

Geo-Rolodex Onboarding User Guide

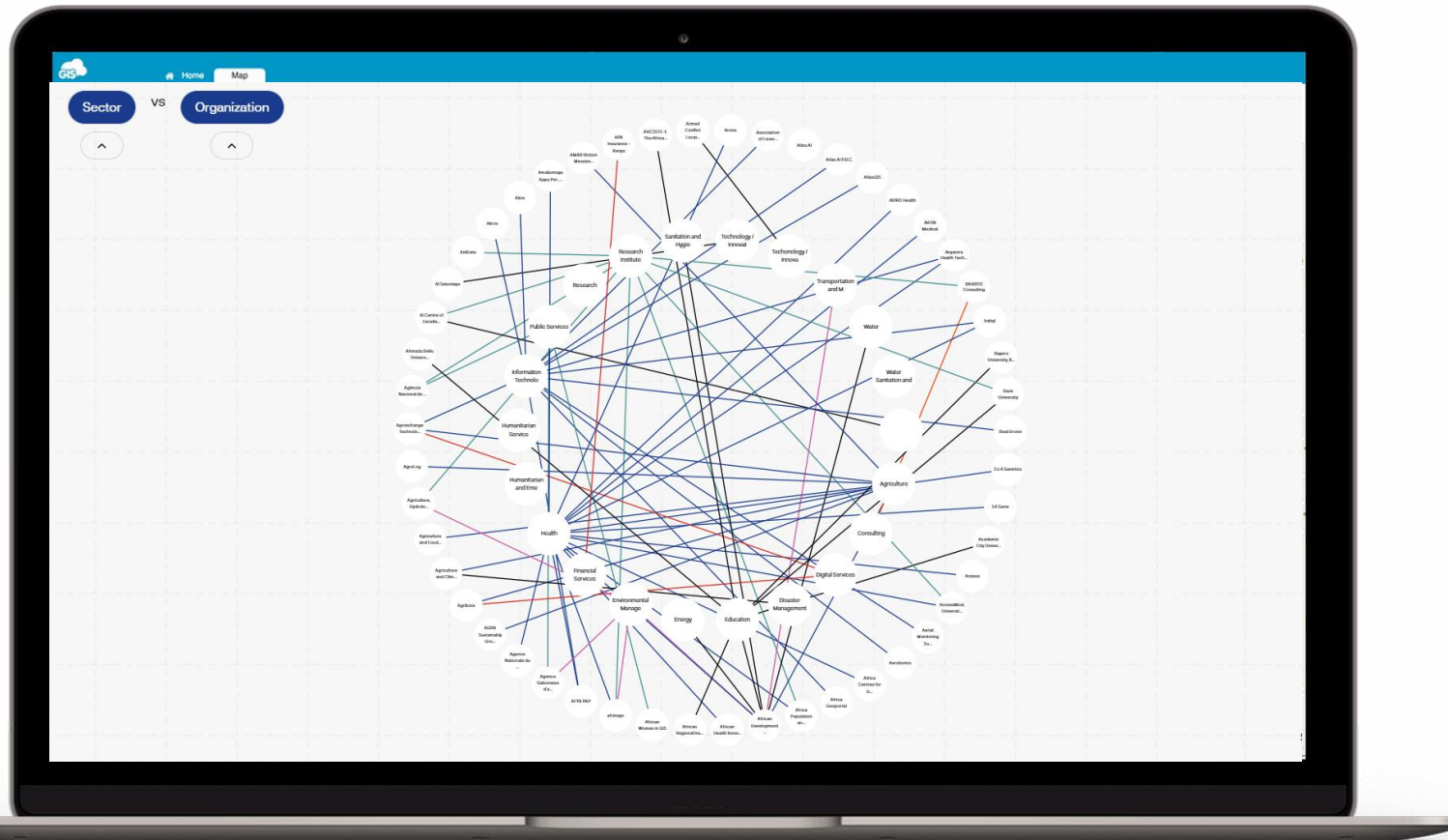




Table of Contents

01

Organization Onboarding

Onboarding steps for invited
stakeholder organization
–Page 3-14

02

User Onboarding

Onboarding steps for invited staff
of stakeholder organization
–Page 15-18

03

Mapping

Guide for mapping and access
stakeholder dataset
–Page 19-30

1. Invited Stakeholder Organization Onboarding

Click **Verify Account** in your invitation mail

Dear User Organization,

Welcome to Geo-Rolodex by Policy Vault, where your organization can streamline stakeholder mapping and drive impactful geospatial investments in low- and middle-income countries (LMICs). We are pleased to invite you to register User Organization on Geo-Rolodex. This platform offers advanced tools to enhance your organization's geospatial strategies.

