UNHCR
The UN Refugee Agency

Enhanced Framework for Implementing Partnership with UNHCR

PARTNER USER GUIDE

UNHCR Partner Portal – Phase 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UNHCR data on Partners are outdated and incomplete.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 epartner@unhcr.org.

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
III. 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
IV. Calls for Expression of Interest
   A. Latest
      i. Review/apply to CfEI
   B. Search
      i. Review/apply to CfEI
V. Conferences
   A. Search - Registration
VI. Administration
   A. User Management

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.

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.

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.

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.

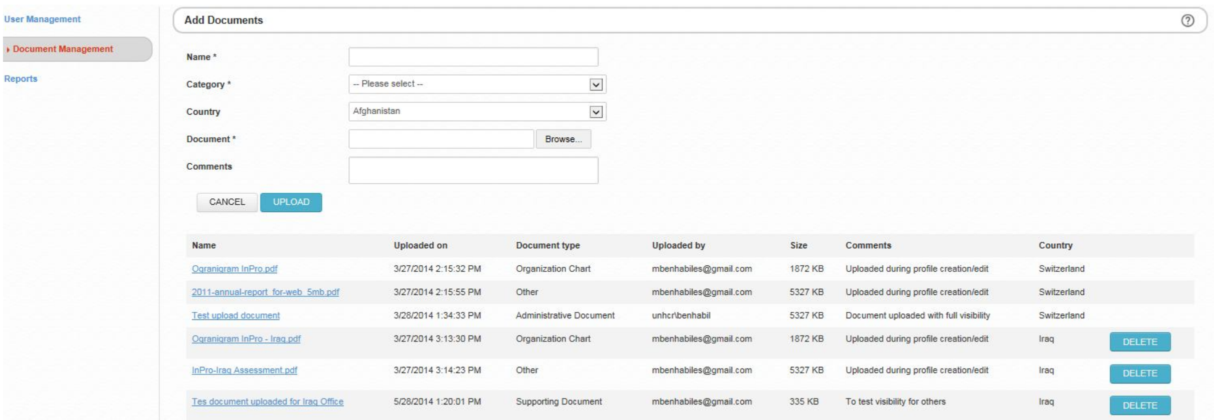


Figure 2.2.3 Document Management section

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 **BROWSE** 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.

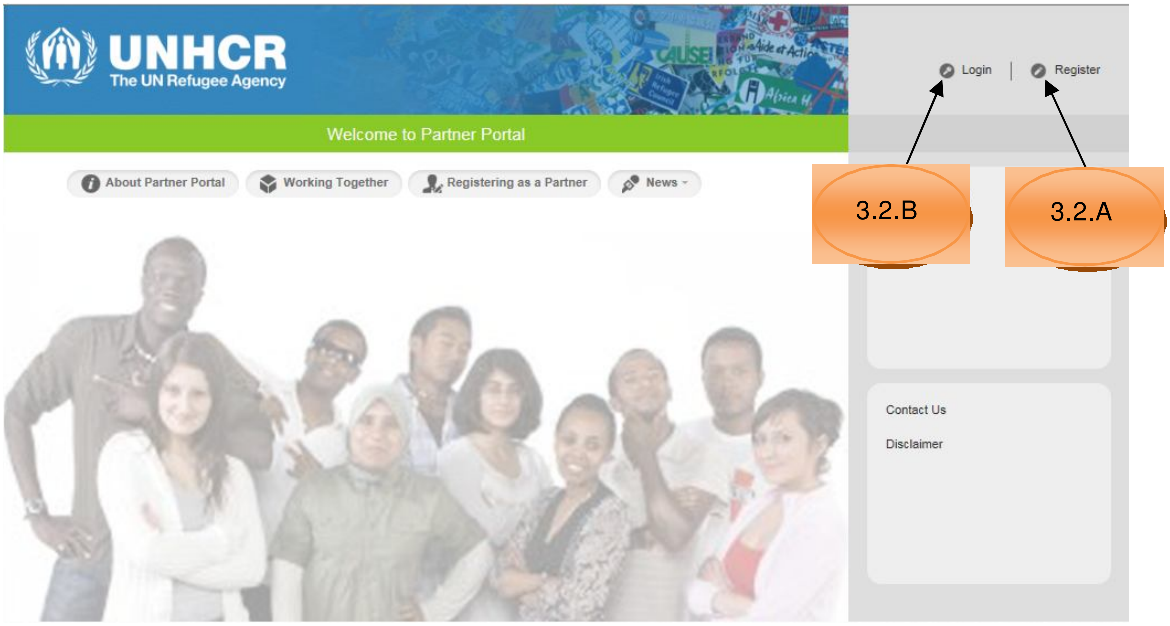


Fig 3.2 Partner Portal Landing Page

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.

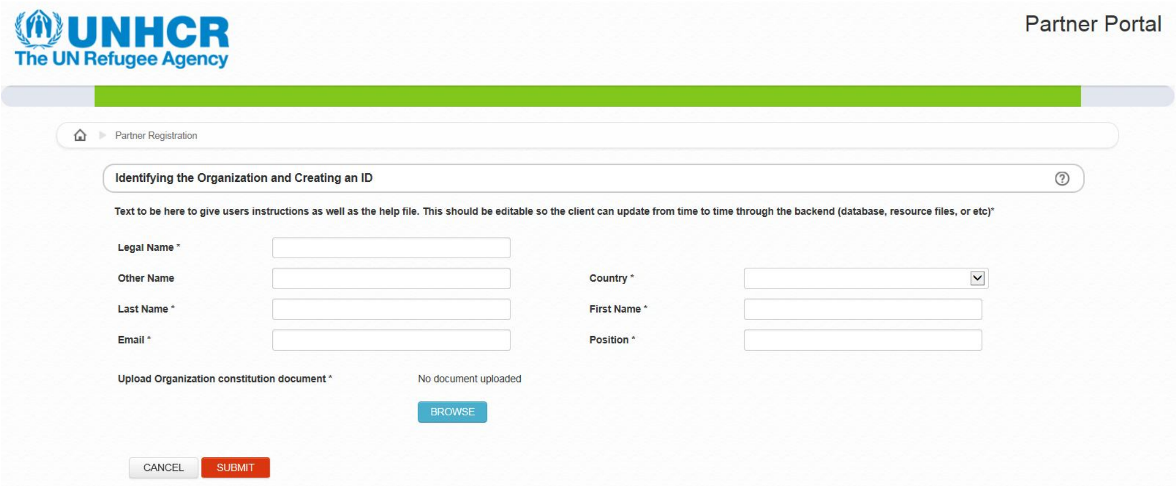


Figure 3.2.1 Self-Registration Screen

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 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 **SUBMIT** 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.*

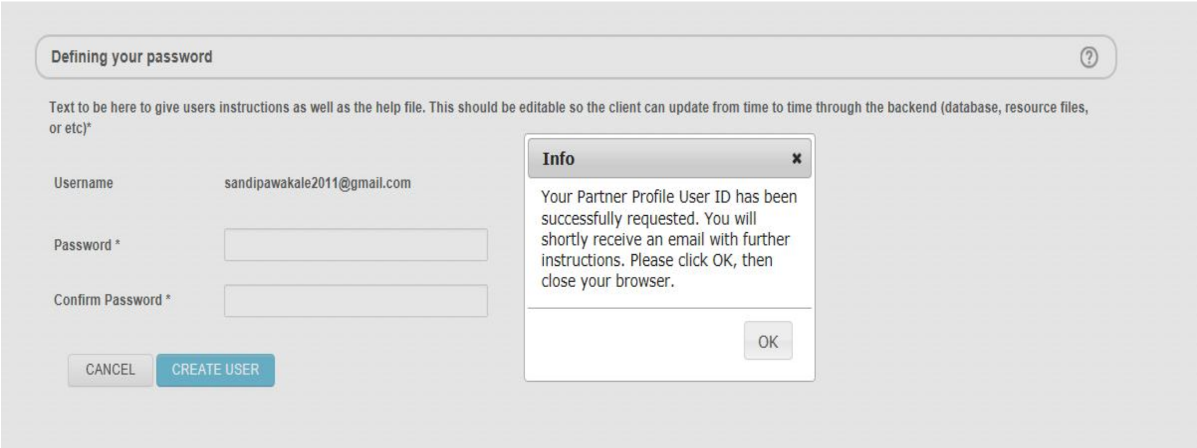


Figure 3.2.2 Defining your password

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.

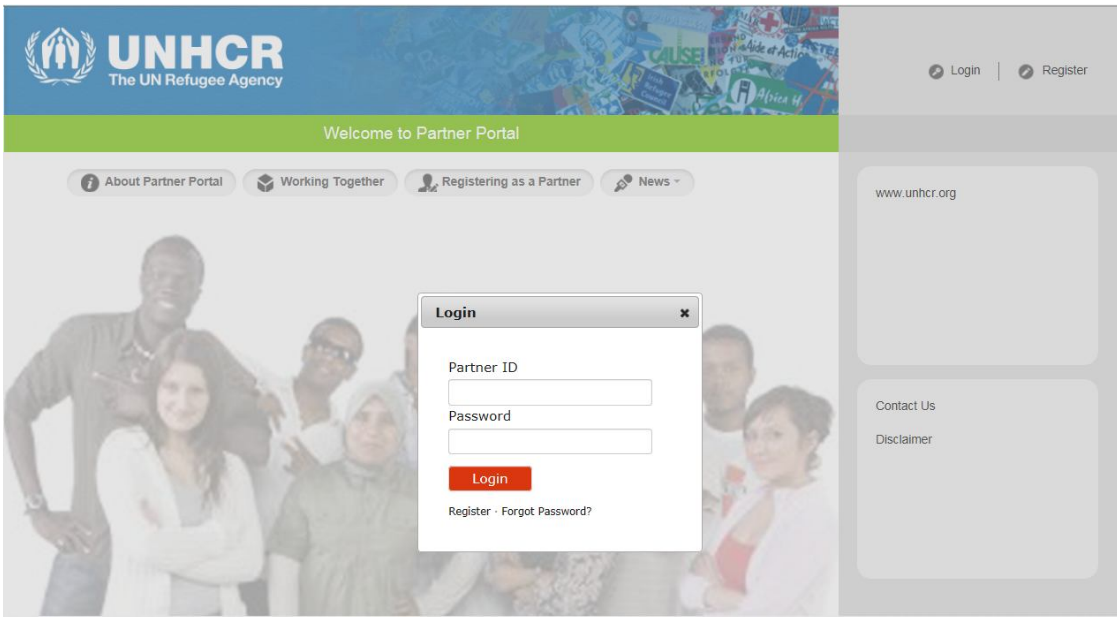


Figure 3.3.1 Login Page

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.

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.

