | 01/01/2000                    |
|                        | Registration Country *                                     | Singapore                     |



| Field  | Required | Description   |
|--|----------|---|
| Year of<br>establishment in<br>country of origin | Yes      | Provides length of time, the organization has been in existence - establishment may pre-date registration |
| Registration in<br>country<br>of origin          | Yes      | Select the appropriate radio button   |

If the organization is registered in the country of origin, you should select **Yes** in the corresponding column and then three (3) additional mandatory fields will appear:

| Field        | Description   |
|--------------|---|
| Registration | The organization's registration number in the country of origin |
| Number       |   |

| Registration<br>Date    | Initial registration date of the organization in the country of origin |
|-------------------------|--|
| Registration<br>Country | Name of the country of registration                                    |

If the organization is not registered in the country of origin, select **No** and a comment field will be made available for you to indicate if registration is in progress; inform of any obstacles to obtaining registration, etc.

#### **Contact Information**

Figure 3.3.4.1.3 shows the **Contact Information** section on the **Identification** page.

The official contact information of the organization's headquarters should be recorded in this section. The information will be used for official communications from UNHCR.

| Contact Information    |   |         |                            |
|------------------------|---|---------|----------------------------|
| Full Mailing Address * | New Sangavi,Famous Chawk,Near SBI<br>Bank |         |                            |
| Country *              | Singapore                                 | City *  | Pune                       |
| Telephone *            | 020223344556677                           | Fax     | 256321312321763            |
| Website                | www.UNHCR.com                             | Email * | sandip.s.awakale@gmail.com |

Figure 3.3.4.1.3 Contact Information section

| Field                | Required | Description  |
|----------------------|----------|--|
| Full Mailing Address | Yes      | Enter the street name, number and zip code.                            |
| Country              | Yes      | Select the country where the organization is headquartered.            |
| City                 | Yes      | Enter the name of the city in which the organization is headquartered. |
| Telephone            | Yes      | Enter the telephone number of the headquarters office.                 |
| Fax                  | No       | Enter the fax number of the headquarters office.                       |
| Website              | No       | Enter the URL (web address) of the organization's website.             |
| Email                | Yes      | Enter the organization's main email address.                           |

#### Primary Authorized Contact Persons

Figure 3.3.4.1.4 below shows the **Primary Authorized Contact Persons** (PACs) section on the **Identification** page.

The contact information for persons with executive roles in the organization should be recorded in this section. The Portal requires at least one contact person with a maximum of three (3). The Portal will use the email address of PACs to send notifications on actions such as Calls for Expression of Interest communications.

Note: Access to the Portal will not be automatically granted to the Primary Authorized Contact Persons. Should you need to give access to one of them, please refer to 3.5.1 User Management section of this document.

| Title*       | ● Mr. ○ Ms.       | Title      | ⊖ Mr. ● Ms.       | Title      | ● Mr. ○ Ms.       |
|--------------|-------------------|------------|-------------------|------------|-------------------|
| Last Name *  | u                 | Last Name  | L2                | Last Name  | L3                |
| First Name * | F1                | First Name | F2                | First Name | F3                |
| Position *   | P1                | Position   | P2                | Position   | P3                |
| Fax          | 1312312321321321  | Fax        | 213123123123      | Fax        | 765765376223423   |
| Telephone *  | 34234234324234    | Telephone  | 2131231212331     | Telephone  | 23423423423442    |
| Mobile       | 23123123213       | Mobile     | 123121233123123   | Mobile     | 32324324324       |
| Email *      | sandip1@gmail.com | Email      | sandip2@gmail.com | Email      | sandip3@gmail.com |
| Location     | Pune              | Location   | Pune2             | Location   | Pune3             |

Figure 3.3.4.1.4 Primary Authorized Contact Persons section

| Field      | Required | Description  |
|------------|----------|--|
| Title      | Yes      | Select the title of the Primary Authorized Contact (PAC) |
|            |          | person   |
| Last Name  | Yes      | Enter the last name of the PAC                           |
| First Name | Yes      | Enter the first name of the PAC                          |
| Position   | Yes      | Enter the name of the position of the PAC                |
| Fax        | No       | Enter the fax number, if applicable                      |
| Telephone  | Yes      | Enter the direct contact number of the PAC               |
| Mobile     | No       | Enter the mobile number of the PAC, if applicable        |
| Email      | Yes      | Enter the email address of the PAC                       |
| Location   | No       | Enter the office location of the PAC                     |

#### Accreditations and Certifications

Figure 3.3.4.1.5 below shows the Accreditations and Certifications section on the Identification page.

| Na  | me of Accreditation | Certifying/Accrediting Body | Date Received |               |
|-----|---------------------|-----------------------------|---------------|---------------|
| tes | sting Phase 1       | А                           | 05/03/2014    | UPDATE DELETE |
|     |                     |                             |               | ADD           |

Figure 3.3.4.1.5 Accreditations and Certifications section

Accreditations/ certifications from recognized humanitarian and professional entities may be leveraged for understanding the level of organizational maturity in the relevant area(s).

To add a new entry, enter the details of the accreditation/certification, and then click on the **ADD** button to save the information.

| Field                          | Required | Description   |
|--------------------------------|----------|---|
| Name of Accreditation          | Yes      | Enter the name of the accreditation received                        |
| Certifying/Accrediting<br>Body | Yes      | Enter the name of the organization that provided the certification. |
| Date Received                  | Yes      | Enter the date the accreditation was received.                      |

To edit or delete an entry, click respectively on the **UPDATE** or **DELETE** button.

| W | ork | inc  | ıla   | nau | age |
|---|-----|------|-------|-----|-----|
|   |     | un e | յ 🗆 ս | ngu | uge |

| Working Languages           | 3                            |
|-----------------------------|------------------------------|
| Select *                    | English x French x Spanish x |
|                             | Others ×                     |
| If others, please specify * | Marathi, Hindi               |

Figure 3.3.4.1.6 Working Language section

Set working languages of your organization by selecting one or multiple entries from the dropdown list. If the language does not exist in this list, select **Others** and then enter the language in the text box: **If others**, **please specify**.

| Field            | Required | Description                         |
|------------------|----------|-------------------------------------|
| Select           | Yes      | Select the working language(s)      |
| If others please | Yes*     | Free text field for other languages |
| specify          |          |                                     |

\* Required only if 'other' is selected

#### Countries of Operation/ Presence

| elect the countries in which the organization operates or has a presence * |                                 |
|--|---------------------------------|
| neet the countries in which the organization operates of has a presence    | Afghanistan 🗙 India 🗙 Nigeria 🗙 |
|  | Singapore x Switzerland x       |
|  |                                 |

Figure 3.3.4.1.7 Countries of Operation/ Presence section

To understand the geographical scope of the organization, select the countries in which the organization operates or has a presence.

#### 3.3.4.2 Mandate/ Mission

This submenu allows you to record the organization's Mandate / Mission's as detailed below.

#### Background & Mission Statement

This section includes two mandatory free text fields (*2,000 characters maximum*) as described in the page shown in Figure 3.3.4.2.1 below.

| Progress                                 | Partner Profile: Help User   | Not Saved |
|--|--|-----------|
|  | The the terms of term |           |
| 🟠 🕨 Organizati                           | on Profile 🕨 Mandate/Mission   |           |
| Identification                           | Background   | 0         |
| Mandate/Mission                          | A brief description of the background and rationale of the establishment of the organization *   |           |
| Governance/Ethics                        |  |           |
| Funding                                  |  |           |
| Collaboration                            | Mission Statement  | 0         |
| Manage/Support<br>Project Implementation | A brief description of the current vision and mandate of the organization *  |           |
|  |  |           |

Figure 3.3.4.2.1 Background and Mission Statement sections

#### Primary Persons of Concern

|                    | Primary Persons of Concern       |   | ? |
|--------------------|----------------------------------|---|---|
| Country Operations | Primary persons of concern *     |   |   |
|                    |                                  | Refugees  |   |
|                    | Primary Operational Experience   | Stateless   | ? |
|                    | Primary operational experience * | Returnees<br>Internally displaced persons<br>Asylum seekers |   |
|                    | Areas of Specializations         | Others  | ? |

Figure 3.3.4.2.2 Primary Persons of Concern section

Select groups which your Organization supports from the Primary Persons of Concern dropdown list. One selection is mandatory and multiple selections are allowed. If a group does not exist in this list, select **Others** and enter the group name in the text box: **Specify others**.

#### Primary Operational Experience

| Primary operational experience * |   |   |
|----------------------------------|---|---|
| Areas of Specializations         |   | Emergency situations<br>Protection<br>Post conflict |
| Domain *                         | Years of experience in each area of specialization * Comments | Development<br>Resettlement                         |
| Select Some Options              | Please select 🔽   | Environmental<br>Others                             |

Figure 3.3.4.2.3 Primary Operational Experience section

Select from the dropdown list the areas in which the organization has operational experience. One selection is mandatory and multiple selections are allowed. If the operational area does not exist in this list, select **Others** and enter the area in the text box: **Specify others**.