To get started, please click the button below to set up your account and begin exploring:

Verify Account

[https://geo-rolodex.map.policyvault.africa/verify?
token=eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJpZCI6IjY2OWU4MjQ0NTM0MTY1ZmM2Mzk3Mj](https://geo-rolodex.map.policyvault.africa/verify?token=eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJpZCI6IjY2OWU4MjQ0NTM0MTY1ZmM2Mzk3Mj)

For detailed instructions on setting up your account and registering User Organization, please refer to our user guide [here](#)

2

Set your password **Create Account** → select **Create Workspace**

**GEO-ROLODEX**

Welcome Aboard!

You have been invited to join the Geo-Rolodex Stakeholder Map. Please follow the steps below to get started.

Password

Company's Information

Contact Information

Expertise And Niche Information

Media Upload

Use Cases

Experience

Password

Password

Create Workspace

3

Input your organization information → select **Next**

 **GEO-ROLODEX**

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Password

Company's Information

Contact Information

Expertise And Niche Information

Media Upload

Use Cases

Experience

Website URL

https://

LinkedIn URL

https://

Year Founded

07/22/2024



Company Bio

Tell us about your company

Write a short bio here

Next

4

Input details of a contact person → select **Next**



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Password

Company's Information

Contact Information

Expertise And Niche Information

Media Upload

Use Cases

Experience

John Doe

Contact Person's Email Address

johndoe@mail.com

Contact Person's LinkedIn URL

https://

Contact Person's Bio

Tell us about your yourself!

Bio

Back

Next

5 Input details about your organization's expertise/niche → select **Next**

 **GEO-ROLODEX**

Welcome Aboard!

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- Password
- Company's Information
- Contact Information
- Expertise And Niche Information**
- Media Upload
- Use Cases
- Experience

