

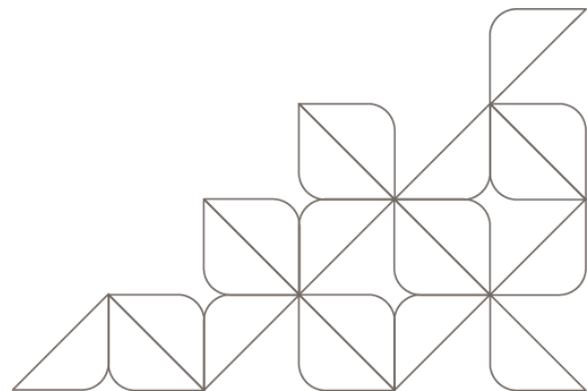
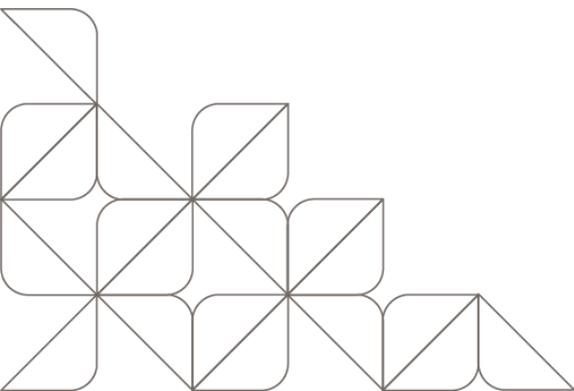


Capacity Solutions Platform

Assess. Track. Report. Capacity Development Assessment Done Right.

Capacity Solutions Platform (CSP) User Guide for Partners

Version 2.0
September 2016



Pact is a promise of a better tomorrow for all those who are poor and marginalized. Working in partnership to develop local solutions that enable people to own their own future, Pact helps people and communities build their own capacity to generate income, improve access to quality health services, and gain lasting benefit from the sustainable use of the natural resources around them. At work in more than 30 countries, Pact is building local promise with an integrated, adaptive approach that is shaping the future of international development. Visit us at www.pactworld.org.

September 2016

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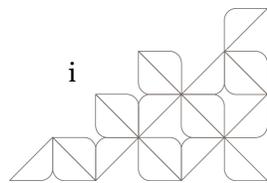
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Abbreviations and Acronyms

CD	capacity development
CPI	Community Performance Index
CSP	Capacity Solutions Platform
GPI	Government Performance Index
ISP	Institutional Strengthening Plan
NUPAS	Non-U.S. Organization Pre-Award Survey
OCA	Organizational Capacity Assessment
OPI	Organizational Performance Index
T&M	training and mentoring
USAID	United States Agency for International Development



1. Introduction to the Capacity Solutions Platform (CSP)

1.1. What is the CSP?

Pact has invested in creating a central platform to complement its decades of capacity development (CD) work in helping local and international organizations better understand and use their CD data. The resulting web-based Capacity Solutions Platform (CSP) administers, measures, analyzes, and reports on CD results. It allows partners to enter data directly into the platform, view results online, and instantly share results through automated reports.

The CSP currently incorporates the following Pact tools:

- Performance indices:
 - Organizational Performance Index (OPI)¹
 - Government Performance Index (GPI)
 - Community Performance Index (CPI)
- Organizational Capacity Assessment (OCA)
- United States Agency for International Development (USAID) Non-U.S. Organization Pre-Award Survey (NUPAS)
- Organizational Network Analysis (ONA)
- Training and Mentoring (T&M) Tracker



Pact staff in Zambia review data on the CSP on their mobile phone at a meeting.

To learn more about Pact's CD tools, visit Pact's Resource Library at <http://www.pactworld.org/library>, where you can download our Creative Commons-licensed materials. And, read more about how Pact is using the CSP at www.capacitysolutionsplatform.com.

1.2. Why did Pact create the CSP and what benefits does it offer?

Currently, no industry standards exist to measure organizational capacity. Each organization has its own tool, and few organizations have reliable, valid tools that measure how CD links to organizational performance. This often leads to information silos, where organizations have access only to their own data and local partners and donors lack access to this data to support decision-making.

Pact created the CSP as a solution to these issues to:

- Offer a common platform, accessible to organizations, partners, and donors
- Promote use of common tools and calculation methods
- Allow easy data entry and storage
- Produce results displayed in simple and visually appealing ways

¹ Pact's OPI has been endorsed by the USAID Local Solutions team as a strong outcome-level measurement of organizational capacity development. See more at <https://usaidlearninglab.org/library/organizational-performance-index-measurement-tool>.

1.3. Who can use the CSP, and how?

Local partners can view, analyze, and submit their CD data to track their performance over time, make decisions on investments in CD, and share their results with external stakeholders like board members or donors. *This manual specifically is designed for local partners using the CSP.*

Pact uses the CSP to view CD data and make decisions on what types of CD interventions to carry out at the partner, project, regional, and global levels. Pact staff have access to all data on the CSP.

Donors also have the opportunity to access the CSP to view summary CD data of the organizations supported under their projects.

1.4. Where is data stored?

The CSP stores data in the cloud so that data easily can be shared with staff who can help with analysis, planning, and reporting from anywhere and in real time.

1.5. Is data secure on the CSP?

Yes. The CSP uses industry standard SSL (encryption) security for all work. Your data is hosted in a secure hosting facility and regularly backed up.

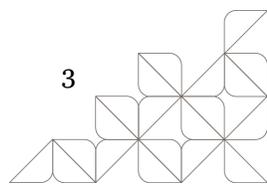
1.6. What is the demo CSP site?

The demo site allows Pact staff to train others on and to practice using the CSP. As such, data on the demo site is not accurate. Notably, new features are released on the demo site before going to the live site to allow Pact staff and CSP users time to practice the new features before they can potentially affect CD data stored on the CSP.

To access the demo site, go to <http://demo.capacitysolutionsplatform.com>. You will need to have a special demo account created for you to access the demo site.

1.7. How do I register or request an account?

To request access to the CSP, you can contact the Pact staff member you are working with or you can email csp@pactworld.org. Once your account has been created, an email will be sent that includes your temporary password and a link to login to the site.

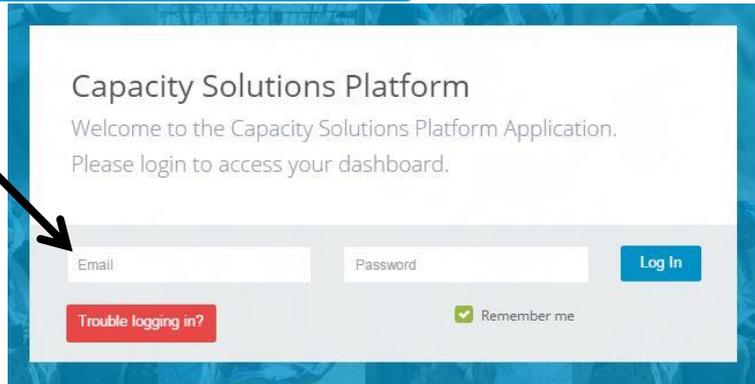


2. Login Process and Troubleshooting

2.1. How to Login

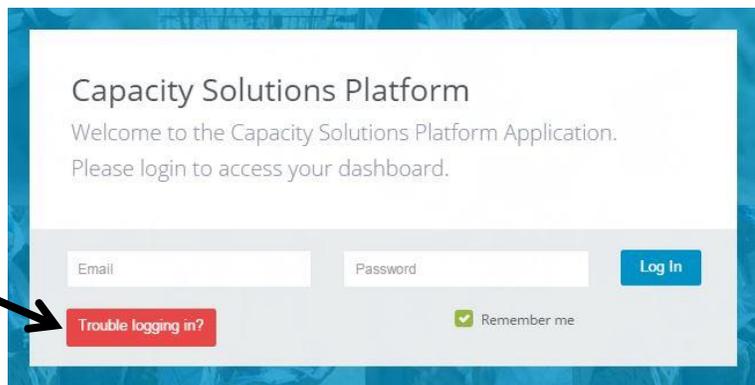
Step 1: Go to <http://pact.capacitysolutionsplatform.com/login>.

Step 2: Enter your email and the password given to you by Pact staff or sent to your email upon registration.



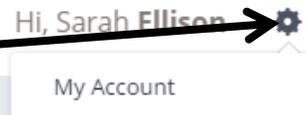
2.2. Recovering your Password

Click “Trouble logging in?” to recover your password. A new, temporary password will be sent to your email account.



2.3. Changing your Password

Step 1: Click on the settings wheel next to your name, then click “My Account.”