#### Area of Specialization

Areas of specialization are required to understand the main expertise of the organization.

| Areas of Specializations                 |  |          |     |
|--|--|----------|-----|
| Domain *                                 | Years of experience in each area of specialization * | Comments |     |
|  | Please select 🔽                                      |          | ADD |
| Administrative Institutions and Practice |  |          |     |
| Basic and Domestic Items                 |  |          |     |
| Camp Management and<br>Coordination      | SAVE   |          |     |
| Co-existence with Local<br>Communities   |  |          |     |
| Community Mobilization                   |  |          |     |
| Coordination and Partnerships 🗸          |  |          |     |

Figure 3.3.4.2.4 Area of Specialization section

- Create an entry, and click on the **ADD** button.
- In the **Domain** column, select from the dropdown list the areas in which the organization specializes. One selection is mandatory and multiple selections are allowed.
- For each entry, **Years of experience** is mandatory in order to get understanding of the level of experience in each area.
- To edit or delete an entry, click respectively on either the UPDATE or DELETE button.

| Field  | Required | Description   |
|--|----------|---|
| Domain   | Yes      | Select the domain from the dropdown list              |
| Years of Experience in<br>each area of<br>specialization | Yes      | Select the years of experience from the dropdown list |

No

Comments

General comments on the line item

#### 3.3.4.3 Governance & Ethics

This menu allows the input of data related to organizational governance and ethics.

| Dashboard                                | Governance  |                      | ? |
|--|---|----------------------|---|
|  | A brief description of the organization's governance structure *  |                      |   |
| Identification                           |   |                      |   |
| Mandate/Mission                          |   |                      |   |
| + Governance/Ethics                      | A brief description of the reporting lines and oversight between headquarters and a typical country/local office *  |                      |   |
| Funding                                  |   |                      |   |
| Collaboration                            | Upload organigram, as appropriate   | No document uploaded |   |
| Manage/Support<br>Project Implementation |   | BROWSE               |   |
| Other Information                        | Delegated authority for signing Project Agreements *  |                      |   |
|  | Publicly available annual report to stakeholders? *   | ● Yes ◯ No           |   |
| Country Operations                       | If yes, please upload a copy of last year's annual report   | No document uploaded |   |
|  | Or insert the link to the report on the organization website  | BROWSE               |   |
|  | Ethics  |                      | 0 |
|  | Does the organization have a policy and practice or standard code of conduct and safeguards against violation and<br>abuse of persons of concern, against fraud, and that provides for the requirements of the UNHCR Project Agreement? * | ⊖ Yes ⊖ No           |   |
|  | CANCEL < PREV NEXT> SAVE  |                      |   |

Figure 3.3.4.3.1 Governance & Ethics screen

#### Governance

- In the first field, to understand the basic governance arrangements and whether there is a layer of oversight of management, enter a brief description of the organization's governance structure (2,000 characters maximum).
- In the second field, to understand the relationship between headquarters and the field, enter a brief description of the reporting lines and oversight between the headquarters and typical country/local offices (2,000 characters maximum).
- If available, upload a copy of the organization's organigram by clicking the **BROW SE** button.
- To understand the level of delegated authority and possible time delays in the Project Partnership Agreement negotiation and signing process, indicate whether the delegated authority for signing Project Agreements is at the headquarters or local level.
- Choose whether there is a publicly available annual report. If the answer is **Yes**, upload a copy of last year's annual report by clicking the **BROW SE** button, or by inserting the link to the report on the organization's website.

#### Ethics

Select Yes / No to indicate if the organization has a policy and practice or standard code of conduct and safeguards against violation and abuse of persons of concern, against fraud, and that provides for the requirements of the UNHCR Project Agreement.
 If the answer is No, provide comments (2,000 characters maximum).

#### 3.3.4.4 Funding

This submenu allows you to record the organization's funding details.

| Dashboard                                | Organizational Annual Budget                                  |                   | 0  |
|--|---|-------------------|--|
|  | - Budget in US\$ equivalent *                                 |                   | >= US\$100,000,000 and < US\$1,000,000,000 |
| Identification                           |   |                   |  |
| Mandate/Mission                          | Core funding  |                   | 0)   |
|  | Source(s) of core funding *                                   |                   |  |
| Governance/Ethics                        |   |                   |  |
| + Funding                                |   |                   |  |
| Collaboration                            | Top 5 Donors for Operations                                   |                   | 0  |
| Manage/Support<br>Project Implementation | Donor*  | Name of the Donor |  |
| Other Information                        | Commercial Organizations                                      |                   | ADD  |
| Country Operations                       | Governments<br>Others<br>Public/Individuals<br>United Nations | XT> SAVE          |  |

#### Figure 3.3.4.4 Funding page

#### Organizational Annual Budget

• To understand the size of the organization and any recent material change in size, indicate the amount of the organization's annual budget from the dropdown selection.

#### Core Funding

• To understand how the organization covers basic core organizational and administrative costs, enter the sources of core funding (2,000 characters maximum).

#### Top 5 Donors for Operations

• To understand whom the organization has worked with and received funding from in the recent past (maximum of last past five years), click on the **ADD** button to create a new entry, then select the category of donor and enter the name of the donor. One entry minimum is required.

To edit or delete an entry, click respectively on the UPDATE or DELETE button.

| Field             | Required | Description                                |
|-------------------|----------|--|
| Donor             | Yes      | Select the donor type in the drop down box |
| Name of the Donor | Yes      | Type in the name of the donor.             |

#### 3.3.4.5 Collaboration

| Dashboard                                | History of Partnership  | 3 |
|--|---|---|
|  | Has the organization collaborated with UNHCR in the past? *   |   |
| Identification                           | If yes, provide a brief description *   |   |
| Mandate/Mission                          |   |   |
| Governance/Ethics                        |   |   |
| Funding                                  | Has the organization collaborated with UN and similar institutions in the past? *   |   |
| ► Collaboration                          | If yes, provide a brief description *   |   |
| Manage/Support<br>Project Implementation |   |   |
| Other Information                        | Network Membership  | 0 |
|  | Is the organization a member of network organizations? *  |   |
| Country Operations                       | If yes, please select *   |   |
|  | Network Organization  |   |
|  | Prease select     ANC8     ECOSOC     ECRE     ICVA     IVTERACTION     Japanese Platform     Other     People in Aid     SCHR     SPHERE     VOICE |   |

Figure 3.3.4.5 Collaboration page

#### History of Partnership

- In the first field, indicate whether the organization has collaborated with UNHCR in the past. If **Yes** is selected, provide a brief description in the text field that appears (*2,000 characters maximum*).
- In the second field, to understand whether the organization has experience working with UNHCR-like entities (UN and similar institutions), indicate whether the organization has collaborated with them in the past. If **Yes** is selected, provide a brief description in the text field that appears (*2,000 characters maximum*).

#### Network Membership

- To demonstrate the organization's existing relationships with their peer organizations, indicate whether the organization is a member of any organizational networks. If **Yes** is selected, click on the **ADD** button to create a new entry, then select the network membership from the dropdown list. One entry minimum is required. If the network organization name is not listed, select **Others**, and add a network organization name in the text field(*254 characters maximum*)
- To edit or delete an entry, click respectively on either the UPDATE or DELETE button.

| Field                | Required | Description  |
|----------------------|----------|--|
| Network organization | Yes      | Select the network organization in the drop down box |

#### 3.3.4.6 Manage/ Support Project Implementation

**The Manage/ Support Project Implementation** menu includes multiple sections to demonstrate the ability of the organization to complete the project assigned.

| Dashboard                             | Internet Access  |  | ? |
|---------------------------------------|--|--|---|
|                                       | Does the organization have reliable access to internet throughout all operations? *                    | ⊖ Yes ⊖ No   |   |
| Identification                        | Working with the Field   |  | 0 |
| Mandate/Mission                       | A brief description of the type of support provided by the Headquarters to field operations for prog   | aramme/project implementation *                      |   |
| Governance/Ethics                     |  | ,  |   |
| Funding                               |  |  |   |
| Collaboration                         | Ability to Scale-Up Operations   |  | 0 |
| Manage/Support Project Implementation | A brief description of the ability to support and mobilize resources to field operations in case of ex | xpansion of operations (ex., emergency situations) * |   |
| Other Information                     |  |  |   |
| Country Operations                    | Results Management   | 1. 아이나           | 0 |
|                                       | Does the organization use a results-based management approach *  | ⊖ Yes ⊖ No   |   |
|                                       | Risk Management  |  | 0 |
|                                       | Does the organization use a risk management approach? *  | ⊖ Yes ⊖ No   |   |

Figure 3.3.4.6.1 Manage/ Support Project Implementation screen (top 4 sections)

#### Internet Access

• To understand whether UNHCR can rely on web-based and email communications with the organization, it is required to indicate whether or not the organization has internet access. If the answer is **No**, you must give details on how the organization operates (*2,000 characters maximum*).

#### Working with the Field

• To understand the value-added that the headquarters may provide to operations by supporting the field, it is required to enter a description of the type of support provided by the headquarters to field operations for programme/project implementation (*2,000 characters maximum*).

#### Ability to Scale-Up Operations

• To understand the ability to quickly mobilize resources in cases of expansion of operations, it is required to enter a description of the organization's ability to support and mobilize resources for field operations (*2,000 characters maximum*).

