

RPM: Basic plan data entry process

A step-by-step guide for Plan Leads

This step-by-step guide covers:

- 1 – Logging in
- 2 – Navigating the application
- 3 – Adding objectives and indicators
- 4 – Defining cluster details
- 5 – Defining disaggregation models
- 6 – Adding disaggregated target data
- 7 – Defining monitoring periods

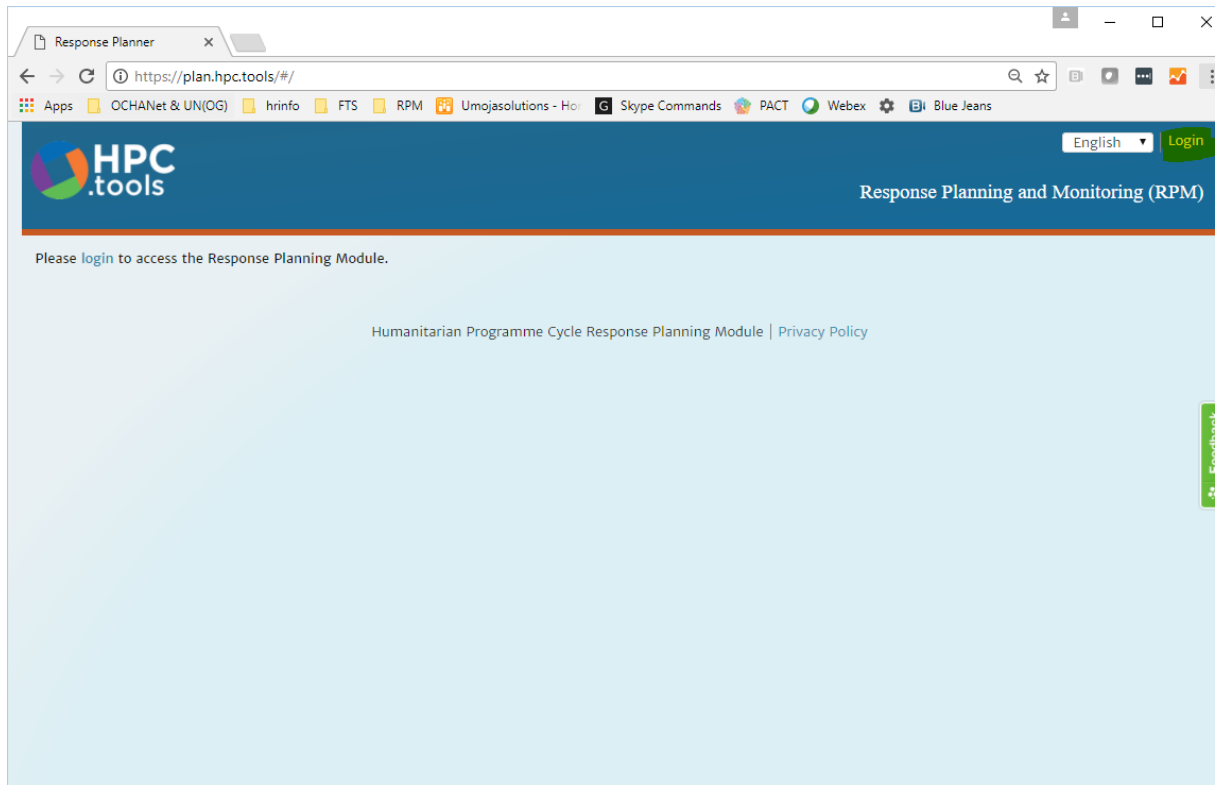
This guide does not cover:

- Customizing your plan blueprint:
 - adding and removing hierarchy levels and
 - adding and removing fields in the objective and indicator definitions.
- Cluster caseloads and costs
- Setting up web content for the Plan Viewer
- Downloading your plan data for use in Excel

These and other advanced features will be described in a forthcoming Advanced Plan Data Entry guide.

1 - Logging in

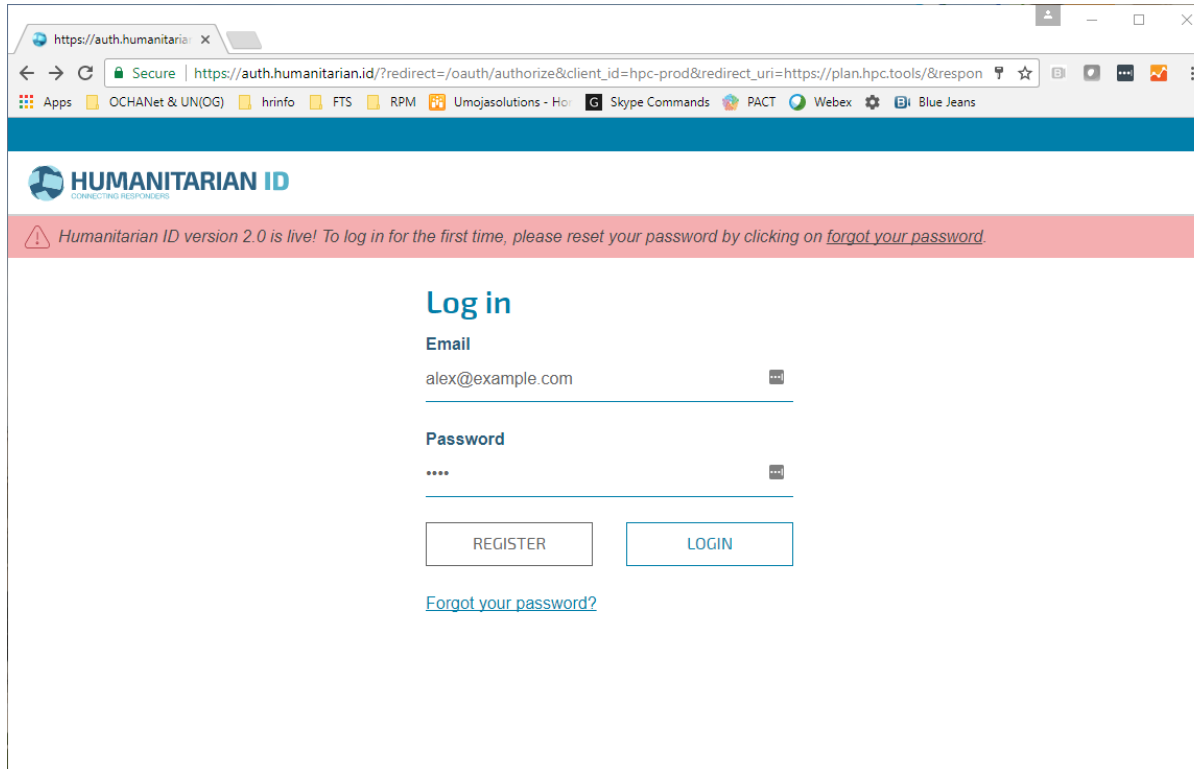
1.1 - Navigate to plan.hpc.tools and click *Login* in the top-right corner.



- We recommend using the latest version of Chrome or Firefox.

1 - Logging in

1.2 - Enter your H.ID credentials:

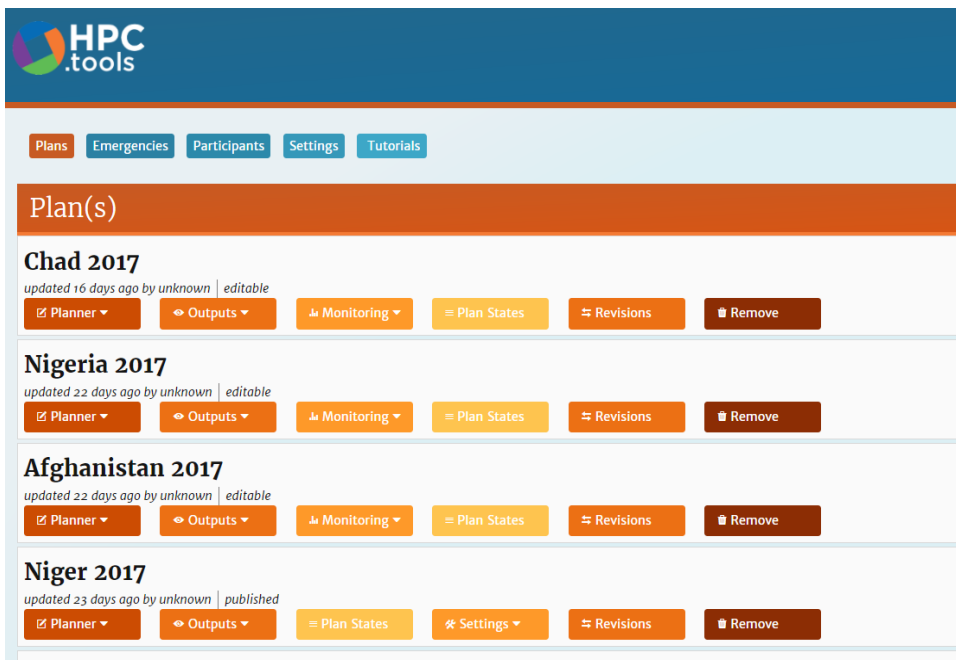


The screenshot shows a web browser window with the URL https://auth.humanitarian.id/?redirect=/oauth/authorize&client_id=hpc-prod&redirect_uri=https://plan.hpc.tools/&respon. The page features the Humanitarian ID logo and a notification banner stating: "Humanitarian ID version 2.0 is live! To log in for the first time, please reset your password by clicking on [forgot your password](#)." Below this, the "Log in" section contains an "Email" field with the text "alex@example.com" and a "Password" field with masked characters "....". At the bottom of the login section are two buttons: "REGISTER" and "LOGIN". A link for "[Forgot your password?](#)" is located below the "LOGIN" button.

- If you do not have an H.ID, please create a profile at humanitarian.id.
- If you are logging in for the first time, H.ID will ask you to authorize RPM. Please do so.

2 – Navigating the application

2.1 – Plans, clusters and some other objects used in RPM are shared with by other applications such as OPS and services such as FTS. For this reason, you will not be required to create a plan from scratch. Upon logging in, your plan will be displayed.

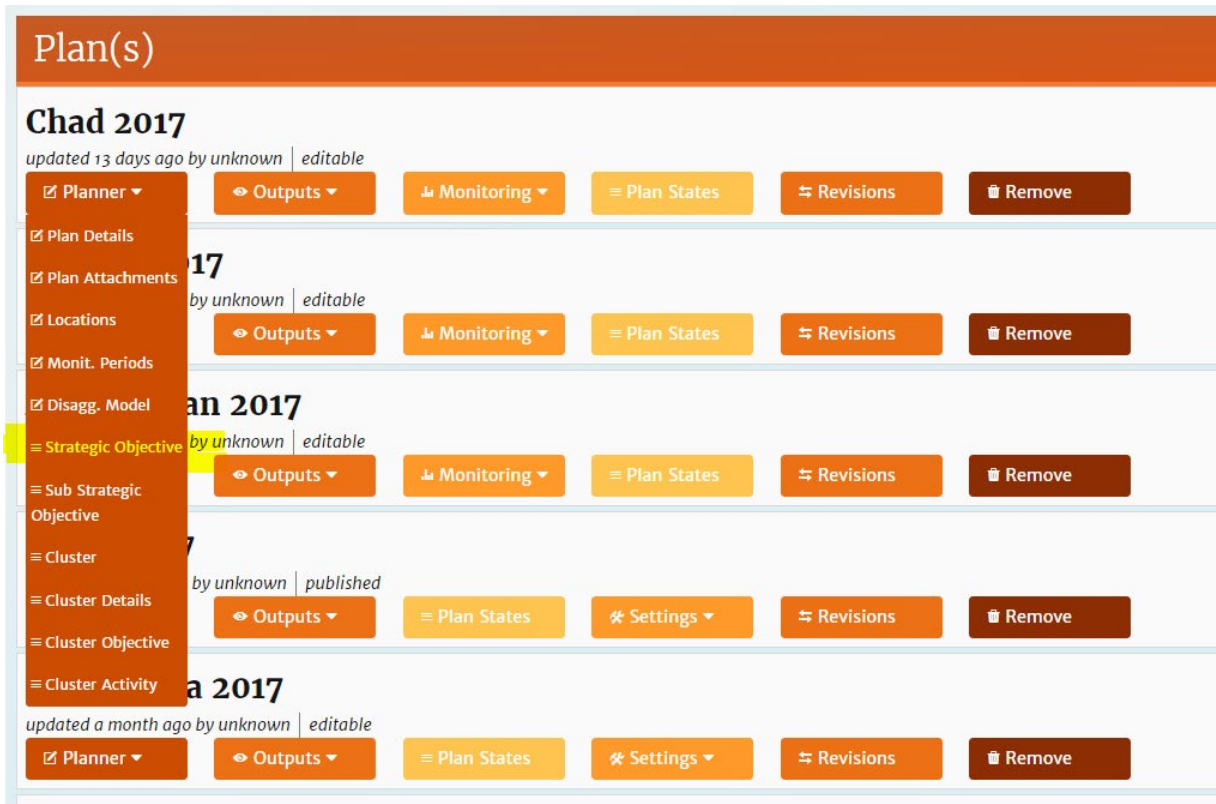


The screenshot displays the HPC.tools application interface. At the top, there is a blue header with the HPC.tools logo. Below the header, a navigation bar contains tabs for Plans, Emergencies, Participants, Settings, and Tutorials. The main content area is titled "Plan(s)" and lists four plans:

- Chad 2017**
updated 16 days ago by unknown | editable
Buttons: Planner, Outputs, Monitoring, Plan States, Revisions, Remove
- Nigeria 2017**
updated 22 days ago by unknown | editable
Buttons: Planner, Outputs, Monitoring, Plan States, Revisions, Remove
- Afghanistan 2017**
updated 22 days ago by unknown | editable
Buttons: Planner, Outputs, Monitoring, Plan States, Revisions, Remove
- Niger 2017**
updated 23 days ago by unknown | published
Buttons: Planner, Outputs, Plan States, Settings, Revisions, Remove

2 – Navigating the application

2.2 – Identify the relevant plan, hover over the *Planning* drop-down and choose *Strategic Objective*.