Change Password

Old Password

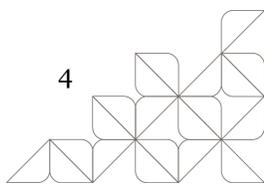
New Password

New Password Confirmation

Step 2: Click “Change Password.” Type in your temporary or old password, then type in your new password twice.

Step 3: Click “Save.”

Save



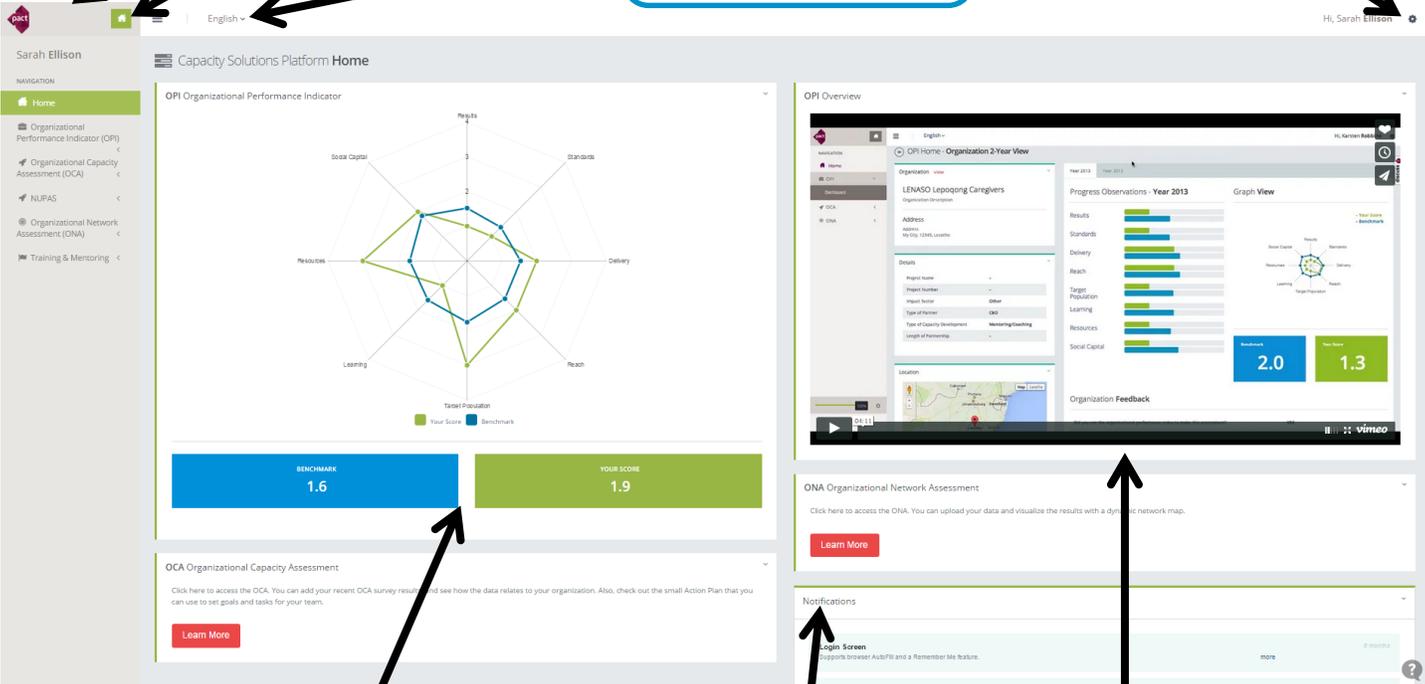
3. The CSP Homepage

Navigation Panel
From this panel, choose which capacity tool to explore.

Home Button
Click here to get to the home page anytime.

Language Menu
Choose your language from various options.

CSP Settings
Here you can make changes to your account.

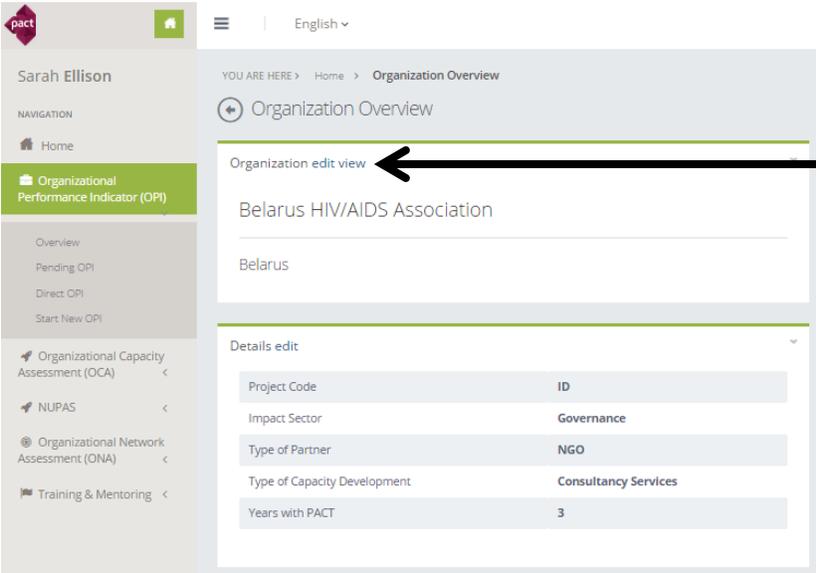


Additional Capacity Tool Panels
Panels showcasing (only) the tools you use and your organization's data will be linked here for quick reference.

CSP Videos and Tutorials
This panel showcases videos and instructional tutorials on using the CSP.

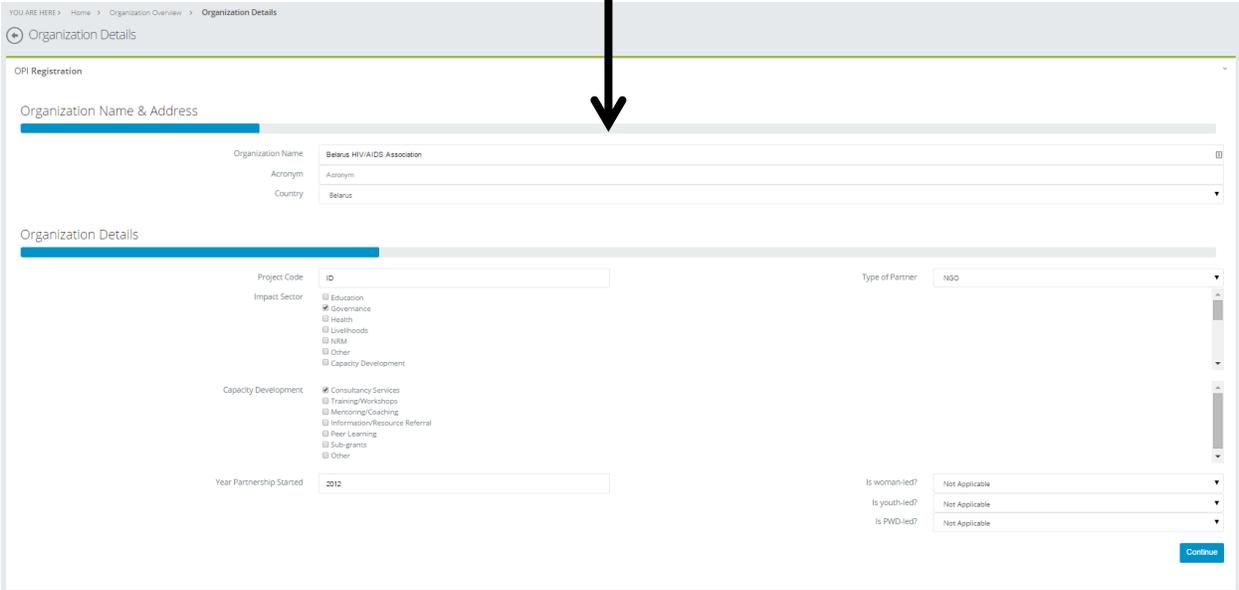
Announcements
This panel shows updates that the CSP designers and developers have made recently.

4. View and Edit Organization Details



When viewing any data, you have the option to view and edit your organization's information. Click the "edit view" button to make changes to your organization's details.

Organization Details: Correct the name; enter a project code; set the type of partner, impact sectors the organization works in, type of capacity development (CD) support received by Pact, and years of partnership with Pact; and designate if the organization is led by women, youth, or a person(s) with disabilities. Click "Continue" when done.

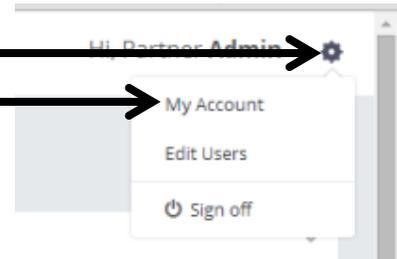


5. Partner Account Settings

Partners can edit their account information, add and edit CSP users from their organizations, or sign out from the settings wheel.