#### Results-based Management

• To understand how the organization measures results and whether it is familiar with resultsbased management frameworks such as the UNHCR approach, it is required to indicate whether or not the organization uses Result-based Management. If **Yes** is selected, a brief description must be provided (*2,000 characters maximum*).

#### **Risk Management**

• To understand how the organization uses results-based management frameworks such as the UNHCR approach, it is required to indicate whether or not the organization uses a risk management approach.

If Yes is selected, a brief description must be provided (2,000 characters maximum).

#### Financial Control

| _ |
|---|
|   |
|   |
|   |
|   |
|   |
|   |

Figure 3.3.4.6.2 Financial Controls section

- It is required to indicate whether the organization has an accounting system (Yes/ No), and if Yes, the type of accounting system.
- To understand whether the organization has a system in place to track project expenditures to support accurate project reporting and claims made to funding agencies, answer the question: Does the accounting system include a project cost ledger providing for the recording of expenditures for each program/donor by required budget cost categories?
   If the answer is Yes, it is required to provide comments (2,000 characters maximum).
- It is required to indicate whether the organization has adequate internal controls for resource management.

If the answer is Yes, it is required to provide comments (2,000 characters maximum).

• It is required to enter the standard of accounting adopted by the organization (2,000 characters maximum).

#### Financial Staffing and Audit

| Financial Staffing  | 0                    |
|---|----------------------|
| Does the organization have adequate and experienced staff responsible for financial management in all operations? * | ● Yes ◯ No           |
| Please comment  |                      |
| Audit   |                      |
| Does the organization have regular organizational audits? *   | ⊙ Yes ⊖ No           |
| What types of audits take place at the organization? *  | Select Some Options  |
| Does the organization have publicly available audit reports? *  | ● Yes O No           |
| If yes, please upload a copy of your Audit Report   | No document uploaded |
|   | BROWSE               |
| Or insert the link to the report on the organization website  |                      |

Figure 3.3.4.6.3 Financial Staffing and Audit sections

Indicate whether the organization has adequate and experienced staff responsible for financial management in all operations.
 If the answer is Yes, it is required to provide comments (2,000 characters maximum).

#### Audit

- Indicate whether the organization has regular audits. If the answer is **Yes**, select from the dropdown list the types of audit that take place.
- Indicate whether the organization has publicly available audit reports. If the answer is **Yes**, upload a copy of the audit report by clicking the **BROW SE** button, or paste a copy of the link to the audit report if it is available on the organization's website.

#### Segregation of Duties

| Segregation of Duties                             |  |  | 0 |
|---|--|--|---|
| Has the organization instituted safeguards in all | operations to ensure the following functio   | nal responsibilities are appropriately segregated? * |   |
| Area of Responsibility *                          | Segregation of Duties?*                      | Comment  |   |
| Authorization to execute a transaction?           | ⊖ Yes ⊖ No                                   |  |   |
| Recording of a transaction?                       | ⊖Yes ⊖No                                     |  |   |
| Custody of assets involved in the transaction?    | ⊖Yes ⊖No                                     |  |   |
| Bank reconciliation and payment approvals?        | ⊖ Yes ⊖ No                                   |  |   |
| Procurement?                                      | ○Yes ○No                                     |  |   |
| Procedures  |  |  | 0 |
| Does the organization have formal documented po   | licies applicable to all operations that cov | er the following areas? *                            |   |
| Policy Area *                                     | Documented Policies? *                       | Comment  |   |
| Human Resources                                   | ⊖ Yes ⊖ No                                   |  |   |
| Procurement                                       | ⊖ Yes ⊖ No                                   |  |   |
| Asset and Inventory Management                    | ⊖Yes ⊖No                                     |  |   |

Figure 3.3.4.6.4 Segregation of Duties and Procedures sections

• Indicate by selecting **Yes** or **No** whether the organization has instituted safeguards in all operations to ensure functional responsibilities are appropriately segregated for each area of responsibility (in transaction authorization, transaction recording, custody of assets, and bank reconciliation and payment approvals).

Write a short comment to justify/ support answers (254 characters maximum).

#### Procedures

 Indicate by selecting Yes or No whether the organization has documented policies applicable to all operations that cover each area (in human resources, procurement, and asset and inventory management).

Write a short comment to justify/support answers (254 characters maximum).

#### 3.3.4.7 Other Information

In the **Other Information** section, enter any other information the organization wishes to share with UNHCR. This section is optional (*2,000 characters maximum*).

| Dashboard                                | Other Information   | 0) |
|--|---|----|
|  | Other information the organization may wish to share with UNHCR |    |
| Identification                           |   |    |
| Mandate/Mission                          |   |    |
| Governance/Ethics                        | CANCEL SAVE SUBMIT  |    |
| Funding                                  |   |    |
| Collaboration                            |   |    |
| Manage/Support<br>Project Implementation |   |    |
| Other Information                        |   |    |
| Country Operations                       |   |    |



#### 3.3.5 My Profile - Country Profile

Once you have completed and submitted the organizational profile, the **Country Operations** menu becomes available for selection.

This allows your organization to create country profiles for countries where the organization operates:

- In **M y Profile**, click on the **Country Operation** submenu.
- In the **Create Country Profiles** section, select a country name from the dropdown list and click on the **ADD** button to create a country profile for the selected country name.
- The selected country name is added to the list under the View/ Edit Country Profiles section.
- Click on the EDIT button next to the selected country name to start the country profile wizard.

All Organization Primary Users have full access to all country profiles within the same organization. Editing a country profile can also be done by a Country User attached to this country profile. See Section 3.5 Administration for more details.

| Dashboard              | Create Country Profiles      |                          |            |          | 0         |
|------------------------|------------------------------|--------------------------|------------|----------|-----------|
| Identification         | Select country to add *      |                          | ADD        |          |           |
| Mandate/Mission        | View / Edit Country Profiles |                          |            |          | 0         |
| Governance/Ethics      | Linked Country Profiles      |                          |            |          |           |
| Funding                | Country                      | Legal Name               | % Complete | Status   |           |
| Collaboration          | Afghanistan                  | International Protection | 57         | Active   | VIEW EDIT |
| Manage/Support         | Algeria                      | International Protection | 0          | Inactive | VIEW EDIT |
| Project Implementation | Argentina                    | International Protection | 0          | Inactive | VIEW EDIT |
| Other Information      | Bahamas                      | International Protection | 0          | Inactive | VIEW EDIT |
| Country Operations     | Bosnia and Herzegovina       | International Protection | 63         | Active   | VIEW EDIT |
|                        | Egypt                        | International Protection | 0          | Inactive | VIEW EDIT |

Figure 3.3.5.1 Country Operations screen

Submenus in **M y Profile** at the country level are:

- Identification
- Funding
- Collaboration
- Capacity and Experience
- Linkages with Persons of Concern
- Other Information

A completion percentage (%) of a profile is displayed on the left side of the title bar during the wizard.

When the completion percentage reaches 99%, you can submit the profile by pressing the **SUBMIT** button. Once submitted, the status of the profile changes to '**Submitted**' (displayed on the right side of the title bar) and the current date as the date of submission replaces the completion percentage on the left side of the title bar. It is only at this point that the profile becomes accessible to authorized UNHCR users.

#### 3.3.5.1 Identification submenu

This submenu allows you to record specific identification information for the organization at the country of operation level. Identification information should be recorded in the Partner Portal *for each country where the organization operates*, even if the organization operates in the country of origin and the information was already recorded in the organization's profile.

#### Organization Information

In **Organization Information** section, **Legal Name** and **Type of Organization** fields are prepopulated from the Organization profile and not editable. You can only enter the **Other Name** by which the Organization is known if different from the Legal Name.

| The second se | stration |
|---|----------|
|   |          |
|   |          |
| Country Profile      Identification   |          |
| shboard Organization Information  | 0        |

Figure 3.3.5.1.1 Organization Information

#### Registration of Organization with Host Government

Figure 3.3.5.1.2 shows the Registration of the Organization with the Host Government in the Country of Operation section under the **Identification** submenu, which includes details of the organization at the local country level.

| Collaboration                   | Registration with Host Government                      |            |
|---------------------------------|--|------------|
| Capacity and Experience         | Year of establishment with host government *           |            |
|                                 | Is the organization registered with host government? * | ● Yes ◯ No |
| inkages with Persons of Concern | Registration Number *                                  |            |
| ther Information                | Registration Date *                                    |            |
| rganization Operations          | Registration Country *                                 |            |



The following fields exist in this section:

| Field | Description |  |
|-------|-------------|--|
|-------|-------------|--|

Year of establishment<br/>in country of operationProvides the length of time the organization has been present in the<br/>country of operation - establishment may pre-date registrationIs the organization<br/>registered with the<br/>host governmentSelect the appropriate radio button

If the organization is registered with the host government, select **Yes** and three additional mandatory fields appear:

| Field                       | Description  |
|-----------------------------|--|
| <b>Registration Number</b>  | The organization's registration number with the host government        |
| <b>Registration Date</b>    | Initial registration date of the organization with the host government |
| <b>Registration Country</b> | Name of the country of registration                                    |

If the organization is not registered with the host government, select **No** and a required comment field will appear, as UNHCR requires to indicate if registration is in progress; inform of any obstacles to obtaining registration, etc.