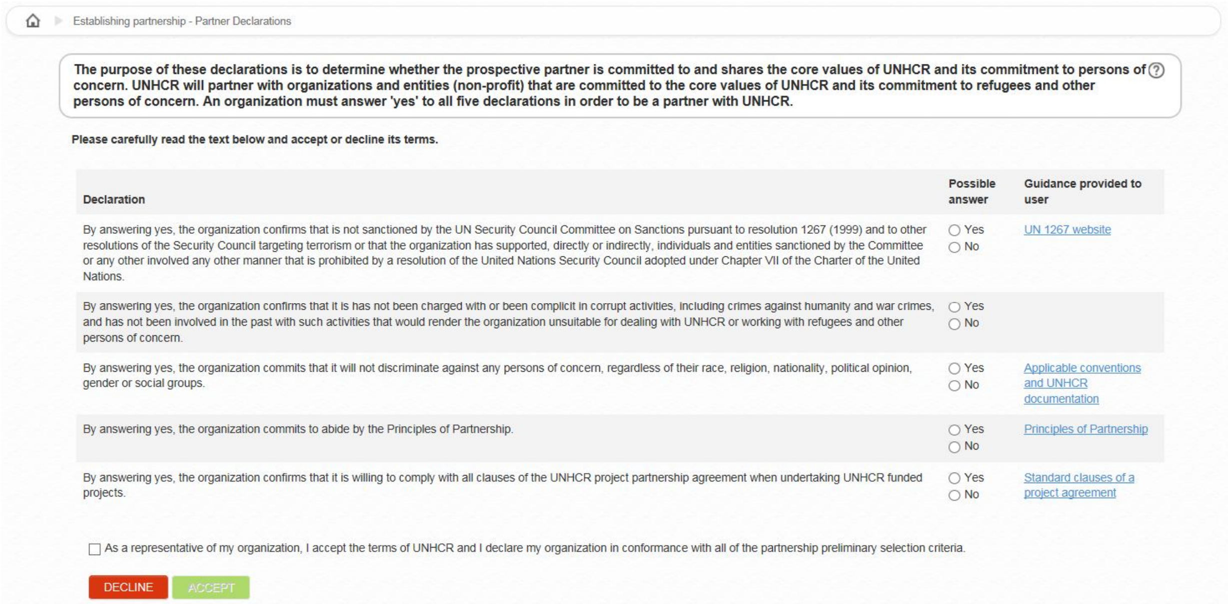


Figure 3.3.3 Global Compliance

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

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.

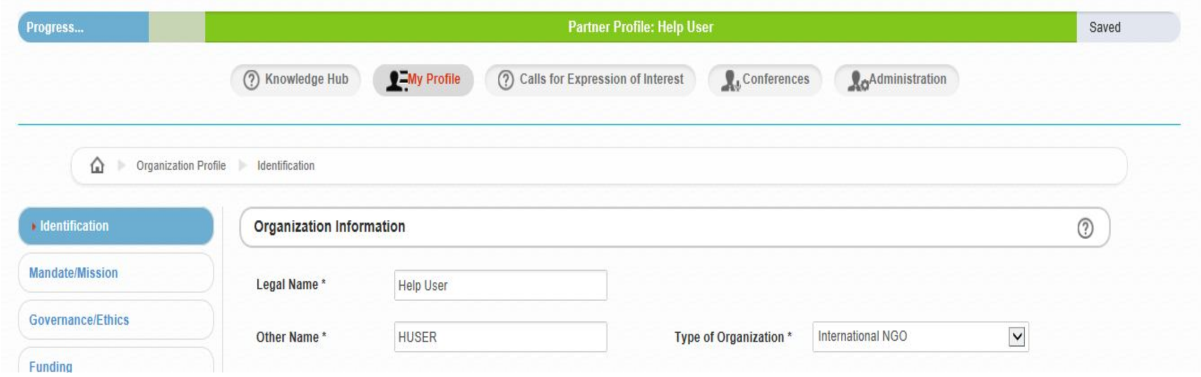


Figure 3.3.4.1.1 Organization Information section

Field	Required	Description
Legal Name	Yes	Prepopulated, entered at the time of registration
Other Name	Yes	Prepopulated, entered at the time of registration
Type of Organization	Yes	Use 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

Figure 3.3.4.1.2 Registration of Organization in Country of Origin section

Field	Required	Description
Year of establishment in country of origin	Yes	Provides length of time, the organization has been in existence - establishment may pre-date registration
Registration in country 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 Number	The organization's registration number in the country of origin

Registration Date	Initial registration date of the organization in the country of origin
Registration 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.

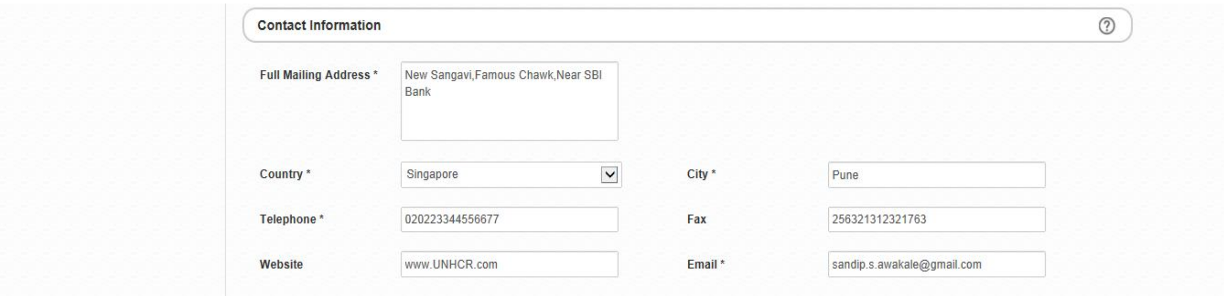


Figure 3.3.4.1.3 Contact Information section

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.*

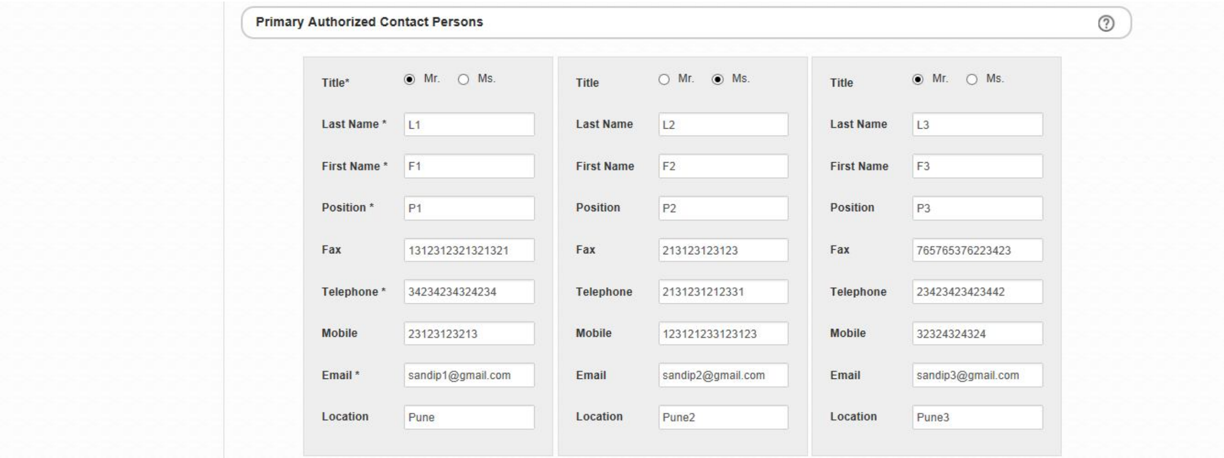


Figure 3.3.4.1.4 Primary Authorized Contact Persons section

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.

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 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.

Working Language

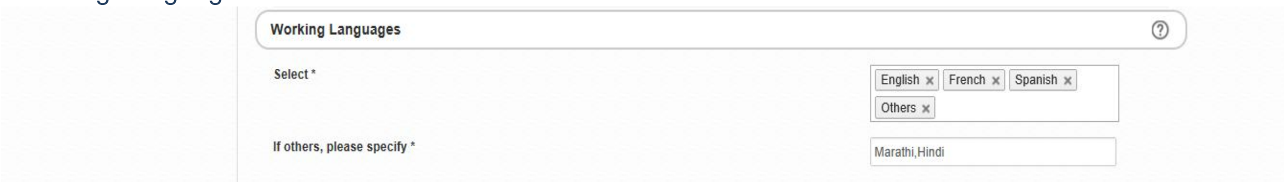


Figure 3.3.4.1.6 Working Language section

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 specify	Yes*	Free text field for other languages

* Required only if 'other' is selected

Countries of Operation/Presence

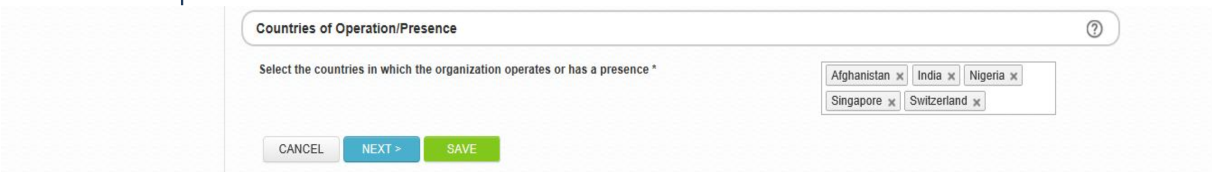


Figure 3.3.4.1.7 Countries of Operation/Presence section

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.

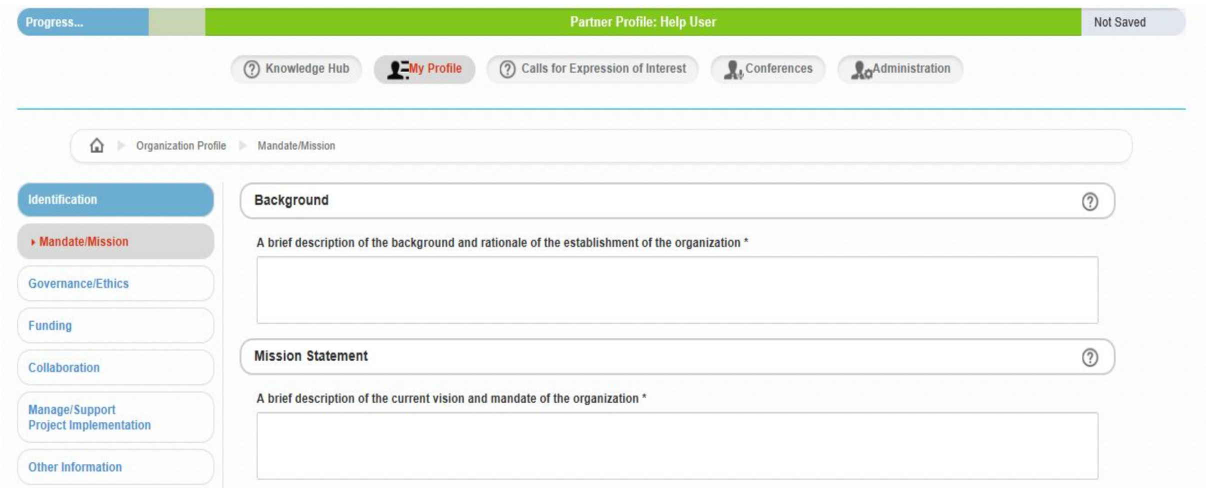


Figure 3.3.4.2.1 Background and Mission Statement sections

Primary Persons of Concern

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

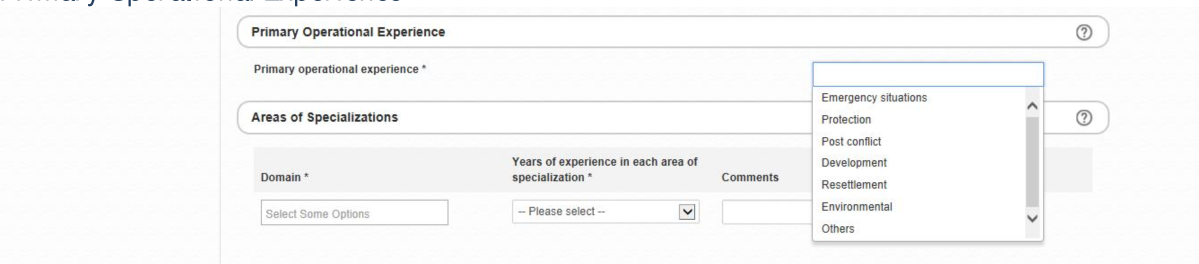


Figure 3.3.4.2.3 Primary Operational Experience section

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.