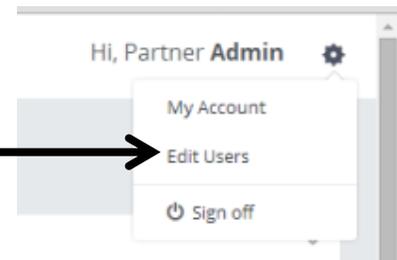
5.1. Edit Account Information

Step 1: Click the settings wheel in the upper right-hand corner of the CSP homepage, then click “My Account” to view and edit your account information.



5.2. Add Account Users

Step 1: Click on the settings wheel in the upper-right hand corner of the CSP homepage, then click “Edit Users.”



Step 2: Search to see if the user already has a profile on the CSP. If not, click “Add User.”

YOU ARE HERE > Home > Edit Users

Edit Users

TOTAL NUMBER OF PARTNERS

Overall	Now This Month	Now This Quarter
1,632	5	5

85% Met This year

TOTAL NUMBER OF USERS

Overall	Now This Month	Now This Quarter
746	15	15

47% Met This year

Search Users

Select Organization

PACT

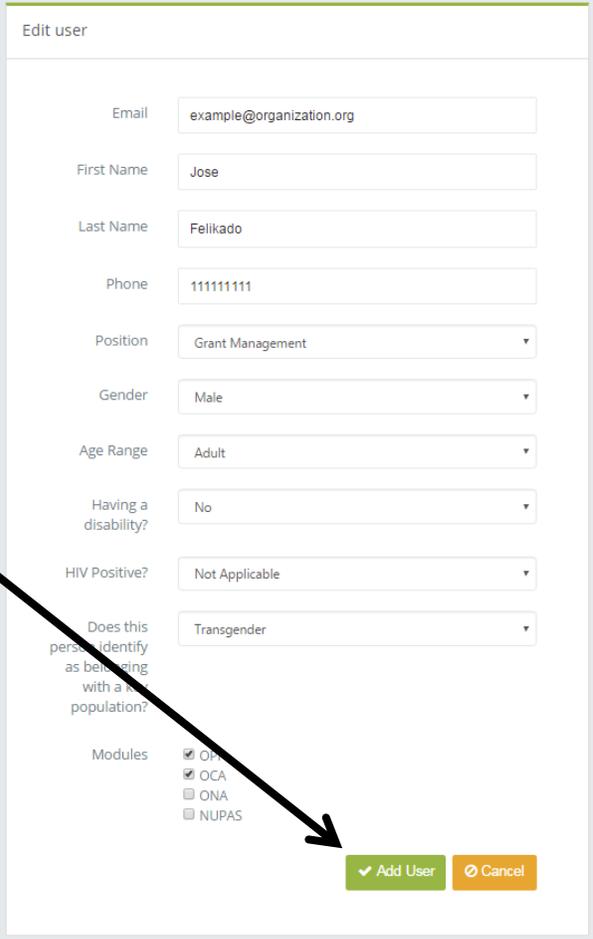
type to search...

Add User

← Prev 10 Next 10 → 15 Displaying from 0 to 10 of 181

USER NAME	FIRST NAME	LAST NAME	ROLES	ORGANIZATION	OCA	ONA
donor@capacitysolutionsplatform.com	Leslie	Smith	Donor	Belarus HIV/AIDS Association	Yes	Yes

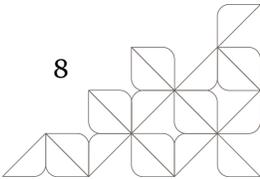
Step 3: Complete all the fields. Check the boxes for the capacity tools the new user should be able to view. Click the green box “Add User” when complete. The new user will receive an email with a temporary password and a link to the CSP.



The screenshot shows a web form titled "Edit user" with the following fields and options:

- Email:
- First Name:
- Last Name:
- Phone:
- Position:
- Gender:
- Age Range:
- Having a disability?:
- HIV Positive?:
- Does this person identify as belonging with a population?:
- Modules: OCA, OCA, ONA, NUPAS

At the bottom right, there are two buttons: a green "Add User" button and an orange "Cancel" button. A black arrow points from the text box on the left to the "Add User" button.



6. Working with OPI Data

6.1. Introduction to the OPI

The Organizational Performance Index (OPI) is a tool that measures the change in organizational performance that results from improved internal capacity. The OPI tracks progress across the four domains of effectiveness, efficiency, relevance, and sustainability. The sister-tools to the OPI include the Community Performance Index (CPI) and the Government Performance Index (GPI), which operate the same way as the OPI on the CSP.

6.2. The OPI Dashboard

The OPI dashboard page will allow you to view your OPI score, view and edit your organization's information, and save your OPI report to PDF.

Organization Details

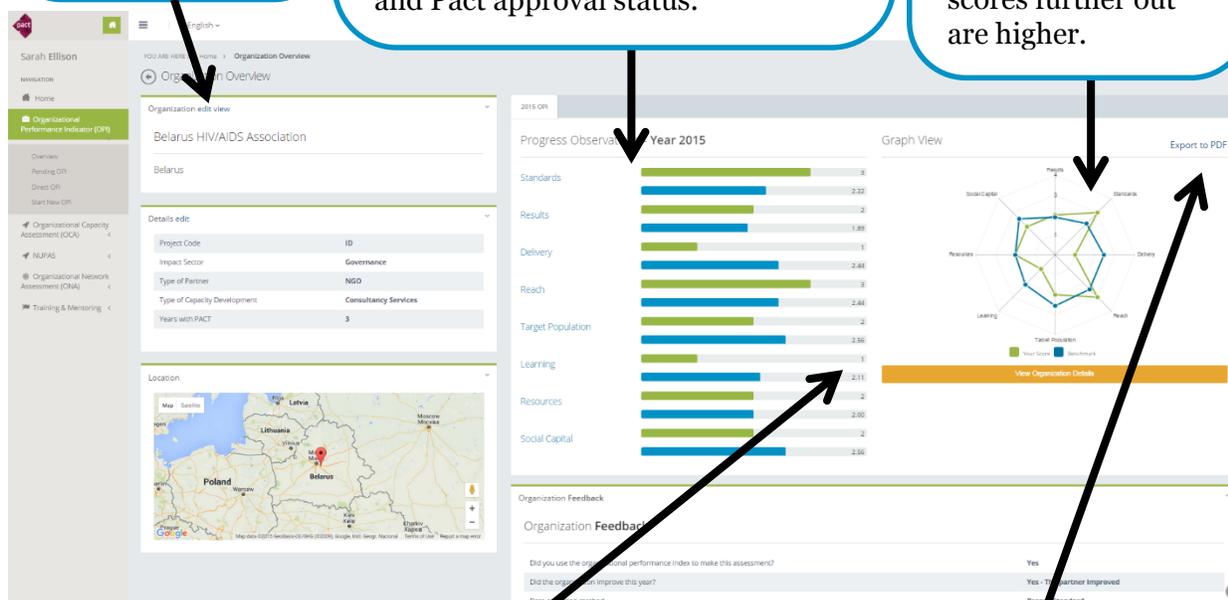
When viewing any capacity tool, you have the option to view and edit your organization's information.

OPI Sub-Domain Chart

View your score against the sub-domain benchmarks, which compares your results to those of the other organizations in your country in that year. Click on any sub-domain to view your results, relevant comments, uploaded evidence files, and Pact approval status.

OPI Spiderweb Graph

Visualize your annual capacity scores against benchmark scores. Scores close to the center are low and scores further out are higher.



Multiple OPI Scores by Year

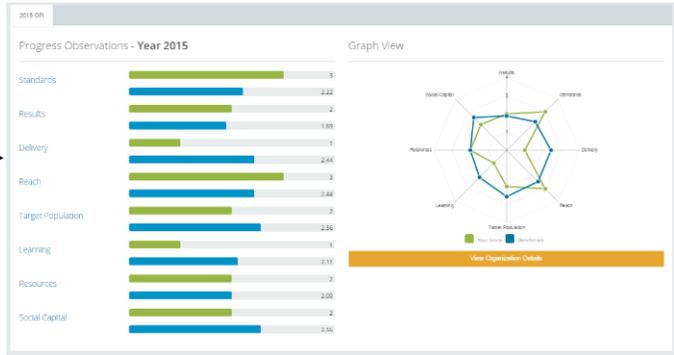
If you have conducted multiple OPIs, click here to see additional tabs with your OPI scores by year or to export PDF versions of your other results.

