



Member Workspace Guidance

Overview

NGO Aid Map's Member Workspace allows you to manage your organization's data. With this feature, you can make the changes you need to at your convenience. This includes things such as updating your organization's description or contact information, or adding or editing individual projects. Your changes are posted to the site right away, without having to go through an approval process. This guide provides step-by-step instructions on how to navigate the Member Workspace so you have complete control over your data.

Introduction

NGO Aid Map is intended to give users as close to a real-time view of who is doing what where as possible. To ensure that organizations can easily keep their information on the site up to date, InterAction created the NGO Aid Map Member Workspace. Everyone that your organization identifies as a data contact for NGO Aid Map is given a username and password to your organization's Member Workspace.

The Member Workspace lets you keep track of all the data your organization has contributed to NGO Aid Map. There, you can easily see the projects that have been uploaded to the site, the number of active or closed projects, or the total number of projects on the site. This feature also allows you (or anyone else with an account) to update existing information or add new information, either for your **organization** or its **projects**.

In the sections that follow we'll go over:

- Member Workspace basics;
- How to manage your **organization information**; and
- How to manage your **project information**.

Member Workspace Basics

Logging in to your Member Workspace

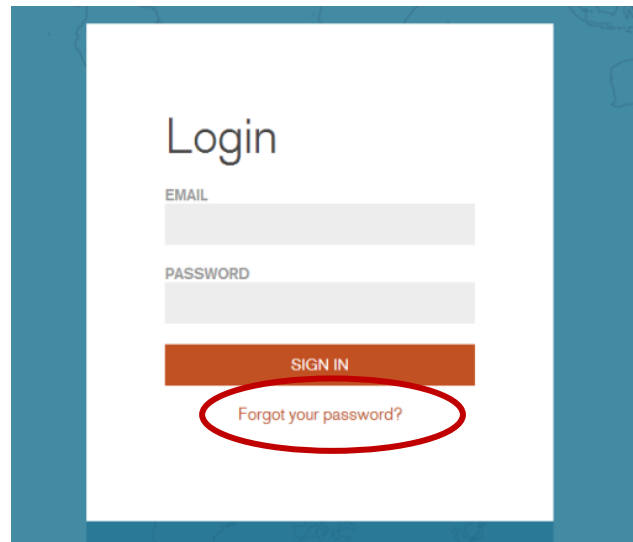
There are two ways to log-in to your Member Workspace:

1. Go to <http://office.ngoaidmap.org/admin>, or
2. Click on “Member Access” at the top right hand corner of the NGO Aid Map [homepage](#)

Once there, enter your username and password. Your username is simply your email address.

If you’ve forgotten your password or need to reset it, just click on the “Forgot your password?” link and follow the instructions.

If you don’t have a username or password and will be providing data for your organization, contact mappinginfo@interaction.org and we will create an account for you.



Member Workspace Dashboard

Once you log-in, you will be in your Member Workspace, which consists of three tabs (see image on next page): the **Dashboard**, **Your Projects** and **Your Organization**. The dashboard provides an overview of your organization’s participation in NGO Aid Map. The other two tabs, which are explained in the two sections that follow, allow you to access and manage information on your **projects** and **organization**.

Here is what you’ll find on your dashboard (image on next page):

- Basic information you have provided about your organization, including name, headquarter address, website, and your logo.
- A summary of your active, closed, and total number of projects
- List of your projects that are ending soon—within 3, 6, and 12 months.
- A detailed summary of your active projects, including countries and sectors of work as well a list of donors and partners.
- A similar summary of your closed projects
- A brief summary of totals for all organizations across NGO Aid Map

