

**PHASE**  
PLATFORM ON HUMANITARIAN AID  
FOR A SUSTAINABLE EMPOWERMENT



**TRAINING GUIDELINE**

# Platform in Humanitarian Aid for a Sustainable Empowerment



**EU Aid Volunteers**  
We Care, We Act



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# Introduction

In the framework of the EU Aid Volunteers Capacity Building project PHASE led by ADICE association, one objective was to create an online platform (database type).

This platform is accessible for volunteer hosting organisations and volunteers to ensure the proper management of the reception of humanitarian volunteers and to reinforce the sustainability of the impact of their actions and on the beneficiary communities.

The platform is available in English, French and Spanish. It is a web platform allowing continuous access.

The platform is a tool to manage the monitoring of projects (description of activities, objectives, tools...) and volunteers (contact details, follow-up interviews, skills development ...).

It is also an online tool to capitalize information and documents related to their organisation in the management of volunteering (security, needs identification, logistics, volunteer management), to list the partners (information, history...), to create alerts for specific events (interviews, deposits, meetings...).

It has a functional and shared calendar related to volunteers and partners and it can edit all documents created via this database (mission offers, logistical documents, training documents...).



## CHAPTER 1

# Connecting to PHASE platform

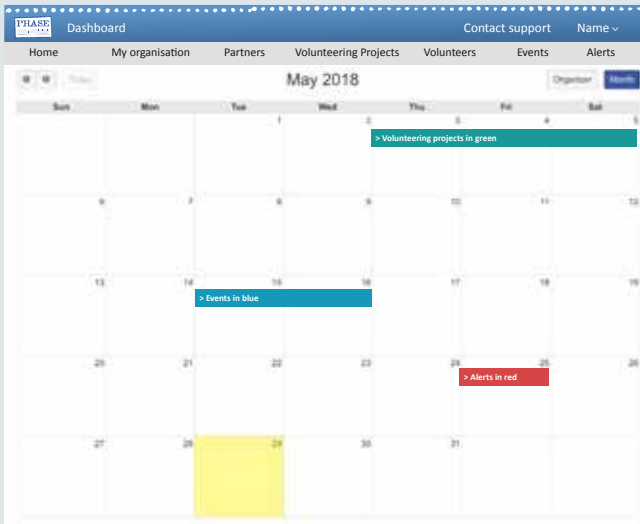
To connect to the application, the participants have to go on the following address:

<https://www.online-phase.com>

You have to enter your username and your password (given by ADICE association) then click on « Connect ».

You can also change your password or recover it if you have forgotten it.





Once logged in, you are automatically redirected to the **dashboard** from the platform.

**This dashboard gathers in calendar form the application's keys dates:**

- > Alerts in red
- > Volunteering projects in green
- > Events in blue

Each element of calendar is clickable. For example, you can click on an event and be redirect inside the edit form.

This calendar also allows you to create alerts or events by clicking on the number of the day.

## 1. MENU TREE

The menu has been designed so that each element has been placed in a logical order. By clicking on each link, you will be redirected to the corresponding module.

From this menu, you can click on **your last name and first name** (located on your right) then **My account** to change your email address and/or password easily.

**Editar mi cuenta**

Mis favoritos como usuario

Nombre de usuario :

Email :

Contraseña real :

Nueva contraseña :

Verificar nueva contraseña :

[Actualizar cambios](#)



The platform includes 6 different but interdependent modules for each other.

- **My organisation** allowed to find every important information of this one,
- **Partners** module gathers all partners organisations of my organisation (this module isn't accessible for a « volunteer » account),
- **Volunteering projects** module centralizes the whole available projects,
- **Volunteers** module collects the volunteers working for the organisation,
- Finally, **Events** and **Alerts** modules bring together all the events and alerts of the entire platform.

## 2. LISTS SYSTEM

List of volunteers 1

4 Columns Export Print

3

1-2 / 2 / 4 registers 100

Actions	Lines	Last name	First name	Birth date	Nationality	Sex	Age	Address	Postal code	Town	Country	Mobile phone	Phone	Sky
	1	dupont	germain	17/09/1998	France	Male	18	Rue de Dunkerque 58	75009	Paris	France			
	2	Aubert	Harmonie	21/09/1988	France	Female	28	Rue de Douai 25	59000	Lille	France	+33658789865	+33320112268	har

5

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Each module (My organisation, Volunteering projects...) is a list where it's possible to perform some actions.