Export to PDF

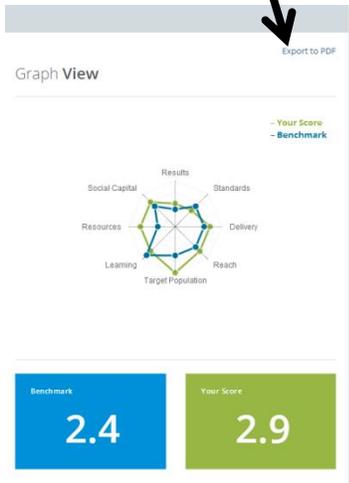
Click "Export to PDF" in the right-hand corner of a tool summary to download the data in a PDF report.

6.3. Exporting OPI Results

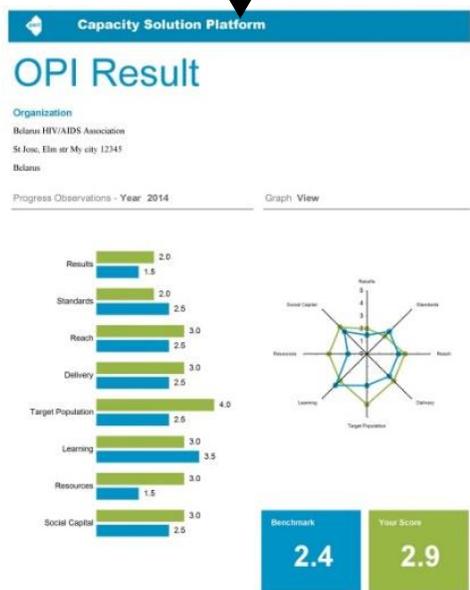
Step 1: Click “View Organizational Details” below the spiderweb graph.



Step 2: Click on “Export to PDF” in the OPI Graph View panel.



Step 3: The OPI Results Report in PDF will download.



6.4. Starting a New OPI

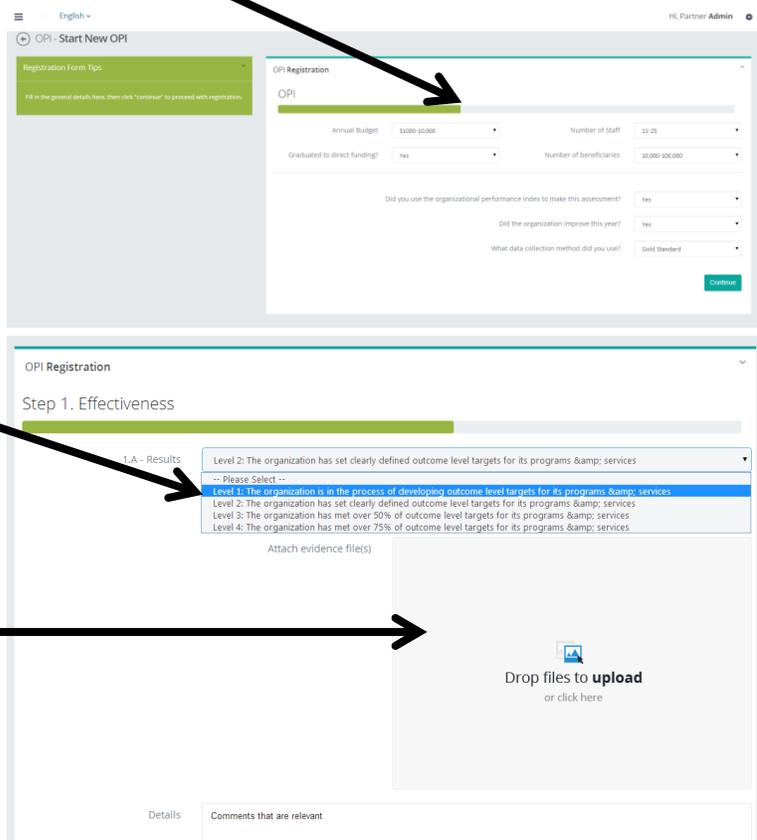
If you are starting a new OPI, please go through the following steps. You also can input the information via an MS Excel template for multiple years of data (see 6.5).

Step 1: Click on “Start New OPI” in the Navigational panel.

Step 2: Complete the OPI registration, then click “Continue”.

Step 3: Choose the level that most closely represents your organization’s current performance in each sub-domain.

Step 4: Drag and drop evidence files for each sub-domain for Pact approval, and type in information about the file attached. When finished uploading all documents, click “Continue.”



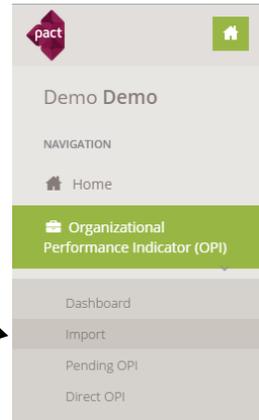
NOTE: Please refer to the Pact OPI handbook for details on acceptable types of evidence for each level.

NOTE: OPI scores only will be available to view on the dashboard after the evidence has been approved by Pact staff.

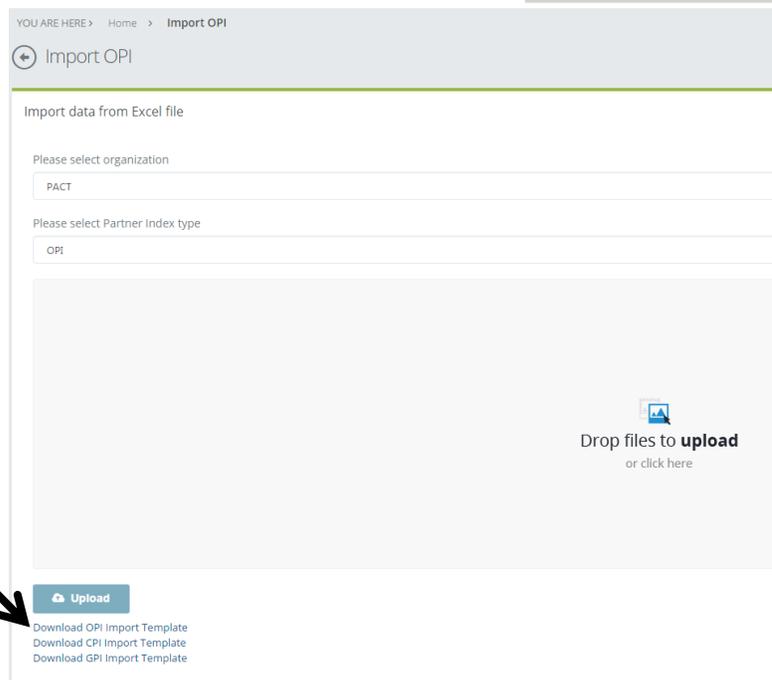
6.5. Input OPI Information via an MS Excel Template

If you are starting a new OPI or have OPI data for multiple organizations or years, importing information via MS Excel template may be easier.

Step 1: Click “Import” in the navigational panel.

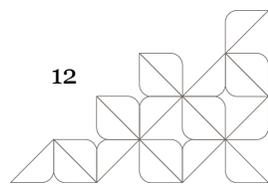


Step 2: Click to download and save on your computer the correct MS Excel template.



Step 3: Complete the MS Excel template, specifically row 4, columns A through J. If you click on a data box in the template, more information will appear to help you complete that box. Columns K through O will update automatically. Row 3 provides an example of what a completed row would look like.

Complete this section										Automatically updates				
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Country	Organization	Results	Standards	Delivery	Reach	Target population	Learning	Resources	Social Capital	Overall Score	Effectiveness	Efficiency	Relevance	Sustainability
China	Example Org	?	?	?	?	?	?	?	?	1.00	1.00	1.00	1.00	1.00
										(no data)	(no data)	(no data)	(no data)	(no data)
										(no data)	(no data)	(no data)	(no data)	(no data)
										(no data)	(no data)	(no data)	(no data)	(no data)
										(no data)	(no data)	(no data)	(no data)	(no data)
										(no data)	(no data)	(no data)	(no data)	(no data)
										(no data)	(no data)	(no data)	(no data)	(no data)
										(no data)	(no data)	(no data)	(no data)	(no data)
										(no data)	(no data)	(no data)	(no data)	(no data)
										(no data)	(no data)	(no data)	(no data)	(no data)

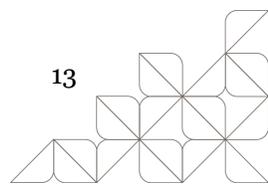


AV	AW	AX	AY	AZ	BA	BB	BG	BK	BL	BN
In which impact areas does this partner work?						Other - Explain	Project Code	Email for Partner	Created By	Created On
HEALTH	LEVELHOOD	MARKETS	NRM	R&M	OTHER	Education	P1234	rporter@pactworld.org	Neil Porter	5/3/14 10:58 AM
Yes	Yes	Yes	Yes	Yes	Yes					

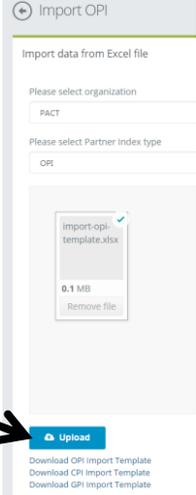
Step 4: Continue filling out the MS Excel template by scrolling to the right. "BN" is the final column.