	<div> <div>Dashboard</div> <div>Your Projects</div> <div>Your Organization</div> </div>					
	<div> <div>Example Organization</div> <div>Edit Organization</div> </div>					
<div> <div> <div> <div>NAME</div> <div>Example Organization</div> <div>website</div> <div>http://www.example.org</div> </div> <div> <div>HQ INFORMATION</div> <div> <div> <div>1400 20th Street NW, Suite 210</div> <div>Washington</div> <div>20006</div> <div>District of Columbia</div> </div> </div> </div> <div> <div>STATUS</div> <div>  </div> </div> </div> </div>						
<div> <div>YOUR PROJECTS</div> <div> <div>ACTIVE PROJECTS</div> <div>7</div> </div> <div> <div>CLOSED PROJECTS</div> <div>1</div> </div> <div> <div>TOTAL PROJECTS</div> <div>8</div> </div> </div>						
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<div> <div>PARTNERS AND DONORS (8)</div> <div> <div> <div> <div>Aid Associates</div> <div>•</div> </div> <div> <div>Aid State Government</div> <div>•</div> </div> <div> <div>United Nations Development Program (UNDP)</div> <div>•</div> </div> <div> <div>Academy for Educational Development</div> <div>•</div> </div> <div> <div>Capricorn Senegal</div> <div>•</div> </div> <div> <div>Faithful for Relief</div> <div>•</div> </div> <div> <div>Outcomes on Research</div> <div>•</div> </div> <div> <div>Robert Laboratories</div> <div>•</div> </div> <div> <div>BRI Group; Melinda Gates Foundation</div> <div>•</div> </div> </div> </div> </div>						
<div> <div>Your Closed Projects (1)</div> </div>						
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<div> <div>SECTORS (1)</div> <div> <div> <div> <div>Construction</div> <div>0</div> </div> <div> <div>Animal Welfare</div> <div>0</div> </div> <div> <div>Communications/Technology</div> <div>0</div> </div> <div> <div>Disast Relief</div> <div>0</div> </div> <div> <div>Economic Recovery and Development</div> <div>0</div> </div> <div> <div>Energy</div> <div>0</div> </div> <div> <div>Fishing</div> <div>0</div> </div> <div> <div>Forestry</div> <div>0</div> </div> <div> <div>Health</div> <div>0</div> </div> <div> <div>Human Rights Democracy and Governance</div> <div>0</div> </div> <div> <div>Other</div> <div>0</div> </div> <div> <div>Refugee Resettlement</div> <div>0</div> </div> <div> <div>Social Services</div> <div>0</div> </div> <div> <div>Transport/Infrastructure</div> <div>0</div> </div> </div> <div> <div> <div>Agriculture</div> <div>0</div> </div> <div> <div>Capacity Strengthening for CSOs (general)</div> <div>0</div> </div> <div> <div>Conflict Prevention and Resolution/Peace and Security</div> <div>0</div> </div> <div> <div>Disaster Prevention and Preparedness</div> <div>0</div> </div> <div> <div>Education</div> <div>0</div> </div> <div> <div>Environment</div> <div>0</div> </div> <div> <div>Food Aid</div> <div>0</div> </div> <div> <div>Gender</div> <div>0</div> </div> <div> <div>Humanitarian Aid</div> <div>0</div> </div> <div> <div>Mining and Extractive Resources</div> <div>0</div> </div> <div> <div>Protection</div> <div>0</div> </div> <div> <div>Shelter and Housing</div> <div>0</div> </div> <div> <div>Trade</div> <div>0</div> </div> <div> <div>Water Sanitation and Hygiene</div> <div>0</div> </div> </div> </div> </div>						
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<div> <div>NGO Aid Map</div> </div>						
<div> <div> <div> <div>ACTIVE PROJECTS</div> <div>15,713</div> </div> <div> <div>CLOSED PROJECTS</div> <div>1,901</div> </div> <div> <div>PROPOSAL SUBMITTALS</div> <div>1,758</div> </div> <div> <div>CONTACTS</div> <div>129</div> </div> </div> </div>						
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How to Manage Your Organization Information

The “Your Organization” tab in your Member Workspace allows you to add or edit the information about your organization that will appear on the site. This section of the Member Workspace can be a bit tricky, so we’ll explain which sections of the “Your Organization” tab you should pay special attention to and how those sections relate to what people see when they visit your organization’s page on an NGO Aid Map site.

Key fields

While you can add several types of information under this tab, you should provide information for the following six fields to ensure that those visiting NGO Aid Map have a good understanding of your organization:

1. Name

2. Description

This can be a general description of your organization, or a description of what your organization is doing in the specific country, region or sector an NGO Aid Map sub-site focuses on. The limit is 10,000 characters, including spaces.

3. Logo

4. Website

5. Contact information

Ideally, this should be a person who can answer questions about the information that appears on the site. However, you can also use a generic email address.

6. Donation information (if applicable)

This can be general donation information for your organization, or be specific to the country, region or sector featured in a particular sub-site.

