HPC projects module user manual

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1 Summary
The HPC projects module (https://projects.hpc.tools) is part of the HPC tools suite. It enables users to create projects and submit them for review and approval for inclusion within response plans. Projects submitted to a plan follow a basic workflow for approval by cluster leads. A plan lead manages the overall process. Each plan can have a set of customized fields specified for projects that wish to be a part of them.

The Response Planning and Monitoring (RPM) tool is the companion module which is used by plan leads and cluster leads to manage plans' logical frameworks, which can be then referenced by projects. Projects that are accepted and approved for publication in a plan can then referenced or viewed publicly via the HPC tools suite (e.g. Financial tracking system, FTS).

2 User login and registration
All users of the projects module must log into the application with a Humanitarian ID (HID) account.

2.1 If you already have an HID account
click on login, and then enter your email and password, and then click on login.

After clicking on the login button you will be directed to HID to enter your details:
2.2 If you do not have an HID account

Click on login, and then click on the “register” button

```
Register in Humanitarian ID

Sign up for a Humanitarian ID account. Doing so will give you access to Humanitarian ID as well as a growing number of related humanitarian community sites.

Email
Your email address

First Name
Your first name

Last Name
Your last name

Passwords must be at least 8 characters long, contain at least one number, one uppercase character and one lowercase character.

Password

Password (confirm)

REGISTER
```

Fill out the details and click register. You will then receive a confirmation email from HID to verify your address. Open the email and click on the link. Now return to projects module, click login, and enter your email and password to login.
2.3 Approving access to HID and entering the project module for the first time

You will then be asked if you want to allow HPC project module to access your HID details. Click “Allow”

You will now see the “User profile screen”. You must fill out your organization and the country in which you are working in. Start typing into the box and the system will try to find a match for your organization and country. Note that you may select more than one country. When complete, click “save and continue” and you will be directed to the map screen.
If you cannot find the organization you are looking for, then click on the link circled below, where you will be directed to a form to fill out.

We will review your submission and add the organization for you and inform you by email. You will not be able to proceed until you have added this organization, so you will have to return to the HPC projects module after you have received this confirmation.
3 Map screen

This is the standard screen that you will see when you have registered and logged in successfully to the HPC projects module.

By default, the application will display the projects which you have created. The screen is split into 3 vertical areas. On the left, these are the project search options. In the middle is the list of projects based on your search parameters. On the right hand side which is hidden by default is the map displaying where the projects are located. To view the map, click on the map toggle button in the left hand search column.
3.1 Searching for projects

1. Click here to access your user profile or logout of the system
2. Language selection. Click here to change the language display of the application.
3. “Recent and saved” tab which is automatically selected by default:
   - My projects – list of all projects that you have created. This is the default view after logging in or clicking on the “Projects Module” header in the top left hand corner.
   - My organization’s in country projects – list of all projects that have the same organization and country as your profile
   - My cluster’s projects – if you are a cluster lead, then this will list all projects that belong to your cluster.
4. “Filters” tab. Click this to search by various parameters.

5. Select a year. The default is the current year, but additional years can be selected. After selecting a year, select at least one of the other options beneath it in order to retrieve results.
a. Plans. For each plan you can also select additional fields such as the field cluster or approval status to filter by, which are unique to that plan only

b. Countries.

c. Global sectors you want to filter by. Note that this is different from the plan’s clusters, which can be found inside each plan by clicking on the plan first.

d. Organizations. Type in the name or abbreviation of an organization to add it to the search parameters.
After selecting some parameters, the results side bar will expand and display all projects matching your search.
4 Project form

Click on “Add project” to begin creating a project.