Step 6: Return to the OPI Import Page, where you downloaded the template from (see step 1). Select the index type that you are uploading from the drop-down menu, then click to upload the complete MS Excel file. You also can drag files from your computer and drop them into this area.

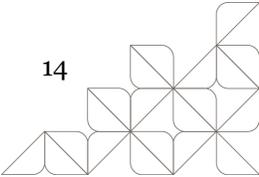
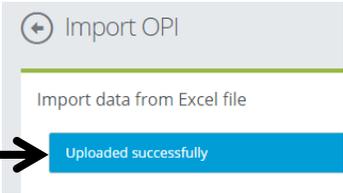
Step 5: You may include the OPI data for multiple years on the MS Excel template by starting a new row and entering the next year's information there. *Be sure that the name you enter for your organization in column B matches the name as it appears in the CSP.* The year of the assessment is the US government fiscal year which begins on October 1. Once you have completed the MS Excel template, save it to your computer.



Step 7: Once the file is saved to this screen, you must click the “Upload” button that has turned a dark shade of blue.



Step 8: Once you click “Upload,” you will see a message at the top of your screen that reads “Uploaded successfully”.



7. Working with OCA Data

7.1. Introduction to the OCA

The Organizational Capacity Assessment (OCA) is a tool designed for use by both Pact and partner organizations to achieve three objectives:

1. Identify capacity development (CD) needs
2. Plan support needed by the partner
3. Monitor changes in organizational capacity by implementing and assessing Institutional Strengthening Plans (ISPs)

Capacity and consensus are two dimensions that are measured and discussed in the OCA process and that enable us to observe specific differences within and across organizations.

7.2. The OCA Dashboard

The screenshot shows the OCA dashboard interface. On the left is a navigation menu with categories like LM, SP, PS, PM, CER, OSHR, MFM, and Action Plan. The main content area includes a date selector (05/20/2014), organization details for 'Belarus HIV/AIDS Association', and a 'Details edit' section. The right side features a 'Quadrant Graph' and a 'Bar Chart'.

OCA Date Tab
View OCA results by date. Click on the date for the OCA you would like to view.

Quadrant Graph
View the capacity areas quadrant graph to determine which quadrant each result is represented in.

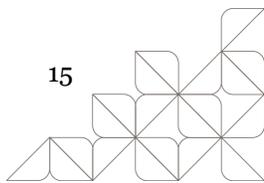
Export to PDF
Click “Export to PDF” to view the results, including data on each category, capacity, and consensus, in a PDF.

OCA Categories
Click on the listed categories for details on the statements of excellence and scoring. Click “Action Plan” to view or edit your ISP.

Organization Details
When viewing any capacity tool, you have the option to view and edit your organization’s information.

OCA Bar Chart
The bar chart represents capacity and consensus. You can click on the bar chart for details on each category.

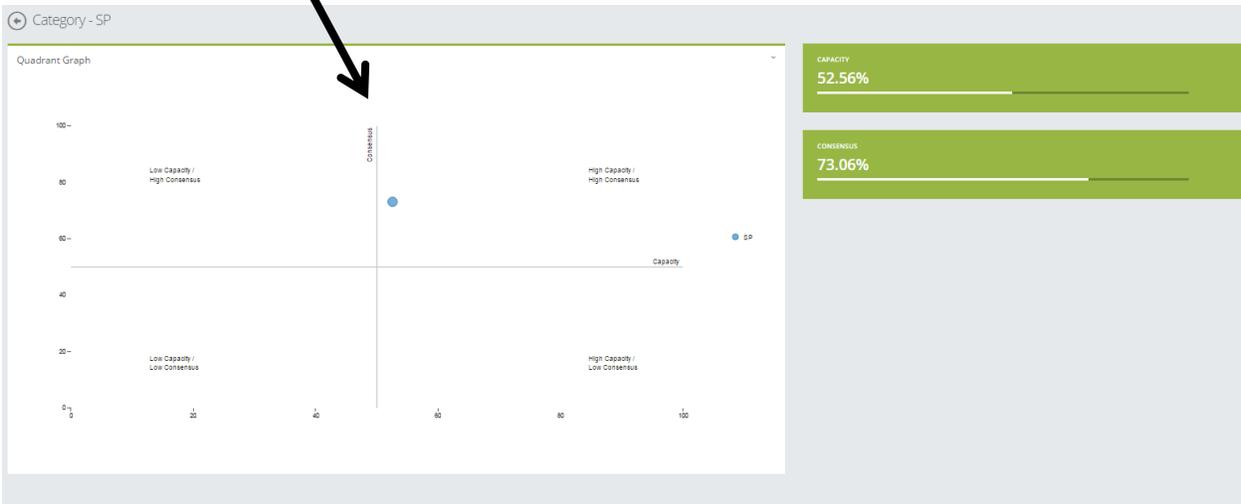
Category	Consensus	Capacity
LM	53	73
SP	54	58
PS	58	67
PM	59	70
CER	62	60
OSHR	60	74
MFM	52	66



7.3. Viewing OCA Capacity Area Results

Step 1: Under “Categories,” click on the specific OCA capacity area you would like to view.

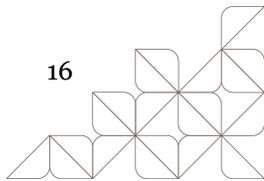
Step 2: View the individual capacity area’s quadrant chart, overall capacity and consensus score, and each Statement of Excellence.



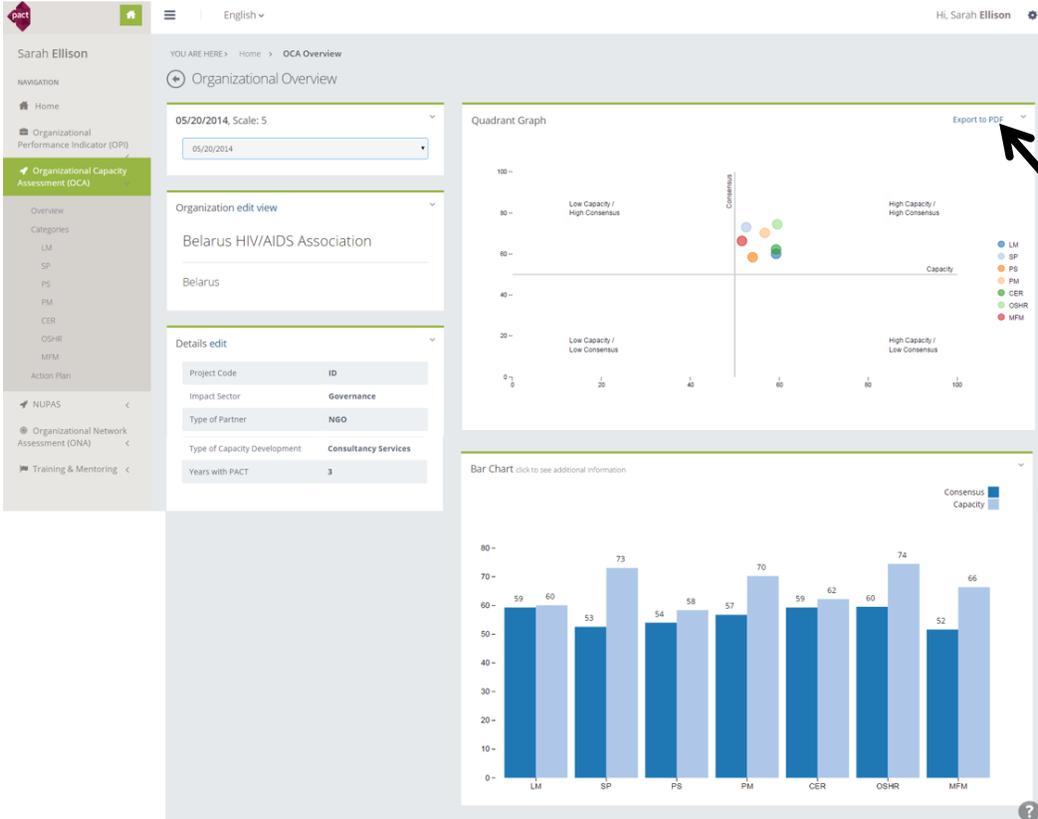
TOPIC	CAPACITY	CONSENSUS
1. Tổ chức có một sứ mệnh rõ ràng giúp định hướng tất cả các hoạt động The organization has a clearly defined mission that guides all of its work.	4.40	0.66
2. Sứ mệnh của tổ chức được phản ánh trong các hoạt động hàng ngày của cán bộ và tình nguyện viên Our mission is reflected in the day-to-day actions taken by staff and volunteers.	3.90	0.54
3. Tổ chức có một kế hoạch chiến lược bằng văn bản xác định rõ phương hướng và mục tiêu dài hạn và trung hạn của tổ chức. We have a documented strategic plan that sets our direction and goals for the medium and long-term.	2.10	0.70
4. Tất cả các hoạt động lập kế hoạch được thực hiện với sự tham gia tích cực của các bên liên quan chính (trong và ngoài tổ chức) All planning activities are conducted with significant participation by key stakeholders (external & internal).	3.70	0.78
5. Tổ chức có một chiến lược huy động vốn và nguồn lực khác (nhân lực và vật chất) rõ ràng và thực tế Our organization has a clear and practical Fundraising and Resource Mobilization Strategy.	2.80	0.60
6. Tổ chức có các kiến thức và kỹ năng phù hợp để thực hiện chiến lược gây quỹ. We have appropriate skills and knowledge to carry out our fundraising strategy.	3.80	0.87
7. Tổ chức có các nguồn tài trợ đa dạng giúp tổ chức duy trì các chương trình trong dài hạn We have a diversified funding base capable of sustaining our programs over the long-term.	4.30	0.78
8. Tổ chức hiểu rõ về vai trò của mình trong lĩnh vực HIV/AIDS Our organization has a clear understanding of its role within the HIV/AIDS sector.	4.00	0.63