#### **Contact Information**

The official contact information of the organization in the country of operations should be recorded in this section. The information will be used for official communications from UNHCR.

| Contact Information    |         | (? |
|------------------------|---------|----|
| Full Mailing Address * |         |    |
| Country *              | City *  |    |
| Telephone *            | Fax     |    |
| Website                | Email * |    |

Figure 3.3.5.1.3 Contact Information

The following fields exist in this section:

| Field                | Required | Description   |
|----------------------|----------|---|
| Full Mailing Address | Yes      | Enter the street name, number and zip code  |
| Country              | Yes      | Choose the country in which the organization is located for the country of operation. |
| City                 | Yes      | Enter the city in which the organization is located                                   |
| Telephone            | Yes      | Enter the telephone number of the country office                                      |
| Fax                  | No       | Enter the telephone number of the country office                                      |
| Website              | No       | Enter the URL of the organization's country website                                   |
| Email                | Yes      | Enter the organization's country main email address                                   |

#### Authorized Contact Persons

Figure 3.3.5.1.4 shows the Primary Authorized Contact Persons (PACs) section under the **Identification** submenu.

The contact information for executive persons with specific roles in the country of operation should be recorded. The Portal requires at least one contact person with a maximum of three (3). The Portal will use the email address of PACs to send notifications on actions such as Calls for Expression of Interest communications.

Note: Access to the Portal will not be automatically granted to the Authorized Contact Persons. Should you need to give access to one of them, please refer to 3.5.1 User Management section of this document.

| uthorized Contact Persons |                   |                   |
|---------------------------|-------------------|-------------------|
| Title* O Mr. O Ms.        | Title O Mr. O Ms. | Title O Mr. O Ms. |
| Last Name *               | Last Name         | Last Name         |
| First Name *              | First Name        | First Name        |
| Position *                | Position          | Position          |
| Fax                       | Fax               | Fax               |
| Telephone *               | Telephone         | Telephone         |
| Mobile                    | Mobile            | Mobile            |
| Email *                   | Email             | Email             |
| Location                  | Location          | Location          |

Figure 3.3.5.1.4 Authorized Contact Persons

| The following fields exist in this section: |
|---|
|---|

| Field      | Required | Description  |
|------------|----------|--|
| Title      | Yes      | Choose the title of the Primary Authorized Contact (PAC) |
|            |          | person   |
| Last Name  | Yes      | Enter the last name of the PAC                           |
| First Name | Yes      | Enter the first name of the PAC                          |
| Position   | Yes      | Enter the name of the position of the PAC                |
| Fax        | No       | Enter the fax number, if applicable                      |
| Telephone  | Yes      | Enter the direct contact number of the PAC               |
| Mobile     | No       | Enter the mobile number of the PAC, if applicable        |
| Email      | Yes      | Enter the email address of the PAC                       |
| Location   | No       | Enter the office location of the PAC                     |

#### Working Language

• Select the working languages which the organization uses in the country of operation. If a language is used and not present in the dropdown list, you can select **Others** and a free text input field will appear.

#### Presence in the country of operation

• To understand the geographical scope of the Organization in the country, list locations within the country of operation where the organization has a presence.

#### Banking Information

Choose whether the organization has a separate account and an interest-bearing account for UNHCR-funded projects in the country of operation.
 If No is selected, provide an explanation in the text field that appears (2,000 characters maximum).

| Select *   |                   |     |
|--|-------------------|-----|
|  | English           |     |
| Presence in the Country of Operation               | French            | ?   |
| ocations of operations in the country of operation | Spanish           |     |
|  | Russian           |     |
|  | Arabic            |     |
|  | Chinese<br>Others |     |
| Banking Information                                |                   | (?) |

Figure 3.3.5.1.5 Working Language, Presence in Country of Operation, and Banking Information sections

### 3.3.5.2 Funding

| Dashboard               | Top 5 Donors for Operations                       |                   | 0   |
|-------------------------|---|-------------------|-----|
|                         | Donor *   | Name of the Donor |     |
| Identification          |   |                   | ADD |
| + Funding               | Commercial Organizations<br>Governments<br>Others |                   | AUD |
| Collaboration           | Public/Individuals<br>United Nations T>           | SAVE              |     |
| Capacity and Experience |   |                   |     |



#### Top 5 Donors for Operations

• To understand which donor the organization has worked with and received funding from in the past five years in the country of operation, click on the **ADD** button to create a new entry, then select the category of donor and enter the name of the donor. One entry minimum is required.

To edit or delete an entry, click respectively on either the UPDATE or DELETE button.

| Field             | Required | Description                                |
|-------------------|----------|--|
| Donor             | Yes      | Select the donor type in the drop down box |
| Name of the Donor | Yes      | Type in the name of the donor.             |

#### 3.3.5.3 Collaboration

| Dashboard                       | History of Partnership  | 0                                       |
|---------------------------------|---|---|
|                                 | Has the organization collaborated with UNHCR in the past? *   | ● Yes ◯ No                              |
| Identification                  | If yes, provide a brief description *   |   |
| Funding                         |   |   |
| Collaboration                   |   |   |
| Capacity and Experience         | Has the organization collaborated with UN and similar institutions in the past? $^{\ast}$             | ⊙ Yes 🔘 No                              |
| inkages with Persons of Concern | If yes, provide a brief description *   |   |
| Other Information               |   |   |
| Organization Operations         | Describe the existing collaboration relationship with other organizations, including governmental aut | horities, in the country of operation * |
|                                 |   |   |
|                                 |   |   |

#### Figure 3.3.5.3 History of Partnership section

#### History of Partnership

- In the first field, indicate whether the organization has collaborated with UNHCR in the country of operation in the past. If **Yes** is selected, provide a brief description in the text field that appears (*2,000 characters maximum*).
- In the next field, to understand whether the organization has experience working with UNHCRlike entities (UN and similar institutions), indicate whether the organization has collaborated with them in the past. If **Yes** is selected, provide a brief description in the text field that appears (*2,000 characters maximum*).
- In the third field existing collaboration with other organizations, including governmental authorities, in the country of operation should be indicated.

#### 3.3.5.4 Capacity and Experience

#### Personnel

- Select from the dropdown list, the number of Core Staff in the country of operation.
- Select from the dropdown list, the number of Project Staff in the country of operation.
- Select from the dropdown list, the number of Volunteers in the country of operation.
- If available, upload a copy of the organization's organigram in the country of operation by clicking the **BROW SE** button.

| Dashboard               | Personnel                         | Please select<br>1 to 5             | 0 |
|-------------------------|-----------------------------------|-------------------------------------|---|
|                         | Core staff *                      | 6 to 10<br>11 to 25                 |   |
| Identification          | Project staff *                   | 26 to 50<br>51 to 100<br>101 to 200 |   |
| Funding                 | Volunteers *                      | 201 to 500<br>more than 500         |   |
| Collaboration           | Upload organigram, as appropriate | No document uploaded                |   |
| Capacity and Experience |                                   | BROWSE DELETE                       |   |



#### Other Assessments

• Indicate whether your organization has received any type of assessment by another UN organization.

If the answer is **Yes**, enter the name(s) of the other UN agencies that have assessed the organization and type of assessment (*2,000 characters maximum*).

• Indicate whether your organization has received any assessment by other accredited bodies in the country of operation.

If the answer is **Yes**, enter the name(s) of the other accredited bodies in the country and the type of assessment (*2,000 characters maximum*).

If available, upload a copy of the assessment by clicking the **BROW SE** button.

| inkages with Persons of Concern | Other Assessments   | 3                    |
|---------------------------------|---|----------------------|
| Other Information               | Has the organization been assessed by UNHCR for procurement pre-qualification status?*            |                      |
|                                 | If Yes, has status been: *  | Approved      Denied |
| rganization Operations          | Has the organization been assessed by another UN organization? *                                  | Yes O No             |
|                                 | If yes, enter the name(s) of the other UN agencies who have assessed your organization $^{\star}$ |                      |
|                                 | Other accredited bodies in the country? *   | ● Yes ◯ No           |
|                                 | If yes, enter the name(s) of the other accredited bodies in the country *                         |                      |
|                                 | Upload a copy of the assessement (optional)   | No document uploaded |
|                                 |   | BROWSE DELETE        |

Figure 3.3.5.4.2 Other Assessments

#### Primary Persons of Concern

• Select groups from the Primary Persons of Concern dropdown list which your organization supports in the country of operation.

The field allows multiple selections. If the group does not exist, select **Others** and then enter the group name in the text box Specify others (*254 characters maximum*).

|                    | Primary Persons of Concern       |   | (2)                                     |
|--------------------|----------------------------------|---|---|
| Country Operations | Primary persons of concern *     |   |   |
|                    |                                  | Refugees  |   |
|                    | Primary Operational Experience   | Stateless   | • |
|                    | Primary operational experience * | Returnees<br>Internally displaced persons<br>Asylum seekers |   |
|                    | Areas of Specializations         | Asylum seekers<br>Others                                    | 0                                       |

Figure 4.3.5.4.3 Primary Persons of Concern section

#### Primary Operational Experience

• Select from the dropdown list the areas in which the organization has primary operational experience in the country of operation.