Sector



Regional Geography



Organization Geospatial Focus



Organization Type



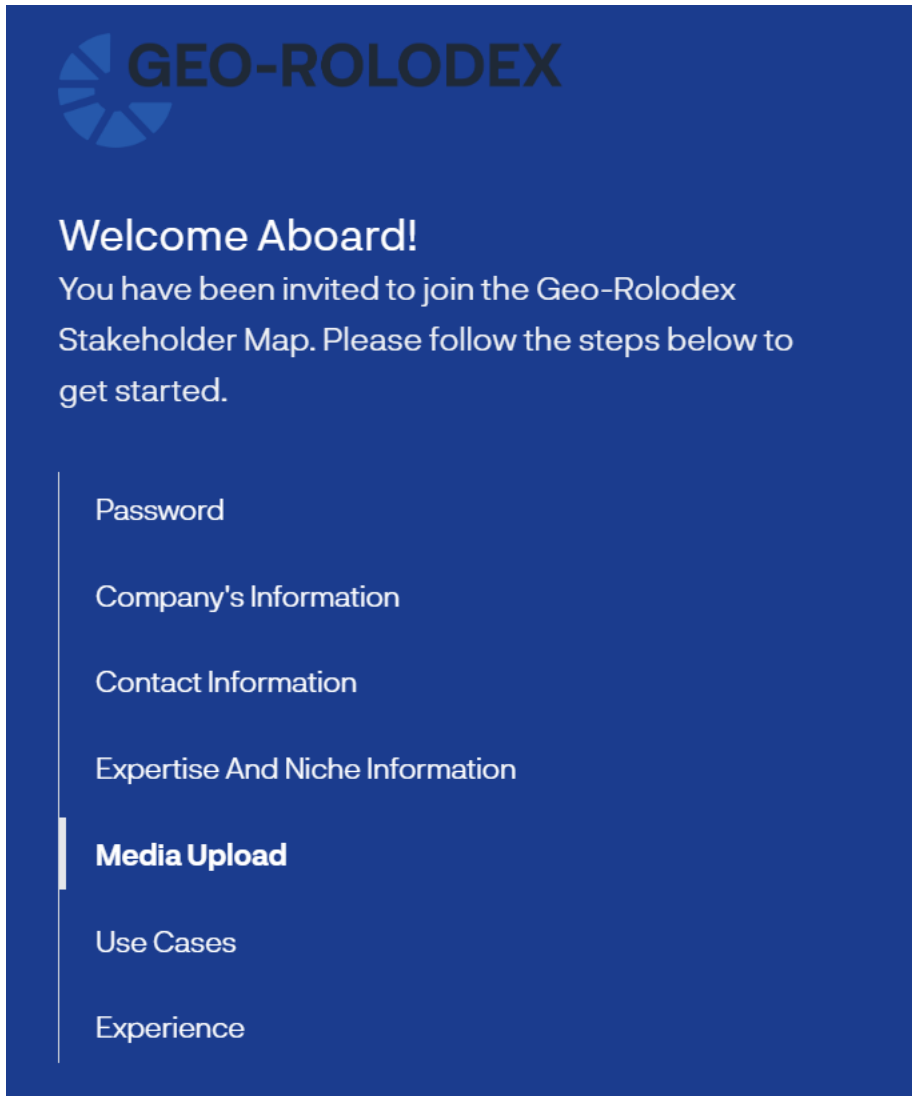
Area Of Specialization



Back

Next

6 Input link to media about your organization, if available → select **Next**



Media Files

Upload media files related to your organization.

 Add Media Files

Back

Next

7

Input link or upload file of your organization's use cases or past projects →
select **Next**

 **GEO-ROLODEX**

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Password

Company's Information

Contact Information

Expertise And Niche Information

Media Upload

Use Cases

Experience

Use Cases

Upload use cases related to your organization.

 Add Use Cases

Back

Next

8

Specify if you have worked with Donor in the past → select **Yes/No**



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Company's Information

Contact Information

Expertise And Niche Information

Media Upload

Use Cases

Experience

Have you worked with a donor?

Yes

No

9

If you have worked with Donor in the past → select **Continue**



GEO-ROLODEX

Welcome Aboard!