The screenshot displays the 'Plan(s)' section of the OCHA HPC application. It shows a list of plans, each with a title, update status, and a set of action buttons. A dropdown menu is open for the 'Planning' tab, showing options like 'Planner', 'Plan Details', 'Plan Attachments', 'Locations', 'Monit. Periods', 'Disagg. Model', 'Strategic Objective', 'Sub Strategic Objective', 'Cluster', 'Cluster Details', 'Cluster Objective', and 'Cluster Activity'. The 'Strategic Objective' option is highlighted in yellow.

| Plan(s) | | | | | | |
|---|---|------------------------------------|---------------------------------------|--------------------------------------|------------------------------------|---------------------------------|
| Chad 2017 updated 13 days ago by unknown editable | <input checked="" type="checkbox"/> Planner ▾ | <input type="checkbox"/> Outputs ▾ | <input type="checkbox"/> Monitoring ▾ | <input type="checkbox"/> Plan States | <input type="checkbox"/> Revisions | <input type="checkbox"/> Remove |
| 17 by unknown editable | <input checked="" type="checkbox"/> Plan Details | <input type="checkbox"/> Outputs ▾ | <input type="checkbox"/> Monitoring ▾ | <input type="checkbox"/> Plan States | <input type="checkbox"/> Revisions | <input type="checkbox"/> Remove |
| an 2017 by unknown editable | <input checked="" type="checkbox"/> Plan Attachments | <input type="checkbox"/> Outputs ▾ | <input type="checkbox"/> Monitoring ▾ | <input type="checkbox"/> Plan States | <input type="checkbox"/> Revisions | <input type="checkbox"/> Remove |
| an 2017 by unknown published | <input checked="" type="checkbox"/> Locations | <input type="checkbox"/> Outputs ▾ | <input type="checkbox"/> Monitoring ▾ | <input type="checkbox"/> Plan States | <input type="checkbox"/> Revisions | <input type="checkbox"/> Remove |
| an 2017 by unknown published | <input checked="" type="checkbox"/> Monit. Periods | <input type="checkbox"/> Outputs ▾ | <input type="checkbox"/> Monitoring ▾ | <input type="checkbox"/> Plan States | <input type="checkbox"/> Revisions | <input type="checkbox"/> Remove |
| an 2017 by unknown published | <input checked="" type="checkbox"/> Disagg. Model | <input type="checkbox"/> Outputs ▾ | <input type="checkbox"/> Monitoring ▾ | <input type="checkbox"/> Plan States | <input type="checkbox"/> Revisions | <input type="checkbox"/> Remove |
| an 2017 by unknown published | <input checked="" type="checkbox"/> Strategic Objective | <input type="checkbox"/> Outputs ▾ | <input type="checkbox"/> Monitoring ▾ | <input type="checkbox"/> Plan States | <input type="checkbox"/> Revisions | <input type="checkbox"/> Remove |
| an 2017 by unknown published | <input type="checkbox"/> Sub Strategic Objective | <input type="checkbox"/> Outputs ▾ | <input type="checkbox"/> Monitoring ▾ | <input type="checkbox"/> Plan States | <input type="checkbox"/> Revisions | <input type="checkbox"/> Remove |
| an 2017 by unknown published | <input type="checkbox"/> Cluster | <input type="checkbox"/> Outputs ▾ | <input type="checkbox"/> Monitoring ▾ | <input type="checkbox"/> Plan States | <input type="checkbox"/> Revisions | <input type="checkbox"/> Remove |
| an 2017 by unknown published | <input type="checkbox"/> Cluster Details | <input type="checkbox"/> Outputs ▾ | <input type="checkbox"/> Monitoring ▾ | <input type="checkbox"/> Plan States | <input type="checkbox"/> Revisions | <input type="checkbox"/> Remove |
| an 2017 by unknown published | <input type="checkbox"/> Cluster Objective | <input type="checkbox"/> Outputs ▾ | <input type="checkbox"/> Monitoring ▾ | <input type="checkbox"/> Plan States | <input type="checkbox"/> Revisions | <input type="checkbox"/> Remove |
| an 2017 by unknown published | <input type="checkbox"/> Cluster Activity | <input type="checkbox"/> Outputs ▾ | <input type="checkbox"/> Monitoring ▾ | <input type="checkbox"/> Plan States | <input type="checkbox"/> Revisions | <input type="checkbox"/> Remove |

2 - Navigating the application

2.3 – Two tracks are displayed: the *Plan State* and the *Plan Data Entry Wizard*.



The screenshot displays the 'Planning' section of the application. At the top, there are two 'Planning' labels with a progress indicator showing 'Content in development' (orange dot) and 'Plan Published' (white dot). Below this is a horizontal navigation bar with eight steps: Plan, Locations, Monitoring periods, Disaggregation, Strategic Objective, Cluster, Cluster Objective, and Cluster Activity. The 'Strategic Objective' step is currently selected. The main content area is titled 'Strategic Objectives' and shows 'No Strategic Objectives'. There is a '+ Add Strategic Objective' button. At the bottom, there are four orange buttons: Dashboard, Previous, Save, and Save & Continue. The footer text reads 'Humanitarian Programme Cycle Response Planning Module | [Privacy Policy](#)'.

2 - Navigating the application


2.4 – The plan can be edited as long as it remains in the *Content in development*-state. For the time being, you will not be required to move the plan through its states, so this process is not covered in this guide.



The screenshot displays the 'Planning' stage of the Humanitarian Programme Cycle Response Planning Module. At the top, a progress bar shows 'Planning' as the current stage, with 'Content in development' highlighted in yellow and 'Plan Published' as the next stage. Below the progress bar, a horizontal navigation bar contains eight steps: Plan, Locations, Monitoring periods, Disaggregation, Strategic Objective, Cluster, Cluster Objective, and Cluster Activity. The 'Strategic Objective' step is currently selected. The main content area is titled 'Strategic Objectives' and shows 'No Strategic Objectives'. A button labeled '+ Add Strategic Objective' is visible. At the bottom, there is a navigation bar with four buttons: Dashboard, Previous, Save, and Save & Continue. The footer text reads 'Humanitarian Programme Cycle Response Planning Module | [Privacy Policy](#)'.

3 – Adding objectives and indicators

3.1 – To add your first strategic objective, click the *[+ Add Strategic Objective]* button.



The screenshot displays the 'Strategic Objectives' section of the Humanitarian Programme Cycle Response Planning Module. At the top, there is a progress bar with two 'Planning' labels and a slider. Below this, a horizontal navigation bar contains several steps: Plan, Locations, Monitoring periods, Disaggregation, Strategic Objective (the current step), Cluster, Cluster Objective, and Cluster Activity. The 'Strategic Objectives' section title is followed by the text 'No Strategic Objectives'. A yellow button labeled '+ Add Strategic Objective' is prominently displayed. At the bottom, there are four orange buttons: Dashboard, Previous, Save, and Save & Continue. The footer of the interface reads 'Humanitarian Programme Cycle Response Planning Module | [Privacy Policy](#)'.

3 – Adding objectives and indicators

3.2 – Type the objective description in the *Description* field. Type a new *Custom ID* if your IMWG has agreed to a particular naming scheme, or keep the default value.

Strategic Objectives

[Expand all](#) [Close all](#)

▼ SOS01 :

| Custom ID* | Description |
|--------------------------------------|---|
| <input type="text" value="SO SOS1"/> | <input type="text" value="Enter Strategic Objective here"/> |

[+ Indicator](#)

[- Remove Strategic Objective](#)

[+ Add Strategic Objective](#)

[Dashboard](#) [Previous](#) [Save](#) [Save & Continue](#)

3 – Adding objectives and indicators

3.3 – If the objective has one or more indicators, click [+ Add indicator]. If not, click [+ Add Strategic Objective] again to add another objective.

Strategic Objectives

[Expand all](#) [Close all](#)

✓ SOSO1 :

Custom ID*

Description

[+ Indicator](#)

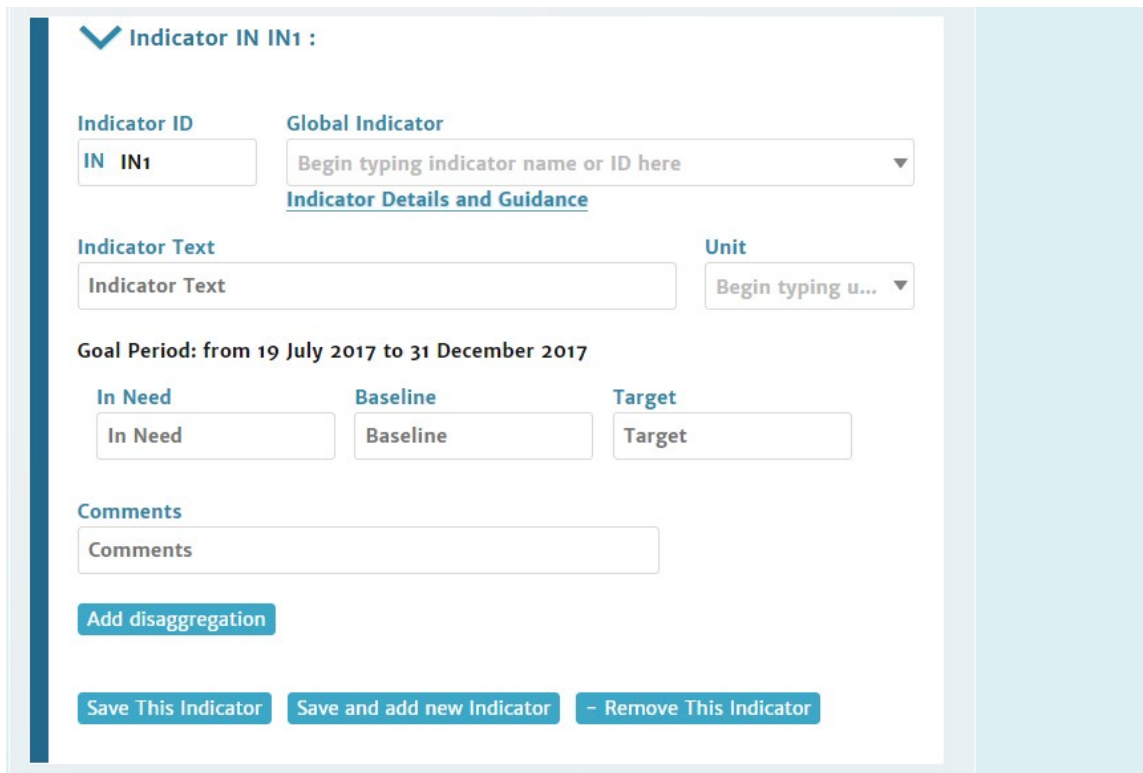
[- Remove Strategic Objective](#)

[+ Add Strategic Objective](#)

[Dashboard](#) [Previous](#) [Save](#) [Save & Continue](#)

3 – Adding objectives and indicators

3.4 – There are three ways to add an indicator: (1) by selecting from the Indicator Registry (IR) and using it as-is, (2) by using an indicator from the IR as a template, (3) by typing one from scratch. For options (1) and (2), see the next slide. To enter a Custom Indicator from scratch, skip to step 3.9 on slide 17. As with objectives, you can keep or overwrite the *Indicator ID*.