The field allows multiple selections. If the area does not exist, select **Others** and then enter the area in the text box: **Specify others** (*254 characters maximum*)

| Primary Operational Experience   |  |          |   | ?   |
|----------------------------------|--|----------|---|-----|
| Primary operational experience * |  |          |   |     |
| Areas of Specializations         |  |          | Emergency situations<br>Protection<br>Post conflict | ^ ⑦ |
| Domain *                         | Years of experience in each area of specialization * | Comments | Development<br>Resettlement                         |     |
| Select Some Options              | - Please select                                      |          | Environmental<br>Others                             | ~   |

Figure 4.3.5.4.4 Primary Operational Experience section

#### Area of Specialization

Areas of specialization are required to understand the main expertise of the organization in the country of operation.

| Areas of Specializations                 |      |  |         |          |     | ? |
|--|------|--|---------|----------|-----|---|
| Domain *                                 |      | Years of experience in each specialization * | area of | Comments |     |   |
|  |      | - Please select                              | ~       |          | ADD |   |
| Administrative Institutions and Practice | ^    |  |         |          |     |   |
| Basic and Domestic Items                 |      |  |         |          |     |   |
| Camp Management and<br>Coordination      | XT > | SAVE   |         |          |     |   |
| Co-existence with Local<br>Communities   |      |  |         |          |     |   |
| Community Mobilization                   |      |  |         |          |     |   |
| Coordination and Partnership             | ~    |  |         |          |     |   |

Figure 4.3.5.4.5 Areas of Specializations section

- To create an entry, click on the **ADD** button.
- In the **Domain** column, select from the dropdown list the areas in which the organization specializes. One selection is mandatory and multiple selections are allowed.
- For each entry, to give a sense of the level of experience for this area of expertise, **Years of** experience is mandatory.
- To edit or delete an entry, click respectively on the UPDATE or DELETE button.

#### 3.3.5.5 Linkages with Persons of Concern

Provide in a text field a description, with examples, of the organization's linkages with persons of concern and host communities in the country of operation (*2,000 characters maximum*).

| ashboard                         | Linkages with Persons of Concern  | 0 |
|----------------------------------|---|---|
|                                  | A brief description, with examples, of the organization's linkages with persons of concern and host communities * |   |
| entification                     |   |   |
| unding                           |   |   |
| ollaboration                     | CANCEL < PREV NEXT > SAVE   |   |
| pacity and Experience            |   |   |
| Linkages with Persons of Concern |   |   |
| ther Information                 |   |   |

Figure 3.3.5.5 Linkages with Persons of Concerns section

#### 3.3.5.6 Other Information

In the Other Information section, enter any other information the organization wishes to share with UNHCR. This section is optional.

| Dashboard                        | Other Information   | 0) |
|----------------------------------|---|----|
|                                  | Other information the organization may wish to share with UNHCR |    |
| Identification                   |   |    |
| Funding                          |   |    |
| Collaboration                    | CANCEL <prev save="" submit<="" td=""><td></td></prev>          |    |
| Capacity and Experience          |   |    |
| Linkages with Persons of Concern |   |    |
| Other Information                |   |    |
|                                  |   |    |



## 3.4 Partner Dashboards

There are two (2) types of dashboards for Partners in the Partner Portal:

- i. Partner Organization Dashboard
- ii. Partner Country Dashboard

These are displayed to the Partner Portal user depending on the role and access rights of the user.

#### 3.4.1 Partner Organization Dashboard

The Organization Dashboard is located in the submenu: **Profile -> Dashboard**, and is the landing page for Partner Portal users. This Dashboard displays information from UNHCR core systems for all UNHCR projects implemented by the Partner.

#### 3.4.1.1 Partner Summary

Specific base Partner data are displayed from the organizational profile, which includes:

- Legal Name: Legal name of the organization from the Partner organizational profile
- **Registered in Country of Origin**: Yes/No. From the Partner organizational profile, based on the question: is the organization registered in the country of origin (*Yes or No*)?
- Partner M SRP Code: Unique Partner M SRP identification code from UNHCR core systems.
- Partner M SRP Vendor ID: Partner vendor ID from UNHCR core systems.
- Profile Last submission date: Last date the Partner submitted the organization profile.
- View full profile in PDF link to open the organizational profile in PDF format.
- **Operational Partner:** From Profile Management, the operational status of the Partner (*Yes or No*).
- Start Year: The first year the Partner has been implementing UNHCR projects.
- End Year: The last year the partner has been implementing UNHCR projects.

#### 3.4.1.2 Current Year Overview by Country

This section includes information on projects regardless if a country profile exists in the Partner Portal or not. The following information is extracted from the UNHCR core system for project agreements and from the Partner Portal for Calls for Expression of Interest (CfEIs) the for current year and by country:

- <u>Country</u> The country name where the partner is currently implementing UNHCR projects. If a profile exists on the Partner Portal for the country, the country name is clickable and opens on the Partner country dashboard.
- <u>**Projects**</u> Total number of UNHCR projects implemented by the Partner in the country.
- <u>Instalments Paid</u> Total amount of instalments paid to the Partner for UNHCR projects implemented by the Partner in the country.
- <u>Budget</u> Total amount of the budget allocated to the Partner for UNHCR projects implemented by the Partner in the country.
- <u>CfEls Submitted</u> Number of CfEls in the country where the Partner has submitted a Concept Note (applied to CfEl).
- <u>CfEls Selected</u> Number of CfEls in the country where the Partner was selected.
- **<u>CfEls Pending</u>** Number of CfEls in the country where the selection decision is still pending.

#### 3.4.1.3 Active Projects

Information in this section is extracted from UNHCR core systems and represents current year UNHCR projects implemented by the organization. It displays the following:

- <u>Project Name</u> Name of the project as recorded in UNHCR core systems.
- **<u>Project Agreement #</u>** Project agreement number as recorded in UNHCR core systems.
- <u>Status</u> Current status of the project.
- <u>Start Date</u> Start date of the project.
- <u>End Date</u> Estimated completion date of the project.
- <u>Budget</u> Budget allocated to the Partner for the project

• Instalments Paid - Instalments paid to the Partner for the project.

#### 3.4.1.4 Current Calls for Expression of Interest

Displays CfEls that exist in the Partner Portal where the Partner has submitted a Concept Note from the organizational profile level. It displays the following:

- Project Name Project name as entered on the CfEI with clickable link to the CfEI details.
- CfEl Reference Number CfEl reference number as created by the Portal on creation of the CfEl.
- Status CfEl Current status in the Partner portal: Open, Closed, Screening Complete, Selection Completed, Rescinded).
- **Project Location** CfEl project Location as recorded on the CfEl in the Partner Portal.

#### 3.4.1.5 Global Historical Collaboration

Information in this section is extracted from UNHCR core systems and returns data for projects implemented by the Partner in all countries for last past five (5) years before the current year. It displays the following:

- Year Each of the last five (5) years, starting from the most recent year.
- **<u>Project Agreements</u>** Total number of project agreements in the year.
- Instalments Paid Total instalments paid for all project agreements in the year.
- <u>Budget</u> Total budgets for all project agreements in the year.
- <u>Agreements Audited</u> Number of project agreements audited in the year
- **<u>Qualified Agreements</u>** Number of qualified project agreements in the year.
- **<u>Financial Performance</u>** Percentage of total Instalments Paid / total Budget in a year.

## 3.4.2 Partner Country Dashboard

The Country Dashboard is located in the submenu: **My Profile -> Dashboard**, and is the landing page for country Partner users. This Dashboard displays the information described below to the organization and Country Users.

## 3.4.2.1 Partner Summary

Specific base partner data from the country profile to include:

- Legal Name: From the Partner country profile Identification page
- **Registered in Country of Operation:** From country profile registration status, based on the profile question: Is the country registered in the country of operation (*Yes or No*)?
- Partner M SRP Code: Unique Partner M SRP identification code from UNHCR core systems.
- Partner M SRP Vendor ID: Partner vendor ID from UNHCR core systems.
- Profile Last submission date: Last date the Partner submitted the country profile.
- View full profile in PDF link to download the organization profile in PDF format.
- Operational Partner: From Profile Management, operational status of the Partner (Yes or No).
- Start Year: The first year the Partner has been implementing UNHCR projects.
- End Year: The last year the Partner has been implementing UNHCR projects.

## 3.4.2.2 Country Active Projects:

Information in this section is extracted from UNHCR core systems and represents current year UNHCR projects implemented by the organization in the current country of operation. It displays the following in order:

• <u>Project Name</u> – Name of the project as recorded in UNHCR core systems.

- **<u>Project Agreement #</u>** Project agreement number as recorded in UNHCR core systems.
- <u>Status</u> Current status of the project.
- <u>Start Date</u> Start date of the project.
- End Date Estimated completion date of the project.
- <u>Budget</u> Budget allocated to the Partner for the project.
- Instalments Paid Instalments paid to the Partner for the project.