When you enter this information for the first time, it becomes the default for all NGO Aid Map sub-sites for which your organization is contributing information. However, as we explain below, it is also possible to tailor the information that appears on each sub-site.

Before we get to that, though, take a look at the images on the next page to see how the organization information you enter in your Member Workspace appears on the front end of the site.



Make sure you hit the green “Save Changes” button whenever you add or edit information in your Member Workspace or your work will be lost!

Save changes

Member Workspace

InterAction

DASHBOARD YOUR PROJECTS YOUR ORGANIZATION

Example Organization

NAME*

Example Organization

ACRONYM

DESCRIPTION*

9916 chars left

This should be a short description of your organization. This shouldn't be too long.

Basic information

- Haiti Aid Map
- Food Security Aid Map
- global
- Syrian Refugee Response

Organization projects 8

Media 3

Resources 2

Save changes

Above: backend member workspace organization form

Below: frontend organization page where form data appears

Showing: ACDI/VOCA, 21 projects by ACDI/VOCA

VIEW PROJECTS LIST

ORGANIZATIONS DONORS COUNTRIES SEARCH PROJECTS RUN REPORTS

21 projects by ACDI/VOCA

ACDI/VOCA fosters broad-based economic growth, raises living standards, and creates vibrant communities. Its technical and management assistance enables organizations—whether enterprises, financial institutions, or cooperatives—to manage and finance themselves and succeed in the global economy. Areas of expertise include agribusiness, community development, enterprise development, financial services, and food security.

ACDI/VOCA was founded in 1963 by U.S. farmer cooperatives and our people-to-people approach remains in our DNA. We have implemented projects in 146 countries on behalf of public, private and multilateral funders, including USAID, USDA, the Millennium Challenge Corporation, the World Bank, UNDP, the Bill & Melinda Gates Foundation, EBRD, NEPAD, the Asian and Inter-American Development Banks, as well as corporations and individual countries.

PROJECT SECTORS

- 18
- 7
- 3
- 2
- 2
- 1

PROJECT LOCATIONS

- Liberia - 6
- Kyrgyzstan - 3
- Mali - 2

ACDI/VOCA
Expanding Opportunities Worldwide

Website <http://www.acdivoca.org/>

Twitter <https://twitter.com/acdivoca>

Facebook <https://www.facebook.com/acdivoca>

Member Workspace

ORGANIZATION ID *
ACDI

LOGO
ACDI VOCA
JPG, PNG and GIF supported
upload new or remove

WEBSITE
http://www.acdivoca.org/ preview the link

NATIONAL STAFF
170

INTERNATIONAL STAFF
1330

SOCIAL LINK

TWITTER
acdivoca preview the link

FACEBOOK
acdivoca preview the link

CONTACT INFORMATION

DONATION INFORMATION

DONATION ADDRESS
50 F Street NW, Suite # 1000

CITY
Washington

ZIP CODE
20001

STATE
DC

DONATION PHONE NUMBER
(202) 469-6000

DONATION WEBSITE
https://npo.networkforgood.org/Donate/Donate.asp:

Your logo, website, contact information, and donation information will appear on the bottom left hand corner of your organization page on NGO Aid Map, next to the list of your projects. You can also add links to social media.

Front end of NGO Aid Map



Adding or Updating Site-Specific Information



You can tailor information for individual sub-sites (or featured maps). If you would like to change the information that appears for your organization on a specific sub-site – such as Haiti Aid Map – you must edit the information under the section for that site.

The “Your Organization” tab allows you to provide different information for each NGO Aid Map sub-site. For example, if your organization contributes information for both Haiti Aid Map and Food Security Aid Map, you can list a different contact for each of those sites or provide a more specific description of what your organization is doing in each of those areas. Your organization may also want to provide different donation information for each site. **While having this flexibility is important, it’s easy to miss where you should make the changes so the information appears on the intended site.**

