



JORDAN MISSION –

Assistance Coordination: Bulk Upload

Trainer-of-Trainer Guide

Background on RAIS

RAIS was initially developed by UNHCR Jordan in 2009 to address the demands for a more coordinated approach by partners delivering refugee assistance. In 2009 refugee assistance targeted Iraqi refugees and included healthcare, education, and material assistance packages. Following its success in Jordan, RAIS was later rolled-out in Lebanon and Syria as part of efforts to share 'best-practices' across the region. In 2012 a review of the system and current operational needs was conducted which led to the release of RAIS v2. In 2014 new modules were incorporated into RAIS including the vulnerability assessment framework, assessment management, and offline functionalities. In 2015 RAIS continued to enhance with additional modules for assistance coordination, referrals and ticketing.

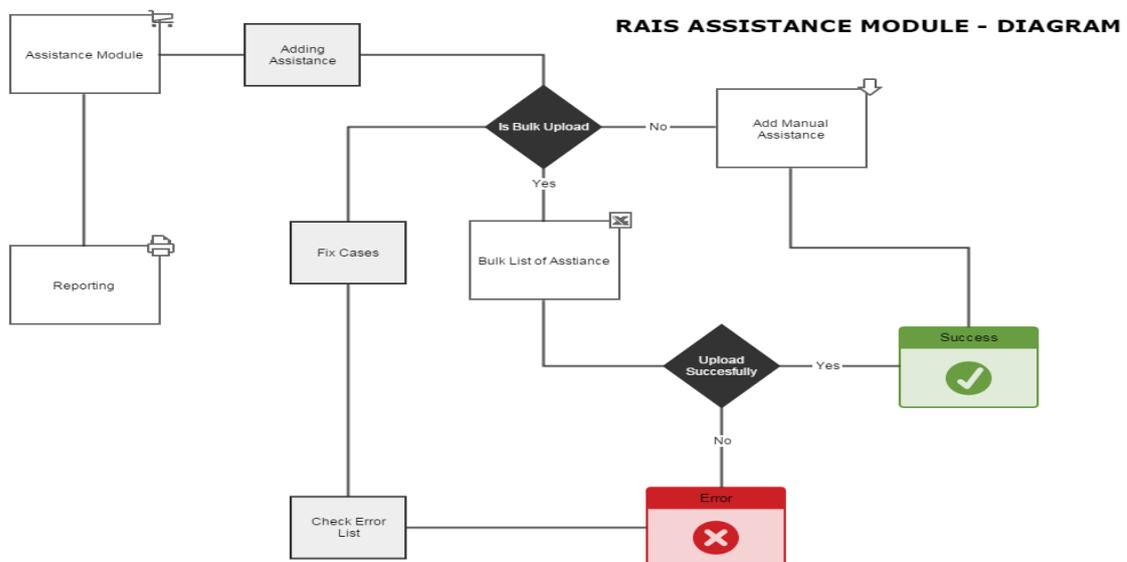
RAIS is now the main coordination tool for assistance delivery in countries across the region (Lebanon, Jordan, Egypt, and Iraq). Over 200 partners are now actively using RAIS which represents over 500 individual users. Since June 2014, 150,000 Home Visits have been recorded on RAIS, and there are over 7 million assistance records corresponding to 1.5 million beneficiaries. New data exploration tools are now under development and RAIS will continue to be scaled-up across the region and beyond. Interest in RAIS has also been expressed by a number of other country operations such as Ecuador, Libya, India, Israel, Kenya and Yemen. In addition a number of key donors have made its use mandatory as part of their donor agreement with partners, independent of whether or not their funding goes through UNHCR.

Introduction – Why use Bulk Upload?

- Bulk upload streamlines the process of assistance application to multiple cases simultaneously.
- It benefits organizations by spending less time on data entry by using a quick and simplistic process which is non resource intensive.
- Reports can directly be extracted from RAIS again providing each organization with assistance summaries for donor reporting.
- Bulk upload and application of assistance to cases enables broader operational transparency to avoid providing duplication of assistance at the interagency level. It also enables organizations to look at means to provide complementary assistance to cases = reduction in wastage and more efficient and effective assistance provision.

Provision of Assistance

The assistance module in RAIS enables organizations to record, coordinate, and report on the assistance provided to persons of concern. The assistance process is outlined in the diagram on the screen.