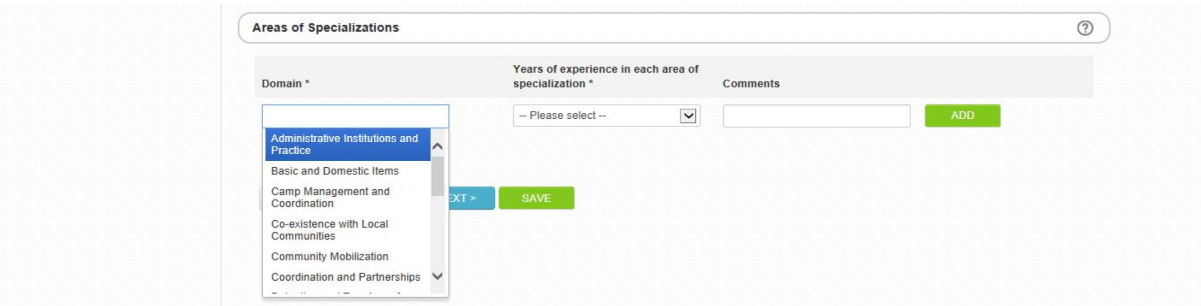


Figure 3.3.4.2.4 Area of Specialization section

- 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 each area of specialization	Yes	Select the years of experience from the dropdown list

Comments	No	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.

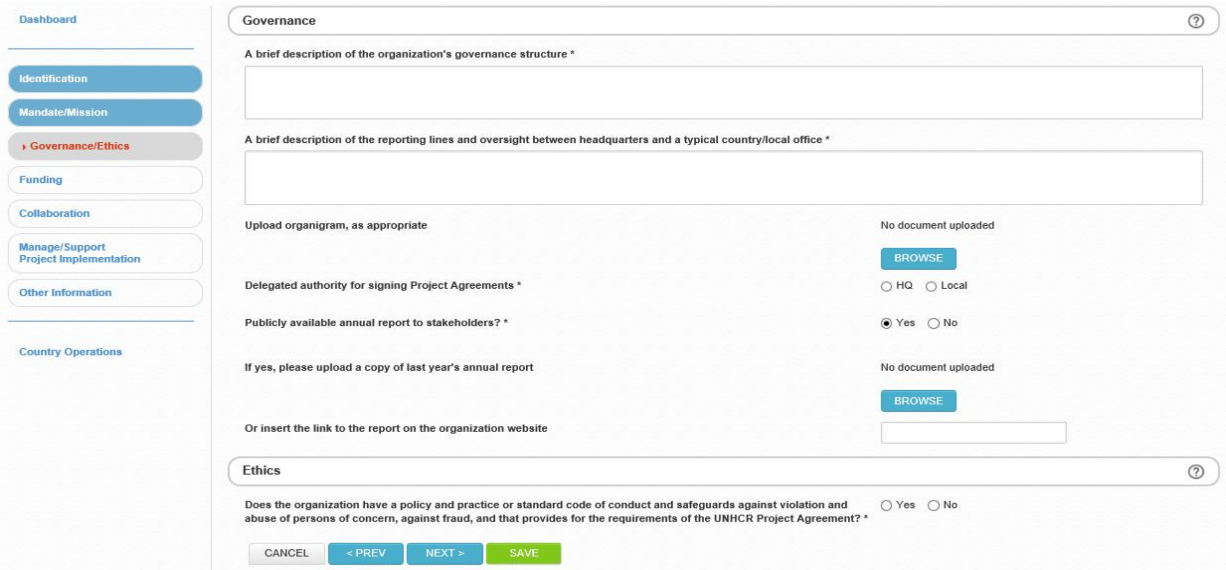


Figure 3.3.4.3.1 Governance & Ethics screen

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 **BROWSE** 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 **BROWSE** 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.

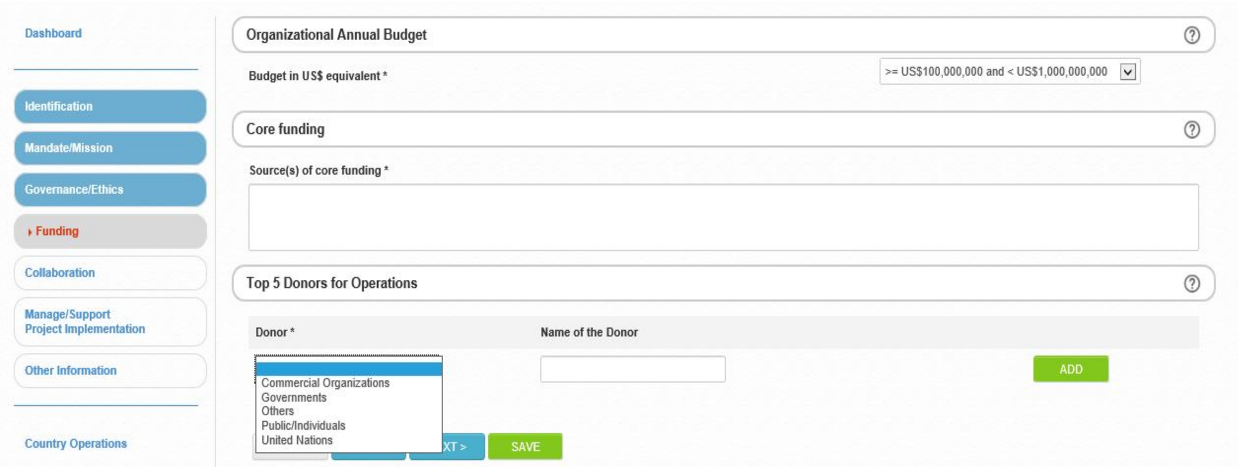


Figure 3.3.4.4 Funding page

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

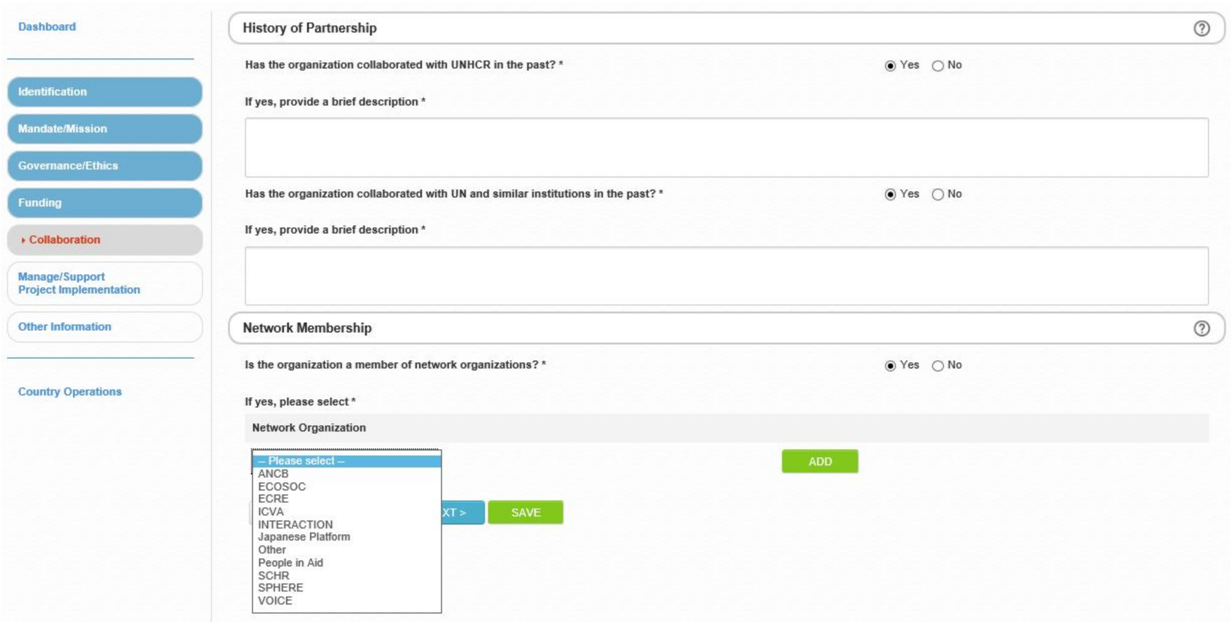


Figure 3.3.4.5 Collaboration page

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.