1. Each list is identified by a specific label of selected module from the menu (in this case we imagine that you have clicked on **Volunteers** from menu).
2. **Add** button allows you to create a new record in the correspondent module.
3. List includes a powerful search system consisting of 3 fields: a rectangle box for the search, a drop-down list to target this search (search on displayed columns, search all or a specific column) and a button to reset the list (cancel the search). After 1 second of inactivity, search starts automatically.
4. Several actions can be executed on the whole list as show/hide or sort columns, export information in Excel or PDF format, print the list and decrease/increase the size's font.

5. All lists contain specific actions, however we always find 2 common actions on each list: edit and delete.

All platform's modules (all lists) are built in the same way.

Some actions can only appear under special conditions (for example « delete » action will no longer be available once the concerned volunteer has been hired in a volunteering project).

Besides, some columns (in particular phone number and email) are clickable. For example, the phone field will redirect to a phone app, and so on.

## 3. FORMS

All app forms are based on a simple but effective design.

First, a title stands at the top of the form to show you where you are (in this case, in a volunteer add form).

Add a volunteer

General information

Date of on arrival interview\* : 25/10/2017

Last name\* :

First name\* :

Birth date\* :

Nationality\* :

Sex\* :

Age\* :

Some forms are divided into several parts. Each part is defined by a subtitle. Fields with (\*) must be completed to validate the entire form. Otherwise, an error message will occur at the bottom page and fields will be surrounded by a red border, as shown below.

## DIFFERENT FIELDS

### 1. Fields containing text

In these fields, you can write what you want. However, some restrictions may be active (for example phone field can only contain numbers).

Larger fields (Health in the example above) can contain multiple rows.

### 2. Date fields

Date fields look like text fields except that when you go into it, a calendar will be displayed. All application dates are formatted the same way (DD/MM/YYYY, i.e day/month/year).

### 3. Selection fields

Some fields (such as country, nationality, etc.) have a selection system as shown in the picture above. You will be able to search into it.

### 4. Multiple selection fields

Unlike a « simple » selection field, multiple selections allow you to add several data in a single field.

Last name\* :

First name\* :

Birth date\* :

Last name\* :

Health :

Date of on arrival interview\* : 25/10/2017

Last name\* :

First name\* :

Birth date\* :

Nationality\* :

Sex\* :

Age :

Address\* :

Today Done

Nationality\* :

Sex\* :

Age :

Address\* :

Postal code\* :

Town\* :

Country\* :

Mobile phone :

Select Nationality

- Afghanistan
- Albania
- Algeria
- American Samoa
- Andorra
- Angola
- Anguilla
- Antigua and Barbuda
- Argentina
- Armenia

Contact names of the organisation :

Eudes BASTID x Terje Kolamets x

Participant	
Volunteer :	dupl
Internal organisation	dupont germain

Bank Detail :	<input type="button" value="Upload a file"/>
---------------	--

Carried out activities	07/10/2017	<input type="button" value="-"/>	<input type="button" value="+"/>
------------------------	------------	----------------------------------	----------------------------------

<input type="button" value="▼"/> Final report
---

## 5. Autocomplete fields

Some text fields have an additional autocomplete system (such as address, volunteer in this case) to help and guide you. Autocomplete is triggered only from 3 typed letters and will only display the corresponding information.

## 6. File uploading fields

By clicking on this kind of button, you will be able to upload a file (from your computer) into the platform. This file loaded will be accessible directly into the form.

## TAB SYSTEM

In many forms, you will be able to find tabs (in the subcategories). By pressing the button (+) you add a tab and by clicking on the red button (-) you delete one.

That is very easy to switch from one tab to another by clicking on it. The active tab is always highlighted.