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Password

Company's Information

Contact Information

Expertise And Niche Information

Media Upload

Use Cases

Experience

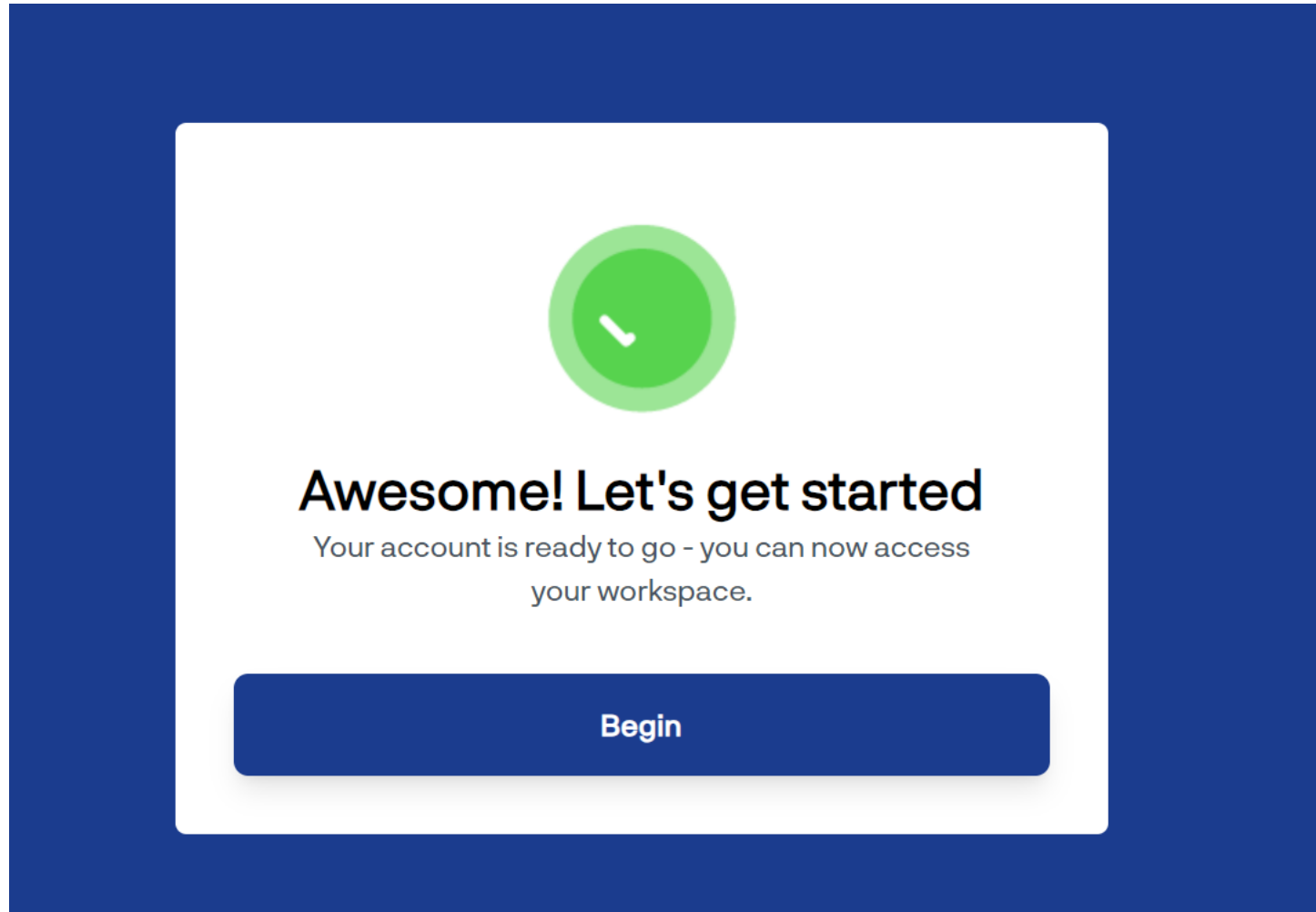
Do you belong to an innovation hub or working community that can provide endorsement for your technical proficiencies

Do you belong to an innovation hub or working community that can provide endorsement for your technical proficiencies

What's the largest investment you've received at one time/for one project?

What's the largest investment you've received at one time/for one project?

Continue



11

Input your email and password → select **Login** → skip to **Page 20**

or click login url: www.geo-rolodex.map.policyvault.africa

Log in to Geo-Rolodex

Welcome back! We are pleased to see you again.

Email Address

Password

[Forgot Password](#)



Log In

 Sign in with Microsoft

2. Invited User Onboarding

1

Click **Verify Account** in your invitation email

Dear User,

Welcome to Geo-Rolodex by Policy Vault, your platform for streamlined stakeholder mapping and impactful geospatial investments in low- and middle-income countries (LMICs). You have been invited to join Geo-Rolodex as a staff member of [REDACTED]. This platform empowers you to collaborate with industry leaders and drive meaningful investments. To activate your account and begin using Geo-Rolodex, please click the button below:

Verify Account

<https://geo-rolodex.map.policyvault.africa/signup/verify-profile?token=eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJpZCI6IjY2YTBkMzI0MGZiNjVhYTQ1M2MwNzRlP-GqVleZLgzT6SwIWQkF7DSoaDIgOQxc&email=malcolm@policyvault.africa>

If this invitation does not apply to you, kindly disregard this email; the link will expire in 30 days.

2

Input your information → select **Create Profile**

Setup Profile

Profile name

Give your profile a name

LinkedIn URL

Your linkedIn link

Bio

Tell us about you

Write a short bio here

Password



Create Profile

3

Input your email and password → select **Login** → skip to **Page 20**

or click login url: www.geo-rolodex.map.policyvault.africa

Log in to Geo-Rolodex

Welcome back! We are pleased to see you again.