Bulk Upload Module – ‘Provision of Assistance to multiple cases’

STEP 1: Select: Assistance – Bulk Upload

The screenshot shows the RAIS Search interface. At the top, there is a navigation bar with various menu items: UNHCR RAIS, Dashboard, Cases Information, Ticketing, Assistance, Eligibility, Forms, Referrals, Appeals, Reports, Administration, and VAF. Below this is the 'RAIS Search' section. A search dropdown menu is open, listing several options: Assistance - Search, Assistance - Single Bulk, Assistance - Bulk Upload (highlighted with a red box), Assistance - Coordination, Assistance - Health, Assistance - Health ECC, and Assistance - Master Coordination. Below the dropdown, there are search filters for 'Search by Id' and 'Search by Name'. The 'Search by Id' section includes input fields for 'Case No.', 'Document ID.', and 'Phone Num'. The 'Search by Name' section is currently empty. At the bottom of the search section, there are 'Search' and 'Clear' buttons. Below the search section, there is a table header with columns: Photo, Status, IndividualID, CoA, Site, proGres No, CoO, Arabic Name, English Name, and Mothe.

Download Bulk upload excel sheet:

The screenshot shows the 'Upload Information' form. At the top, there is a blue header with the text 'Upload Information'. Below this is a yellow warning box that says 'Warning! Make sure that in your excel, the sheet name is 'Assistances''. The form contains several fields: 'Organization' (a dropdown menu with 'Select Organization'), 'Assistance Type' (a dropdown menu with 'Select assistance type'), 'Provided By:' (a dropdown menu with 'UNHCR'), 'Provided Through:' (a dropdown menu with 'UNHCR'), 'Quantity:' (a text input field with '0'), 'Value' (a text input field with '0.0'), 'Frequency' (a dropdown menu with 'One Time'), and 'Apply Only To PA' (a checkbox). At the bottom, there are 'Upload Assistance Information' and 'Back' buttons. Two red boxes highlight specific areas: one around the 'Upload File:' section, which includes a text input field, a 'Select' button, and a '*Size limit: 25MB' warning; and another around the 'Assistance Template' section, which includes links for 'Link - Bulk' and 'Link - Bulk Health'.

User is to enter the following data first in to the bulk upload screen:

Fields to be **entered** in to the **bulk upload screen (above):**

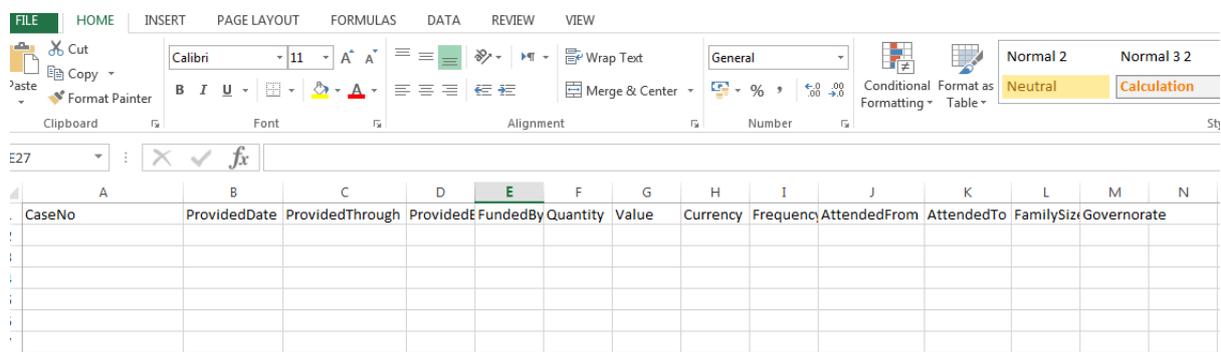
1. Organization (reporting)
2. Provided By (distributing organization)
3. Assistance Type
4. Provided Through (if third party implementing partner undertaking distribution on behalf of your organization – otherwise insert your organization name)
5. Frequency (should remain – one time)
6. Date Provide (date assistance was distributed)

- 7. Funded By (donor – if donor not present from automated selection request to add from DAG)
- 8. Currency (default should remain JD if cash – if other assistance type please ignore)

The user should enter the following fields in the excel sheet:

TIP: do not edit the excel sheet fields – otherwise the system will reject the upload.
 The reason why most of the fields should be completed in the bulk upload screen and not the excel sheet is to remove the likelihood of errors and rejections.