## SHOWING/HIDING A CATEGORY

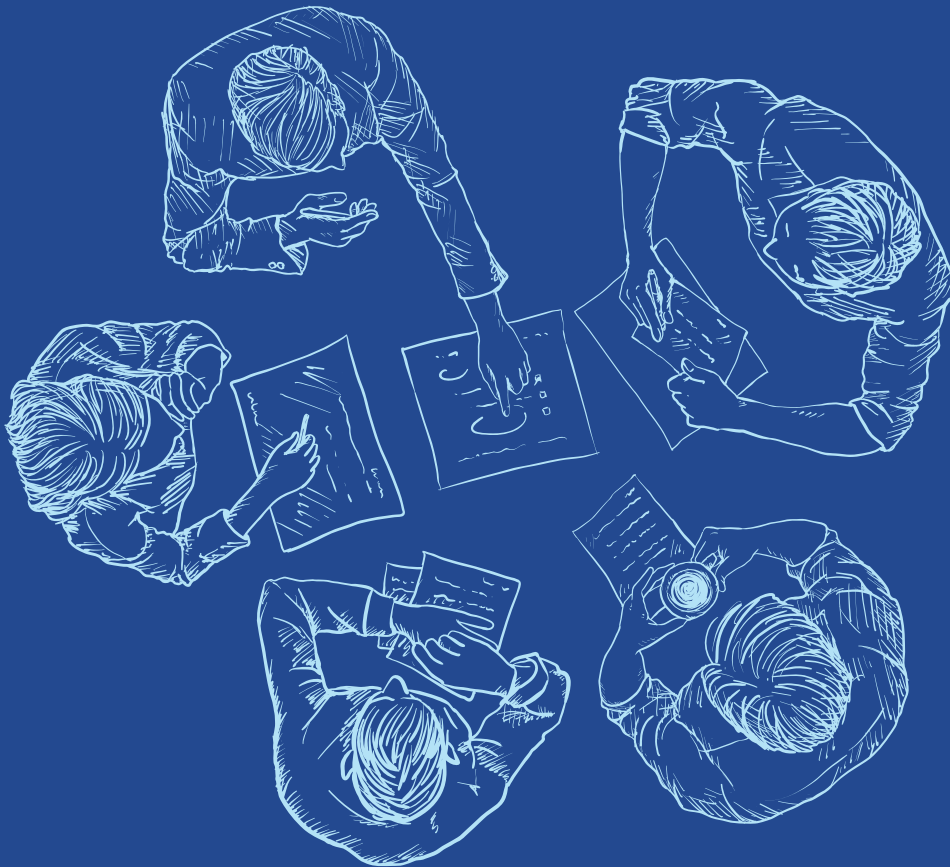
Like for tabs in the application, you will find a mechanism to show or hide a category. The goal is to reduce forms size when displaying.





CHAPTER 2

# Organisation account



# 1. MY ORGANISATION MODULE



This module allows a user to insert useful host structure's information but also capitalize tools, methodologies to ensure the good volunteers' management and finally tools and information related to the projects carried out.



Onto this list, 7 actions are available:

1. Editing organisation to which you belong,
2. Organisation's files uploading,
3. Generating security files,
4. Generating local context files,
5. Generating incident reports,
6. Generating evacuation plan,
7. Centralizing alerts concerning the organisation.

## EDIT FORM

The form is made up of 8 distinct categories:

1. General information,
2. Contact persons,
3. Implemented projects,
4. Volunteers hosted by the organisation (this part isn't editable, it only displays the volunteers),
5. Security,
6. Local context,
7. Incident reports,
8. Evacuation plan.



**Risk assessment** subcategory found in security part is a bit specific.

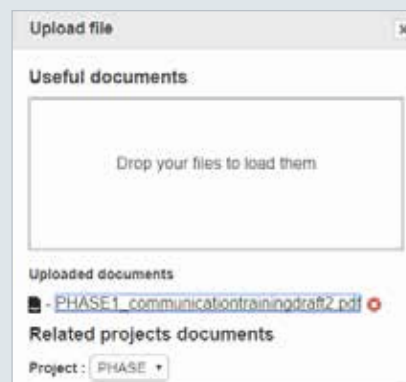
A tab system has been integrated to allow you to choose the risk and inside this one, you will find another part with tabs. As shown in the picture above, there are 2 different potential risks in the « Health » risk.

## DOWNLOADING FILES

There is an action into the app to load/download files. You simply drag and drop a file to store it in the application.

Then, that is very easy to manage files related to the organisation (get file by clicking on it or delete it by clicking on the cross (x))

In project documents, you can choose which project you will link to these files, from a drop-down list.



## ALERTS CENTRALIZATION

An action displays alerts and centralizes them in a window. The information is divided into 2 parts: current alerts and past alerts. By clicking on any alert, you will be redirected to it, in concerning module.