✓ Indicator IN IN1 :

Indicator ID
IN IN1

Global Indicator
Begin typing indicator name or ID here ▼
[Indicator Details and Guidance](#)

Indicator Text
Indicator Text

Unit
Begin typing u... ▼

Goal Period: from 19 July 2017 to 31 December 2017

| In Need | Baseline | Target |
|---------|----------|--------|
| In Need | Baseline | Target |

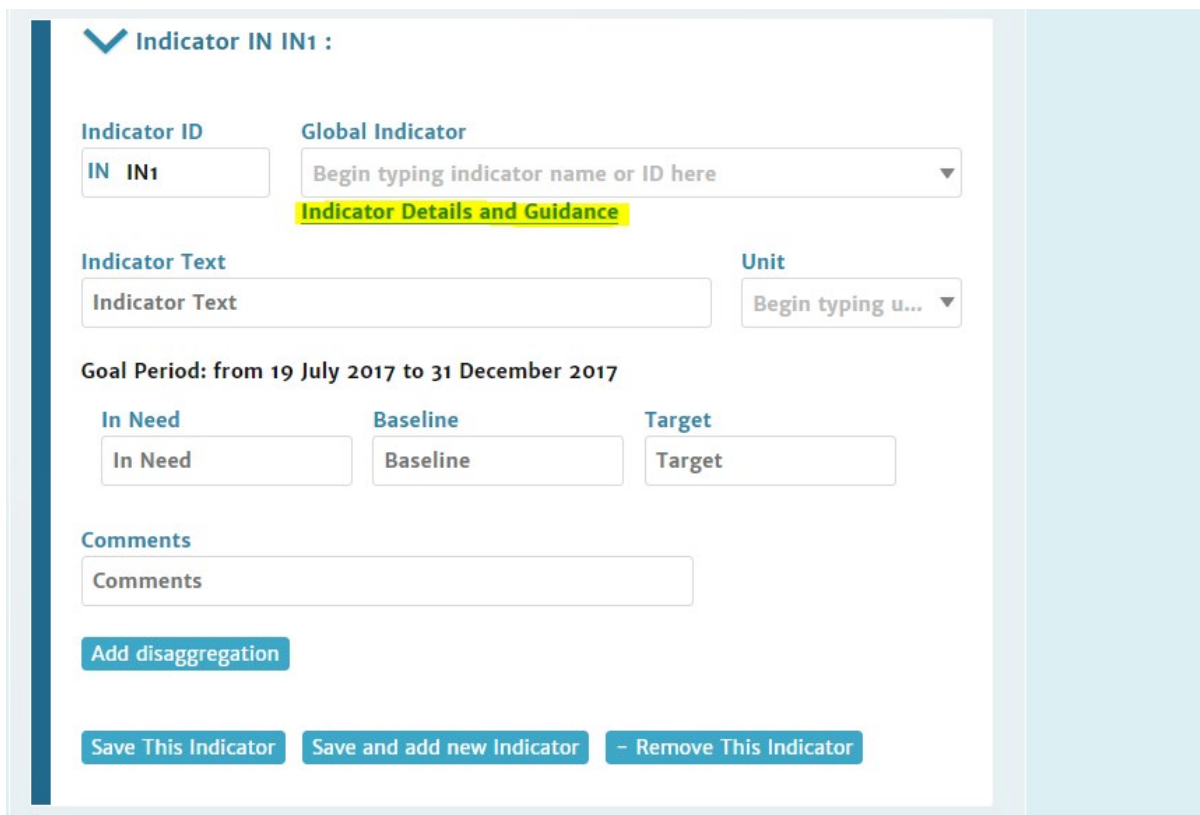
Comments
Comments

Add disaggregation

Save This Indicator Save and add new Indicator - Remove This Indicator

3 – Adding results data per indicator

3.5 - To use an indicator from the IR as-is or as a template, start by clicking the *Indicator Details and Guidance link*, which opens the IR in another browser tab.



Indicator IN IN1 :

Indicator ID: IN IN1

Global Indicator: Begin typing indicator name or ID here

Indicator Details and Guidance

Indicator Text: Indicator Text

Unit: Begin typing u...

Goal Period: from 19 July 2017 to 31 December 2017

| In Need | Baseline | Target |
|---------|----------|--------|
| In Need | Baseline | Target |

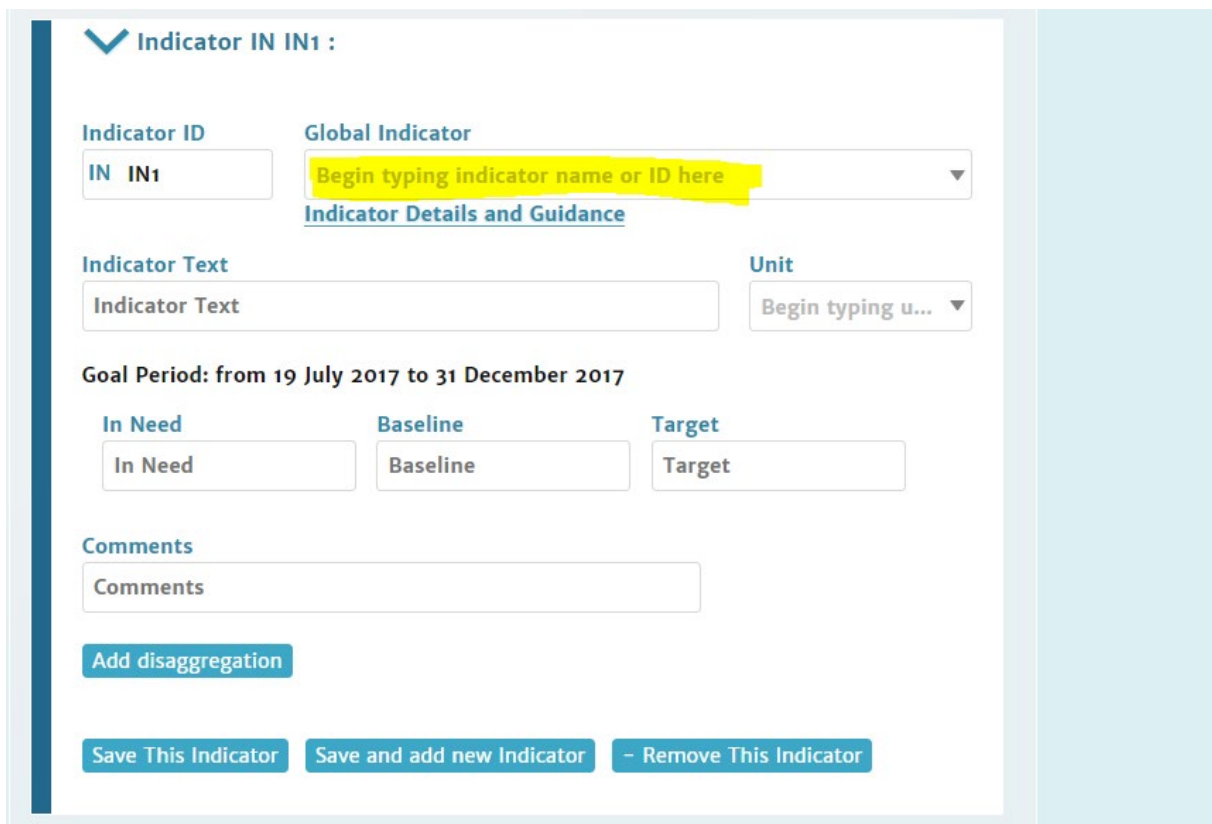
Comments: Comments

Add disaggregation

Save This Indicator | Save and add new Indicator | - Remove This Indicator

3 – Adding results data per indicator

3.6 – Use the features in IR to identify the indicator you want to use, then start typing its name in the autocomplete *Global Indicator* field.



The screenshot shows a web form for adding results data per indicator. The form is titled "Indicator IN IN1 :". It contains several input fields and buttons. The "Indicator ID" field has the text "IN IN1". The "Global Indicator" field is a dropdown menu with the placeholder text "Begin typing indicator name or ID here". Below this field is a link "Indicator Details and Guidance". The "Indicator Text" field has the placeholder text "Indicator Text". The "Unit" field is a dropdown menu with the placeholder text "Begin typing u...". The "Goal Period" is set to "from 19 July 2017 to 31 December 2017". There are three input fields for "In Need", "Baseline", and "Target", each with its respective label above it. The "In Need" field has the text "In Need". The "Baseline" field has the text "Baseline". The "Target" field has the text "Target". There is a "Comments" field with the placeholder text "Comments". At the bottom of the form, there are three buttons: "Add disaggregation", "Save This Indicator", "Save and add new Indicator", and "- Remove This Indicator".

Indicator IN IN1 :

Indicator ID: IN IN1

Global Indicator: Begin typing indicator name or ID here

[Indicator Details and Guidance](#)

Indicator Text: Indicator Text

Unit: Begin typing u...

Goal Period: from 19 July 2017 to 31 December 2017

In Need: In Need

Baseline: Baseline

Target: Target

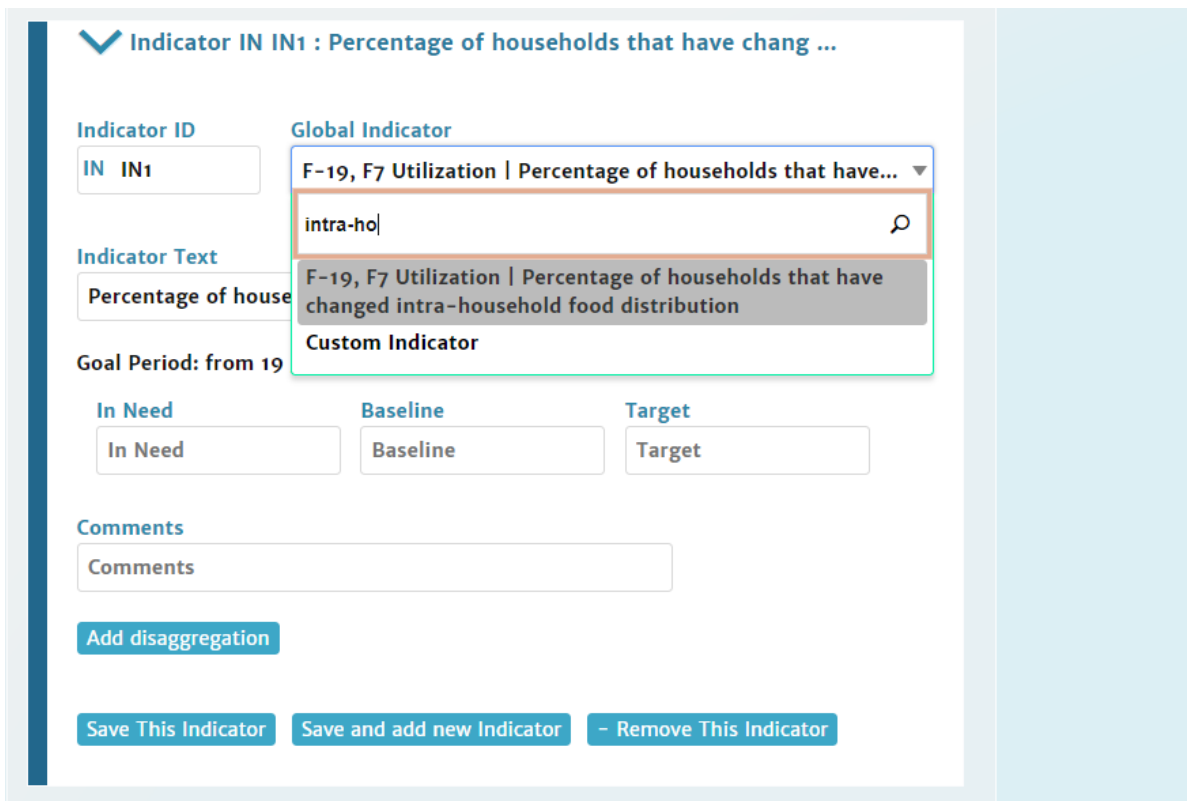
Comments: Comments

Add disaggregation

Save This Indicator Save and add new Indicator - Remove This Indicator

3 – Adding results data per indicator

3.7 – The field returns indicators with names including your typed text. Select the indicator you need and its description is added to the *Indicator Text* field. To use it as-is, skip to step 3.10 on slide 18. To customize the indicator, continue to step 3.8 on slide 16.



The screenshot displays a web form for adding an indicator. At the top, a blue header bar contains a checkmark icon and the text "Indicator IN IN1 : Percentage of households that have chang ...". Below this, the form is organized into several sections:

- Indicator ID:** A text box containing "IN IN1".
- Indicator Text:** A text box containing "Percentage of house".
- Goal Period:** A text box containing "from 19".
- Global Indicator:** A dropdown menu with a search icon. The dropdown is open, showing a list of indicators. The first item is "F-19, F7 Utilization | Percentage of households that have...", which is highlighted. Below it is "intra-ho|". The second item is "F-19, F7 Utilization | Percentage of households that have changed intra-household food distribution". The third item is "Custom Indicator".
- In Need:** A text box containing "In Need".
- Baseline:** A text box containing "Baseline".
- Target:** A text box containing "Target".
- Comments:** A text box containing "Comments".
- Buttons:** At the bottom, there are three buttons: "Add disaggregation", "Save This Indicator", "Save and add new Indicator", and "- Remove This Indicator".

3 – Adding results data per indicator

3.8 – To customize the selected indicator, simply edit the text in the *Indicator Text* field. Continue from step 3.10 on slide 18.

Indicator IN IN1 : Number of households that have changed i ...

Indicator ID

Global Indicator

IN IN1

F-19, F7 Utilization | Percentage of households that have... ▼

[Indicator Details and Guidance](#)

Indicator Text

Number of households that have changed intra-household

⚠

The Indicator has been edited. If it was changed significantly, please enter "Custom Indicator" into the Global Indicator field.