Email Address

Enter email

Password

[Forgot Password](#)

Password



Log In



Sign in with Microsoft

3. Mapping System Guide

1

select **Arrows** for both categories → select any **Categories** from both sides

Map

Organisations

Data

Use Cases

Setup

Organization

Country Of Operation

Operational Language

Organization Geospatial Focus

Regional Geography

Organization Type

Area Of Specialization

Sector

VS

Organization

Country Of Operation

Operational Language

Organization Geospatial Focus

Regional Geography

Organization Type

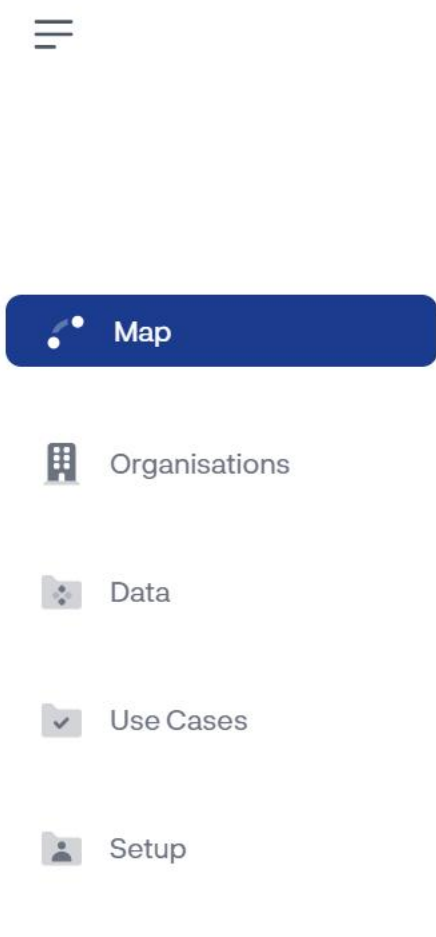
Area Of Specialization

Sector

Filter

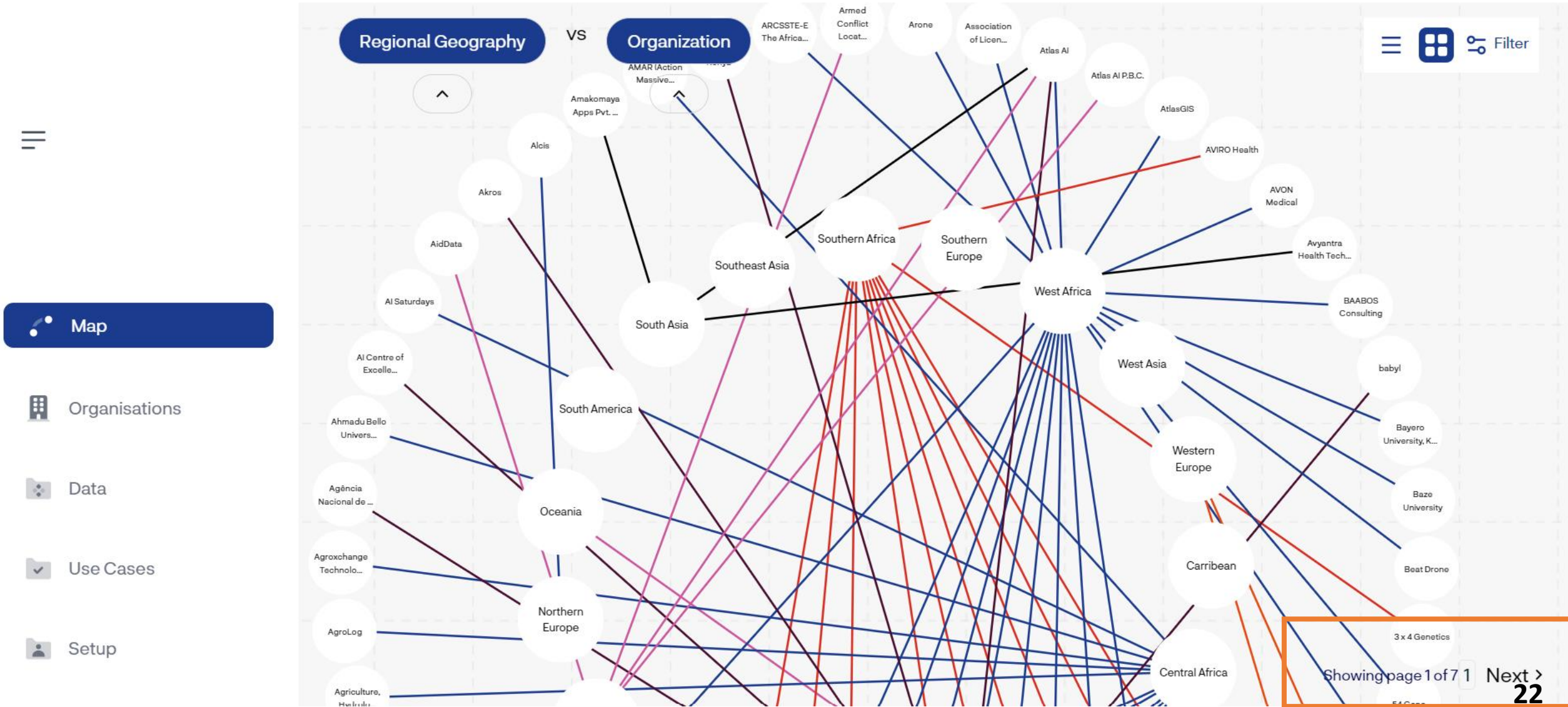
he top left to get started

Plot map by selecting any **Categories** from both sides. E.g. **Regional Geography x Organization**



3

Click **Next** to see the next set organizations (arranged alphabetically)