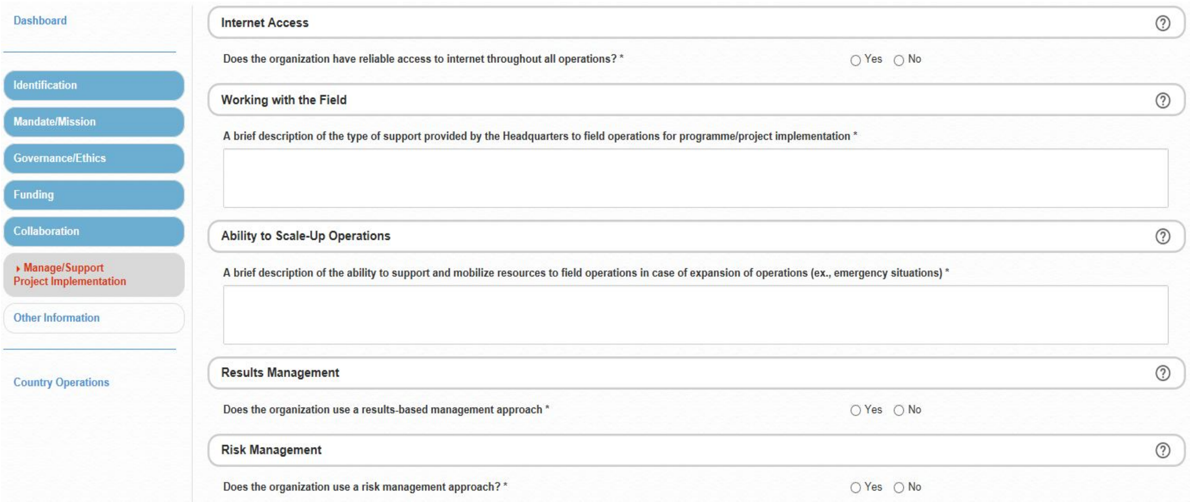


Figure 3.3.4.6.1 Manage/Support Project Implementation screen (top 4 sections)

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 results-based 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

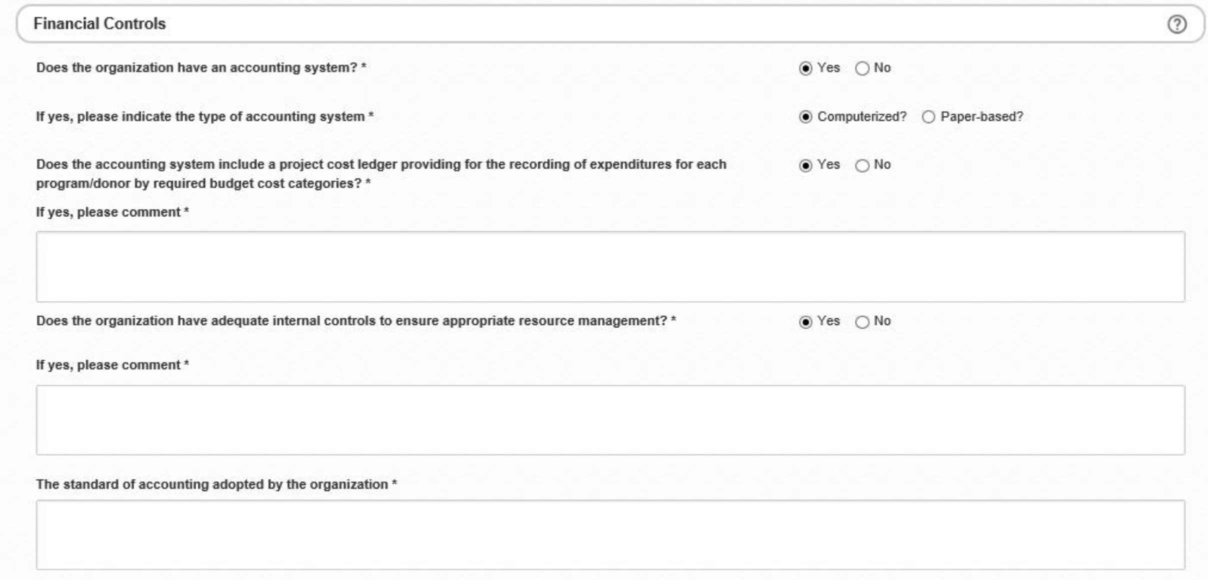


Figure 3.3.4.6.2 Financial Controls section

- 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

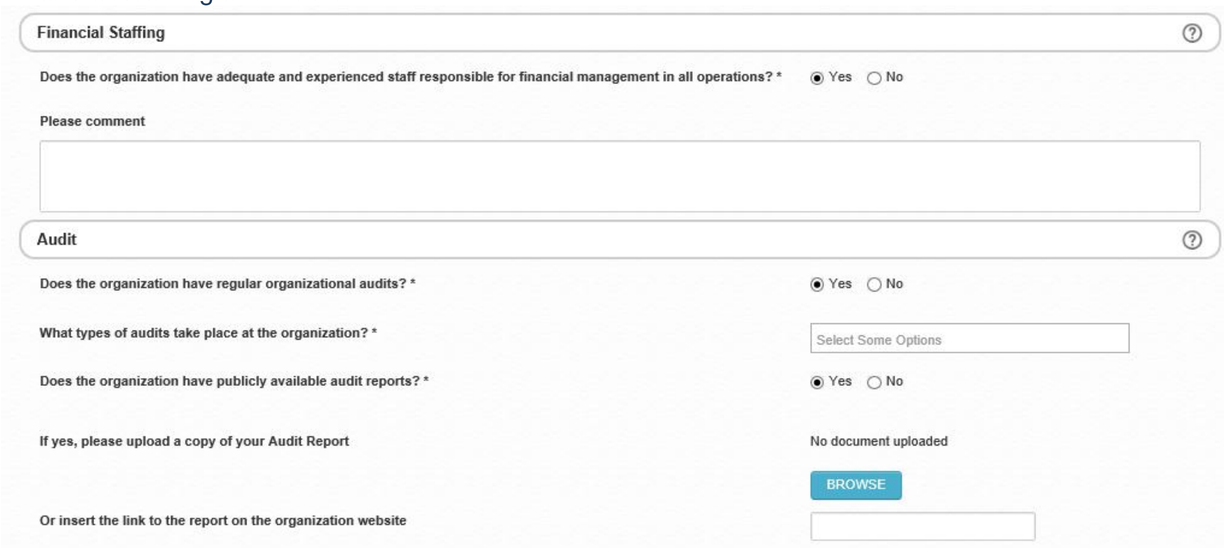


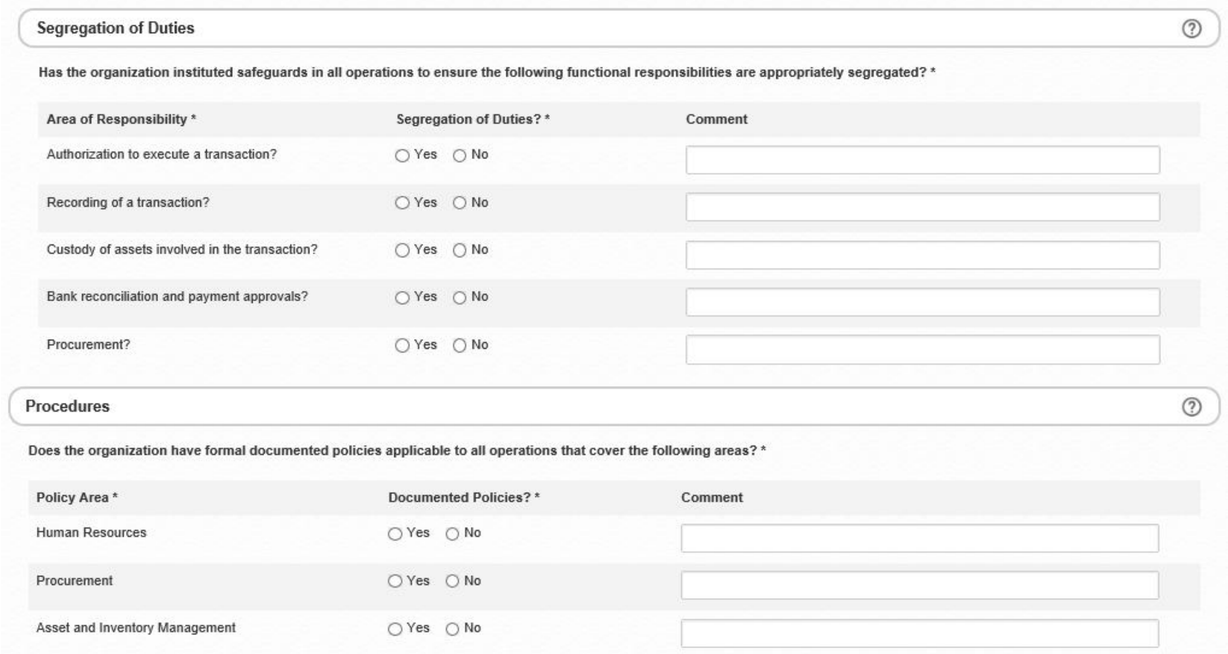
Figure 3.3.4.6.3 Financial Staffing and Audit sections

- 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 **BROWSE** 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

Has the organization instituted safeguards in all operations to ensure the following functional 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

Does the organization have formal documented policies applicable to all operations that cover 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*).

Figure 3.3.4.7 Other Information Section screen

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 **My 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.

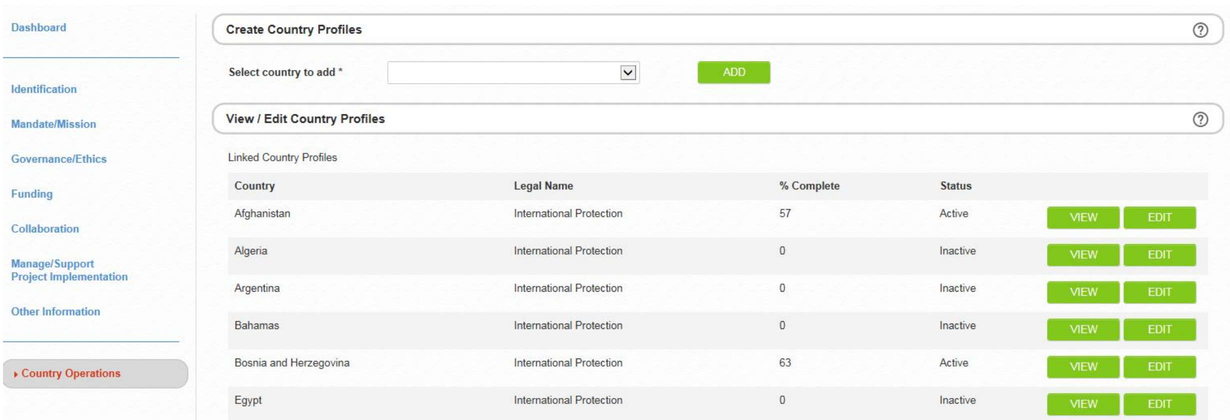


Figure 3.3.5.1 Country Operations screen

Submenus in **My 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.

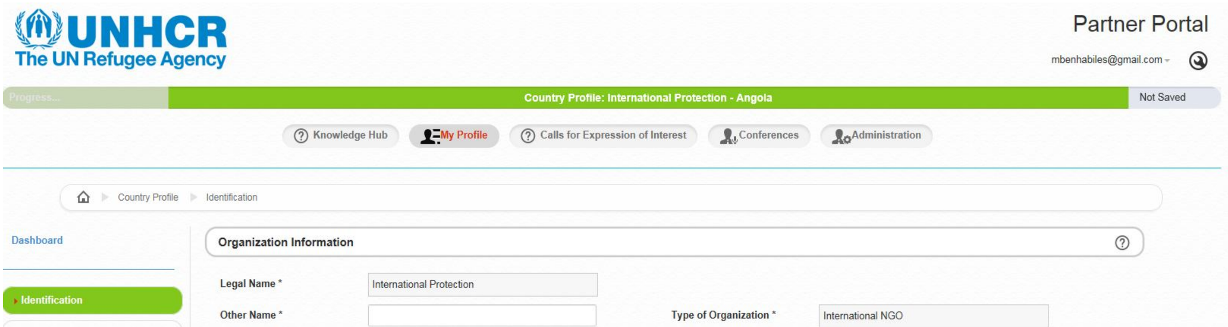


Figure 3.3.5.1.1 Organization Information

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.