4.1 Basic information
• The first step of the project creation process contains basic project information such as title, description, dates, organization, implementing partners and contact details.
• Start date and end date:
  o Use the selector icon in each of the fields to select specific dates.
  o Alternatively, if the project simply spans a whole calendar year, click one of the buttons “Use 2018” or “Use 2019” and it will be prefilled from 1 January to 31 December of that year.
• Organizations:
  o At least one organization is required.
  o By default your organization is automatically selected for this project. However, you may remove this by clicking on the “x” icon at the end. You may also add additional organizations by typing into the “add organization” box (either by name or abbreviation). The system will try to find a match to your entry and preselect it.
  o If you cannot find a match, click on the link beneath the text field and you will be directed to a separate form to fill out. We will review your submission and add the organization for you and inform you by email.
  o You may add more than one organization. Type the name of the organization into the “organization name” text field, and select the option which matches and it will be added to your list. Note that if you select multiple organizations, you will be required to specify the budget requirements for each organization in the “Budget section” of the form.
  o Click on the “x” icon next to an organization to remove it.
• Implementing partners:
  o Fill this text field in if the appealing organization will provide funds to other organizations will assist in the implementation of this project.
• Contacts:
  o At least one contact is required. If there are additional contacts that need to be added, click on the “add another contact” link.
• Any required fields are highlighted with a red left hand border. The save buttons will not be available until all required fields have been filled out.
• Click “Save and next” to proceed to the next section.
• After clicking save, a project code will be assigned to the project and displayed in the toolbar.
4.2 Select a response plan

After selecting a plan from the drop down list, the plan’s specific fields will be displayed:

These are the clusters within the plan. Select the relevant ones. Note that if you select more than one cluster you will be asked to provide the budget breakdown for each cluster.

These are the plan’s form fields. Required fields are marked with a red border on the left hand side of the field.
4.3 Select specific locations

After selecting a plan in step 2, the country will be preselected. Use this step to specify any lower administration levels by clicking on the relevant checkboxes.
4.4 Linking the project to a clusters’ framework

In this step, you can set a project’s caseload target in relation to the cluster’s caseload target (set in RPM).

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

If more than one cluster was selected in step 2, then you can switch between the selected clusters to add the caseload and cluster activities and targets.
In addition, if the indicator has a disaggregation model defined at the cluster level, then you can also specify how the project’s target is broken down according to the same disaggregation model. Select the checkbox “include disaggregation and targets” to display a dynamic table to fill in this information.
4.5 Project costing

- Type in the total project cost of the project.
- In the section “line items”, you can detail how the total amount is broken down. Click on “add another line item” to add as many lines as needed. Click on the “x” icon to remove lines that are not needed.
- Type the amount for each budget line in the “cost” column and the % total will be calculated for you. Alternatively, type into the % column and the cost amount will be calculated for you.
- If you change the total project cost, then the individual line items’ costs will be automatically updated using the percentage values.
- Note that the sum total amounts of the rows must equal the total project cost. If it is not equal, it will be highlighted in red, and you will not be allowed to proceed to save.
- It is also necessary to tick the checkbox to confirm that updates on funding to the project will be reported to FTS.
4.5.1 Multiple organizations

If more than one organization has been added in the step one of the project form, then the budget breakdown per organization is required. This is displayed beneath budget line items.

- By default, the percentages will be equally split between the number of organizations when a project is first created.
- Type the amount for each organization in the “cost” column and the % total will be calculated for you. Alternatively, type into the % column and the cost amount will be calculated for you.
- If you change the total project cost, then the individual line items’ costs will be automatically updated using the percentage values.
- Note that the sum total amounts of the rows must equal the total project cost. If it is not equal, it will be highlighted in red, and you will not be allowed to proceed to save.

**Budget Breakdown**

<table>
<thead>
<tr>
<th>Organization</th>
<th>Amount</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>World Food Programme</td>
<td>$2,500</td>
<td>25</td>
</tr>
<tr>
<td>United Nations Children’s Fund</td>
<td>$7,500</td>
<td>75</td>
</tr>
<tr>
<td><strong>Total for Organizations</strong></td>
<td>$10,000</td>
<td>100%</td>
</tr>
</tbody>
</table>

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

Similar to multiple organizations, if more than one cluster has been selected, then the budget per cluster is required.

- By default, the percentages will be equally split between the number of clusters when a project is first created.
- Type the amount for each organization in the “cost” column and the % total will be calculated for you. Alternatively, type into the % column and the cost amount will be calculated for you.
- If you change the total project cost, then the individual line items’ costs will be automatically updated using the percentage values.
- Note that the sum total amounts of the rows must equal the total project cost. If it is not equal, it will be highlighted in red, and you will not be allowed to proceed to save.