Unit

Begin typing u... ▼

Goal Period: from 19 July 2017 to 31 December 2017

In Need

Baseline

Target

In Need

Baseline

Target

Comments

Comments

Add disaggregation

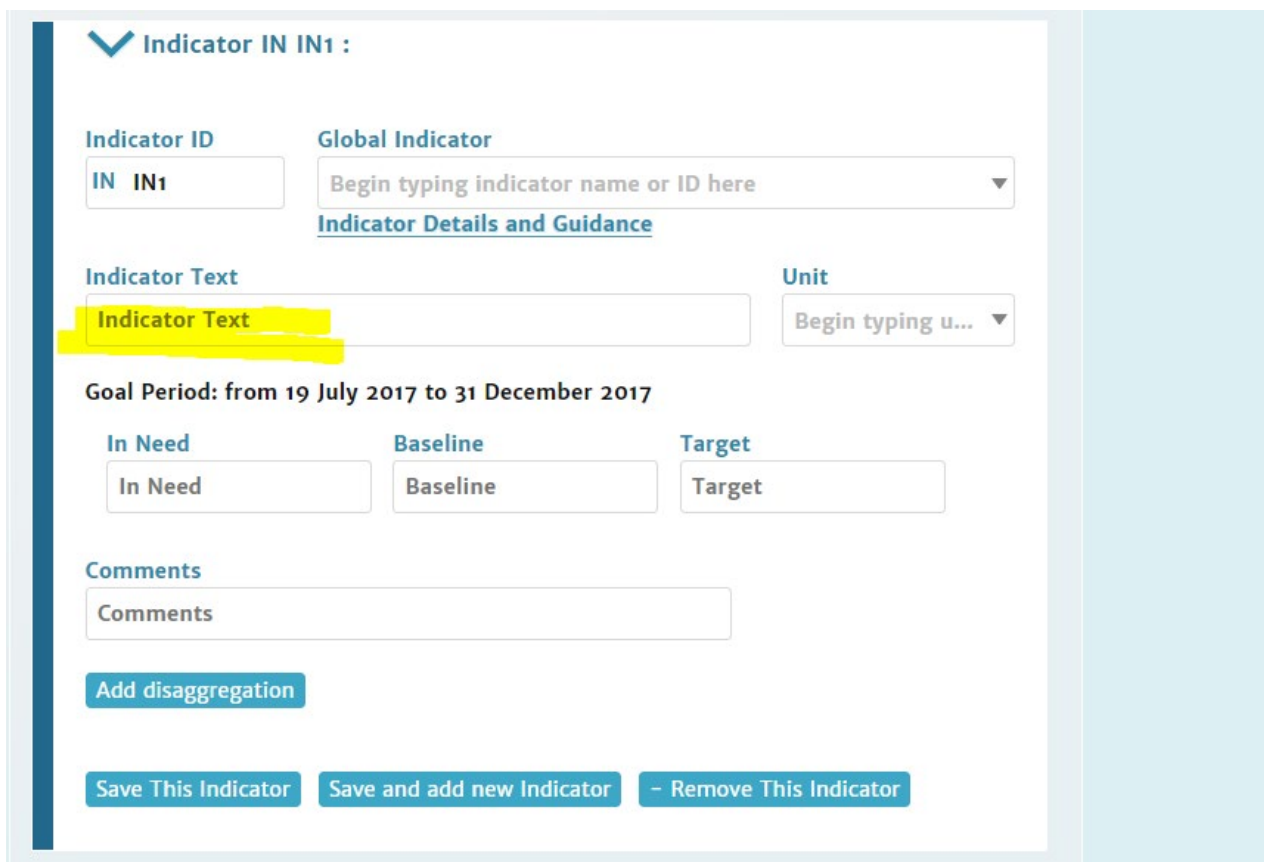
Save This Indicator

Save and add new Indicator

- Remove This Indicator

3 – Adding results data per indicator

3.9 – To enter a *Custom Indicator* from scratch, type the indicator description in the *Indicator Text* field.



Indicator IN IN1 :

Indicator ID: IN IN1

Global Indicator: Begin typing indicator name or ID here

[Indicator Details and Guidance](#)

Indicator Text: Indicator Text

Unit: Begin typing u...

Goal Period: from 19 July 2017 to 31 December 2017

| In Need | Baseline | Target |
|---------|----------|--------|
| In Need | Baseline | Target |

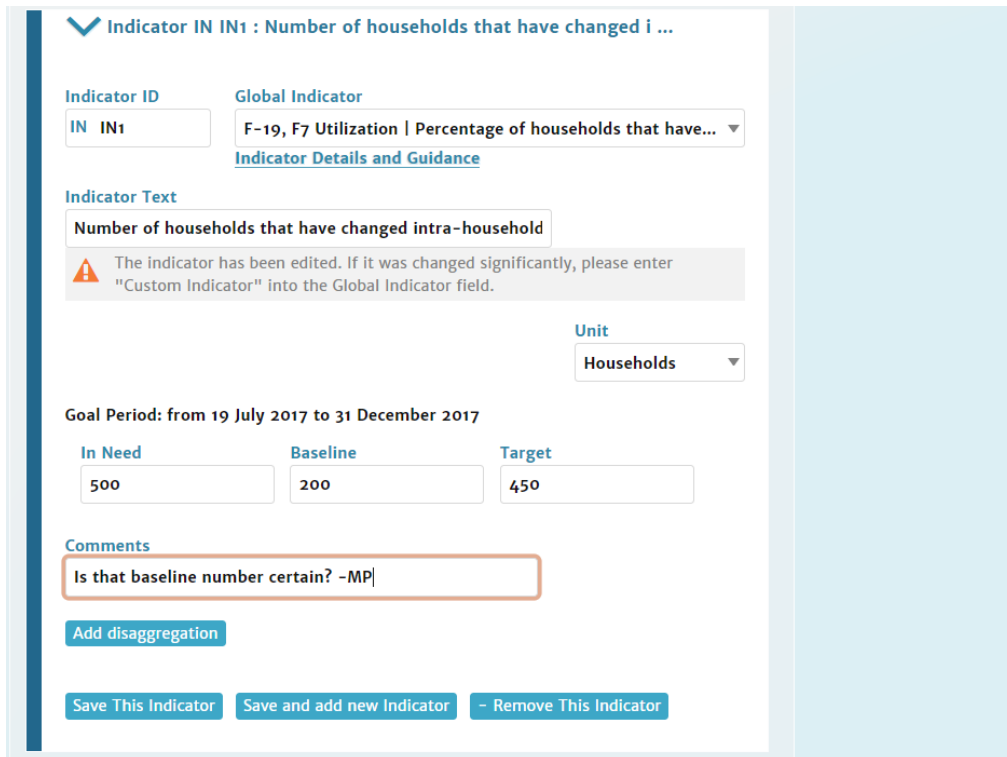
Comments: Comments

Add disaggregation

Save This Indicator Save and add new Indicator - Remove This Indicator

3 – Adding results data per indicator


3.10 – Complete the indicator data entry by adding a Unit from the list and entering (aggregate) *In need*, *Baseline* and *Target* figures. You can add a comment for reference. Comments are displayed within the app and are not included in the viewer or API feed.



Indicator IN IN1 : Number of households that have changed i ...

Indicator ID: IN IN1 Global Indicator: F-19, F7 Utilization | Percentage of households that have...
[Indicator Details and Guidance](#)

Indicator Text: Number of households that have changed intra-household

 The indicator has been edited. If it was changed significantly, please enter "Custom Indicator" into the Global Indicator field.

Unit: Households

Goal Period: from 19 July 2017 to 31 December 2017

| In Need | Baseline | Target |
|---------|----------|--------|
| 500 | 200 | 450 |

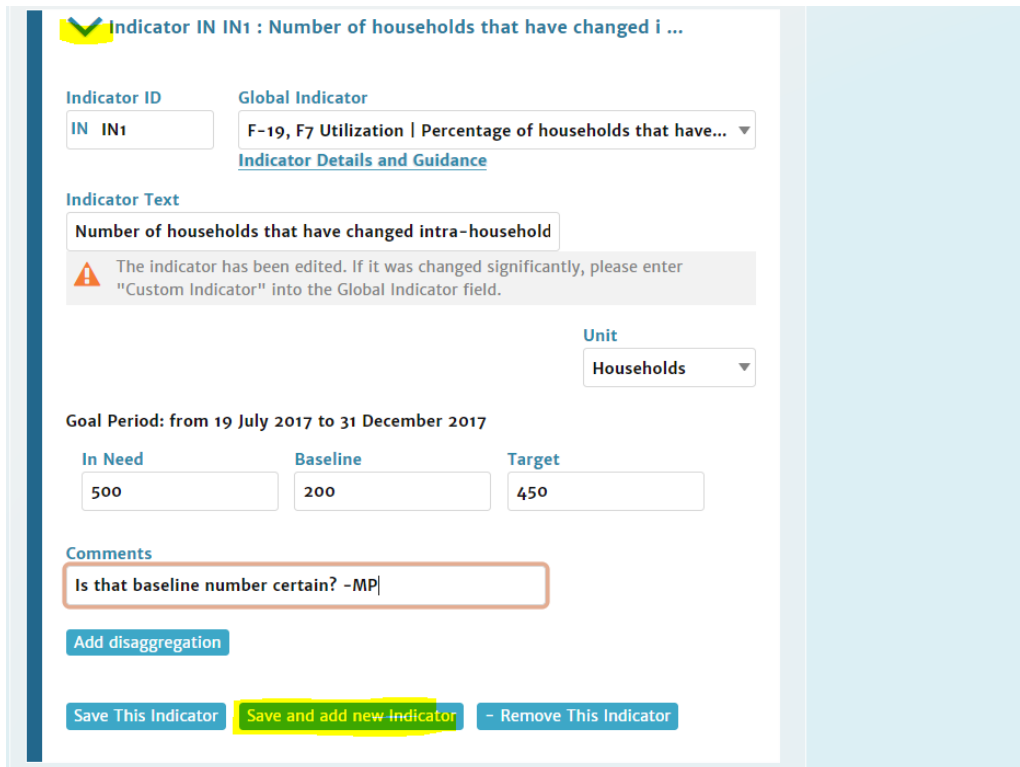
Comments: Is that baseline number certain? -MP|

[Add disaggregation](#)

[Save This Indicator](#) [Save and add new Indicator](#) [- Remove This Indicator](#)

3 – Adding results data per indicator

3.11 – Adding disaggregated in need, baseline and target data is covered in sections 5.x to 5.y on slides xx to yy. To add another indicator, click [Save and add another indicator]. To minimize the indicator, click the chevron in the top left of the indicator panel.



Indicator IN IN1 : Number of households that have changed i ...

Indicator ID: IN IN1

Global Indicator: F-19, F7 Utilization | Percentage of households that have... [Indicator Details and Guidance](#)

Indicator Text: Number of households that have changed intra-household

The indicator has been edited. If it was changed significantly, please enter "Custom Indicator" into the Global Indicator field.

Unit: Households

Goal Period: from 19 July 2017 to 31 December 2017

| In Need | Baseline | Target |
|---------|----------|--------|
| 500 | 200 | 450 |

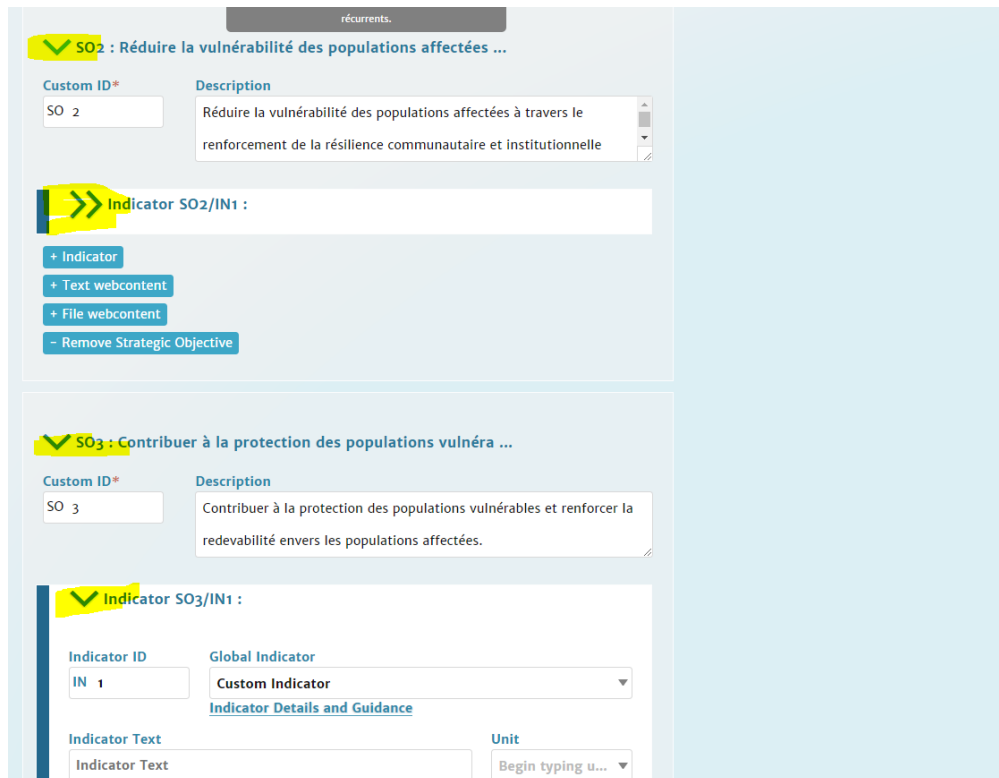
Comments: Is that baseline number certain? -MP

Add disaggregation

Save This Indicator Save and add new indicator - Remove This Indicator

3 – Adding results data per indicator

3.12 – Repeat steps 3.3 to 3.11 for each indicator under this objective. Then repeat steps 3.1 and 3.2 for all other objectives, adding indicators as you go. Use the chevrons to the left of the descriptions to expand or minimize their objective and indicator panels.