## 2. PARTNERS MODULE

List of partners

Columns: Columns, Export, Print, 1-1 / 1 / 3 registers, 100

Actions	Lines	Name of the structure	PIC number	Address	Postal code	Town	Country	Website	Email	Phone number	Skype	Cer
     	1	ADICE		Avenue Jean Lebas 2	59100	Roubaix	France	www.adice.asso.fr	adice@adice.asso.fr	+33320112268	asso.adice	

Page 1 of 1

This module contains the information about host organisation's partners.



Onto this list, 6 actions are available:

1. Editing a partner,
2. Deleting a partner,
3. Generating an information document for the partner,
4. Partners' files uploading,
5. Centralizing events,
6. Centralizing alerts.

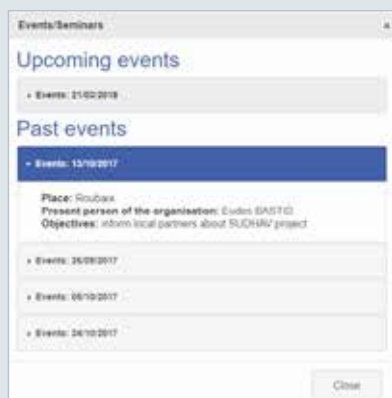
### ADD FORM

The form is made up of 2 categories: general information and contact persons.

### EDIT FORM

The form is made up of 4 categories:

1. General information,
2. Contact persons,
3. List of hosted/sent volunteers (this part isn't editable, it only shows volunteers),
4. Events/Seminars (this part isn't editable, it only shows events),



## EVENTS CENTRALIZATION

The same principle as the centralization of alerts is applied. Events are separated into 2 categories: upcoming events and past events.

## 3. VOLUNTEERING PROJECTS MODULE

Actions	Lines	Name of the project	Type of the project	Number of the project	Field of activities	Date of arrival	Date of departure
	1	SUDHAY	EU Aid Volunteers - EUAV	EUAV1	Education	05/07/2018	31/12/2018

In this module, the host organisation will be able to include volunteering projects information and documents.



Onto this list, 8 actions are available:

1. Editing project,
2. Deleting project (it will not be possible to delete a volunteer who has been assigned to a project),
3. Downloading files,
4. Generating general information file,
5. Generating volunteer profile file,
6. Generating final report,
7. Centralizing events,
8. Centralizing alerts.

### ADD FORM

The form is made up of 4 categories:

1. General information,
2. Volunteer profile and announcement,
3. Sending organisation,
4. Carried out activities.

You must inform a line manager and a mentor in the general information section.

Line manager	
Line manager's name* :	BASTID Eudes
Phone number :	+33320112268
Email :	eudes.bastid@adice.asso.fr
Mentor	
Mentor's name* :	

*Line manager's name* and *Mentor's name* are autocomplete fields. Once a line manager or a mentor has been selected, other information (phone number and email) are automatically displayed.

### EDIT FORM

The form is made up of 6 categories:

1. General information
2. Volunteer profile and announcement,
3. Sending organisation,
4. Carried out activities.
5. Final report to be completed when the project will be ended,
6. Participant.

A participant (volunteer) will not be able to be assigned to the project directly into the edit form. First, you must create the concerned volunteer from the module *Volunteers*.

Participant	
Volunteer :	dupont germain
Birth date :	17/09/1998
Sex :	Male
Age :	18

That is also an autocomplete field.

## 4. VOLUNTEERS MODULE

List of volunteers

Columns: Export Print

1-2 / 2 / 4 registers 100

Actions	Lines	Last name	First name	Birth date	Nationality	Sex	Age	Address	Postal code	Town	Country	Mobile phone	Phone	Sky
	1	dupont	germain	17/09/1998	France	Male	18	Rue de Dunkerque 58	75009	Paris	France			
	2	Aubert	Harmonie	21/09/1988	France	Female	28	Rue de Douai 25	59000	Lille	France	+33658789865	+33320112268	nat

The module allows a host organisation to include all information about volunteers that it will host.



9 actions are available:

1. Editing volunteer,
2. Deleting volunteer,
3. Downloading files,
4. Centralizing events,
5. Centralizing alerts.
6. Generating description file,
7. Generating objectives and expectation file,
8. Generating follow up file,
9. Displaying different projects in which the volunteer participated (this action is only visible when the

volunteer has been assigned to one project at least).