Step 3: Click on an individual Statement of Excellence to view each OCA participant’s score.

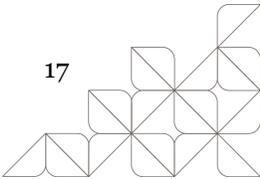
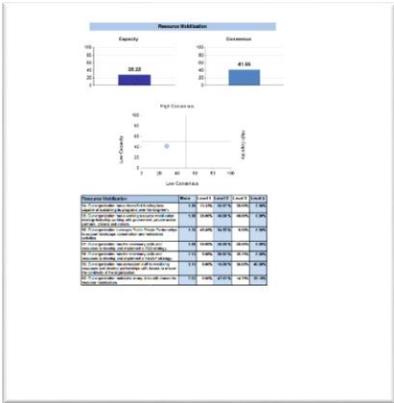
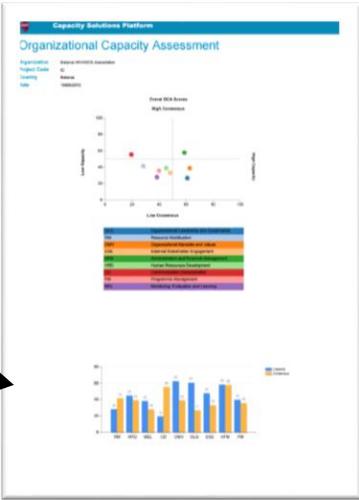
TOPIC	CAPACITY	CONSENSUS
1. Tổ chức có một sứ mệnh rõ ràng giúp định hướng tất cả các hoạt động The organization has a clearly defined mission that guides all of its work.	4.40	0.66
2. Sứ mệnh của tổ chức được phản ánh trong các hoạt động hàng ngày của cán bộ và tình nguyện viên Our mission is reflected in the day-to-day actions taken by staff and volunteers.	3.90	0.54
3. Tổ chức có một kế hoạch chiến lược bằng văn bản xác định rõ phương hướng và mục tiêu dài hạn và trung hạn của tổ chức. We have a documented strategic plan that sets our direction and goals for the medium and long-term.	2.10	0.70
4. Tất cả các hoạt động lập kế hoạch được thực hiện với sự tham gia tích cực của các bên liên quan chính (trong và ngoài tổ chức) All planning activities are conducted with significant participation by key stakeholders (external & internal).	3.70	0.78
5. Tổ chức có một chiến lược huy động vốn và nguồn lực khác (nhân lực và vật chất) rõ ràng và thực tế Our organization has a clear and practical Fundraising and Resource Mobilization Strategy.	2.80	0.60
6. Tổ chức có các kiến thức và kỹ năng phù hợp để thực hiện chiến lược gây quỹ. We have appropriate skills and knowledge to carry out our fundraising strategy.	3.80	0.87
7. Tổ chức có các nguồn tài trợ đa dạng giúp tổ chức duy trì các chương trình trong dài hạn We have a diversified funding base capable of sustaining our programs over the long-term.	4.30	0.78
8. Tổ chức hiểu rõ về vai trò của mình trong lĩnh vực HIV/AIDS Our organization has a clear understanding of its role within the HIV/AIDS sector.	4.00	0.63



7.4. Exporting OCA Results to PDF



Step 2: The OCA report PDF will download and be ready for your needs, including the quadrant chart, capacity areas, and Statements of Excellence.



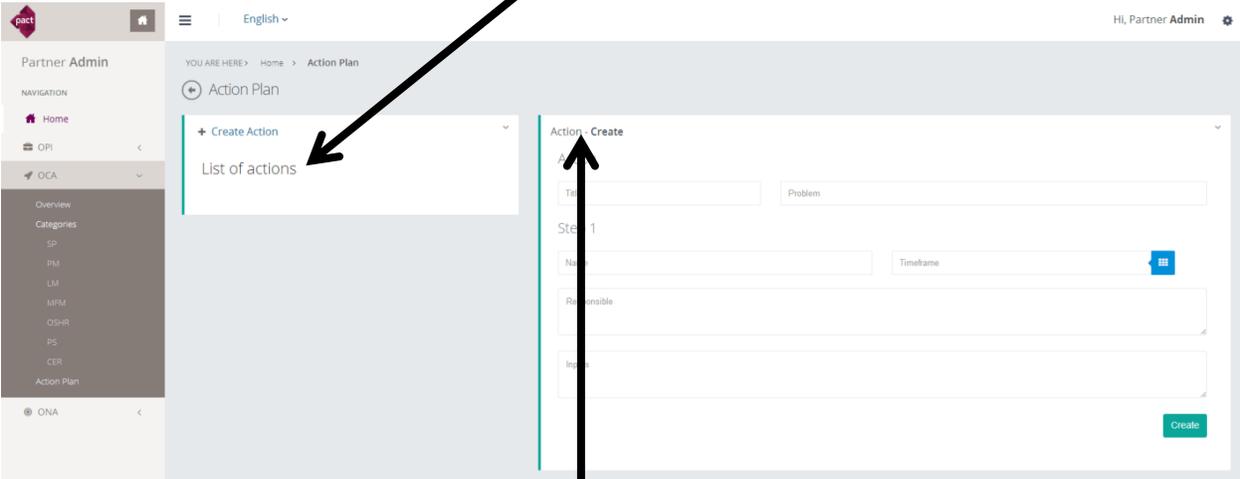
7.5. Creating an OCA Action Plan

Action Plan Overview

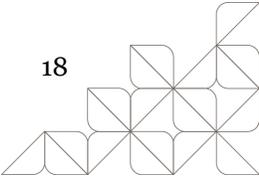


View and Create Actions
Click on “Action Plan” in the OCA navigation panel to view and create actions.

List of Actions Panel
This panel will show the list of actions created. You can delete and create actions from this window.



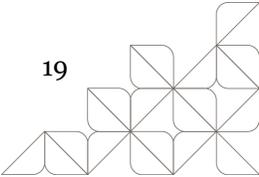
Create Action Panel
This panel allows you to input actions, their steps, each step’s timeframe, responsible persons, and needed inputs to complete the step.



Example of an Action Developed in CSP

The screenshot displays the 'Action Plan' interface in the CSP. On the left, a sidebar contains a 'Create Action' button and a 'List of actions' section with 'Develop HR Guidelines' listed. The main area is divided into two panels. The top panel, 'Action - Timeline', shows a calendar view for the period from Friday, September 19 to Thursday, October 9, 2014. A horizontal bar represents the duration of the action, with five steps marked along it. Below the timeline, the steps are listed: Step 1 (09/18/2014: Research HR policies and standards), Step 2 (09/25/2014: Develop HR draft standards and guidelines), Step 3 (10/02/2014: Finalize HR draft standards for approval), Step 4 (10/09/2014: Final HR standards approval), and Step 5 (10/09/2014: Final HR standards approval). The bottom panel, 'Action - Plan', provides a detailed view of the action 'Develop HR Guidelines'. It includes a 'Problem' statement: 'There are no HR guidelines and they need to be developed.' Below this, four tasks are listed, each with a status icon (checkmark or 'x'), a title, and associated metadata: 'Timeframe', 'Responsible', and 'Inputs'.
Task 1: Research HR policies and standards (Status: x). Timeframe: 09/18/2014. Responsible: Willard Remphy. Inputs: none.
Task 2: Develop HR draft standards and guidelines (Status: checkmark). Timeframe: 09/25/2014. Responsible: Paul Oakley. Inputs: HR standards research information.
Task 3: Finalize HR draft standards for approval (Status: checkmark). Timeframe: 10/02/2014. Responsible: Paul Oakley, John Smith. Inputs: HR guidelines draft.
Task 4: Final HR standards approval (Status: checkmark). Timeframe: 10/09/2014. Responsible: Kevin Allen. Inputs: HR guidelines draft.