- Fields to be **entered** in to **excel sheet (below)**:
1. Case no.
 2. Value (JD value given if cash – for other assistance types this field can be ignored)



User to save excel sheet, select and upload it to the **UPLOAD FILE** section and click upload assistance information.

Note: For organizations uploading more than 10,000 instances of assistance (at any given time in one batch) please ensure that you undertake your upload either:

- Early morning** before business hours,
- After business hours,** or
- Weekends** to avoid the bulk upload module itself from failing / timeout or system interruption and traffic for other modules.

This applies to *organizations with repeat large monthly beneficiary lists* i.e. WFP, UNHCR and UNICEF or large one-off distributions not inclusive of camp barcode scanning. By following this advice it will prevent system traffic for everyday RAIS users given the lengthy processing time for large uploads of assistance. This will enable other RAIS user organizations to use this module without delay and without disruption to their everyday business flow. Please be mindful of your fellow users.

AFTER the Bulk upload file has been uploaded a summary status shall be present as per below screenshot:

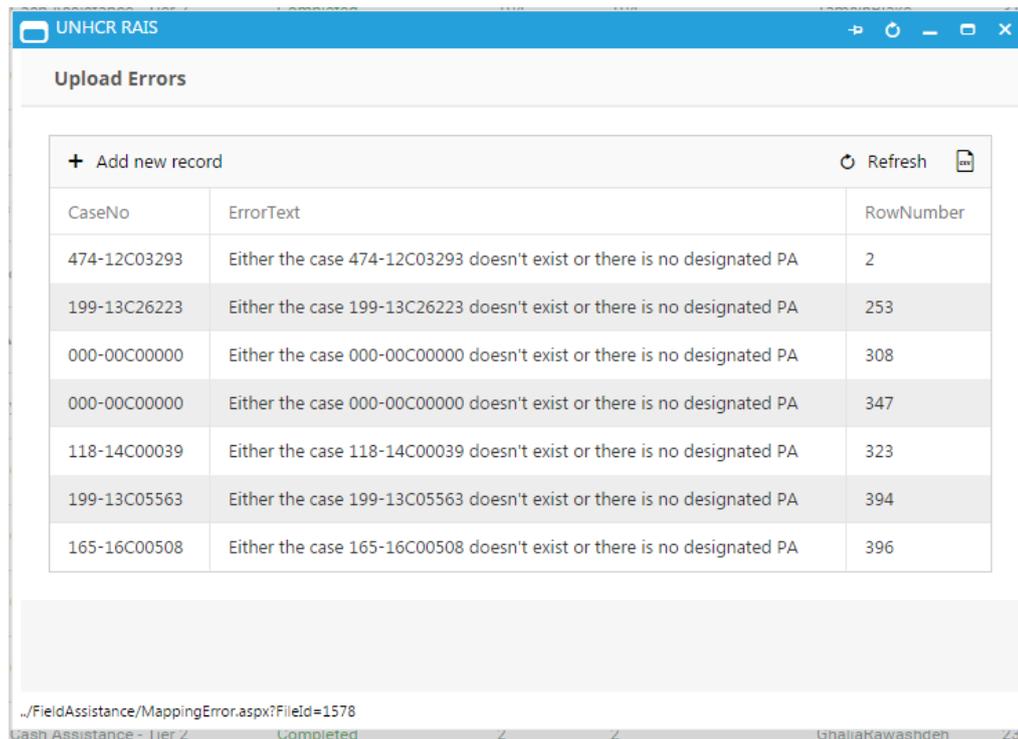
For each bulk-upload file that your organization tries to upload there will be a summary status available. Files which return the **‘Completed with Errors’** in the Status bar should be a prompt to the user to investigate why the error/s occurred. In the highlighted example below 7 errors have

occurred from 431 cases that have been uploaded. But the remaining 424 cases were successfully applied with assistance.

In the case where file status presents 'Completed' and 'Uploaded Successfully' no further action is required and the assistance has been successfully applied to the cases.