### ADD FORM

The form is made up of 8 categories:

1. General information,
2. Education,
3. Work experiences,
4. Social and associative engagement,
5. Linguistic skills,
6. Other skills,
7. Objectives and expectations,
8. Follow up.

### EDIT FORM

The form is made up of 11 categories:

1. General information,
2. Education,
3. Work experiences,
4. Social and associative engagement,
5. Linguistic skills,
6. Other skills,
7. Objectives and expectations,
8. Follow up,
9. Events/Seminars (this part isn't editable, it only displays events),
10. Historic about volunteering projects (this part isn't editable, it only displays projects),
11. Alerts (this part isn't editable, it only displays alerts).



## 5. EVENTS MODULE

List of events

Columns: Export Print

1-4 / 4 / 12 registers 100

Actions	Lines	Start date	End date	Organized by	Volunteering project	Names of partners organisations	Place	Type	Number of participants	Subject
  	1	21/03/2018	21/03/2018	Eudes BASTID	EUAV.1 - SUDHaV	ADICE	Roubais	meeting	100	EUAV
  	2	13/10/2017	14/10/2017	Eudes BASTID	EUAV.1 - SUDHaV	ADICE	Roubais	meeting	25	Deploym
  	3	05/10/2017	08/10/2017	germain dupont	EUAV.1 - SUDHaV	ADICE	Tournai	Workshop	10	Meeting
  	4	26/09/2017	26/09/2017	Eudes BASTID		ADICE	Lille	Conference / seminar	100	EUAV.1

You can find the past or upcoming events list.



3 actions are available:

1. Editing event,
2. Deleting event,
3. Generating event's description file.

### ADD/EDIT FORM

That is made up of 4 sections:

1. Event information,
2. Contact persons in the organisation,
3. Different present partners,
4. Different present volunteers.

To be able to add present partners, you must select a partner organisation first and then select contact persons from this organisation.

Partners

Names of partners organisations :

Contact names of partners organisations :

ADICE

Contact names of partne







After adding an event, you can create an alert in relation with this one, but it is not necessary, depends on cases.

## 6. ALERTS MODULE

List of alerts

Columns: Export Print

1-2 / 2 / 2 registers 100

Actions	Lines	Sending date	Done by	Volunteering project	Type	Content	Remarks
  	1	24/10/2017	Terje Kolamets		Other	test	test
  	2	24/10/2017				Volunteer arrival / departure : sensibilisation au chv communautaire.	

Page 1 of 1

This module allows you to create alerts. Then, alerts will be sent on different dates by email and showed on the user dashboard for those concerned (with user account).



**3 actions are available:**

1. Editing alert,
2. Deleting alert (if an alert has been deleted, emails will not be sent anymore),
3. Displaying volunteer concerned by the alert.

### ADD/EDIT FORM

That is made up of 4 sections:

1. Alert information,
2. Contact persons in the organisation,
3. Different recipients,
4. Different volunteers.

### SENDING AN ALERT



That isn't enough to create an alert for it to be send. You must click on the orange button called **Send**.

**Sending an alert will be done on 3 specific dates (these dates are in the form):**

1. The first sending will be on the sending date,
2. The second sending to a recall date automatically calculated according to the days' number before the deadline,
3. The last one at the deadline.

**A custom email will be sent to different people mentioned in the form.**

1. To the person who created the alert,
2. To the organisation of the person,
3. To people listed in the section « Recipients »,
4. To volunteers.

## 7. APPLICATION FLOW

For proper use, it's better to follow the predefined flow.

First, you must fill in all the important information about your organisation (contact persons, etc.).

Secondly, you have to create partner(s) with whom you usually work.