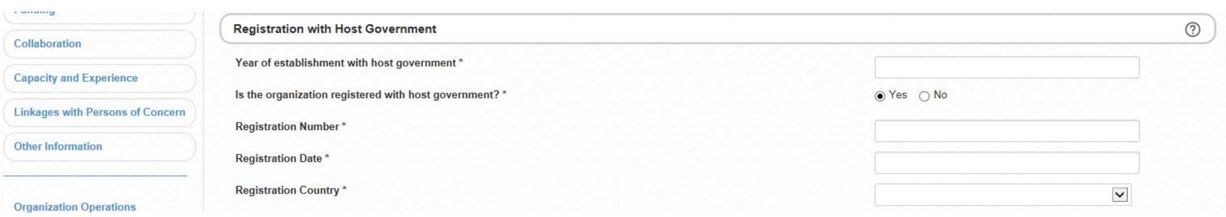


Figure 3.3.5.1.2 Registration of Organization with Host Government in Country of Operation

The following fields exist in this section:

Field	Description

Year of establishment in country of operation	Provides the length of time the organization has been present in the country of operation - establishment may pre-date registration
Is the organization registered with the host government	Select the appropriate radio button

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

Field	Description
Registration Number	The organization's registration number with the host government
Registration Date	Initial registration date of the organization with the host government
Registration Country	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.

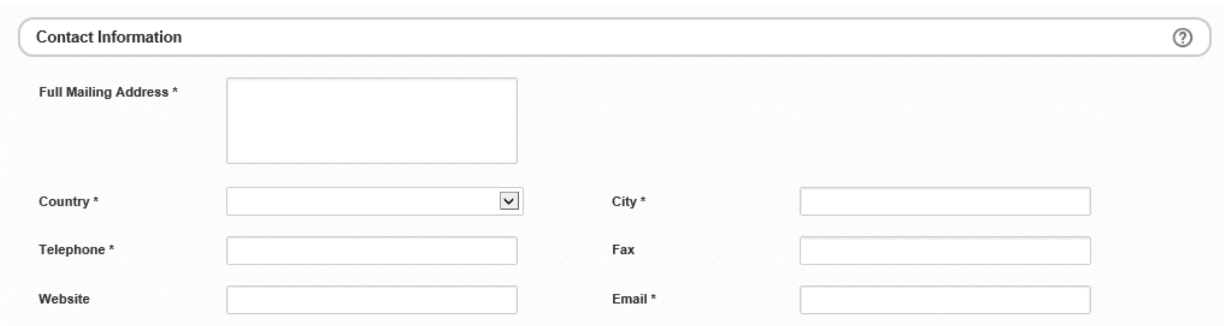


Figure 3.3.5.1.3 Contact Information

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.*

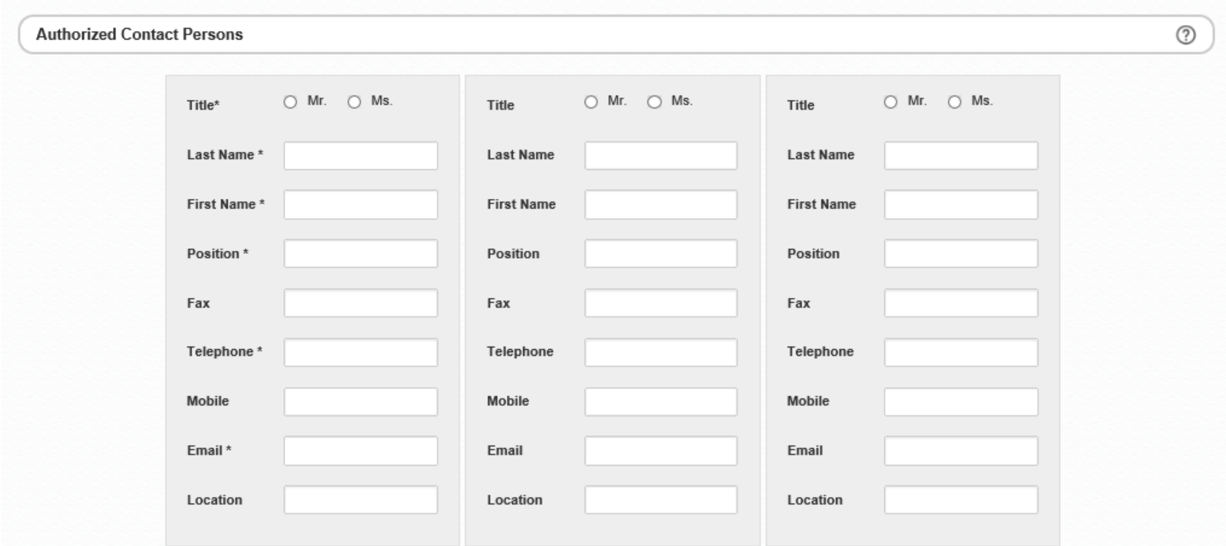


Figure 3.3.5.1.4 Authorized Contact Persons

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*).

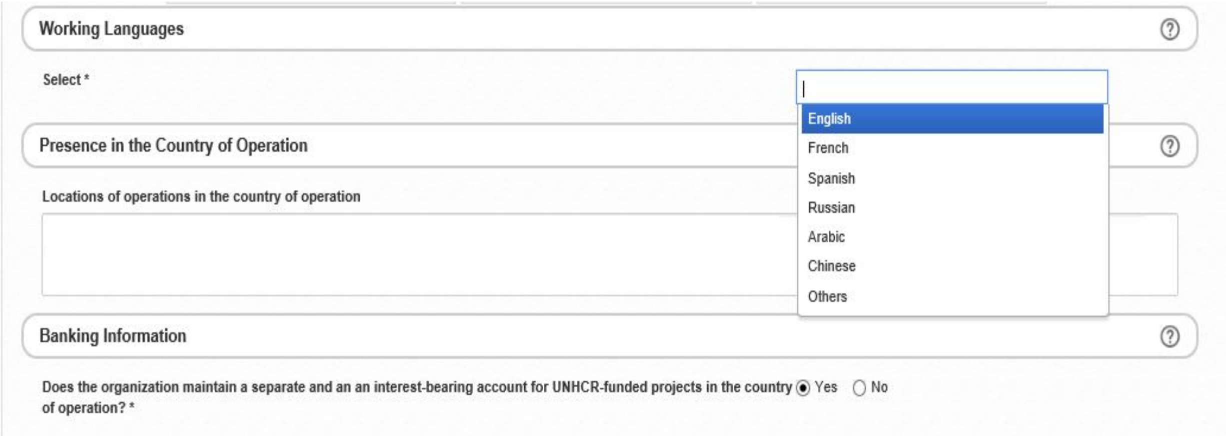


Figure 3.3.5.1.5 Working Language, Presence in Country of Operation, and Banking Information sections

3.3.5.2 Funding

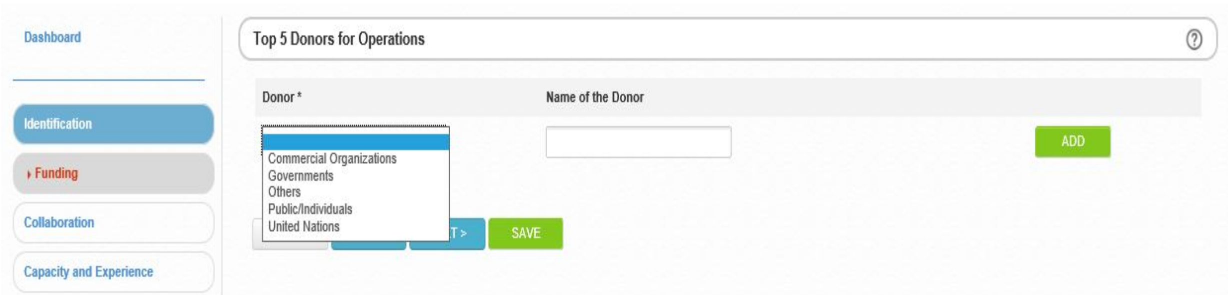


Figure 3.3.5.2 Top 5 Donors for Operations

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

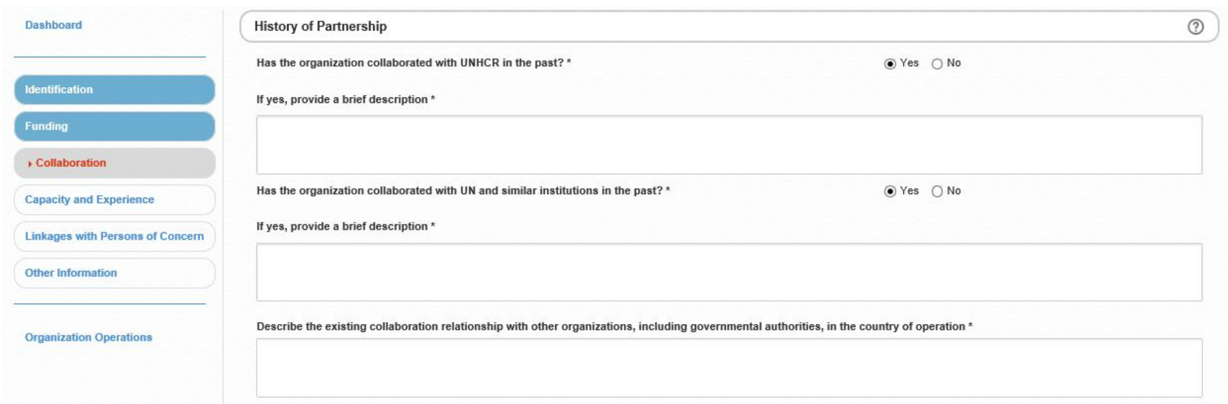


Figure 3.3.5.3 History of Partnership section

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 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*).
- 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 **BROWSE** button.

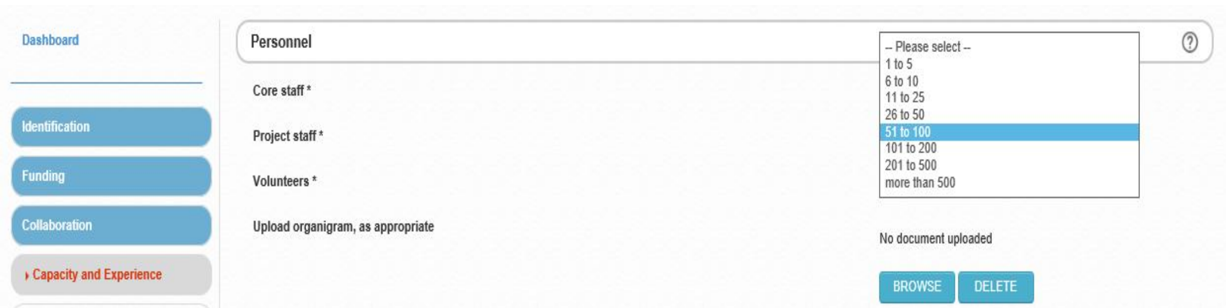


Figure 3.3.5.4.1 Personnel section

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 **BROWSE** button.