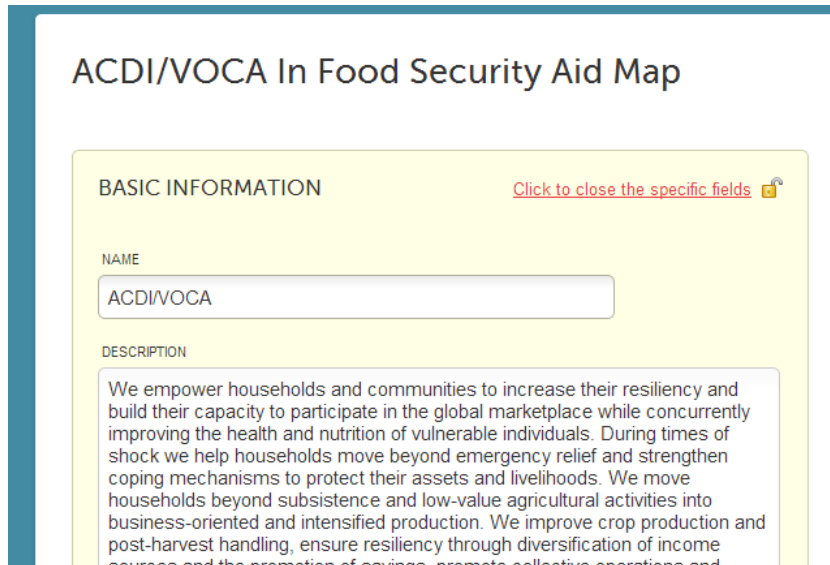
When you first click on the “Your Organization” tab, the site takes you to the “Basic Information” section by default (see image below). As mentioned earlier, when you enter information in this section of “Your Organization,” it will automatically be copied into the sections for all the various sub-sites (e.g., Haiti Aid Map, Food Security Aid Map, etc.). Updates to this section will also be carried over into the section for each of the sub-sites, **unless you have added or edited the information under a site-specific section in the past.**

“Your Organization” – “Basic Information” section

When you click on the “Your Organization” tab, you will land on the “Basic information” section.

If you would like to add different information for a specific sub-site, you must select that site from the list of sites below “Basic information.”

Entering information specifically for Food Security Aid Map



Once you've selected a specific site, you'll notice that the name of that site appears at the top of the page. Click inside whatever box you would like to edit to add site-specific information.

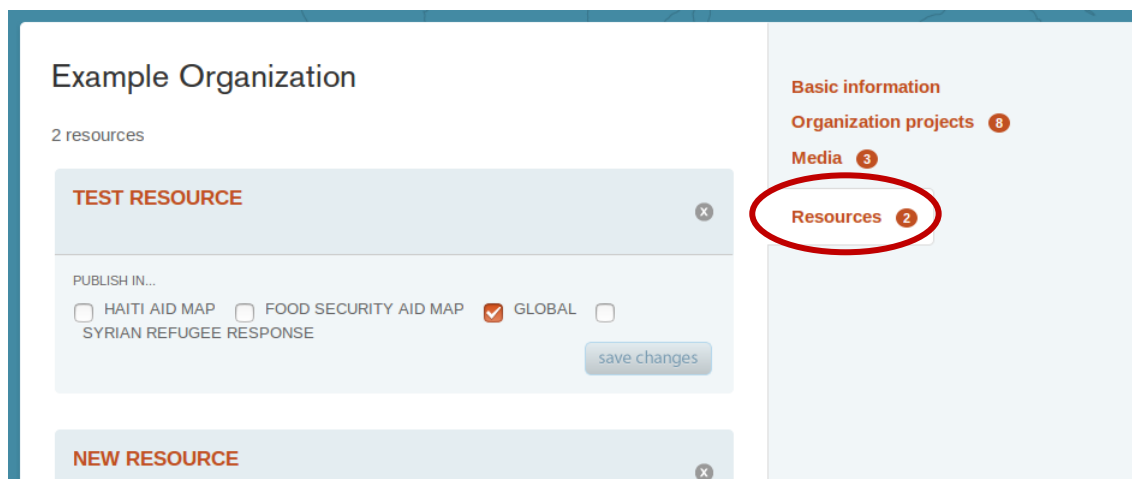
In this example, we have edited the information for the description and contact information fields.

Once you make changes for a specific sub-site, any information you add under the "Basic information" section will not be copied over into that sub-site.

Adding Resources

In addition to the fields mentioned above, you can also add resources about your organization.