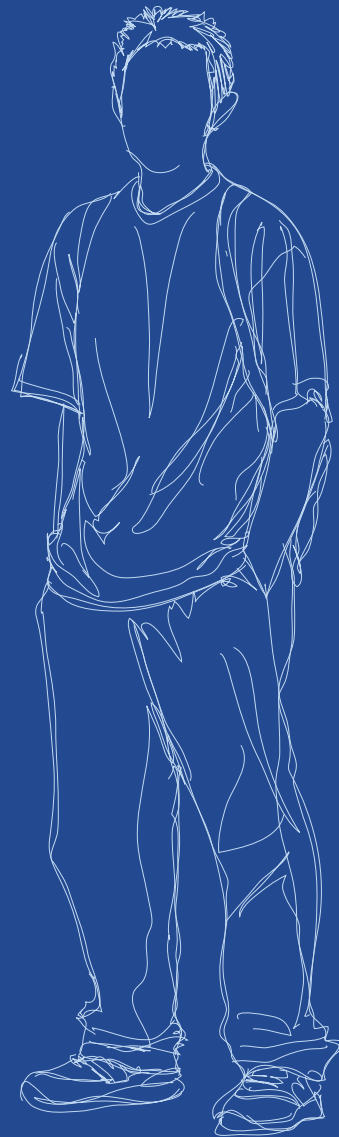
Thirdly, you have to fill in all important project data.

In the end, you will be able to create a volunteer and this one will be assigned to the project.



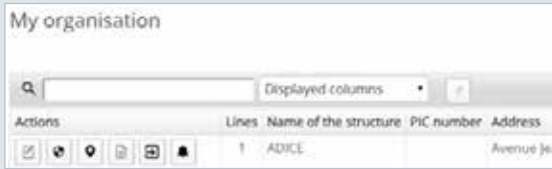
CHAPTER 3

# Volunteer account





## 1. MY ORGANISATION MODULE



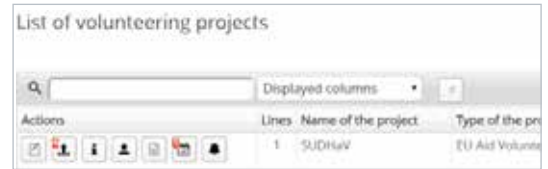
Onto this list, 6 actions are available:

1. Editing organisation to which you belong,
2. Generating security files,
3. Generating local context files,
4. Generating incident reports,
5. Generating evacuation plan,
6. Centralizing alerts concerning the organisation.

### EDIT FORM

The form is made up of a single category that is to create incident reports.

## 2. VOLUNTEERING PROJECTS MODULE



Onto this list, 7 actions are available:

1. Editing project,
2. Downloading files,
3. Generating general information file,
4. Generating volunteer profile file,
5. Generating final report,
6. Centralizing events,
7. Centralizing alerts.

## 3. MY PROFILE MODULE



7 actions are available:

1. Downloading files,
2. Centralizing events,
3. Centralizing alerts.
4. Generating description file,
5. Generating objectives and expectation file,
6. Generating follow up file,
7. Displaying different projects in which the volunteer participated.



## 4. EVENTS MODULE

List of events

Displayed columns

Actions	Lines	Start date	End date	Organized by
	1	05/10/2017	08/10/2017	germain dupont



Onto this list, 3 actions are available:

1. Editing event (you can only edit your events),
2. Deleting event (you can only delete your events),
3. Generating event's description file.

### ADD FORM/ÉDITER

That is made up of 4 sections:

1. Event information,
2. Contact persons in the organisation,
3. Different present partners,
4. Different present volunteers.

## 5. ALERTS MODULE

List of alerts

Displayed columns

Actions	Lines	Sending date	Done by
	1	24/10/2017	germain dupont



3 actions are available:

1. Editing alert (you can only edit your alerts),
2. Deleting alert (if an alert has been deleted, emails will not be sent anymore),
3. Displaying volunteer concerned by the alert.

### ADD/EDIT FORM

That is made up of 4 sections:

1. Alert information,
2. Contact persons in the organisation,
3. Different recipients,
4. Different volunteers.



# Global conclusion

This online volunteering management platform has been created to be easily used by any hosting organisation and their humanitarian hosted volunteers.

Indeed, it allows the organisation to complete privately all the useful and relevant data linked to the organisation, partners, volunteers, volunteering projects. It also gives the opportunity to the organisation to create and plan easily events and alerts to be shared to the relevant recipients.

The hosted volunteers can also have access to their own account to view the useful information (related to the security, their monitoring...) and also to share and stock the documents and tools that they can create all along their projects with their hosting organisation.

Such platform will give the opportunity to the organisations to structure their volunteering processes, facilitate the creation of high quality volunteering management tools, stock all the relevant materials and information related to volunteering projects (volunteers, partners, projects...) and organize and inform about your events and plan alerts.



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#euaidvolunteers



**EU Aid Volunteers**  
We Care, We Act