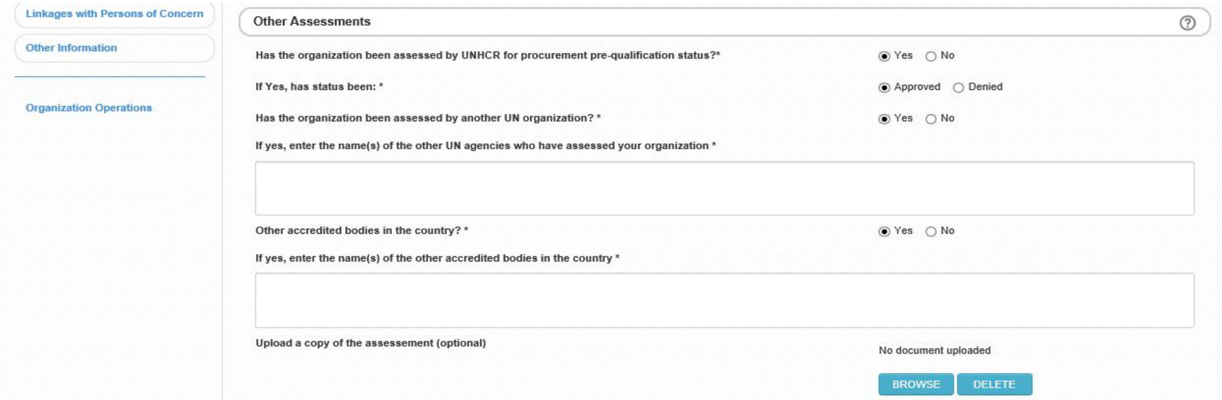


Figure 3.3.5.4.2 Other Assessments

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*).

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*)

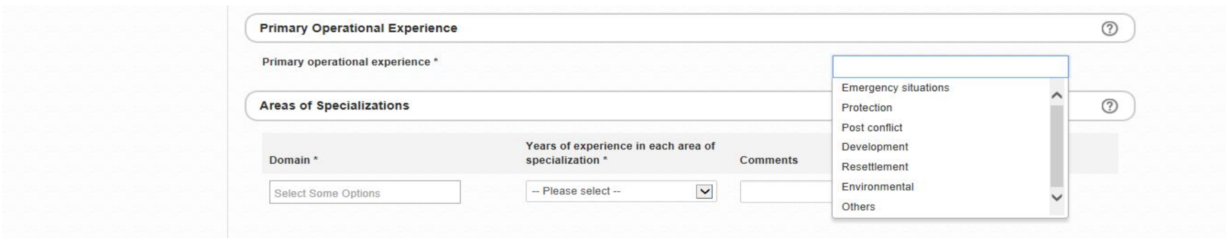


Figure 4.3.5.4.4 Primary Operational Experience section

Area of Specialization

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

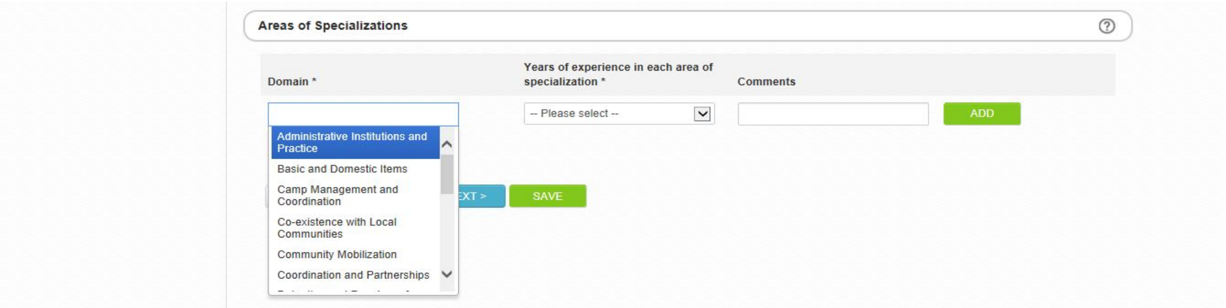


Figure 4.3.5.4.5 Areas of Specializations section

- 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*).

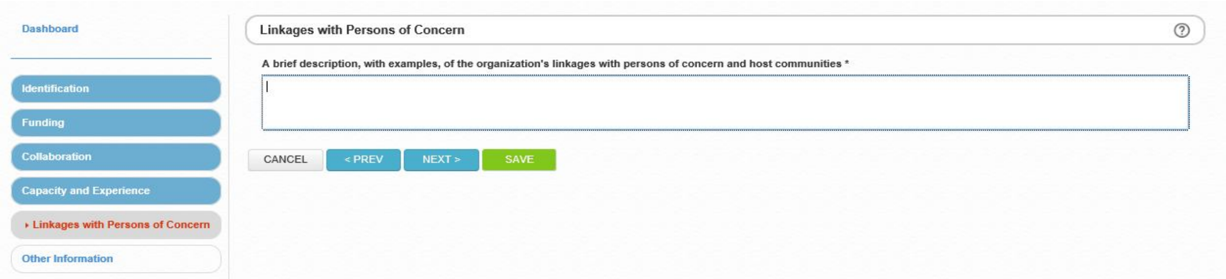


Figure 3.3.5.5 Linkages with Persons of Concerns section

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.

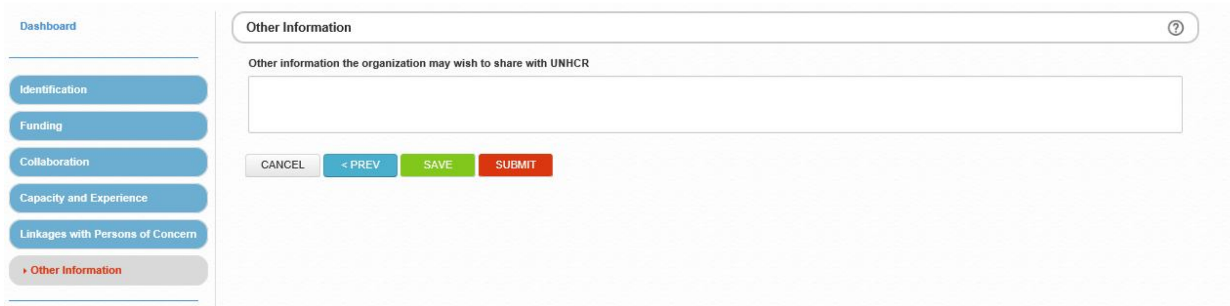


Figure 3.3.5.6 Other Information section

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 MSRP Code:** Unique Partner MSRP identification code from UNHCR core systems.
- **Partner MSRP 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:

- **Country** – 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.
- **Projects** – Total number of UNHCR projects implemented by the Partner in the country.
- **Instalments Paid** – Total amount of instalments paid to the Partner for UNHCR projects implemented by the Partner in the country.
- **Budget** – Total amount of the budget allocated to the Partner for UNHCR projects implemented by the Partner in the country.
- **CfEIs Submitted** – Number of CfEIs in the country where the Partner has submitted a Concept Note (applied to CfEI).
- **CfEIs Selected** – Number of CfEIs in the country where the Partner was selected.
- **CfEIs Pending** – Number of CfEIs 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:

- **Project Name** – Name of the project as recorded in UNHCR core systems.
- **Project Agreement #** – Project agreement number as recorded in UNHCR core systems.
- **Status** – Current status of the project.
- **Start Date** – Start date of the project.
- **End Date** – Estimated completion date of the project.
- **Budget** – 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 CfEIs 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.
- **CfEI Reference Number** – CfEI reference number as created by the Portal on creation of the CfEI.
- **Status** – CfEI Current status in the Partner portal: Open, Closed, Screening Complete, Selection Completed, Rescinded).
- **Project Location** –CfEI project Location as recorded on the CfEI 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.
- **Project Agreements** – Total number of project agreements in the year.
- **Instalments Paid** – Total instalments paid for all project agreements in the year.
- **Budget** – Total budgets for all project agreements in the year.
- **Agreements Audited** – Number of project agreements audited in the year
- **Qualified Agreements** – Number of qualified project agreements in the year.
- **Financial Performance** – 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 MSRP Code:** Unique Partner MSRP identification code from UNHCR core systems.
- **Partner MSRP 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:

- **Project Name** – Name of the project as recorded in UNHCR core systems.

- **Project Agreement #** – Project agreement number as recorded in UNHCR core systems.
- **Status** – Current status of the project.
- **Start Date** – Start date of the project.
- **End Date** – Estimated completion date of the project.
- **Budget** – 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 CfEIs 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 CfEI with clickable link to the CfEI details.
- **CfEI Reference Number** – CfEI reference number as created by the Portal on creation of the CfEI.
- **Status** – CfEI Current status in the Partner Portal: Open, Closed, Screening Complete, Selection Completed, Rescinded).
- **Project Location** –CfEI project Location as recorded on the CfEI 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:

- **Year** – Each of the last five (5) years, starting from the most recent year.
- **Project Agreements** – Total number of project agreements in the year.
- **Instalments Paid** – Total instalments paid for all project agreements in the year.
- **Budget** – Total budgets for all project agreements in the year.
- **Agreements Audited** – Number of project agreements audited in the year
- **Qualified Agreements** – Number of qualified project agreements in the year.
- **Financial Performance** – 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 Primary User**	**Organization User**	**Country User**
Profiles			
Manage the organization's users accounts	Yes	No	No
Capture Profile Information	Yes[1]	Yes[2]	Yes[3]
Consult Partner Profile	Yes[1]	Yes[1]	Yes[1]
Attach and remove documents	Yes[1]	Yes[2]	Yes[3]
View documents	Yes[1]	Yes[2]	Yes[3]
Calls for Expression of Interest			
View Posted Calls for Expression of Interest	Yes	Yes	Yes
Express interest in partnering	Yes	Yes	Yes[3]
View Partners' submissions	Yes[1]	Yes[2]	Yes[3]
Conferences			
View conference details	Yes	Yes	Yes
View the list of the organization's registered participants	Yes[1]	Yes[1]	Yes[1]
Register participants for a conference	Yes[4]	Yes[4]	Yes[4]

1. At both organization (HQ) and country level
2. Only at organization level (HQ)
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.