FileId	Organization	File Name	FA Type	Status	#Records	#Passed	#Failed	Update By	Updated Date	Download
1581	Medair	1701 Winter Tier 2 JOR341.xlsx	Winter Cash Assistance - Tier 2	Completed	2	2		TamsinBlake	31/01/2017	Uploaded Successfully Rollback
1580	Medair	1701 Winter Tier 1 JOR341.xlsx	Winter Cash Assistance - Tier 1	Completed	4	4		TamsinBlake	31/01/2017	Uploaded Successfully Rollback
1579	Medair	1612 Winter Tier 2 JOR341.xlsx	Winter Cash Assistance - Tier 2	Completed	104	104		TamsinBlake	31/01/2017	Uploaded Successfully Rollback
1578	Medair	1612 Winter Tier 1 JOR341.xlsx	Winter Cash Assistance - Tier 1	Completed With Errors	431	424	7	TamsinBlake	31/01/2017	Errors Rollback
1577	IOCC	RAISAssistanceFVDecember.xlsx	General Voucher Distribution (GVD)	Completed With Errors	150	135	15	MahaQattam	30/01/2017	Errors Rollback
1576	IOCC	RAISAssistanceFVDecember.xlsx	General Voucher Distribution (GVD)	Rolled Back	150		150	MahaQattam	30/01/2017	Errors Rollback
1575	PU-AMI	Copy of RAISAssistanceTemplateHthTest.xlsx	Cash For Health	Rolled Back	1	1		SaleesTurk	29/01/2017	Errors Rollback
1574	ACTED	Bread Card Cycle 58 From 22 To 26 Jan 2017.xlsx	Bread Voucher	Completed With Errors	5365	5318	47	mSharina	29/01/2017	Errors Rollback

By clicking on the **Errors** button to the right of the screen, the following pop-up shall appear advising why the error occurred.



The Error message 'Either the case XX doesn't exist or there is no designated PA – (Principle Applicant)' can mean 1 of 3 things:

1. Incorrect case number, case number is not in ProGres or RAIS = update, correct and re-upload with correct Case ID.
2. Check Case status in **RAIS Search Case module**:

If Case ID appears, yet presented an error in the bulk upload check case status (next to photograph – view next slide) where there will be a letter:

A = Active

C = Closed (cannot provide assistance to – case no longer in country)

I = Inactive (as referred by UNHCR protection).

RAIS Search

Search

Search by Id

Case No. 199 Individual ID. Document ID. Phone Number Ration Card No

Search by Name

Search Clear

Photo	Status	IndividualID	CoA	Site	progres No	CoID	Arabic Name	English Name	Mother's Name	Sex	Date of Birth	Age	Rel
	C	199	JOR	JORIR	199	SYR				M		36	PA
	C	199	JOR	JORIR	199	SYR				F		30	WIF
	C	199	JOR	JORIR	199	SYR				F		12	DAU
	C	199	JOR	JORIR	199	SYR				M		10	SON

3. Cases with Active status can receive assistance but bulk uploader may have rejected the upload as a result of a synchronization error due to the merging of cases / change in family composition or circumstance and a new Case ID being created as a result. Request manual synchronization from Joramdag@unhcr.org and re-upload assistance through bulk uploader once synchronization has been completed.

After error amendments have been made user to proceed to upload again, and again cross-checking that the status then states 'Completed' and 'Uploaded Successfully'.

Field	Organization	File Name	FA Type	Status	#Records	#Passed	#Failed	Update By	Updated Date	Download
1609	ACTED	Winterization Cash Assistance-Tier 2.xlsx	Winter Cash Assistance - Tier 2	Completed	24	24		NesreenDalbooh	06/02/2017	Uploaded Successfully
1608	ACTED	Winterization Cash Assistance-Tier 1 .xlsx	Winter Cash Assistance - Tier 1	Completed	132	132		NesreenDalbooh	06/02/2017	Uploaded Successfully

It is each organizations responsibility to check, review and correct data if erroneously entered – data cleaning should occur at least once a month. In this instance particularly JOD values applied to cases, as RAIS is a joint assistance coordination system, incorrect JOD values or application to incorrect cases, or not reporting at all in RAIS can have an impact on beneficiaries eligibility / and / or duplication of assistance provision.

It is recommended that each agency review summary reports of data entered and cross-check entries on a monthly basis to ensure due-diligence.