The screenshot displays the OCHA HPC Information Services interface. It shows two strategic objectives (SO2 and SO3) and their respective indicators (IN1). The interface includes fields for Custom ID, Description, and Indicator ID, along with buttons for adding indicators, text/webcontent, and removing strategic objectives. The 'Indicator SO2/IN1' section is highlighted with a yellow chevron, indicating it is expanded. The 'Indicator SO3/IN1' section is also highlighted with a yellow chevron, indicating it is expanded. The 'Indicator SO2/IN1' section shows a 'Custom ID' of 'SO 2' and a 'Description' of 'Réduire la vulnérabilité des populations affectées à travers le renforcement de la résilience communautaire et institutionnelle'. The 'Indicator SO3/IN1' section shows a 'Custom ID' of 'SO 3' and a 'Description' of 'Contribuer à la protection des populations vulnérables et renforcer la redevabilité envers les populations affectées'. The 'Indicator SO3/IN1' section also shows a 'Global Indicator' dropdown menu with 'Custom Indicator' selected, and a link to 'Indicator Details and Guidance'. The 'Indicator SO3/IN1' section also shows a 'Unit' dropdown menu with 'Begin typing u...' selected.

récurrents.

✓ SO2 : Réduire la vulnérabilité des populations affectées ...

Custom ID* SO 2

Description Réduire la vulnérabilité des populations affectées à travers le renforcement de la résilience communautaire et institutionnelle

>> Indicator SO2/IN1 :

+ Indicator

+ Text webcontent

+ File webcontent

- Remove Strategic Objective

✓ SO3 : Contribuer à la protection des populations vulnérables ...

Custom ID* SO 3

Description Contribuer à la protection des populations vulnérables et renforcer la redevabilité envers les populations affectées.

✓ Indicator SO3/IN1 :

Indicator ID IN 1

Global Indicator Custom Indicator

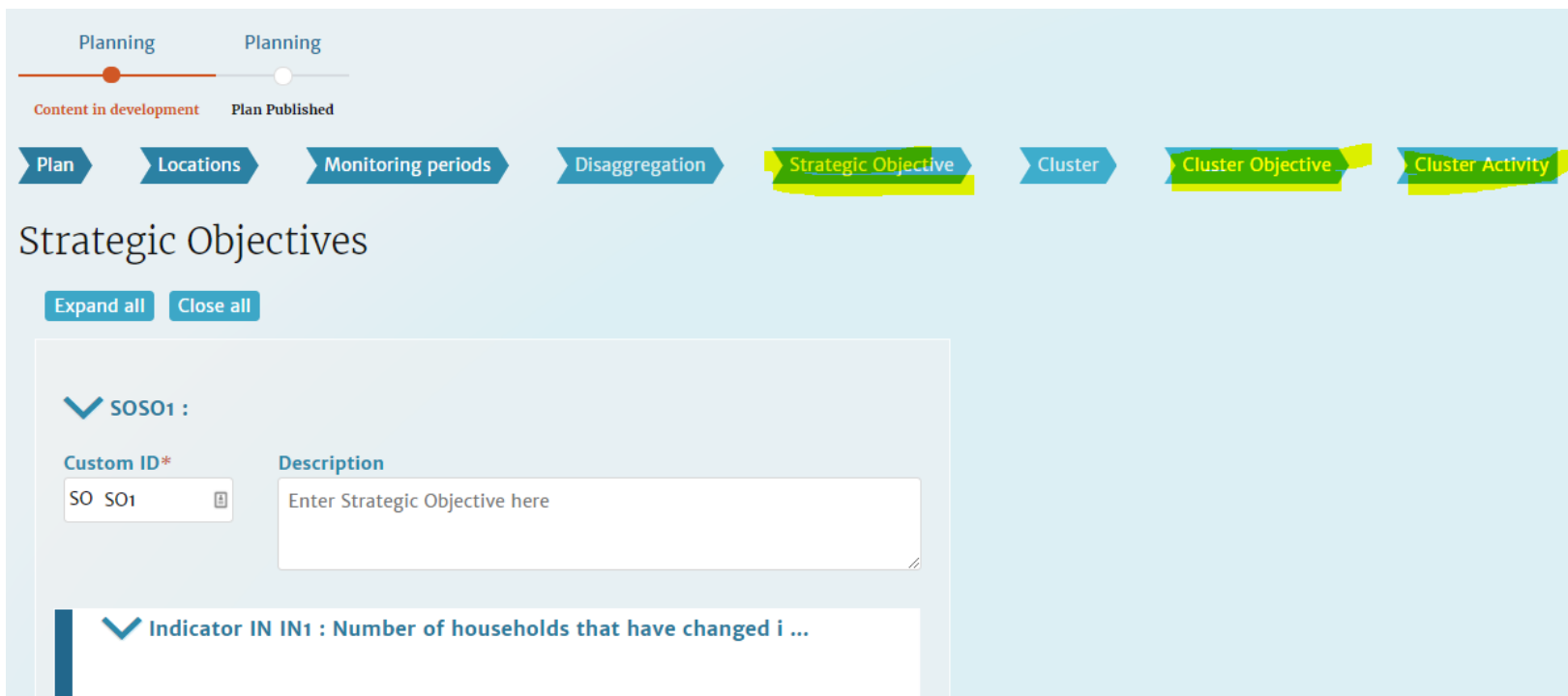
[Indicator Details and Guidance](#)

Indicator Text Indicator Text

Unit Begin typing u...

3 – Adding results data per indicator

3.13 – When you have entered all Strategic Objectives and their indicators, click Save and Continue. Steps 3.1 to 3.12 apply equally to Cluster Objectives and Cluster Activities or indeed any other hierarchy elements in your planning context.



The screenshot displays the 'Strategic Objectives' section of the HPC Information Services interface. At the top, a progress bar shows the current stage as 'Planning' (indicated by a red dot) and 'Plan Published' (indicated by a white dot). Below the progress bar, a series of steps are listed: Plan, Locations, Monitoring periods, Disaggregation, Strategic Objective (highlighted in yellow), Cluster, Cluster Objective, and Cluster Activity. The 'Strategic Objectives' section is expanded, showing a list of objectives. The first objective is 'SOSO1 :'. Below this, there is a 'Custom ID*' field with the value 'SO SO1' and a 'Description' field with the placeholder text 'Enter Strategic Objective here'. Below the 'Strategic Objectives' section, the first indicator is visible: 'Indicator IN IN1 : Number of households that have changed i ...'.

Planning Planning

Content in development Plan Published

Plan Locations Monitoring periods Disaggregation Strategic Objective Cluster Cluster Objective Cluster Activity

Strategic Objectives

Expand all Close all

✓ SOSO1 :

Custom ID* Description

SO SO1 Enter Strategic Objective here

✓ Indicator IN IN1 : Number of households that have changed i ...

4 – Defining clusters

4.1 – Continuing from *Strategic Objectives*, the *Clusters* page is displayed. Alternatively you can navigate here from the Dashboard by clicking *Clusters* in the Planning pull-down for your plan, or from within the wizard by clicking the *Cluster* workflow tab.

Clusters

Please choose the clusters/sectors that will be active in this Plan.

NUTRITION

EDUCATION

PROTECTION

COORDINATION
ET SUPPORT
SERVICES

ABRIS-AME

RELEVEMENT
PRECOCE


SANTE

EHA


SECURITE
ALIMENTAIRE

Drag Clusters above to revise order.

Icon


Click to change the icon

Abbreviation*

CL 5219 


Name*

Nutrition

Global cluster name

Global cluster name

Icon


Click to change the icon

Abbreviation*

CL 5220

Name*

Education

Global cluster name


Global cluster name


4 – Defining clusters

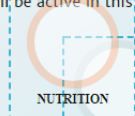
4.2 – Cluster objects are shared with FTS and OPS. You cannot add or remove any, but you can change the order they are displayed in the RPM by dragging the boxes at the top of the screen left and right. The order below will update to match.


Clusters


Please choose the clusters/sectors that will be active in this Plan.



ABRIS-AME



EDUCATION



NUTRITION



PROTECTION


COORDINATION
ET SUPPORT
SERVICES



RELEVEMENT
PRECOCE


SANTÉ


EHA


SECURITE
ALIMENTAIRE


Drag Clusters above to revise order.


Click to change the icon

Abbreviation*
CL 5223

Name*
Abris-AME

Global cluster name
Global cluster name


Click to change the icon

Abbreviation*
CL 5220

Name*
Education

Global cluster name
Global cluster name

4.3 – Click the blank circle next to each cluster and use the modal window to select an icon for each cluster. When you have added an icon to each, click *Save & Continue*.





4 – Defining clusters


4.4 – The *Cluster Details* page is displayed. Alternatively, you can navigate here from the Dashboard by clicking *Cluster Details* in the Planning pull-down for your plan, or from within the wizard by however over the *Cluster* workflow tab and clicking *Cluster Details*.


Clusters : Abris-AME


Configure details for the Cluster/Sector.



ABRIS-AME



EDUCATION



NUTRITION



PROTECTION


COORDINATION
ET SUPPORT
SERVICES



RELEVEMENT
PRECOCE


SANTÉ


EHA


SECURITE
ALIMENTAIRE

Cluster icon



Abbreviation*

Name*

Global cluster name

+ Contact

+ Caseload ?

Dashboard

Previous

Save










Save & Continue

4 – Defining clusters


4.5 – Navigate between the clusters by clicking their icons. For each cluster, add the coordinator, co-lead and/or cluster IMO by clicking [+ Contact].

Clusters : Abris-AME

Configure details for the Cluster/Sector.



Cluster icon



Abbreviation*

Name*

Global cluster name

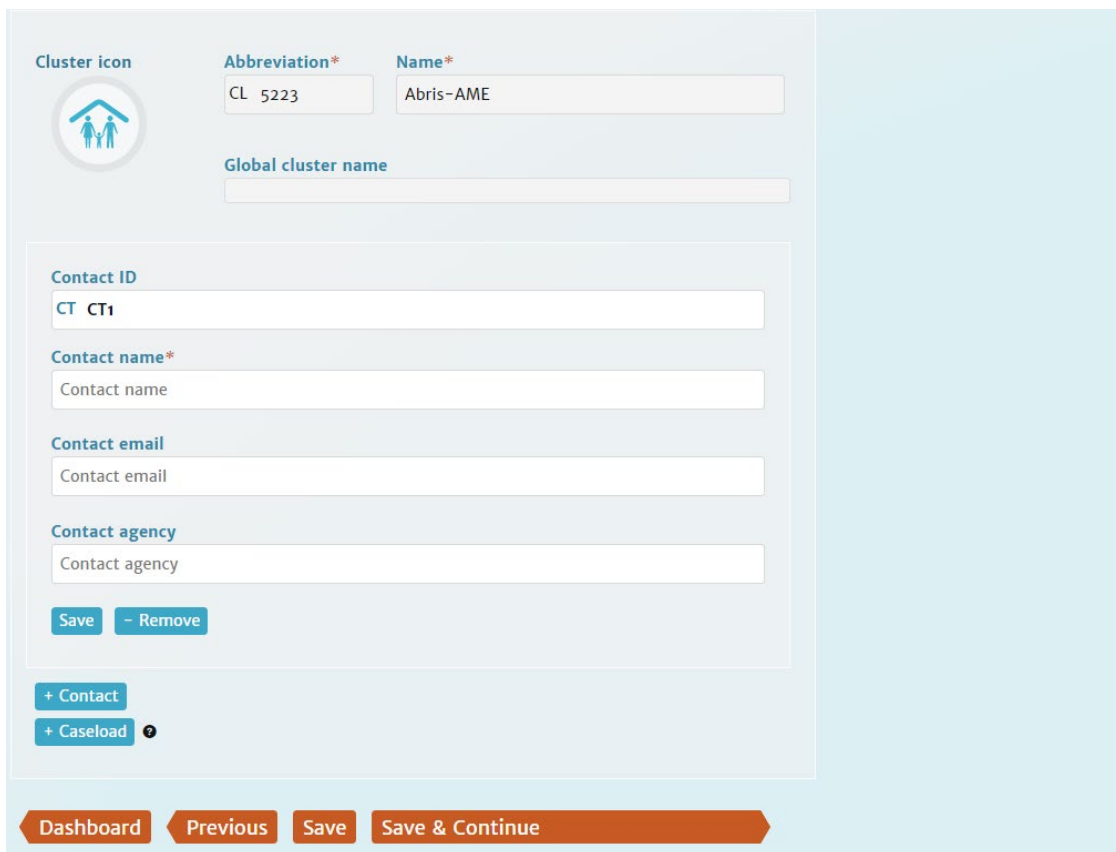
[+ Contact](#)

[+ Caseload](#) ?