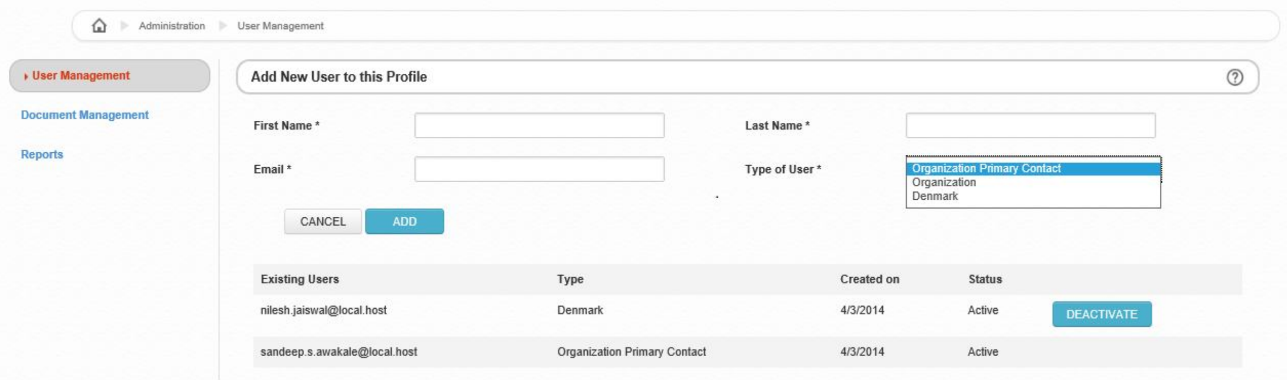


Figure 3.5.1.2.1 Add New User to this Profile section

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.

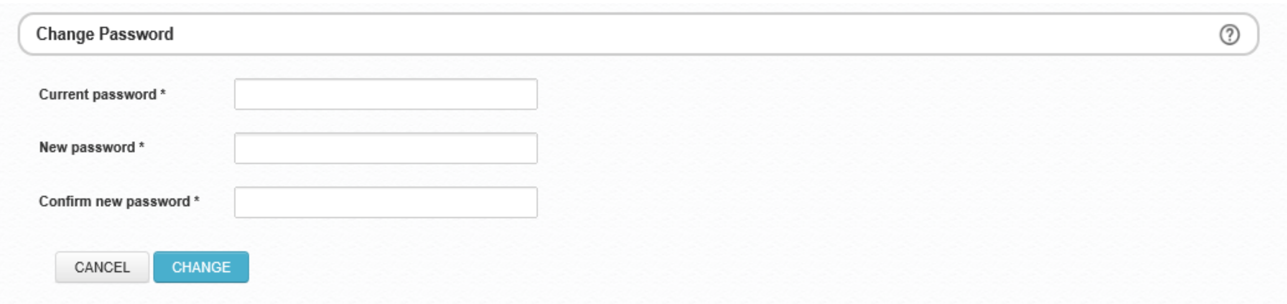


Figure 3.5.1.4 Change password

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 **BROWSE** 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.*

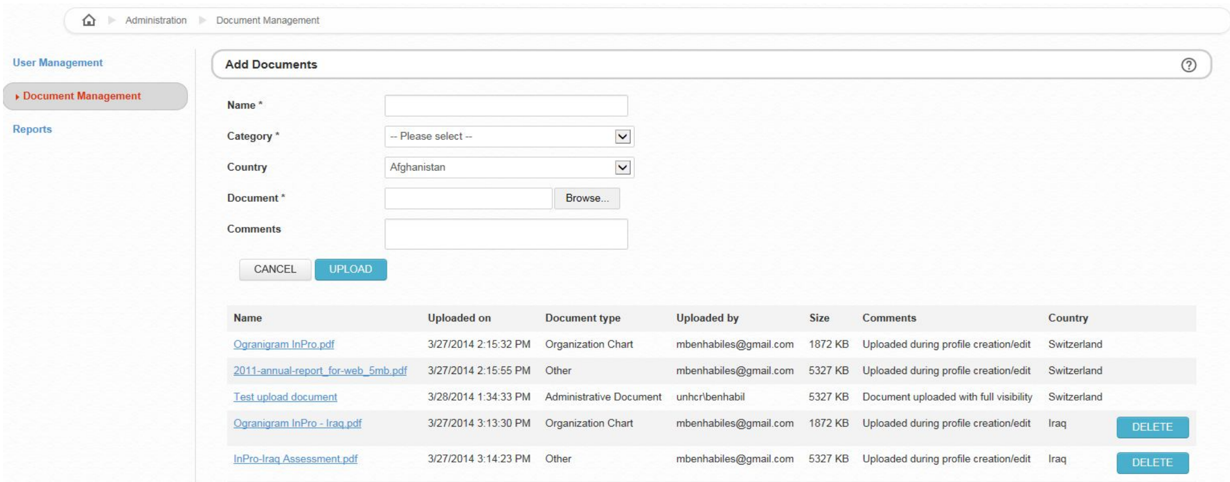


Figure 3.5.2 Document Management section

Field Description of Document management:

Field	Description
Name	Enter the name of the document.
Category	Select the category of document from the dropdown list.
Country (Only for Primary Users)	Select a Country name, to attach the document to a specific country 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 CfEIs is displayed under the **Open Calls for Expression of Interest** section. If there are no current open CfEIs, a "No project" message will be displayed.

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

3.6.1 Latest

In the displayed list of CfEIs under the **Latest** submenu, click on a **Project title** to view the details of the CfEI. As the status of the CfEI is open, you can submit a Concept Note or update your submission. You can only apply or update a submission of CfEIs 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.

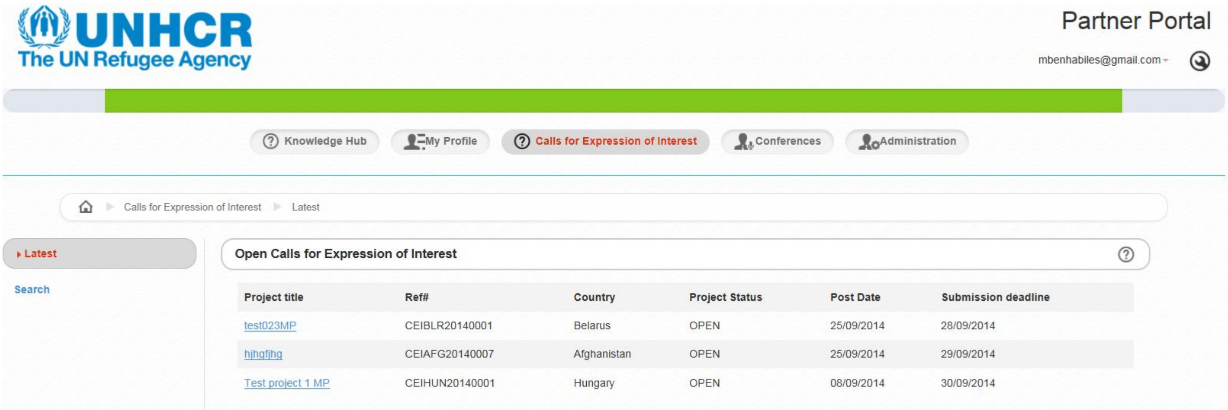


Figure 3.6.1 – Latest section

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 CfEIs using multicriteria filtering parameters.

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

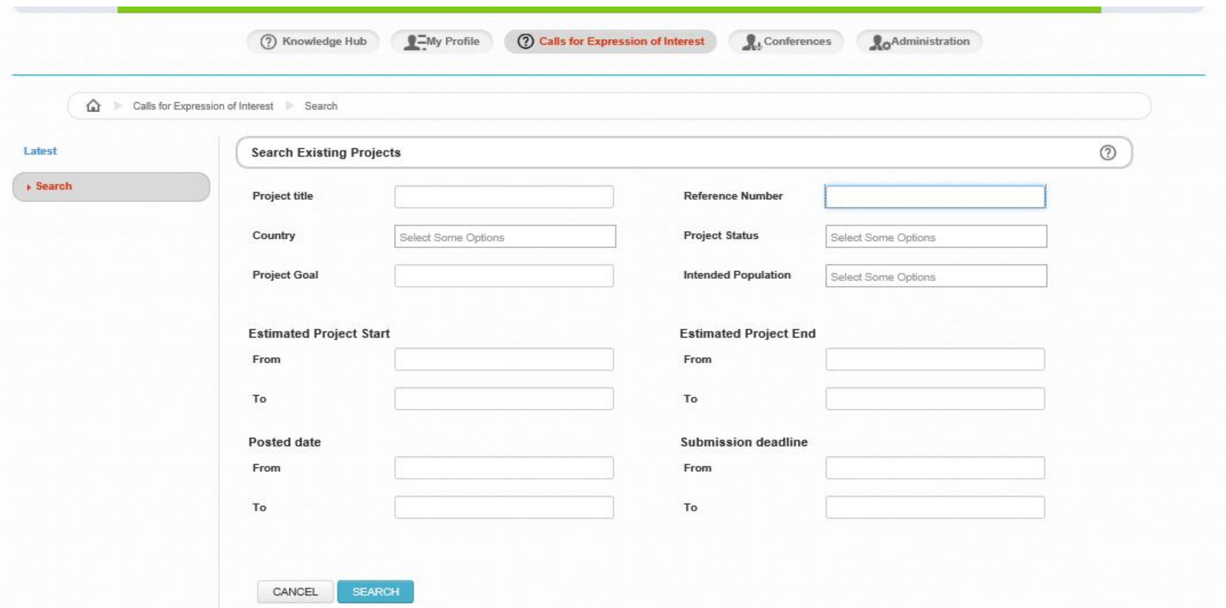


Figure 3.6.2 –Search section

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 CfEIs from the dropdown list.
  (*Multiple selections are allowed. The tool will search for any of the selected status*)
- In **Country**, select the country issuing CfEI from the dropdown list.
  (*Multiple selections are allowed. The tool will search for any of the selected countries.*)
- In **Reference Number**, enter the CfEI Reference number if known or part of the Reference number such as Country 3 Characters ISO code or year
  (*For example to filter CfEIs for 2014, enter only 2014; to search for all CfEIs 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 CfEIs matching the criteria set is returned with their current status. To open the details page of a CfEI, 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 CfEI once in the detailed page of an **OPEN** CfEI.