**Budget Breakdown**

<table>
<thead>
<tr>
<th></th>
<th>Amount</th>
<th>Percentage</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food Security</td>
<td>$1,500</td>
<td>15.00</td>
<td></td>
</tr>
<tr>
<td>Education</td>
<td>$8,500</td>
<td>85</td>
<td></td>
</tr>
<tr>
<td><strong>Total for OXFAM</strong></td>
<td>$10,000</td>
<td>100%</td>
<td></td>
</tr>
</tbody>
</table>

Your budget lines must add up to your total project cost.
4.5.3 Multiple organizations and clusters

If you have selected multiple clusters and multiple organizations as part of your project, then the budget breakdown based on the combination of all of them will be required. This will be presented in a nested table as shown. For each organization, you will be required to specify its total, and then the breakdown by cluster within that organization.

The total for the clusters must add up to 100% for each organization, and similarly the total for all organizations must add to 100% of the project’s budget requirements.

<table>
<thead>
<tr>
<th>Budget Breakdown</th>
<th>World Food Programme</th>
<th>United Nations Children’s Fund</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$ 2,500</td>
<td>$ 7,500</td>
</tr>
<tr>
<td>Food Security</td>
<td>$ 1,500</td>
<td>$ 2,250</td>
</tr>
<tr>
<td>Education</td>
<td>$ 1,000</td>
<td>$ 5,250</td>
</tr>
<tr>
<td>Total for World Food Programme</td>
<td>$2,500</td>
<td>100%</td>
</tr>
<tr>
<td>Total for United Nations Children’s Fund</td>
<td>$7,500</td>
<td>100%</td>
</tr>
<tr>
<td>Total for Organizations</td>
<td>$10,000</td>
<td>100%</td>
</tr>
</tbody>
</table>

Your budget lines must add up to your total project cost.
4.6 Review project before submitting

In the final step, all the data you have entered for this project can be viewed together. Click "previous" to go back and make further modifications if needed.

When the project is ready, click "Submit project for review" for the cluster leads to review.
4.7 Comments
If you have edit rights for a project (which is based on your role and the project’s status), then you will also be able to add comments to the project. All other users will only be able to view but not edit the comments.

Click on the comments icon to add and view the list of comments.
The number of comments added to the project will be displayed in the icon itself.
5 Submitting a project to a plan and approvals

5.1 Submitting a project to a plan

- Once a project has been created, you can submit the project to the plan in the final step after reviewing the project details. Click on the “Submit project for review” button.
- Once your project has been submitted, cluster leads will then be able to review your project and approve it. While it is in status submitted to plan, you will not be able to edit your project details any further. However, you can change it back to “Draft” if you wish to make any amendments.

/WSH;FSC/56944/1

My new field project

Last updated by Generic Project Owner on 2018-08-23 18:10:00.

Basic Info

Project Name
My new field project

Start Date
01/01/2019

End Date
31/12/2019

Objective

text

Organizations
- Office for the Coordination of Humanitarian Affairs
- United Nations Children’s Fund

Contact Info
- teltxt / rowe@rowe.co / 32432
5.2 Cluster lead approval

- As a cluster lead, you will be able to approve projects that have been submitted to the plan. Navigate to the relevant project and you will be able to review the project and make changes if required.

- Click on the status name “submitted to plan”. Options to change the status of this project are then displayed. Select one of them to change the status. They are:
  - Approve project – this moves the project on to the next stage for further approval if relevant
  - Reject project – this rejects the project from the plan. The project remains as readonly for the project owner. Note that as cluster lead, you can also change this back to “under review”.
  - Return for edit – this returns the project to the owner for further edits, and then they can resubmit the project to the plan for review again.

- Note that if a user has selected multiple clusters on a project,
  - Each cluster lead will have to approve the project in order for the project to be set to “Approved by cluster”
  - Similarly all of the cluster leads must reject in order for the project to be set to “rejected”
  - The project remains in “under review” until all cluster leads have taken action on the project.
  - If any of the cluster leads selects “return for edit”, then the whole project is returned to the project owner for edit immediately.
5.3 View project

If you do not have rights to edit a project, you may still view it but in read only mode.
6 Workflow and edit rights for projects submitted to a plan

Projects will follow a set of basic approval steps for inclusion in a plan. The steps and roles involved are listed below:

This is the standard set of workflow steps for all plans. Note that if additional review steps are needed for a specific plan, these can be customized.