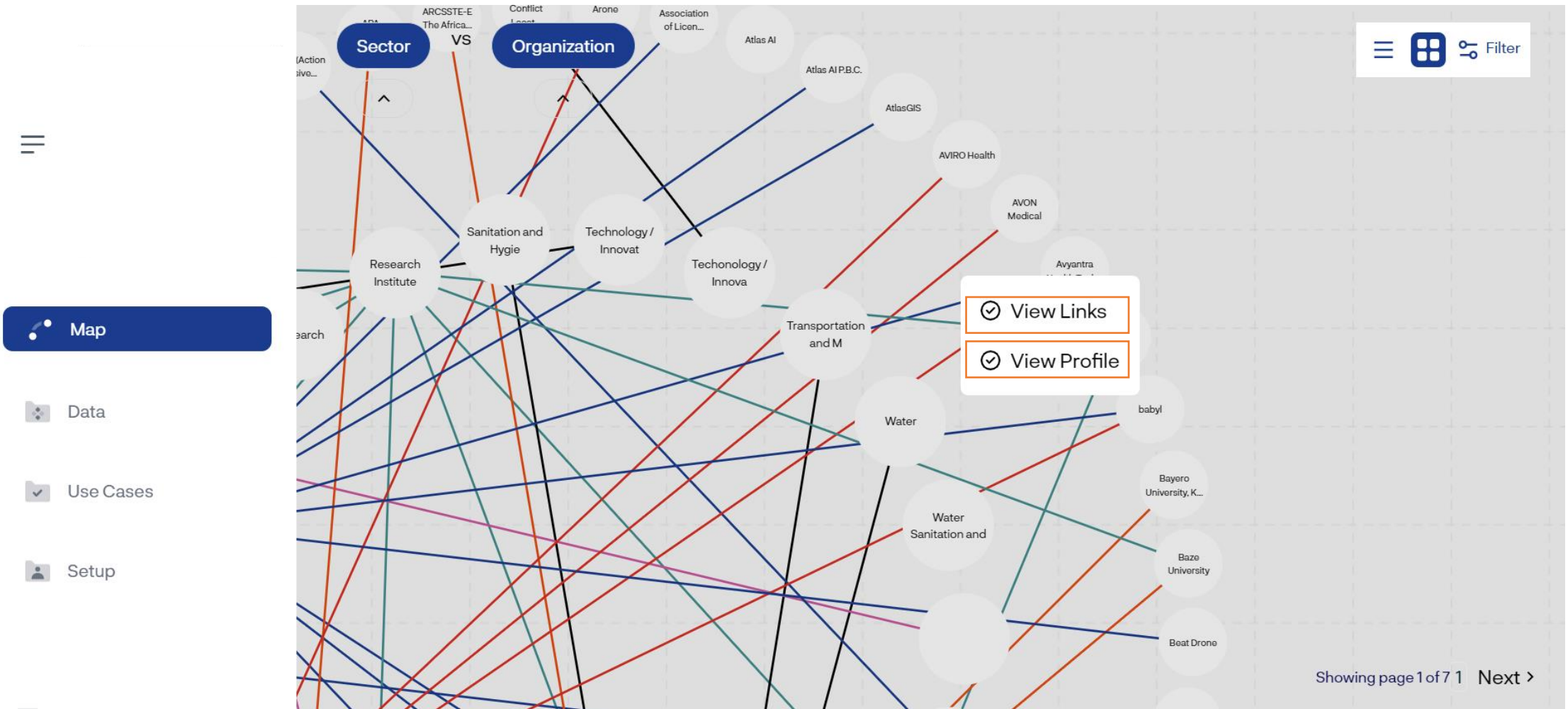
23

Use the **Filter** if necessary to focus on particular organizations.



6

Right click on any **company on the map** → select **View Links** to see attributes linked to them → select **View Profile** to see the company profile information



7

View all organizations in the platform → select **Recommend Organization** to recommend new organizations

Map

Organisations

Data

Use Cases

Setup

Organizations

Recommend Organization

All (2) Newly Uploaded (322) Recommendation

Search Organizations

Sort By Select Sort By Export as

	Company	Email Address	Contact Person	Website	Phone	Date Added
☐	De	De				07-05-2024
☐	User Organization	mal				07-08-2024

8

View raw data of details of all organizations in the platform → select **Export as to export** → Sort by for **Recency**

≡

Map

Data

Use Cases

Setup

Help

Logout

Raw Data

All Newly Uploaded

Search Categories

Sort By

Most Recent

Select Sort By

Most Recent

Least Recent

Export as

CSV

Category	Data	
Operational Language	English French	view All
Country of Operation	Ethiopia Ghana Kenya Nigeria Sierra Leone Zambia	view All
Sector	Consulting Water Sanitation And Hygiene Technology / Innovation Rese	view All
Regional Geography	East Africa West Africa Central Africa	view All
Organization Geospatial Focus	Analytics Capacity Building Users	view All
Organization Type	For Profit Consulting Research Institute	view All
Area of Specialization	Analysis And Evaluation GIS & Mapping Monitoring And Evaluation	view All