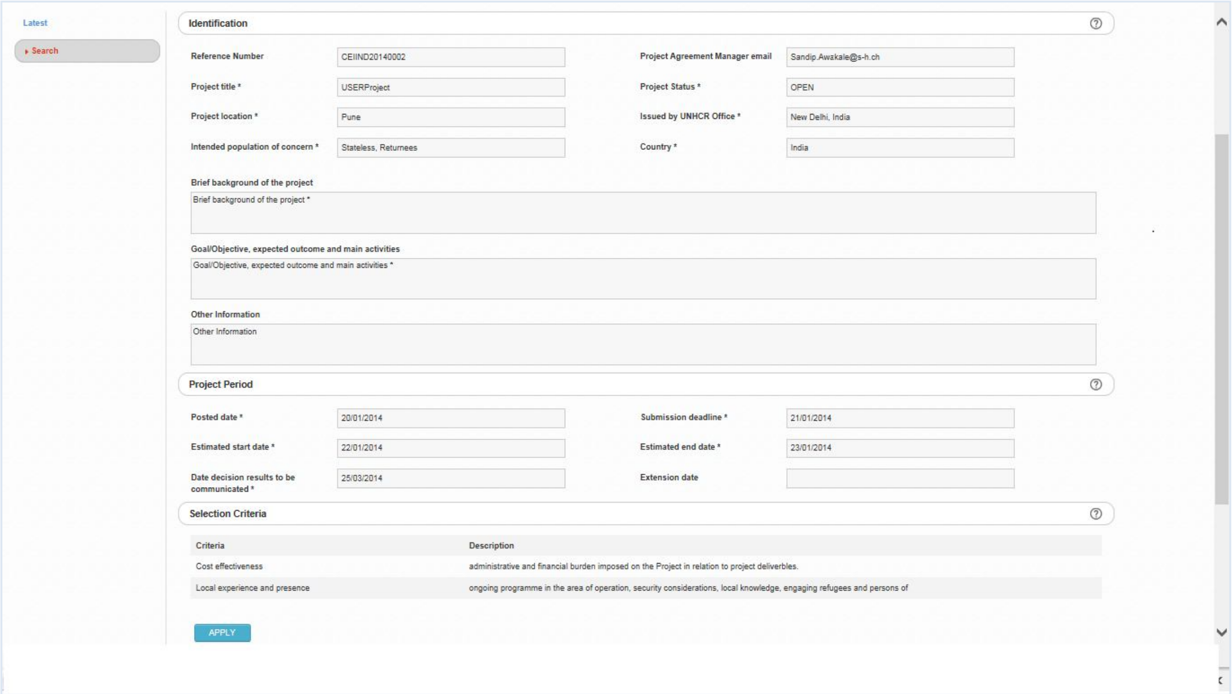


Figure 3.6.3 – Partner Calls for Expression of Interest screen

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

- Click on the Project title name of the CfEI you want to view.
  (*A page opens with the details of the CfEI*)
- 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 **BROWSE** 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 **SUBMIT** 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 **My 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 CfEI, it will open to the content page of the CfEI with details of your submission.

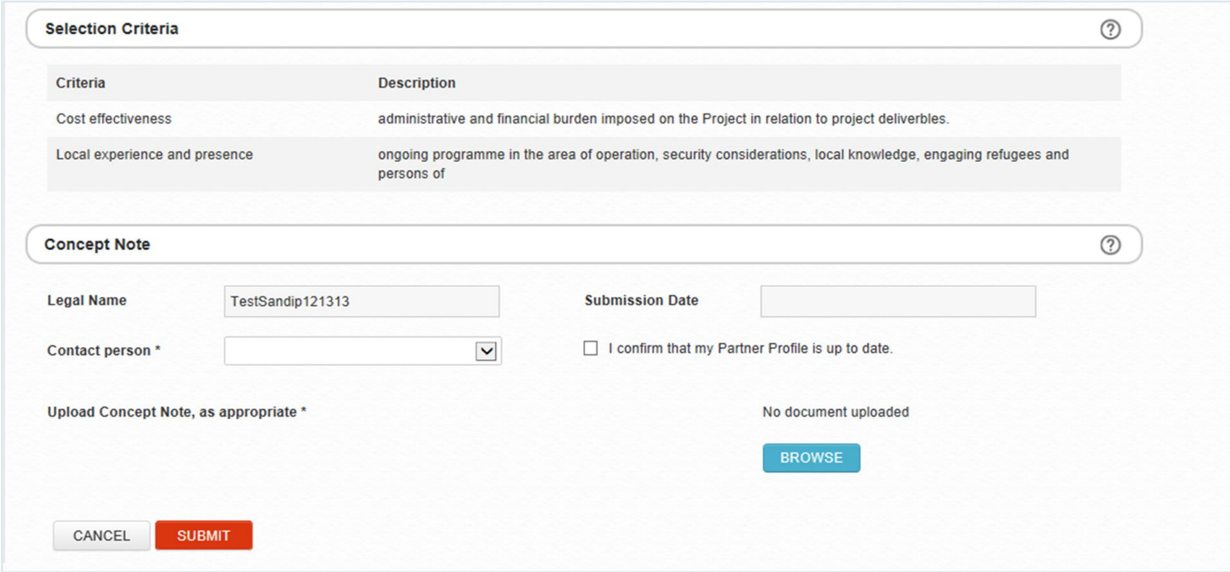


Figure 3.6.4 – Concept Note section

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 the Partner Dashboard will contain the CfEI. It will not be possible to submit if required fields are not completed or if the submission date 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.

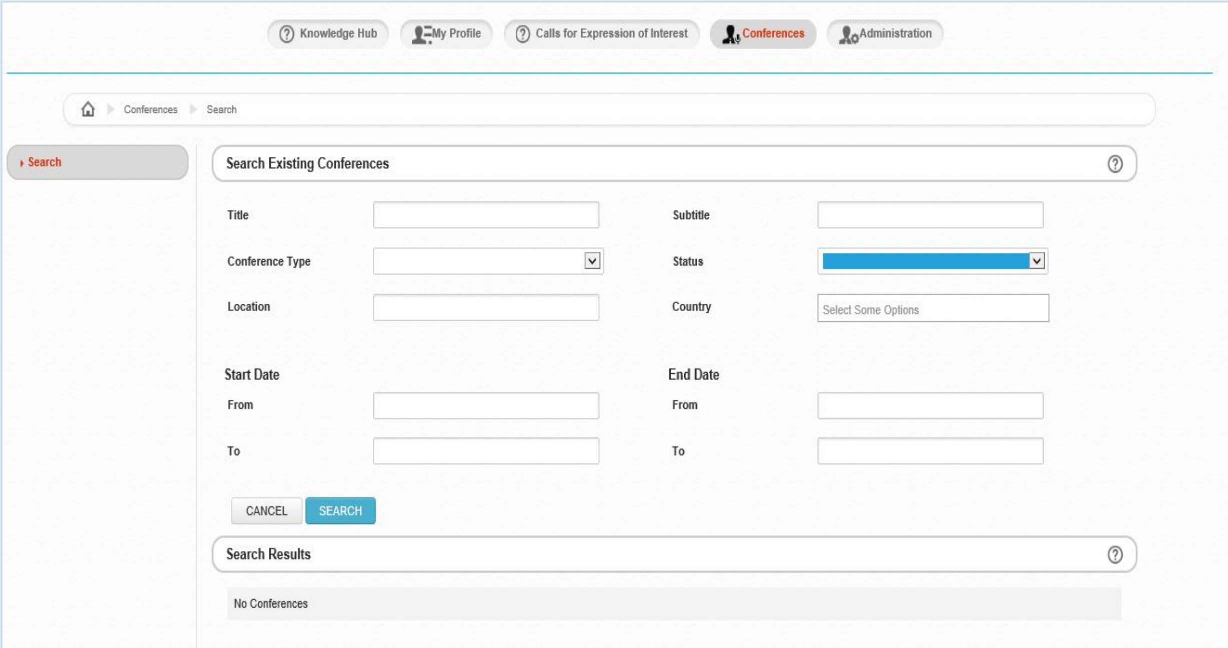


Figure 3.7.1 Conference Search section

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. **From** will search all dates pasted on the entered date and **To** will search all dates before the entered date.
End date	End date of the conference. **From** will search all dates pasted on the entered date and **To** 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.

Search 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 **SUBMIT**. 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

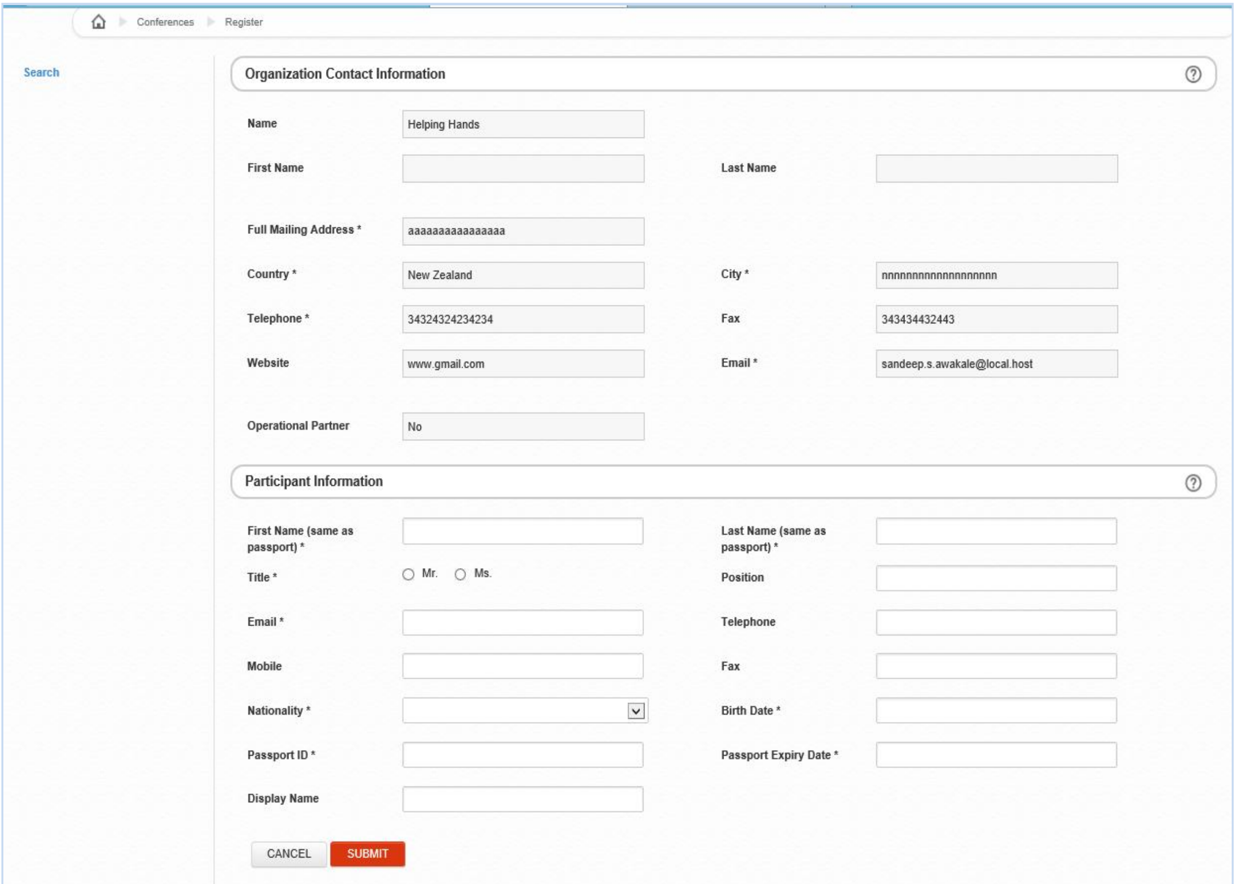


Figure 3.7.3 Conference Registration screen

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 and button descriptions for Conference Participant Registration:

Field/Buttons	Required	Description
First Name	Yes	Enter the first name of the participant as it appears on his/her 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 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.

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 Committte
- 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 epartner@unhcr.org

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For Information and Inquiries.
Please contact :

UNHCR IPMS
epartner@unhcr.org

URL: https://partner.unhcr.org/