[Dashboard](#) [Previous](#) [Save](#) [Save & Continue](#)

4 – Defining clusters

4.6 – For each contact, you can use the default ID or overwrite it. Enter the relevant details for each contact. When you are finished, click *Save and Continue*.



The screenshot shows a web form for defining clusters. It includes a 'Cluster icon' section with a house icon, an 'Abbreviation*' field with 'CL 5223', a 'Name*' field with 'Abris-AME', and a 'Global cluster name' field. Below these are four input fields for 'Contact ID' (containing 'CT CT1'), 'Contact name*', 'Contact email', and 'Contact agency'. At the bottom of the form are buttons for '+ Contact', '+ Caseload', and a help icon. A navigation bar at the very bottom contains buttons for 'Dashboard', 'Previous', 'Save', and 'Save & Continue'.

Cluster icon

Abbreviation* CL 5223

Name* Abris-AME

Global cluster name

Contact ID CT CT1

Contact name*

Contact email

Contact agency

Save - Remove

+ Contact

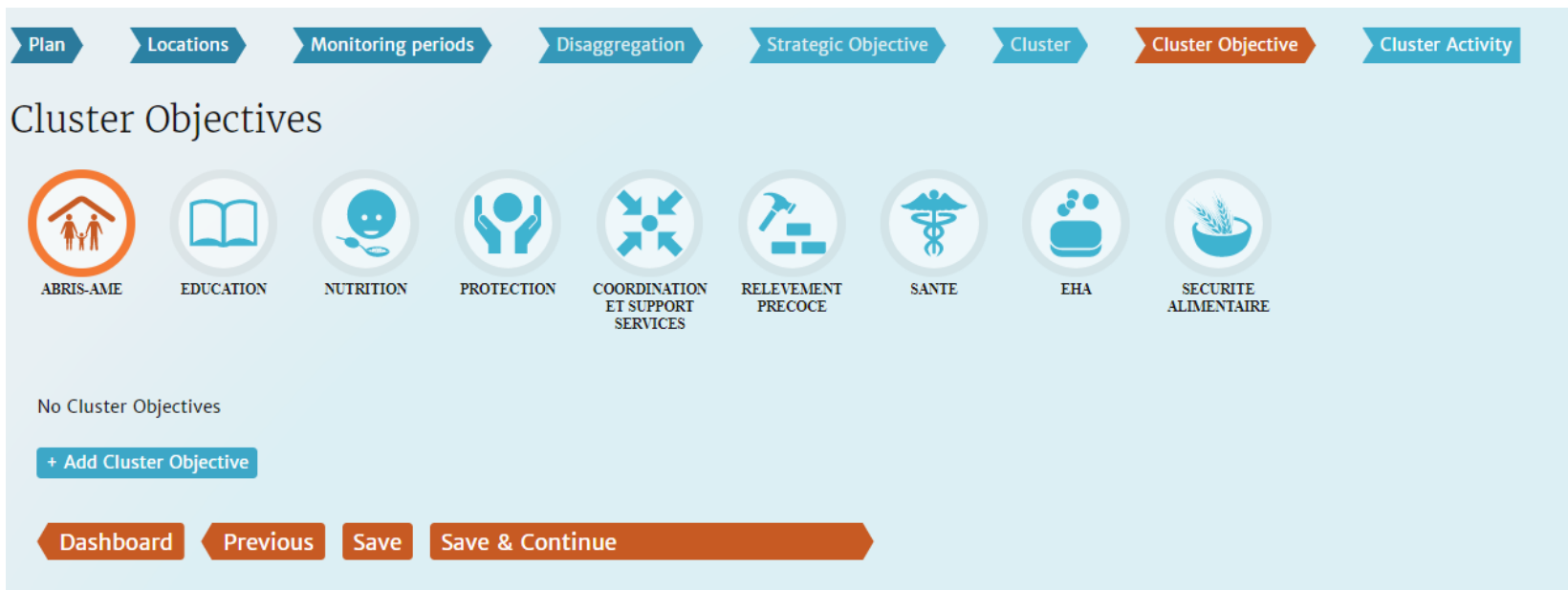
+ Caseload ?

Dashboard Previous Save Save & Continue

4 – Defining clusters

4.7 – The Cluster Objectives page is displayed. Alternatively you can navigate here from the Dashboard by clicking *Clusters* Objectives in the Planning pull-down for your plan, or from within the wizard by clicking the *Cluster Objectives* workflow tab.

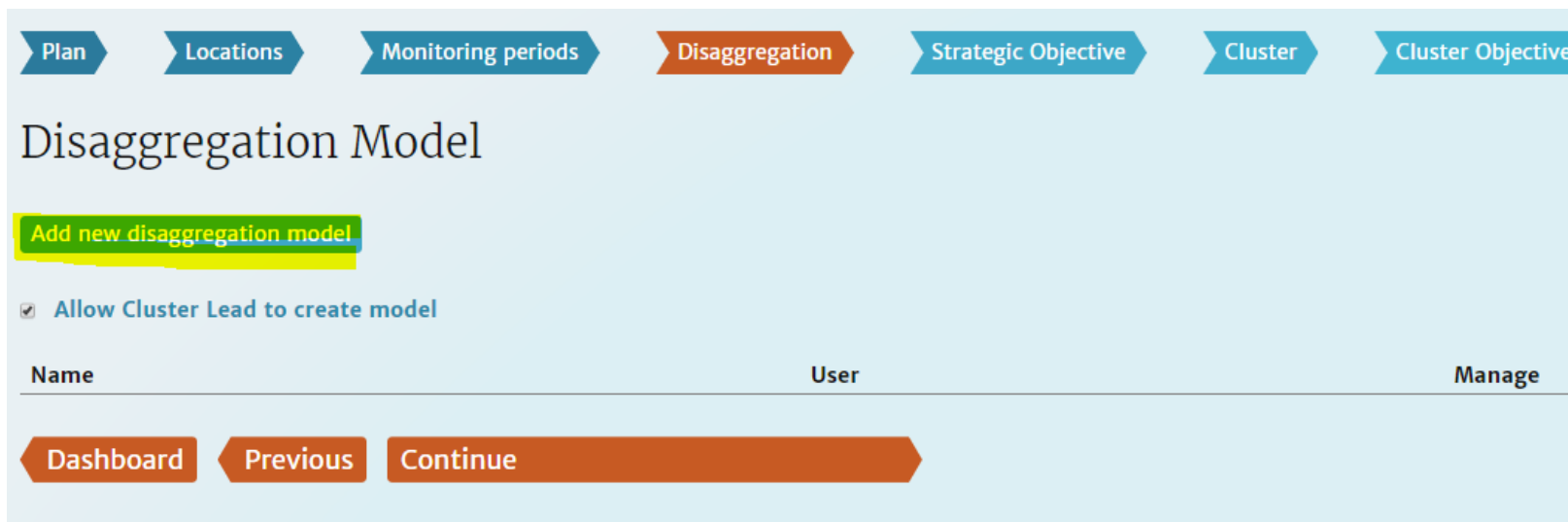
Follow the procedure in steps 3.1 to 3.12 to add all Cluster Objectives and Cluster Activities, or indeed any other hierarchy elements in your planning context.



The screenshot shows the 'Cluster Objectives' page within a workflow wizard. At the top, a series of tabs indicates the current step: Plan, Locations, Monitoring periods, Disaggregation, Strategic Objective, Cluster, **Cluster Objective** (highlighted in orange), and Cluster Activity. Below the tabs, the title 'Cluster Objectives' is displayed. A row of nine circular icons represents different humanitarian sectors: ABRIS-AME (shelter and NFI), EDUCATION (book), NUTRITION (person with leaf), PROTECTION (hands), COORDINATION ET SUPPORT SERVICES (network), RELEVEMENT PRECOCE (hammer), SANTE (caduceus), EHA (pill), and SECURITE ALIMENTAIRE (wheat). Below these icons, the text 'No Cluster Objectives' is shown, followed by a blue button labeled '+ Add Cluster Objective'. At the bottom, a row of navigation buttons includes Dashboard, Previous, Save, and a large orange button labeled 'Save & Continue'.

5 – Adding disaggregation models

5.1 - Navigate to the *Disaggregation Model* page from the Dashboard by clicking *Disagg. Model* in the Planning pull-down for your plan, or from within the wizard by clicking the *Disaggregation* workflow tab. RPM allows multiple disaggregation models to be managed. To start, click *[Add new disaggregation model]*.



Plan Locations Monitoring periods **Disaggregation** Strategic Objective Cluster Cluster Objective

Disaggregation Model

Add new disaggregation model

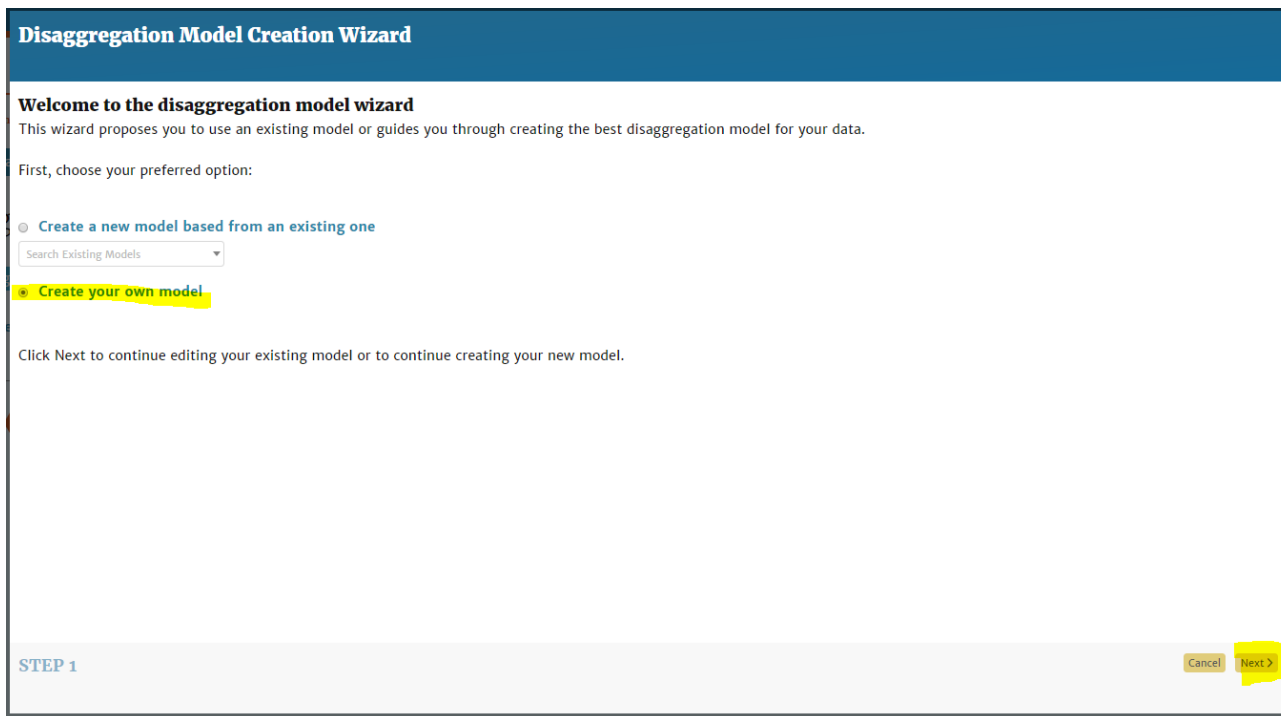
☒ Allow Cluster Lead to create model

| Name | User | Manage |
|------|------|--------|
|------|------|--------|

Dashboard Previous Continue

5 – Adding disaggregation models

5.2 – You can create a model from scratch or use an existing model as a template. For this example, we will create a model which disaggregates beneficiaries by admin 1 locations, sex and age. First, choose the *Create your own model*-radio button and click *Next*.