6.1 Table of roles with permissions to change a project’s status:

<table>
<thead>
<tr>
<th>Project’s current status</th>
<th>Project’s next status</th>
<th>Role with permitted rights to change current status to next status</th>
</tr>
</thead>
</table>
| Not submitted            | Submitted to a plan    | • Project owner  
|                          |                        | • Cluster lead  
|                          |                        | • Plan lead      |
| Submitted to a plan      | Under review 1         | • Cluster lead  
|                          |                        | • Plan lead      |
| Submitted to a plan      | Rejected               | • Cluster lead  
|                          |                        | • Plan lead      |
| Under review 1           | Under review 2         | • Plan lead      |
| Under review 2           | Published              | • Plan lead      |
| Accepted                 |                        | -                |
| Returned for edit        | Under review           | • Project owner  
|                          | Not submitted          |                  |
| Rejected                 | Under Review           | • Cluster lead  
|                          |                        | • Plan lead      |
Notes:

- Project owners can only submit the projects that they have created.
- Users with the “cluster lead” or “plan lead” role are associated to plans, and can only approve or reject projects linked to their plans

6.2 Table of edit rights:

<table>
<thead>
<tr>
<th>Project’s current status</th>
<th>Role with permitted rights to edit project details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not submitted</td>
<td>• Project owner</td>
</tr>
<tr>
<td>Submitted to a plan</td>
<td>• Cluster lead</td>
</tr>
<tr>
<td>Under review 1</td>
<td>• Cluster lead</td>
</tr>
<tr>
<td></td>
<td>• Plan lead</td>
</tr>
<tr>
<td>Under review 2</td>
<td>• Plan lead</td>
</tr>
<tr>
<td>Accepted</td>
<td></td>
</tr>
<tr>
<td>Returned for edit</td>
<td>• Project owner</td>
</tr>
</tbody>
</table>

Notes:

- Project owners can edit projects that they have created only.
- Users with the “cluster lead” or “plan lead” role are associated to plans, and can only edit projects linked to their plans

7 Publishing a project

Once a project has been fully approved by all relevant actors (e.g. cluster leads, HC), then the project is marked as “Accepted” within the plan.

At this stage, the project is not yet visible publicly on any of the HPC tools applications (e.g. FTS, HPC viewer, API), only within the projects module.

When the plan has been fully finalized and set to “published”, then all “accepted” projects will be also set to “published” and can now be viewed publicly on the HPC tools applications.
8 Reports and downloads
The projects module produces several reports, both on screen and also as downloads either in pdf or Microsoft Excel.

8.1 Budget requirement totals and grouping
To view the requirements for a plan, first select it from the search pane on the left.

Select at least one plan and any other additional filters like status or cluster.

Group the requirements of projects by selecting one of the options from this drop down.

The standard options are organization, cluster and status.

If a plan has been selected, then these options will include the custom fields for a plan that are either checkboxes or single item select boxes.

This summary row shows the number of projects and the total requirements of the selected projects matching the filter options.
8.2 Downloading full and summary project data in excel

This icon allows you to download the current summary view of projects, all data related to the projects as an excel, or all location data of projects as a csv file.

The “Download all data.xls” option will include all custom fields related to a plan, and will separate out a project with multiple clusters and/or organizations into multiple rows. It will also include 2 extra worksheet tabs which has the caseload values for each project, and separately all the indicators and targets for each project.
8.3  Downloading a project’s data (pdf and disaggregated data)

To view the options for downloading a single project’s data, go to the project and click the reports menu in the tool bar. From here you can download the current project as a pdf file. Additionally, you can also download the project’s indicators and any disaggregated data for the indicators and caseload.
8.4 Downloading multiple projects as a pdf file
This is available in the search screen.

After you have done a search, click on the download pdf icon

A pop up window is displayed with the list of all projects from the search results. Select the ones you want to print by checking the checkbox next to each project and then click on the “download selected projects button”.

Alternatively, you can download all projects from the list by clicking “download all”. Please note that depending on the number of projects, this may take some time to generate.
When the file is ready, this link will appear. Click on it to download the zip file containing the pdf files.
9 Changing the status of multiple projects in bulk

If you have the appropriate role (e.g. plan lead or cluster lead), then you may be able to change the statuses of multiple projects at the same time. To do this, first perform a search for the list of projects that you want to change. Then switch to the table view:

Click this icon to switch to the table view of results

After selecting the projects by checking the checkbox on the left, click the overflow menu icon in the table header and the statuses which they can be changed to will be displayed. Select the status you wish to change the projects to.

Note that the projects you select must all have the same status in order to change their statuses at the same time. If not, then this overflow menu will not permit you to change the status of the projects.