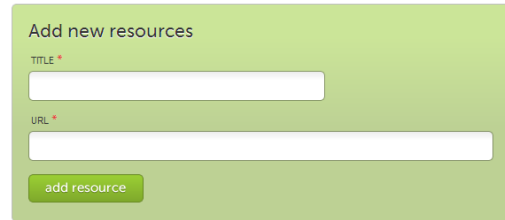
1) Click on "Resources" on the right hand side of the "Your Organization" tab.



2) Add the name of the resource and the link to the appropriate webpage, then click “add resource”.

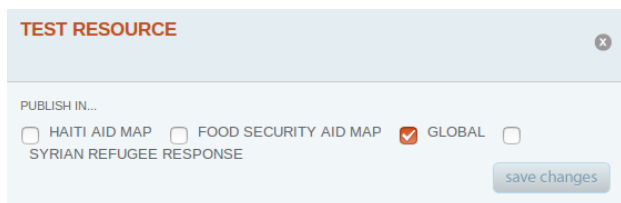
Resource you might consider adding include:

- Annual reports
- Blog posts
- Special reports
- Videos (consider adding as media, below)

A green rectangular form titled "Add new resources". It contains two input fields: "TITLE *" and "URL *". Below the fields is a green button labeled "add resource".

3) Check which NGO Aid Map site you would like the project to appear on, then hit “save changes”

You have control over which resources appear on each sub-site. While some resources may be relevant to all the sub-sites your organization is providing information for, others (like an update on your work in Haiti) may only be applicable to one particular site.

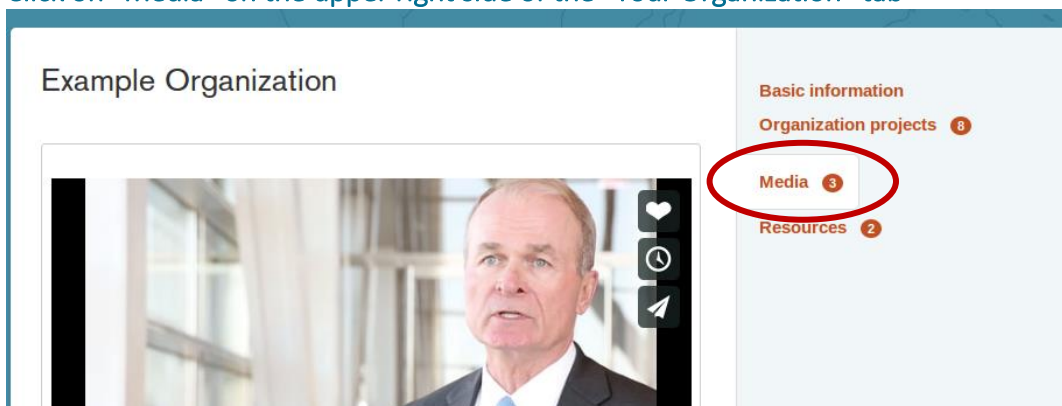
A light blue rectangular form titled "TEST RESOURCE" with a close button (X). Below the title is the section "PUBLISH IN...". It contains four checkboxes: "HAITI AID MAP", "FOOD SECURITY AID MAP", "GLOBAL" (which is checked), and "SYRIAN REFUGEE RESPONSE". At the bottom right is a button labeled "save changes".

The resources will be listed as “Additional Resources” on your organization’s page on whatever sub-sites you selected.

Adding Media

In addition to the fields mentioned above, you can also add resources about your organization.

1. Click on “Media” on the upper right side of the “Your Organization” tab



2. Add, remove, or change the order of pictures and videos you want to show on your public organization page.

ADD A NEW IMAGE

Upload a new image

No file selected.

-- OR --

Add a new image by url

ADD A NEW VIDEO

Add a new video

Hover over an existing picture or video to reveal controls to remove and reorder pieces.

Adding Data Contacts

One other important piece of information you should complete in the organization form is “Data Contact.” This is the person that will receive automatic email notifications of projects ending within the next 30 days, which are sent out on the 15th of every month. The data contact will not appear on the public site. You can have the same person listed as the data contact for all NGO Aid Map sub-sites, or designate different individuals for specific sub-sites. All data contacts should have a Member Workspace account.

Email notification of projects about to end

NGO Aid Map projects ending soon.

16 project(s) ending between February 15, 2014 and March 14, 2014

Hello,

We'd just like to remind you that the following project(s) will be ending within a month.