NOTE: The action plan function is best used for short-term planning. Longer-term CD needs are likely better developed offline using the ISP.



8. Working with ONA Data

8.1. Introduction to the ONA

The Organizational Network Analysis (ONA) is a diagnostic tool that can be used with stakeholders to map a network, understand the relationships between different actors, and track the exchange of information and resources. The ONA can be used with virtually any group of stakeholders working in a particular area, from local health providers to business coalitions, even within different departments in an organization.

8.2. ONA Dashboard

Define the Map

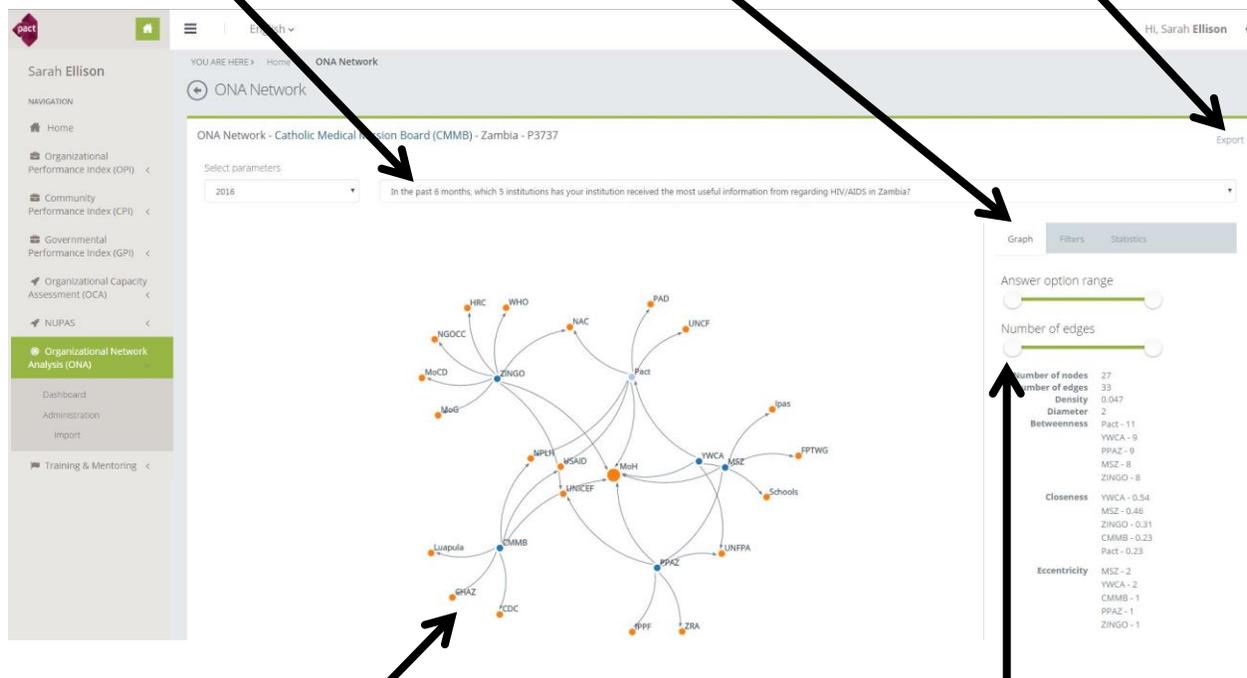
Use the drop-down menus to select the year of the survey and the question results you want to view.

Graph Metrics Bar

Use ONA statistics to gain quantitative detailed information.

Export to PNG

Click “Export” then “Download” to save the image of the network.



ONA Map

Observe mapped networks in a simple but effective form. Visualize patterns of interaction, identifying bottlenecks, redundancies, under-utilized resources, and information. To change the placement of the map on the screen, click the white space and drag the map. You also may scroll in and out of the map if your mouse is over the map and has a scroll function.

Define Response Ranges

Click and drag the circles of the answer options and number of edges to highlight different responses. The map and metrics bar will update automatically.

8.3. ONA Filter Tab

Define the Map
Use the drop-down menus to select the survey year and the question results you want to view.

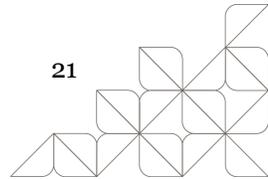
Export to PNG
Click “Export” then “Download” to save the image of the network, which will appear in PNG format.

The screenshot shows the ONA Network interface. At the top, there is a breadcrumb trail: "YOU ARE HERE > Home > ONA Network". Below that, the page title is "ONA Network - Catholic Medical Mission Board (CMMB) - Zambia - P3737". There is an "Export" button in the top right corner. A "Select parameters:" section contains a dropdown menu set to "2016" and a question: "In the past 6 months, which 5 institutions has your institution received the most useful information from regarding HIV/AIDS in Zambia?". The main area displays a network graph with nodes representing various organizations and their connections. A "Filter" panel is open on the right, showing a list of responders with checkboxes next to their names. The "Filter" button is highlighted with a green box.

Filter Responders
Click the check box next to the name of a responder(s) you want to remove from the map, then click “Filter.” The map will update automatically. If you want to include all responders again, click the box next to “Select all” so that the check mark appears, then click “Filter.” If a responder has a check mark next to its name and you have clicked “Filter,” it is represented in the map.

The screenshot shows the exported ONA Network image. The title is "Capacity Solutions Platform Organizational Network Analysis". Below the title, it says "2016 - In the past 6 months, which 5 institutions has your institution received the most useful information from regarding HIV/AIDS in Zambia?". The network graph is displayed, showing a different set of nodes and connections compared to the original interface, reflecting the filtered results.

ONA Exported Image
The exported image will look like this once it has downloaded. If you have changed anything in the filter or answer ranges, click “Export” again to update the image before downloading.



8.4. ONA Statistics Tab

Define the Map

Use the drop-down menus to select the survey year and the question results you want to view.

Sort Statistics

Click the arrows next to the statistical measures to sort by lowest or highest.

Export to PDF or MS Excel

Click "PDF" or "Excel" to download the statistics on the screen in the format you prefer.

The screenshot shows the ONA Statistics Tab interface. At the top, there are two dropdown menus: 'Select parameters' (set to 2016) and a question dropdown (set to 'In the past 6 months, which 5 institutions has your institution received the most useful information from regarding HIV/AIDS in Zambia?'). Below these is a table with columns: PARTNER NAME, IN DEGREE, OUT DEGREE, BETWEENNESS, ROUNDED CLOSENESS, and ECCENTRICITY. The table lists partners like ZINGO, Pact, CMMB, PPAZ, YWCA, MSZ, MoH, Luapula, and WHO. To the right of the table is a 'Statistics' sidebar with a 'Graph' tab selected. It shows 'Answer option range' and 'Number of edges' sliders, and a list of statistics for each partner, such as 'Betweenness' for Pact (11) and 'Closeness' for YWCA (0.54). An 'Export PDF Excel' button is visible in the top right corner.

Define Response Ranges

Click and drag the circles of the answer options and number of edges to highlight different responses. The statistics and metrics bar will update automatically.

The screenshot shows the exported ONA statistics table overlaid on a Microsoft Excel spreadsheet. The table has columns: Partner Name, In Degree, Out Degree, Betweenness, Closeness, and Eccentricity. The data is as follows:

Partner Name	In Degree	Out Degree	Betweenness	Closeness	Eccentricity
Pact	1	6	11	0.23	1
NAC	2	0	0	0	0
USAID	2	0	0	0	0
PAD	1	0	0	0	0
NPLH	2	0	0	0	0
UNCF	1	0	0	0	0
MoH	6	0	0	0	0
ZINGO	0	8	8	0.30	1
WHO	1	0	0	0	0
MoG	1	0	0	0	0
NGOCC	1	0	0	0	0
MoCD	1	0	0	0	0
UNICEF	2	0	0	0	0
HRC	1	0	0	0	0
PPAZ	1	5	9	0.16	1
UNFPA	2	0	0	0	0
IPPF	1	0	0	0	0
ZRA	1	0	0	0	0
YWCA	0	4	9	0.53	1
Schools	1	0	0	0	0
MSZ	0	4	8	0.46	1
FPTWG	1	0	0	0	0
Ipas	1	0	0	0	0
CMMB	1	6	6	0.22	1
CDC	1	0	0	0	0
CHAZ	1	0	0	0	0
Luapula	1	0	0	0	0

ONA Exported Statistics

The exported PDF and MS Excel statistics will look like this once downloaded. If you have changed anything in the filter or answer ranges, click "Export" again to update the statistics before downloading.