9

View use cases of all organizations in the platform → select **Export as to export** → Sort by for **Recency**

Map

Data

Use Cases

Setup

Help

Logout

Use Cases

All(1) Newly Uploaded

Search Usecases

Filter By Organization

Select Organization

Sort By

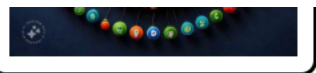
Select Sort By

Export as

	Company	Use Cases	Completion Date	Date	
	De			24	

10

Update your organization profile & information → select **Activate 2FA** to improve security →
Select language for translation of web content to another language



Map



Organisations



Data



Use Cases



Setup



Help



Logout



Update Profile Details

Update Your Onboarding details



Disable Account Temporarily

Disable your account for a while till you want to use again



Activate 2FA

2-Factor Authentication to your account



Delete Account

I am no longer interested in using this account

Translate Page



Select Language



Powered by

Translate

Contact support for any issues by inputting your queries → Select **Submit Query** → Select **Logout** to logout of the platform



- Map
- Organisations
- Data
- Use Cases
- Setup

Help

Send us your queries.
Reach out to us and we will respond as soon as possible

Full Name

Email

↶ ↷
Paragraph
▼
B
I

▼

▼

Submit Query

Help & Support

Have questions or need to report an issue using the Geo-Rolodex mapping portal? We've got you covered.

Contact support at support@policyvault.africa or help@policyvault.africa

www.geo-rolodex.com