#### 3.4.2.3 Current Calls for Expression of Interest:

Displays CfEls that exist in the Partner Portal where the partner has submitted a Concept Note from the country profile. It displays the following:

- **Project Name** Project name as entered on the CfEl with clickable link to the CfEl details.
- CfEl Reference Number CfEl reference number as created by the Portal on creation of the CfEl.
- Status CfEl Current status in the Partner Portal: Open, Closed, Screening Complete, Selection Completed, Rescinded).
- Project Location -- CfEl project Location as recorded on the CfEl in the Partner Portal.

#### 3.4.2.4 Historical Collaboration

Information in this section is extracted from UNHCR core systems and returns data for projects implemented by the Partner in the country for last past five (5) years prior to the current year. It displays the following:

- <u>Year</u> Each of the last five (5) years, starting from the most recent year.
- **<u>Project Agreements</u>** Total number of project agreements in the year.
- Instalments Paid Total instalments paid for all project agreements in the year.
- <u>Budget</u> Total budgets for all project agreements in the year.
- <u>Agreements Audited</u> Number of project agreements audited in the year
- **<u>Qualified Agreements</u>** Number of qualified project agreements in the year.
- **<u>Financial Performance</u>** Percentage of total Instalments paid / total budget in a year.

#### 3.4.2.5 Background Information

Statistical Snapshot containing data collected by UNHCR on populations of concern. It includes:

- **Residing in "country name"** contains the number of the population of concern who are residing in the country of operation.
- **Originating from "country name"** –contains the number of the population of concern whose originating country matches the current profile country name.

## 3.5 Administration

The Administration section allows Partner users to administer users and documents within their respective profile.

#### 3.5.1 User Management

#### 3.5.1.1 User roles

Each Partner user has access to edit profiles attached to his/her account and to view other profiles of the same organization. The following Partner roles exist:

- Organization Primary User
- Organization User
- Country User
The roles and functionality for each role is defined as:

| Partner users roles   |                              |                      |                  |
|---|------------------------------|----------------------|------------------|
| Functionality   | Organization<br>Primary User | Organization<br>User | Country User     |
| Profiles  |                              |                      |                  |
| Manage the organization's users accounts                    | Yes                          | No                   | No               |
| Capture Profile Information                                 | Yes <sup>1</sup>             | Yes <sup>2</sup>     | Yes <sup>3</sup> |
| Consult Partner Profile                                     | Yes <sup>1</sup>             | Yes <sup>1</sup>     | Yes <sup>1</sup> |
| Attach and remove documents                                 | Yes <sup>1</sup>             | Yes <sup>2</sup>     | Yes <sup>3</sup> |
| View documents  | Yes <sup>1</sup>             | Yes <sup>2</sup>     | Yes <sup>3</sup> |
| Calls for Expression of Interest                            |                              |                      |                  |
| View Posted Calls for Expression of Interest                | Yes                          | Yes                  | Yes              |
| Express interest in partnering                              | Yes                          | Yes                  | Yes <sup>3</sup> |
| View Partners' submissions                                  | Yes <sup>1</sup>             | Yes <sup>2</sup>     | Yes <sup>3</sup> |
| Conferences   |                              |                      |                  |
| View conference details                                     | Yes                          | Yes                  | Yes              |
| View the list of the organization's registered participants | Yes <sup>1</sup>             | Yes <sup>1</sup>     | Yes <sup>1</sup> |
| Register participants for a conference                      | Yes <sup>4</sup>             | Yes <sup>4</sup>     | Yes <sup>4</sup> |

1. At both organization (HQ) and country level

2. Only at organization level (HQ)  $% \left( {H_{\rm A}} \right)$ 

3. In their assigned country only

4. Participants must be from the same organization

## 3.5.1.2 Adding a New User to this Profile

This Managing Profile Users section allows Partners' primary users to add and delete users' accounts.

## 3.5.1.2.1 Adding Partner Users

To manage your organization's user accounts, click on the **User Management** submenu located under the **Administration** main menu.

In **Add New User to this Profile** section, fill in the user contact information and select **Type of User** from the dropdown list based on the above **Partners User Roles** matrix. The list of existing country profiles is included in the dropdown list. Therefore, to attach the account to a country profile, select the country from the dropdown list. There is no limitation to the number of accounts you can create. Once you click on the **ADD** button to record the new entry, the system will send a notification to the email address of the newly created account. The notification message includes a link to create a password.

| User Management    | Add New User to this Profile |                              |                |            |  |            |  |
|--------------------|------------------------------|------------------------------|----------------|------------|--|------------|--|
| ocument Management | First Name *                 |                              | Last Name *    |            |  |            |  |
| eports             | Email *                      |                              | Type of User * |            | Organization Primary Co<br>Organization<br>Denmark | ontact     |  |
|                    | Existing Users               | Туре                         |                | Created on | Status   |            |  |
|                    | nilesh.jaiswal@local.host    | Denmark                      |                | 4/3/2014   | Active   | DEACTIVATE |  |
|                    | sandeep.s.awakale@local.host | Organization Primary Contact |                | 4/3/2014   | Active   |            |  |

Figure 3.5.1.2.1 Add New User to this Profile section

## 3.5.1.3 Deactivating and Re-activating Profile Users

By default, all accounts created under the User Management functionality are set active. Only Partners' primary user accounts can deactivate accounts by clicking on the **DEACTIVATE** button next to the account. Once deactivated, the status of the user account changes to inactive and the **DEACTIVATE** button is replaced with the **ACTIVATE** button. In the same manner, when an account has been deactivated, it can be reactivated by clicking on the **ACTIVATE** button next to the account.

## 3.5.1.4 Changing Profile User Passwords

All Partner users can change their passwords while they are logged into the Partner Portal. To change your password, in the **Change Password** section, enter your current password, then enter the new password and repeat the new password in the **Confirm new password** field, and then click on the **ChANGE** button.

| Change Password        | 0 |
|------------------------|---|
| Current password *     |   |
| New password *         |   |
| Confirm new password * |   |

Figure 3.5.1.4 Change password

If you are not logged into the Portal, the instruction for forgotten passwords can be found in the **Create, Edit and View Profiles** section of this document.

#### 3.5.2 Document management

To manage profile documents, click on the **Document Management** submenu located under the **Administration** main menu item.

In the **Document Management** submenu, you can upload and view only documents of the profile you are managing. Primary users have full access to all documents for profiles within the same organization.

To add a document in the profile library:

- Enter a Name for the document in the Name field.
- Select the document category from the dropdown list.

- If you are an Organization Primary User, select the country name from the dropdown list to attach the document to the country profile, or Organization to attach to the organization profile.
- Click BROW SE to select the document you want to upload from your local drive.
- In the Comment field, enter a description of the document.
- Click on the **UPLOAD** button to complete the procedure and save the document in the library.

Once uploaded, a new line item is added with a clickable name to open the document. A **DELETE** button is defined for each line item in case you want to remove the document from the library.

Note:

- The size of each document must be less than 10M.
- All documents uploaded in the profile editing have the "Uploaded during profile creation" comment.
- All documents uploaded in the profile editing will not have a **DELETE** button.
- You can only delete documents you have uploaded.

| Jser Management     | Add Documents                     |                         |                         |                       |         |  |             | ?      |
|---------------------|-----------------------------------|-------------------------|-------------------------|-----------------------|---------|--|-------------|--------|
| Document Management | Name *                            |                         |                         |                       |         |  |             |        |
| Reports             | Category * -                      | Please select           | V                       |                       |         |  |             |        |
|                     | Country At                        | ghanistan               | ~                       |                       |         |  |             |        |
|                     | Document *                        |                         | Browse                  |                       |         |  |             |        |
|                     | Comments                          |                         |                         |                       |         |  |             |        |
|                     | CANCEL UPLOAD                     |                         |                         |                       |         |  |             |        |
|                     | Name                              | Uploaded on             | Document type           | Uploaded by           | Size    | Comments                               | Country     |        |
|                     | Ogranigram InPro.pdf              | 3/27/2014 2:15:32 PM    | Organization Chart      | mbenhabiles@gmail.com | 1872 KB | Uploaded during profile creation/edit  | Switzerland |        |
|                     | 2011-annual-report_for-web_5mb.pr | df 3/27/2014 2:15:55 PM | Other                   | mbenhabiles@gmail.com | 5327 KB | Uploaded during profile creation/edit  | Switzerland |        |
|                     | Test upload document              | 3/28/2014 1:34:33 PM    | Administrative Document | unhcr\benhabil        | 5327 KB | Document uploaded with full visibility | Switzerland |        |
|                     | Ogranigram InPro - Iraq.pdf       | 3/27/2014 3:13:30 PM    | Organization Chart      | mbenhabiles@gmail.com | 1872 KB | Uploaded during profile creation/edit  | Iraq        | DELETE |
|                     |                                   |                         |                         |                       |         |  |             |        |

Figure 3.5.2 Document Management section

| Field                    | Description   |
|--------------------------|---|
| Name                     | Enter the name of the document.                                     |
| Category                 | Select the category of document from the dropdown list.             |
| Country                  | Select a Country name, to attach the document to a specific country |
| (Only for Primary Users) | profile, or Organization for organization profile documents.        |
| Document                 | File name of the upload document.                                   |
| Comments                 | Enter any relevant comments about the document.                     |

# 3.6 Call for Expression of Interest

The **Calls for Expression of Interest** (CfEIs) main menu provides you with access to current CfEIs, allowing you to search the CfEIs database using multicriteria filters, to manage your submissions to Open CfEIs and view the selection status of CfEIs.