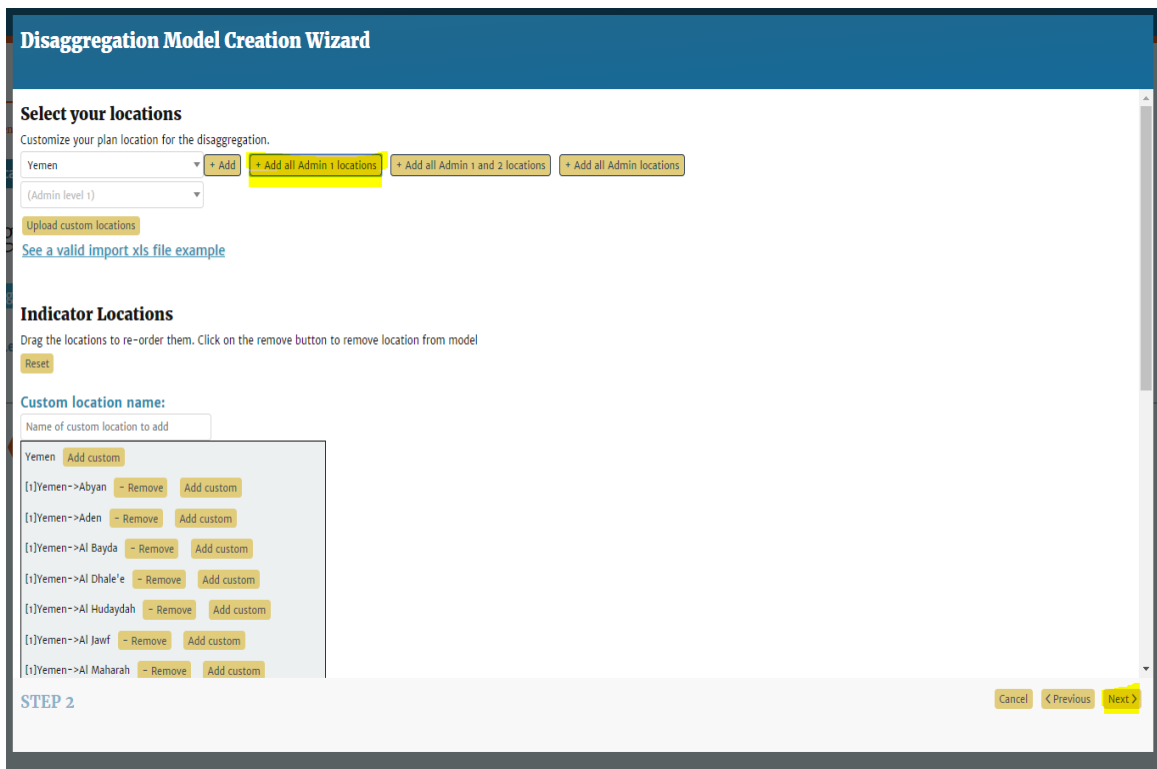


The screenshot shows the 'Disaggregation Model Creation Wizard' interface. The title bar is dark blue with the text 'Disaggregation Model Creation Wizard' in white. Below the title bar, the main content area has a white background. It starts with the heading 'Welcome to the disaggregation model wizard' followed by the text 'This wizard proposes you to use an existing model or guides you through creating the best disaggregation model for your data.' Below this, it says 'First, choose your preferred option:'. There are two radio button options: 'Create a new model based from an existing one' (which is currently selected) and 'Create your own model' (which is highlighted with a yellow background). Under the first option, there is a search bar labeled 'Search Existing Models'. At the bottom of the main content area, there is a light gray bar containing the text 'STEP 1' on the left and two buttons, 'Cancel' and 'Next >', on the right. The 'Next >' button is highlighted with a yellow background.

5 – Adding disaggregation models

5.3 – Locations and categories are handled separately. Add the locations by clicking the *[+ Add all Admin 1 locations]* button, then click *Next*.

You can also add custom locations; these are not covered in this guide.



Disaggregation Model Creation Wizard

Select your locations

Customize your plan location for the disaggregation.

Yemen

(Admin level 1)

[See a valid import xls file example](#)

Indicator Locations

Drag the locations to re-order them. Click on the remove button to remove location from model

Custom location name:

Name of custom location to add

Yemen

[1]Yemen->Abyan

[1]Yemen->Aden

[1]Yemen->Al Bayda

[1]Yemen->Al Dhale'e

[1]Yemen->Al Hudaydah

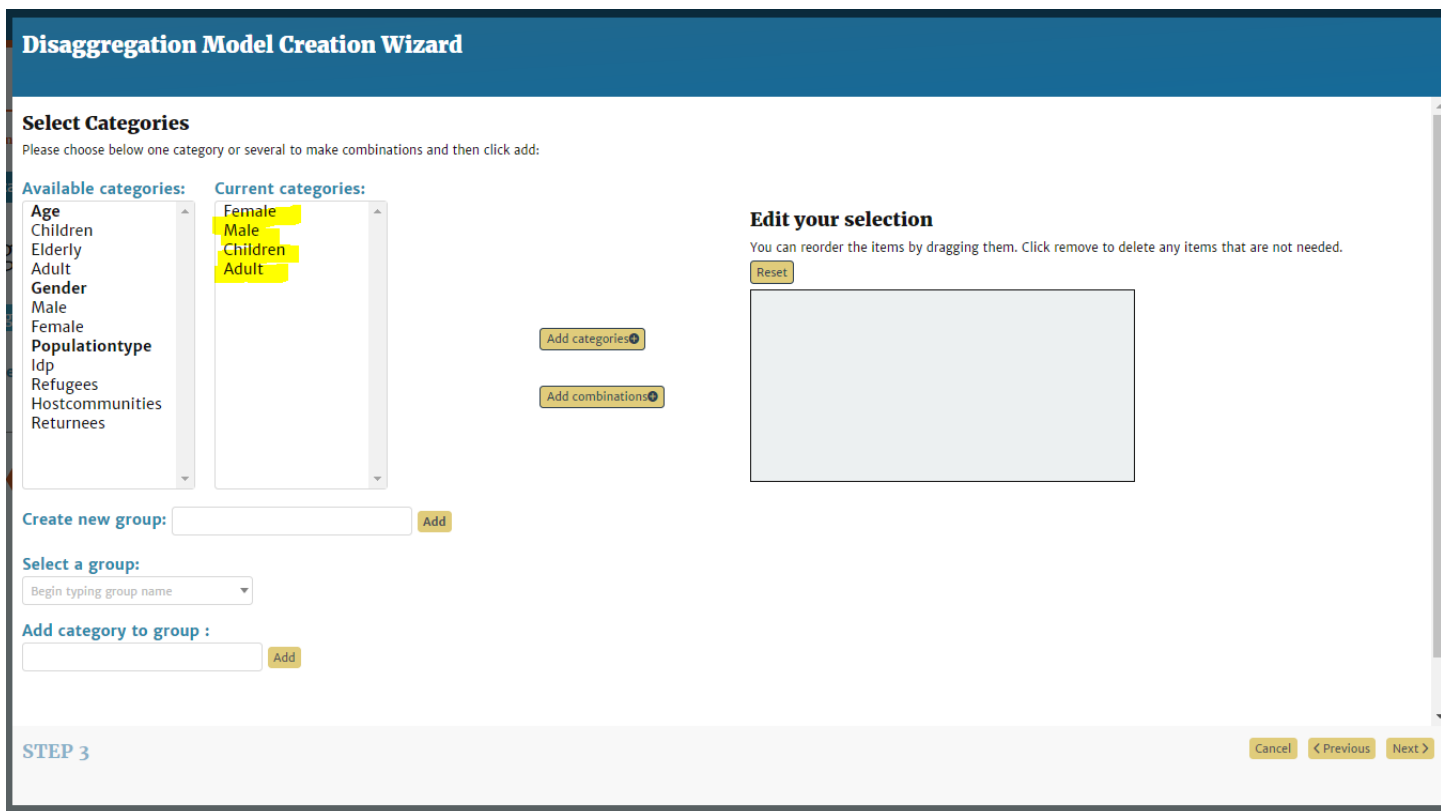
[1]Yemen->Al Jawf

[1]Yemen->Al Maharah

STEP 2

5 – Adding disaggregation models

5.4 – Choose the categories in the list on the left. They are added to an intermediate list in the middle. Continue to the next slide for separate categories, or skip to step 5.6 on slide 34 to review combination categories.



Disaggregation Model Creation Wizard

Select Categories
Please choose below one category or several to make combinations and then click add:

Available categories:

- Age
- Children
- Elderly
- Adult
- Gender
- Male
- Female
- Population type
- Idp
- Refugees
- Host communities
- Returnees

Current categories:

- Female
- Male
- Children
- Adult

Edit your selection
You can reorder the items by dragging them. Click remove to delete any items that are not needed.

Buttons: Add categories, Add combinations, Reset

Create new group: **Add**

Select a group:

Add category to group : **Add**

STEP 3

Navigation: Cancel < Previous Next >

5 – Adding disaggregation models

5.5 – To use the selected categories as-is, as separate categories, click [*Add categories*], then click next.

Disaggregation Model Creation Wizard

Select Categories

Please choose below one category or several to make combinations and then click add:

Available categories:

Current categories:

Age
Children
Elderly
Adult
Gender
Male
Female
Populationtype
Idp
Refugees
Hostcommunities
Returnees

Create new group: Add

Select a group:

Add category to group : Add

Edit your selection

You can reorder the items by dragging them. Click remove to delete any items that are not needed.

Reset

age->[Children](#)

age->[Adult](#)

gender->[Male](#)

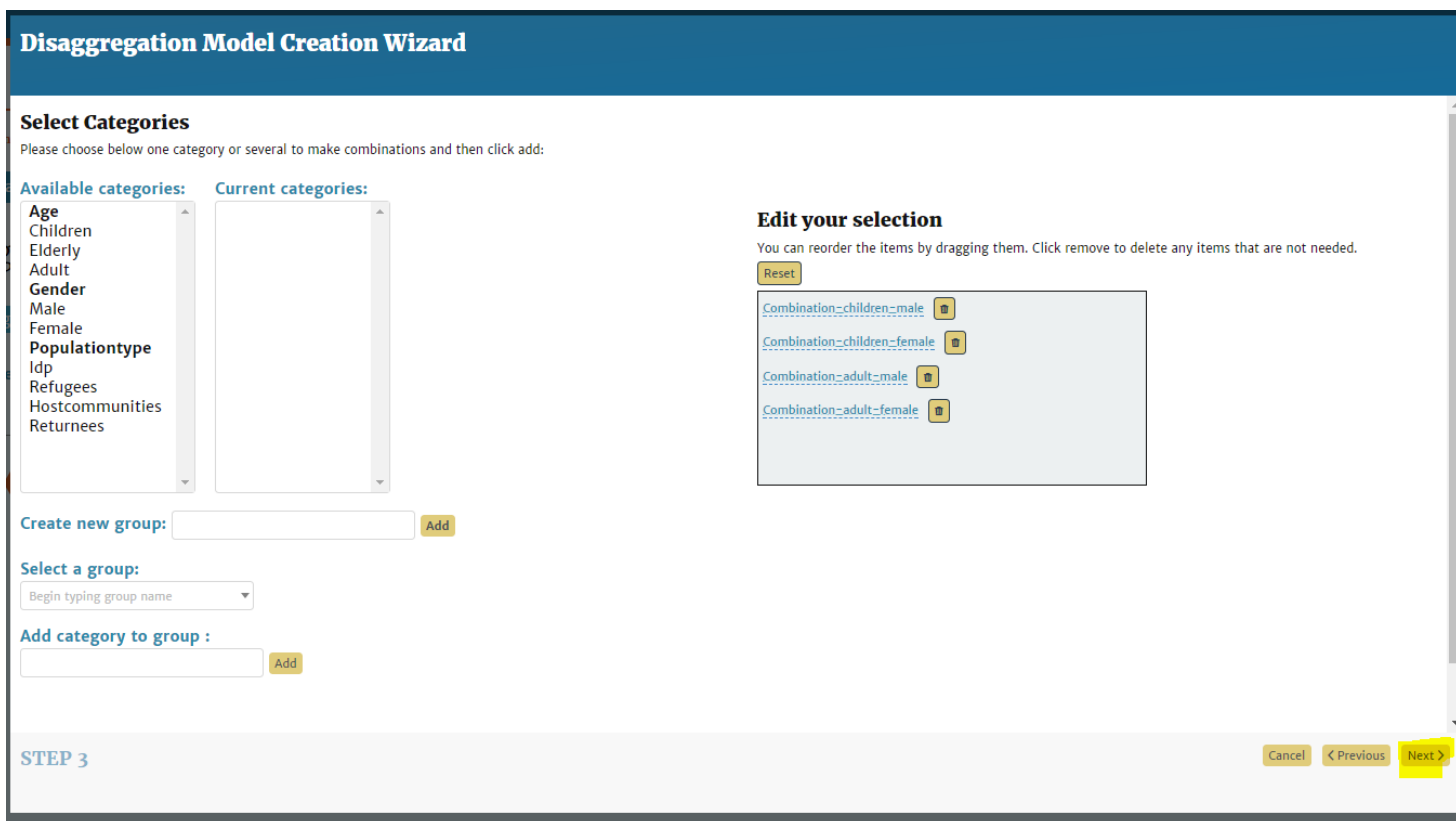
gender->[Female](#)

STEP 3

Cancel < Previous Next >

5 – Adding disaggregation models

5.6 - To create combination categories, (i.e female-adults, female-children, male-adults etc.) click [*Add combinations*] followed by *Next*.