Community Health and AIDS Mitigation Project (CHAMP)
In Haiti · End date: February 28, 2014

IMARE: Inclusive Market Alliance for Rural Entrepreneurs
In Guatemala · End date: February 28, 2014

How to Manage Your Project Information

The “Your Projects” tab in your Member Workspace is where you can view all the projects that have been added for your organization, edit existing projects, or add new ones.

When you first click on the tab, you will see a list of your projects, a search bar and different filters (see image on next page).

- You can **search** projects by title, location, or even by your organization’s project ID if it has been provided.
- You can also **filter** projects by status (active or closed), country, sector or site.
- If you would like to conduct additional analysis or would prefer to view your project data in an Excel spreadsheet, just click on the **Export projects** button at the top of the project listing.
- Your project data is also available in XML format for publishing to IATI (International Aid Transparency Initiative). Unless your organization is already independently publishing to IATI, your data is automatically included in a daily publication of NGO Aid Map data to IATI. For more information visit [IATI’s website](#), our [IATI page](#). Email us at mappinginfo@interaction.org if you have questions or would like to know more about this feature.

Search, filter or export projects

The screenshot displays the 'Your Projects' interface. At the top, there is a 'SEARCH BY TEXT' section with a text input field containing the placeholder 'Search projects by name, description, organization intervention ID..' and a green 'Search' button. Below this are four filter dropdowns: 'STATUS' (set to 'All statuses'), 'COUNTRY' (set to 'All'), 'SECTOR' (set to 'Any sector'), and 'SITE' (set to 'Any site'). Below these is an 'ORGANIZATION' dropdown set to 'Any Organization'. A large blue horizontal bar separates the filters from the project list. The project list header shows '8 Projects'. To the right of the header are three buttons: 'New project' (green), 'Export projects' (grey), and 'IATI export' (grey). The first project entry is partially visible, showing the name 'TEST2' in red text, followed by 'Agriculture' and 'Angola' in a light grey box.

Adding a New Project

To add a new project, simply click on the small “New project” button at the top of your project listing, or on the large “Create New Project” button at the bottom of the page. Clicking on either of these buttons will take you to a blank, online project form where you can enter information about your project.

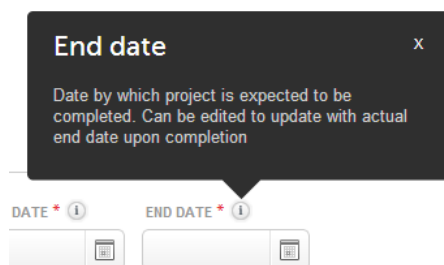
Organizations are encouraged to add as much information about their projects as possible, but seven fields are required (these are noted by a red asterisk next to the field name):

1. Organization
2. Project name
3. Project description
4. Start date
5. End date
6. Sector(s)
7. Location (at least at the country level)

If any of these fields are missing, you will get an error message and your project will not be saved.

If you need more information on what kind of information a field calls for, see our [Project Reporting Guidance](#) document. You can also click on the information icon next to the field name in the project form to get the definition for that field.