When you click on the **Calls for Expression of Interest** main menu button, a page appears with a left side menu bar containing **Latest** and **Search** submenus. The **Latest** submenu is highlighted and a list of open CfEls is displayed under the **Open Calls for Expression of Interest** section. If there are no current open CfEls, a "No project" message will be displayed.

The Primary and Organization Users will have by default a view of all **OPEN** CfEls, whereas Country Users will have a view of **OPEN** CfEls in their country only.

#### 3.6.1 Latest

In the displayed list of CfEls under the **Latest** submenu, click on a **Project title** to view the details of the CfEl. As the status of the CfEl is open, you can submit a Concept Note or update your submission. You can only apply or update a submission of CfEls with **OPEN** project status. On the submission deadline date, the status will change to **CLOSE** and access will be blocked for new submissions or updates.

| The UN Refuge |                                   |                  |                         |                    |                       |                     |   |
|---------------|-----------------------------------|------------------|-------------------------|--------------------|-----------------------|---------------------|---|
|               | () Knowledge Hub                  | My Profile       | Calls for Expression of | interest 🕵 Confere | ences <b>Ro</b> Admir | nistration          |   |
| Calls fo      | r Expression of Interest 🕨 Latest |                  |                         |                    |                       |                     |   |
| Latest        | Open Calls for Expres             | sion of Interest |                         |                    |                       |                     | 0 |
| Search        | Project title                     | Ref#             | Country                 | Project Status     | Post Date             | Submission deadline |   |
|               | test023MP                         | CEIBLR20140001   | Belarus                 | OPEN               | 25/09/2014            | 28/09/2014          |   |
|               | hihafiha                          | CEIAFG20140007   | Afghanistan             | OPEN               | 25/09/2014            | 29/09/2014          |   |
|               | Test project 1 MP                 | CEIHUN20140001   | Hungary                 | OPEN               | 08/09/2014            | 30/09/2014          |   |

Figure 3.6.1 - Latest section

#### 3.6.2 Search

In the **Search** submenu, the **Search** tool gives you the ability to access and filter the entire Calls for Expression of Interest database to search for CfEls using multicriteria filtering parameters.

Opening a CfEl from the search result list will give the same options as opening it from the Latest submenu.

| 🕜 🕨 Calls f | or Expression of Interest 👂 Search |                     |                       |                     |   |
|-------------|------------------------------------|---------------------|-----------------------|---------------------|---|
| test        | Search Existing Pr                 | ojects              |                       |                     | ? |
| Search      | Project title                      |                     | Reference Number      |                     |   |
|             | Country                            | Select Some Options | Project Status        | Select Some Options |   |
|             | Project Goal                       |                     | Intended Population   | Select Some Options |   |
|             | Estimated Project                  | Start               | Estimated Project End | 1                   |   |
|             | From                               |                     | From                  |                     |   |
|             | То                                 |                     | То                    |                     |   |
|             | Posted date                        |                     | Submission deadline   |                     |   |
|             | From                               |                     | From                  |                     |   |
|             | То                                 |                     | То                    |                     |   |

Figure 3.6.2 – Search section

To filter the search results, multiple fields can be filled in. The logic used is:

• When multiple choice is used (for a given criterion): a logical "**OR**" is performed,

• When different criteria are combined, a logical "AND" is performed

Fill in filtering criteria as described in the next steps. A minimum of one criterion is required:

- In **Project Title**, enter the exact title of a project or words from project titles. (*The tool will search for the exact words or phrase entered.*)
- In **Project Status**, select the status of CfEls from the dropdown list. (*Multiple selections are allowed. The tool will search for any of the selected status*)
- In **Country**, select the country issuing CfEl from the dropdown list. (*Multiple selections are allowed. The tool will search for any of the selected countries.*)
- In **Reference Number**, enter the CfEl Reference number if known or part of the Reference number such as Country 3 Characters ISO code or year (*For example to filter CfEls for 2014, enter only 2014; to search for all CfEls in Chad, enter CHD.*)
- In **Project Goal**, enter a phrase or text string to be searched in the CFEIs Project goal field. (*The tool will search for the exact word or phrase entered.*)
- In **Intended Population of Concern**, select the group of persons from the dropdown list. (*Multiple selections are allowed. The tool will search for any of the selected Intended Population of Concern types.*)
- In **Estimated project start date**, select **From** and **To** dates. (*The tool will search within the range of defined dates including the dates entered.*)
- In **Estimated project end date**, select **From** and **To** dates. (*The tool will search within the range of defined dates including the dates entered.*)
- In **Posted date**, select **From** and **To** dates. (*The tool will search within the range of defined dates including the dates entered.*)
- In **Submission Date**, select **From** and **To** dates. (*The tool will search within the range of defined dates including the dates entered.*)

Once completed, click on the **SEARCH** button and a list of CfEls matching the criteria set is returned with their current status. To open the details page of a CfEl, click on the project title.

## 3.6.3 Applying to a Call for Expression of Interest

Partners can only submit a Concept Note for a CfEl once in the detailed page of an OPEN CfEl.

| Identification  |   |  |                        | 0 |
|---|---|--|------------------------|---|
| Reference Number  | CEIIND20140002  | Project Agreement Manager email  | Sandip Awakale@s-h.ch  |   |
| Project title *   | USERProject   | Project Status *   | OPEN                   |   |
| Project location *  | Pune  | Issued by UNHCR Office *   | New Delhi, India       |   |
| Intended population of concern *  | Stateless, Returnees  | Country *  | India                  |   |
|   |   |  |                        |   |
| Brief background of the project   |   |  |                        |   |
| Brief background of the project *   |   |  |                        |   |
| Goal/Objective, expected outcome a  |   |  |                        |   |
| Goal/Objective, expected outcome an   | d main activities *   |  |                        |   |
| Other Information   |   |  |                        |   |
| Other Information   |   |  |                        |   |
|   |   |  |                        |   |
| Project Period  |   |  |                        | 0 |
| Project Period Posted date *  | 20/01/2014  | Submission deadline *  | 21/01/2014             | 0 |
|   | 20101/2014  | Submission deadline *<br>Estimated end dats *  | 2101/2014<br>2301/2014 | 0 |
| Posted date *   |   |  |                        | 0 |
| Posted date *<br>Estimated start date *<br>Date decision results to be  | 22/01/2014  | Estimated end date *   |                        | 0 |
| Posted date *<br>Estimated start date *<br>Date decision results to be<br>communicated *  | 22/01/2014  | Estimated end date *   |                        |   |
| Posted date *<br>Estimated start date *<br>Date decision results to be<br>communicated *<br>Selection Criteria  | 2201/2014<br>2503/2014<br>Description                             | Estimated end date *   | 23/01/2014             |   |
| Posted date *<br>Estimated start date *<br>Date decision results to be<br>communicated *<br>Selection Criteria<br>Criteria  | 22/01/2014<br>25/03/2014<br>Description<br>administrative and fit | Estimated end data *<br>Extension date   | 2301/2014              |   |
| Posted date *<br>Estimated start date *<br>Date decision results to be<br>communicated *<br>Selection Criteria<br>Criteria<br>Cost effectiveness<br>Local experience and presence | 22/01/2014<br>25/03/2014<br>Description<br>administrative and fit | Estimated end date * Extension date anoial burden imposed on the Project in relation to project delive | 2301/2014              |   |
| Posted date *<br>Estimated start date *<br>Date decision results to be<br>communicated *<br>Selection Criteria<br>Criteria<br>Cost effectiveness                                  | 22/01/2014<br>25/03/2014<br>Description<br>administrative and fit | Estimated end date * Extension date anoial burden imposed on the Project in relation to project delive | 2301/2014              |   |
| Posted date *<br>Estimated start date *<br>Date decision results to be<br>communicated *<br>Selection Criteria<br>Criteria<br>Cost effectiveness<br>Local experience and presence | 22/01/2014<br>25/03/2014<br>Description<br>administrative and fit | Estimated end date * Extension date anoial burden imposed on the Project in relation to project delive | 2301/2014              |   |

Figure 3.6.3 – Partner Calls for Expression of Interest screen

To submit a Concept Note to a CfEI, follow these steps:

- Click on the Project title name of the CfEl you want to view. (A page opens with the details of the CfEl)
- Navigate to the bottom of the page, and click on the **APPLY** button. (*A new section* **Concept Note** is added to the bottom of the page)
- In the **Contact Person** field, from the dropdown list, select the name of the designated contact person to receive notifications for the current Call for Expression of Interest. (*Names in the dropdown list are Primary Contact Person names from the default Organization/Country profile*)
- If your profile is up to date, tick the box: I confirm that my Partner Profile is up to date.
- Click on **BROW SE** to select and upload the Concept Note document (10M maximum). Once uploaded, the document name appears with a link to open the document. A **DELETE** button is added to allow you to remove the document from the Portal if needed.
- Click on the SUBM IT button to complete the process.
- The page refreshes and a popup message appears, notifying you that the submission has been successful.
- Click on the **OK** button to return to the Call for Expression of Interest detailed page where the Submission date is updated with current day's date in the **Concept Note** section.
- Go to the **Dashboard** submenu under the **M y Profile** main menu and verify that a record for your submission exists under the **Current Calls for Expression of Interest** section.
- If you click on the Project title of the CfEl, it will open to the content page of the CfEl with details of your submission.