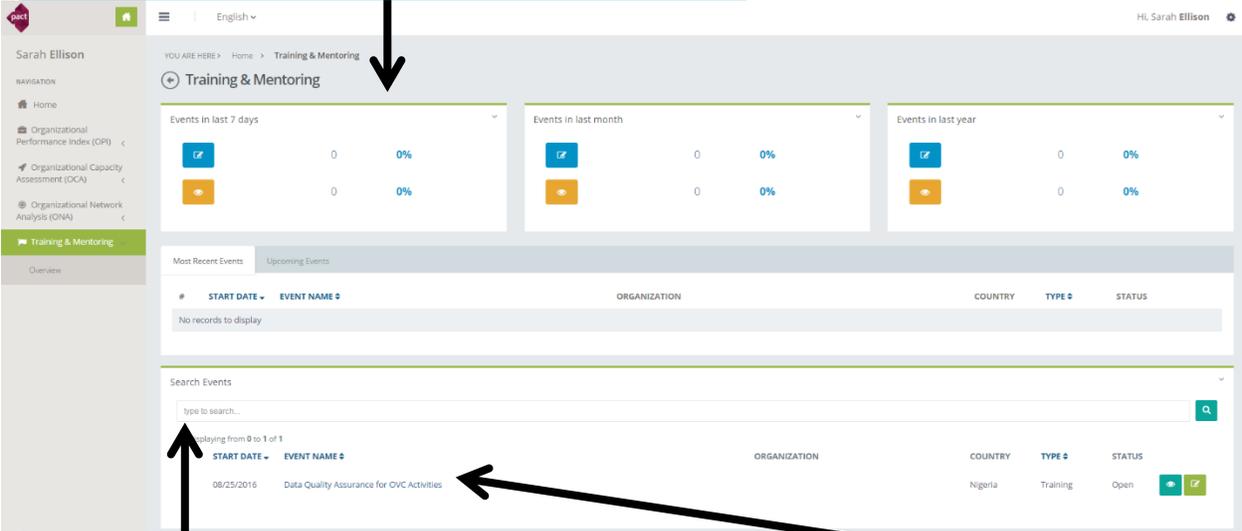
9. The Training and Mentoring Tracker

9.1. Introduction to the T&M Tracker

The Training and Mentoring (T&M) Tracker allows you to view details of events that your organization has participated or will participate in. This record can be used to highlight capacity development (CD) activities that Pact has provided your team over the course of your engagement.

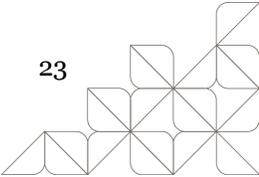
9.2. T&M Dashboard

Summary of Events
View the total numbers of T&M events your organization has participated in over time.



Search Events
Type into the search box the name of a particular event, or click the arrows next to “Start Date,” “Event Name,” or “Type” to sort all T&M events.

View Event
Click on the name of the event to view its details.



9.3. Viewing Open Event Details

Event Information
View the event's time, location, and description.

Mark Attendance
To confirm a specific person's attendance, click the box next to his/her name.

Add One Attendee
Complete the information in this box to add one attendee at a time. When completed, click "Create."

Add Many Attendees
Download and complete the User Import Template to add many attendees to an event.

Upload Additional Files
You can add photos, agendas, notes, or any other type of document to the event. Simply drag and drop files into the box or click the box, select the file, then click "Upload."

Close the Event
The information from the event is not recorded until the event is "closed." Click this button to close the event, but only after the event is complete. Once closed, an event cannot be edited, but can be viewed.

Print Attendance Sheet
Click "Print Sign-Up Sheet" to download a PDF of the attendees' names. When they arrive for the event, they can sign next to their names.

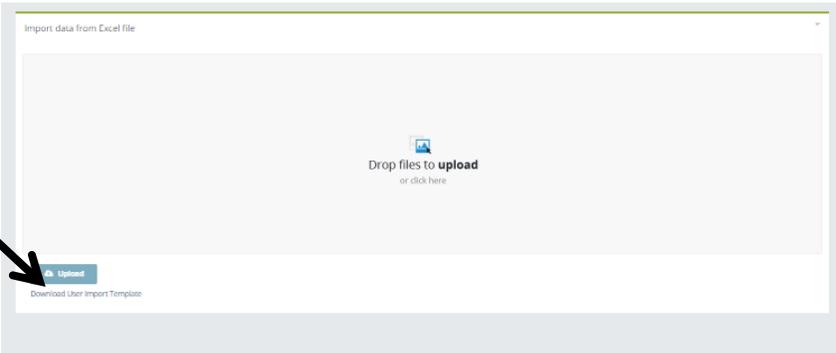
The screenshot shows the following interface elements:

- Event Details:** Training event in Nigeria, From 18:00 to 17:00 on 8/25/2016, Project Code: Z3087, Setting: Program Site, Geographical Scope: District, Theme: Monitoring, Evaluation, and Results, Status: Open.
- Attendance Table:**

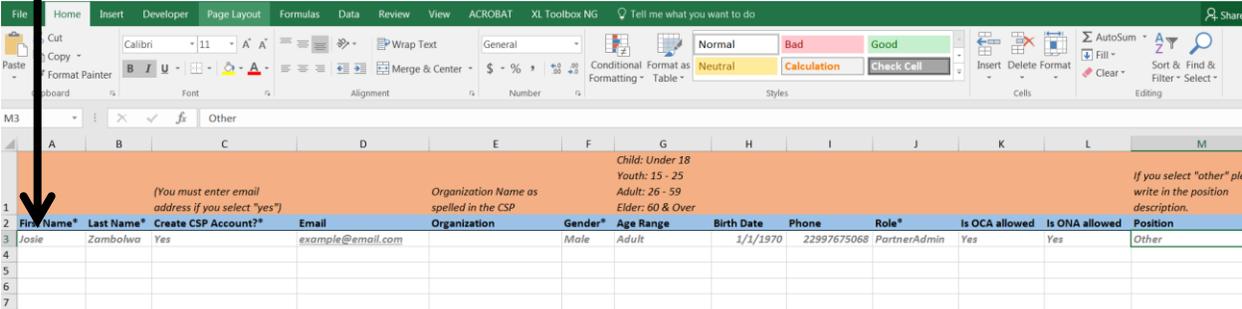
ACTION	FIRST NAME	LAST NAME	ORGANIZATION
<input type="checkbox"/>	Sarah	Elison	Associates For Community Vision And Development (ACCOVD)
- Add Attendee Form:** Organization (Please Select), Create CSP Account?, First Name, Last Name, Phone, Position (Please Select), Gender (Please Select), Birth Date (Choose date), Age Range (Please Select), Having a disability? (Not Applicable), HIV Positive? (Not Applicable), Does this person identify as belonging with a key population? (Not Applicable), Create.
- Actions:** Attendance sheet, Supporting documents (max 5), Event picture, Print Sign-up sheet, Close event.
- Import data from Excel file:** Download User Import Template, Upload.
- Upload boxes:** Drop files to upload or click here.

9.4. Adding Many Attendees to an Event

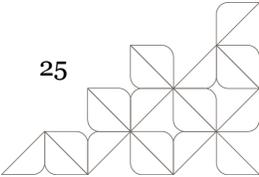
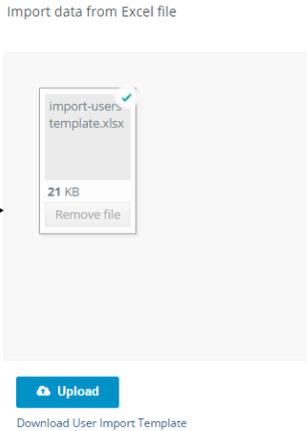
Step 1: When viewing the details of an open event, click “Download User Import Template” to save and open the MS Excel template.



Step 2: Complete the MS Excel template starting in row 4. Enter each new user in a new row. You must enter information for every column that has an *. The table continues to the right until column Q. You must include an email address if you plan to create a CSP account for the attendee. To link the attendee to your organization, you must spell your organization name exactly as it is recorded in the CSP.



Step 3: On the event details page, click on the box to select the attendance file, or drag and drop the file, then click “Upload.”





pact

building
local
promise.