Disaggregation Model Creation Wizard

Select Categories
Please choose below one category or several to make combinations and then click add:

Available categories:

- Age
- Children
- Elderly
- Adult
- Gender
- Male
- Female
- Population type
- Idp
- Refugees
- Host communities
- Returnees

Current categories:

Create new group: **Add**

Select a group:

Add category to group : **Add**

Edit your selection
You can reorder the items by dragging them. Click remove to delete any items that are not needed.

Reset

- Combination-children-male **Remove**
- Combination-children-female **Remove**
- Combination-adult-male **Remove**
- Combination-adult-female **Remove**

STEP 3

Cancel **< Previous** **Next >**

5 – Adding disaggregation models

5.7 – Name the model. It is strongly recommended you specify the categories in the name. Then click **Save**.

Disaggregation Model Creation Wizard

Save the model

Choose a confinent name and save to complete the wizard

Please specify a name for this model so that it can be reused in future.

A default name has been generated for you, but you can replace this.

Model Name:

Yemen 2017 - Admi - gbwm

The table below is a preview. Click "save" to save this model.

| Yemen | Children - male | Children - female | Adult - male | Adult - female | Total |
|------------------|-----------------|-------------------|--------------|----------------|-------|
| Yemen>Abyan | | | | | |
| Yemen>Aden | | | | | |
| Yemen>Al Bayda | | | | | |
| Yemen>Al Dhale'e | | | | | |
| Yemen>Al Hudayd | | | | | |
| Yemen>Al Jawf | | | | | |
| Yemen>Al Mahara | | | | | |
| Yemen>Al Mahwit | | | | | |
| Yemen>Amanat Al | | | | | |
| Yemen>Amran | | | | | |
| Yemen>Dhamar | | | | | |
| Yemen>Hadramau | | | | | |
| Yemen>Hajjah | | | | | |

STEP 4

Cancel
< Previous
Save

5 – Adding disaggregation models

5.8 – Create as many disaggregation models as needed. Then Continue when done.

Planning

Planning

Content in development

Plan Published

Plan

Locations

Monitoring periods

Disaggregation

Strategic Objective

Cluster





Cluster Objective

Cluster Activity

Disaggregation Model

Add new disaggregation model

☒ Allow Cluster Lead to create model

| Name | User | Manage |
|--------------------------|--------------|---|
| Yemen 2017 - Adm1 - gbwm | pryce@un.org |   |
| Yemen 2017 - Adm1 - cafm | pryce@un.org |   |

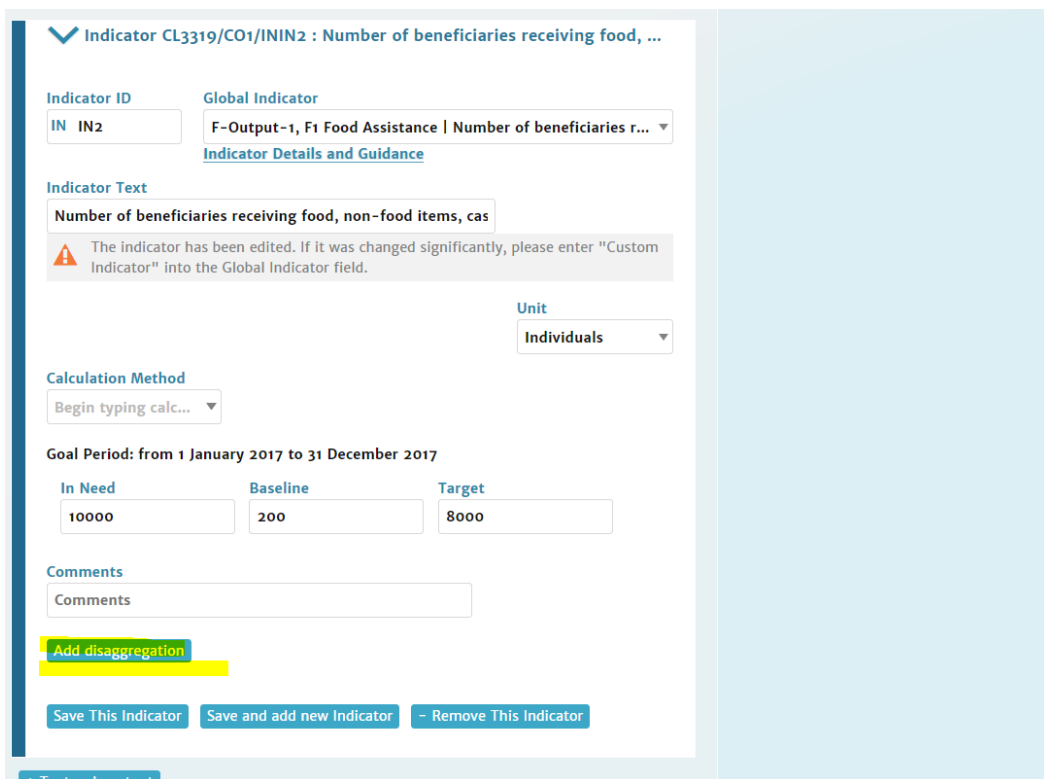
Dashboard

Previous

Continue

6 – Adding disaggregated targets


6.1 – Now that you have disaggregation models, you can apply them to the indicators in your plan. Navigate to an indicator which needs disaggregation, then click *[Add disaggregation]*.



Indicator CL3319/CO1/ININ2 : Number of beneficiaries receiving food, ...

Indicator ID: IN IN2 Global Indicator: F-Output-1, F1 Food Assistance | Number of beneficiaries r...
[Indicator Details and Guidance](#)

Indicator Text: Number of beneficiaries receiving food, non-food items, cas

 The indicator has been edited. If it was changed significantly, please enter "Custom Indicator" into the Global Indicator field.

Unit: Individuals

Calculation Method: Begin typing calc...

Goal Period: from 1 January 2017 to 31 December 2017

| In Need | Baseline | Target |
|---------|----------|--------|
| 10000 | 200 | 8000 |

Comments: Comments

Add disaggregation

Save This Indicator Save and add new Indicator - Remove This Indicator

+ Text webcontent

6 – Adding disaggregated targets

6.2 – Select a disaggregation model from the list and click *Select model*.

Disaggregation Wizard

indicator details
Description: Number of beneficiaries receiving food, non-food items, cash transfers and vouchers
Period: from 1 January 2017 to 31 December 2017
Unit:

Overall totals:

| In Need | Baseline | Target |
|---------|----------|--------|
| 10000 | 200 | 8000 |

Select disaggregation model
Please specify how this indicator should be disaggregated. You have to select from an existing model.

Select existing model

Admin 1 disaggregation

Selected model contains:
Locations:

- Niger
- Niger >Agadez
- Niger >Diffa
- Niger >Dosso
- Niger >Maradi
- Niger >Niamey
- Niger >Tahoua
- Niger >Tillabery
- Niger >Zinder

Category combinations:

Close Select model

6 – Adding disaggregated targets

6.3 – A table is displayed. You can enter the disaggregated values directly. Note that you can paste multiple rows and columns of data at once. Click *Zoom* to maximize and Save and continue when done. Repeat the procedure in steps 6.1 to 6.3 for each indicator which needs disaggregation and click Save and Continue when done

Disaggregated goals

indicator details

Description: Number of beneficiaries receiving food, non-food items, cash transfers and vouchers

Period: from 1 January 2018 to 31 December 2018

Unit:

Overall totals:

| In Need | Baseline | Target |
|---------|----------|--------|
| 10000 | 200 | 8000 |

Disaggregated goals

[Zoom](#) [Export to CSV \(file\)](#)

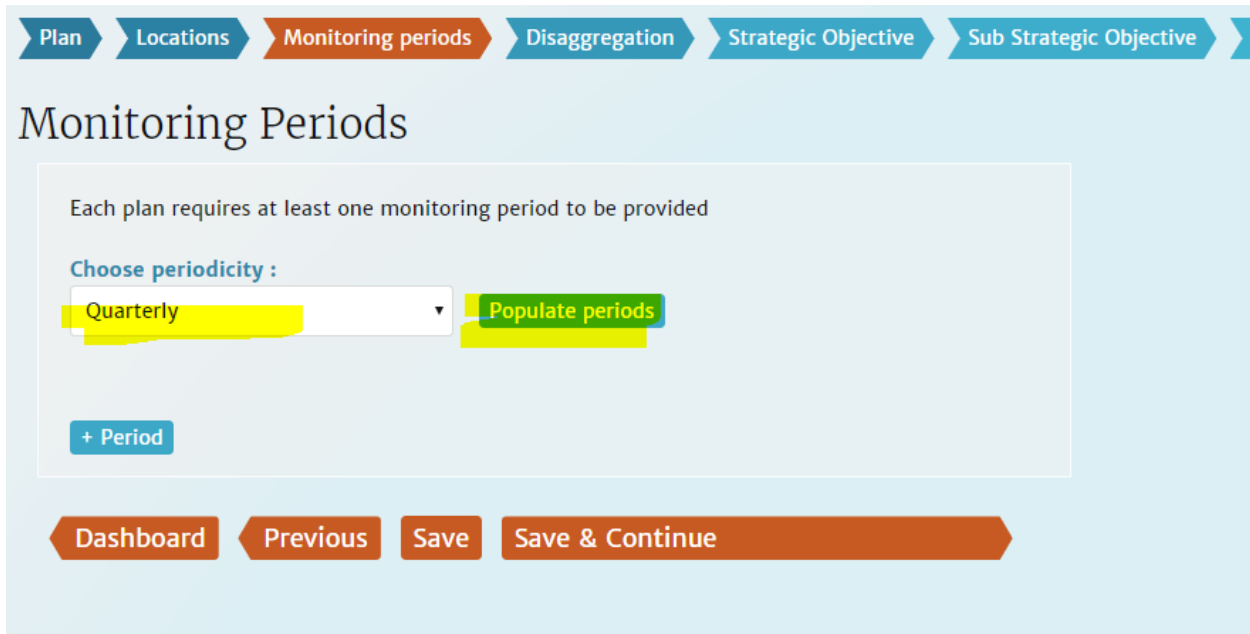
| | Boys | | | Girls | | | Elderly – male | | | Male | | | Fer | |
|--------------|---------|----------|--------|---------|----------|--------|----------------|----------|--------|---------|----------|--------|---------|-----|
| | In Need | Baseline | Target | In Need | Baseline | Target | In Need | Baseline | Target | In Need | Baseline | Target | In Need | Bas |
| Cameroon | 100 | 25 | | | | | | | | | | | | |
| Adamaoua | 200 | 10 | | | | | | | | | | | | |
| Centre | 50 | 17 | | | | | | | | | | | | |
| Est | | | | | | | | | | | | | | |
| Extreme-Nord | | | | | | | | | | | | | | |
| Littoral | | | | | | | | | | | | | | |
| Nord | | | | | | | | | | | | | | |
| Nord-Ouest | | | | | | | | | | | | | | |
| Ouest | | | | | | | | | | | | | | |
| Sud | | | | | | | | | | | | | | |
| Sud-Ouest | | | | | | | | | | | | | | |

Close Select different Model Save and stay **Save and continue**

7 – Defining monitoring periods

7.1 – Navigate to the *Monitoring Periods* screen clicking *Monit. Periods* in the Planning pull-down for your plan, or from within the wizard by clicking the *Monitoring Periods* workflow tab.

The default monitoring periodicity for HRPs is quarterly. Choose a periodicity from the list, then click [*Populate periods*].



The screenshot shows the 'Monitoring Periods' screen within a workflow wizard. At the top, a series of tabs indicates the current step: 'Plan', 'Locations', 'Monitoring periods' (highlighted in orange), 'Disaggregation', 'Strategic Objective', 'Sub Strategic Objective', and 'C'. Below the tabs, the title 'Monitoring Periods' is displayed. A light blue box contains the instruction 'Each plan requires at least one monitoring period to be provided'. Underneath, the label 'Choose periodicity :' is followed by a dropdown menu showing 'Quarterly' and a green 'Populate periods' button. A '+ Period' button is also visible. At the bottom, a row of navigation buttons includes 'Dashboard', 'Previous', 'Save', and 'Save & Continue' (highlighted in orange).

7 – Defining monitoring periods

7.2 – Default periods for your chosen periodicity are added. Make any changes to the start and end dates as necessary. For cumulative results, start each period on the same day.

Custom periods and expiry dates for monitoring data entry can be added; these are not covered in this guide.

Monitoring Periods

Each plan requires at least one monitoring period to be provided

Choose periodicity :
Quarterly ▼

Populate periods Reset periods

| | Start date* | End date* | Expiry date | |
|---------------------|-------------|-----------|----------------|------------------------|
| Monitoring Period 1 | 01/01/17 | 31/03/17 | provide your e | Remove |
| Monitoring Period 2 | 01/04/17 | 30/06/17 | provide your e | Remove |
| Monitoring Period 3 | 01/07/17 | 30/09/17 | provide your e | Remove |
| Monitoring Period 4 | 01/10/17 | 31/12/17 | provide your e | Remove |

+ Period

Any questions?

Feel free to email the HPC-IS team at OCHA HQ:

- Mark Pryce - *pryce (at) un (dot) org*
- Anwar Mahfoudh - *mahfoudh (at) un (dot) org*