| Selection Criteria   |                  |                                       |   |                                      |
|----------------------|------------------|---------------------------------------|---|--------------------------------------|
| Criteria             |                  | Description                           |   |                                      |
| Cost effectiveness   |                  | administrative and finance            | al burden imposed on the Project in relation to | project deliverbles.                 |
| Local experience and | presence         | ongoing programme in th<br>persons of | area of operation, security considerations, loc | cal knowledge, engaging refugees and |
| Concept Note         |                  |                                       |   |                                      |
| Legal Name           | TestSandip121313 |                                       | Submission Date                                 |                                      |
| Contact person *     |                  |                                       | I confirm that my Partner Profile is u          | up to date.                          |
| Upload Concept Note, | as appropriate * |                                       | No docume                                       | ent uploaded                         |
|                      |                  |                                       |   |                                      |

Figure 3.6.4 - Concept Note section

Field Description of the Concept Note section:

| Field/ Button       | Description   |
|---------------------|---|
| Legal name          | Organization Legal Name from the Partner Profile. Not Editable.   |
| Contact Person      | Contact Person is selected from the Authorized Contact Persons list in the Identifications menu of the profile.   |
| Submission date     | Submission date uses the date when submit is selected (and will display empty before).  |
| Upload Concept Note | Allows the user to upload the Concept Note document for submission to the selected CfEI.  |
| Cancel              | Cancels the submission.   |
| Submit              | Submits the Concept Note for assessment by UNHCR. Once submitted<br>the Partner Dashboard will contain the CfEI. It will not be possible to<br>submit if required fields are not completed or if the submission date<br>has passed. |

Note:

- The Partner can create and update a CfEI any time before the submission deadline.
- The submission is based on the user default profile. If the contact person has to be selected from the Authorized Contact Persons list of a country profile, it is recommended that submission is done by a Country User attached to the country profile.

# 3.7 Conferences

You can only request registration for participants from your organization for conferences with a **REGISTRATION OPEN** status.

#### 3.7.1 Search

In the **Search** submenu located under the **Conferences** main menu, the search tool allows you to search for past, current and future conferences and to display the list of participants from your organization for a conference.

| 0 |
|---|
| V |
|   |
|   |
|   |
|   |
|   |
|   |
|   |
|   |

Figure 3.7.1 Conference Search section

Field and button descriptions for Conference Search:

| Field/ Button   | Description   |
|-----------------|---|
| Title           | Title includes a brief and descriptive title for the Conference and could   |
|                 | be used to verbally refer to a Conference.  |
| Subtitle        | Includes the subtitle for the Conference  |
| Conference Type | Conference type, selected from the dropdown list.   |
| Status          | Status of conference to search, selected from a dropdown box.   |
| Location        | City/Area for the conference.   |
| Country         | Country for the Conference.   |
| Start Date      | Start date of the conference. <b>From</b> will search all dates pasted on the entered date and <b>To</b> will search all dates before the entered date. |
| End date        | End date of the conference. <b>From</b> will search all dates pasted on the entered date and <b>To</b> will search all dates before the entered date.   |
| Cancel          | Cancels the search and clears results.  |
| Search          | Starts the Search.  |

## 3.7.2 Search Results

Once the search is completed, results are displayed in a list. You can select a conference for more information, and if the registration status is **REGISTRATION OPEN**, you can request attendance to it or request registration for any person from your organization.

| earch Results           |                   |                    |          |            |            |               |
|-------------------------|-------------------|--------------------|----------|------------|------------|---------------|
| Title                   | Status            | Subtitle           | Location | Start Date | End Date   | Registrations |
| Test conf               | Registration Open |                    | Bulgaria | 01/01/2015 | 02/02/2015 | 0             |
| as                      | Registration Open |                    | as       | 01/03/2015 | 01/03/2015 | 0             |
| Project Title on 422014 | Registration Open | SubProTitle 422014 | Pune     | 04/04/2014 | 05/04/2014 | 2             |
| New 2042014             | Registration Open | Test               | Pune     | 16/04/2014 | 21/04/2014 | 2             |
| ConMang422014           | Registration Open | CMnew422014        | Geneva   | 04/04/2014 | 05/04/2014 | 1             |
| SampleTesting           | Registration Open | SAMPTEST           | Delhi    | 04/04/2014 | 05/04/2014 | 2             |
| TESTConference          | Registration Open | Testcon            | Mumbai   | 04/04/2014 | 05/04/2014 | 2             |

Figure 3.7.2 Conference Search Results section

## 3.7.3 Request Registration for Conference

Steps in self-registering:

- 1. Select a conference that is open for registration.
- 2. Select **REGISTER**.
- 3. Complete attendee's information details and press **SUBM IT**. See figure 3.7.3 below.
- 4. UNHCR will process the registration request. The decision will be sent by email to the participant's email address.
- 5. For each request, the decision will be reflected in the status field of the list of participants under the Registration section

|   | Organization Contact Information   |                 |                                   |                              |  |  |
|---|------------------------------------|-----------------|-----------------------------------|------------------------------|--|--|
|   | Name                               | Helping Hands   |                                   |                              |  |  |
|   | First Name                         |                 | Last Name                         |                              |  |  |
|   | Full Mailing Address *             | aaaaaaaaaaaaaaa |                                   |                              |  |  |
|   | Country *                          | New Zealand     | City *                            | плопопопопопопоп             |  |  |
|   | Telephone *                        | 34324324234234  | Fax                               | 343434432443                 |  |  |
|   | Website                            | www.gmail.com   | Email *                           | sandeep.s.awakale@local.host |  |  |
|   | Operational Partner                | No              |                                   |                              |  |  |
| ( | Participant Information            | 1               |                                   |                              |  |  |
|   | First Name (same as<br>passport) * |                 | Last Name (same as<br>passport) * |                              |  |  |
|   | Title *                            | ⊖ Mr. ⊖ Ms.     | Position                          |                              |  |  |
|   | Email *                            |                 | Telephone                         |                              |  |  |
|   | Mobile                             |                 | Fax                               |                              |  |  |
|   | Nationality *                      |                 | Birth Date *                      |                              |  |  |
|   | Passport ID *                      |                 | Passport Expiry Date *            |                              |  |  |
|   | Display Name                       |                 |                                   |                              |  |  |
|   |                                    |                 |                                   |                              |  |  |

Figure 3.7.3 Conference Registration screen

## 3.7.3.1 Organization Contact Information

This section is prefilled from the default partner profile.

# 3.7.3.2 Participant Information

You will have to fill in the participant contact information for each person you want to request registration for the conference.

| Field/ Buttons          | Required | Description   |
|-------------------------|----------|---|
| First Name              | Yes      | Enter the first name of the participant as it appears on his/her<br>Passport    |
| Last Name               | Yes      | Enter the last name for the participant as it appears on the Passport           |
| Title                   | Yes      | Mr. or Ms.  |
| Position                | No       | Participant's position in the organization.                                     |
| Email                   | Yes      | Participant's email address   |
| Telephone               | No       | Participant's telephone number  |
| Mobile                  | Yes      | Participant's mobile number   |
| Fax                     | No       | Participant's fax number  |
| Nationality             | Yes      | Select the nationality from the dropdown list                                   |
| Birth Date              | Yes      | Enter the birth date using date picker control                                  |
| Passport Id             | Yes      | Enter Passport Id Number  |
| Passport<br>Expiry Date | Yes      | Select the Passport expiry date   |
| Display Name            | No       | Enter the display name if different from the First and Last name, fields above. |
| Cancel                  |          | Click 'Cancel' button to cancel. Changes will not be saved.                     |
| Submit                  |          | Submits registration for UNHCR processing.                                      |

Field and button descriptions for Conference Participant Registration:

END OF THE GUIDE

# THANKS

UNHCR (DFAM/Implementing Partnership Management Service) wishes to express its deep gratitude to the individuals and organizations that have contributed to the development of the Portal, particularly the international network of NGO Partner Organisations including International Council for Voluntary Agencies, InterAction, Refugee Council-USA, Asia Pacific Refugee Rights Network, OFADEC and African Taskforce and the UNHCR-NGO Field Working Group:

- African Humanitarian Action-AHA
- REDESO
- Refugee Consortium of Kenya
- American Refugee Committe
- International Rescue Committee
- CFSI
- Don Bosco
- SHARP
- Danish Refugee Council-DRC
- Greek Council for Refugees
- IMC
- INTERSOS
- Norwegian Refugee Council-NRC
- OXFAM
- World Vision
- Jordan Health Aid Society
- Qandil
- SHS

Suggestions for the betterment of the Portal and enhancements its capabilities are greatly valued and appreciated. For the suggestions and requests for further details please contact <u>epartner@unhcr.org</u>



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