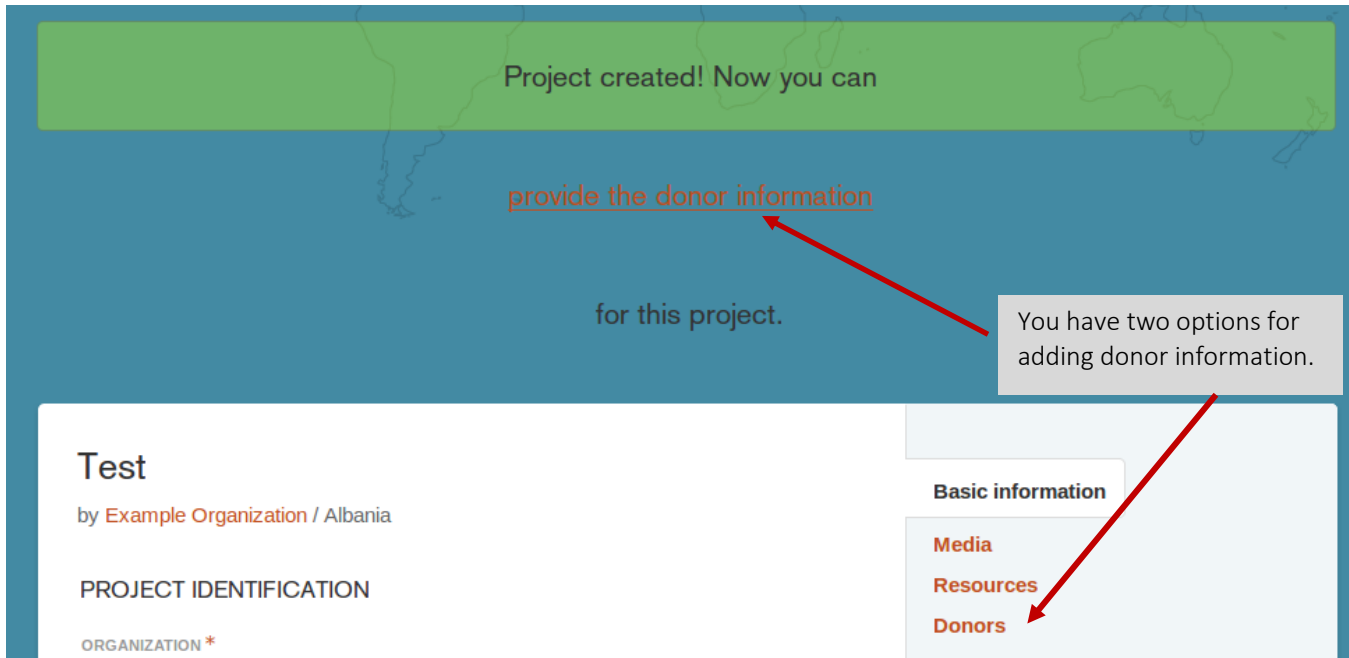
When you have finished entering this basic information for the project, click on the “Save changes” button.



Donor information

Once you have saved the project, you will be prompted to add information on the project’s donor(s). You can do this by:

- Clicking on the link included in the message confirming that you have successfully added a project, or
- Clicking on the “Donors” section on the right hand side of the page.



To add a donor, simply start typing the donor's name in the box. As you type, a list of possible donors will appear below. Select the appropriate donor if it appears on this list. If the donor does not appear, finish typing the donor name and then click on "add donation." This new donor will be added to our database. You can also email us at mappinginfo@interaction.org with the donor names you need added, and we'll do it as soon as we get the email.



If you have many projects to add or edit, you may want to consider using our batch upload tool, which allows multiple projects to be uploaded at once. Find out more by reading our [Batch Upload Guidance](#).

Editing Existing Projects

To edit a project, select the project from the project listing. This will take you to the project form, where you can make updates or changes. Make sure you click on the "Save changes" button when you're done. If you have many edits to make – such as updating the contact information for all of your projects – it is usually best to use our batch upload tool.

Adding Pictures and Videos to Your Projects

Through the online project form, you can also add pictures and videos to your projects. These will appear below the description of your project on the site (see example below), and can be added by clicking on the "Media" section on the right hand side of the project form (see image above).

Pictures

To add pictures, just upload the file(s) of the image(s) you'd like to feature on the project page and hit save. Once you have done this, you will be asked whether



you'd like to provide a caption for your picture. You can use this to provide a description of the picture, and/or to include a photo credit. You will also be able to choose the order in which pictures appear. Keep in mind that **horizontal** pictures work best.

Videos

To add a video, click on the “add a video” link on top of the save button (see image above). Enter the link to your video and hit save. Only links to Vimeo and YouTube videos are supported.



You can add multiple pictures and videos to your projects. Users can scroll through them by clicking forward and backwards arrows.

Adding Additional Resources to Projects

Through the online project form, you can also add other linked content from web that is related to your project, such as project reports and updates, blog posts, etc. From the “Your Projects” tab, click “Resources” on the right hand side. Add a resource by entering a title and its url. These links will then be available on the left sidebar of your project under the heading “Resources”.

Additional Guidance Documents and Templates

Other Guidance Documents

- [Project Reporting Guidance](#)
- [In-Kind Donations Reporting Guidance](#)
- [Batch Upload Guidance](#)

File Template for Batch Uploads

- [Batch Upload Template](#)

Online Resources

- [Reference Lists for Batch Upload](#)
- [About NGO Aid Map's Approach to Sector Coding](#)
- [NGO Aid Map and IATI](#)