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Timelines

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[I\) What is the Timelines tab of a project\(#I\) What is the Timelines tab of a project\)](#)

[II\) Timelines workflow\(#II\) Timelines workflow\)](#)

[III\) The link between the Timelines and the Operational Modalities\(#III\) The link between the Timelines and the Operational Modalities\)](#)

[OneGMS Focus: WHO can do WHAT in the Timelines' tab?\(#OneGMS Focus: WHO can do WHAT in the Timelines' tab?\)](#)

I) What is the Timelines tab of a project

The Timelines tab of a project determines the different assurance mechanisms and requirements that will be applied to the project during its implementation phase. Timelines are set and validated at Budget Clearance stage and are reflected in Annex B of the Grant Agreement.

The Timelines tab includes:

CBPF GRANT MANAGEMENT SYSTEM (GMS)

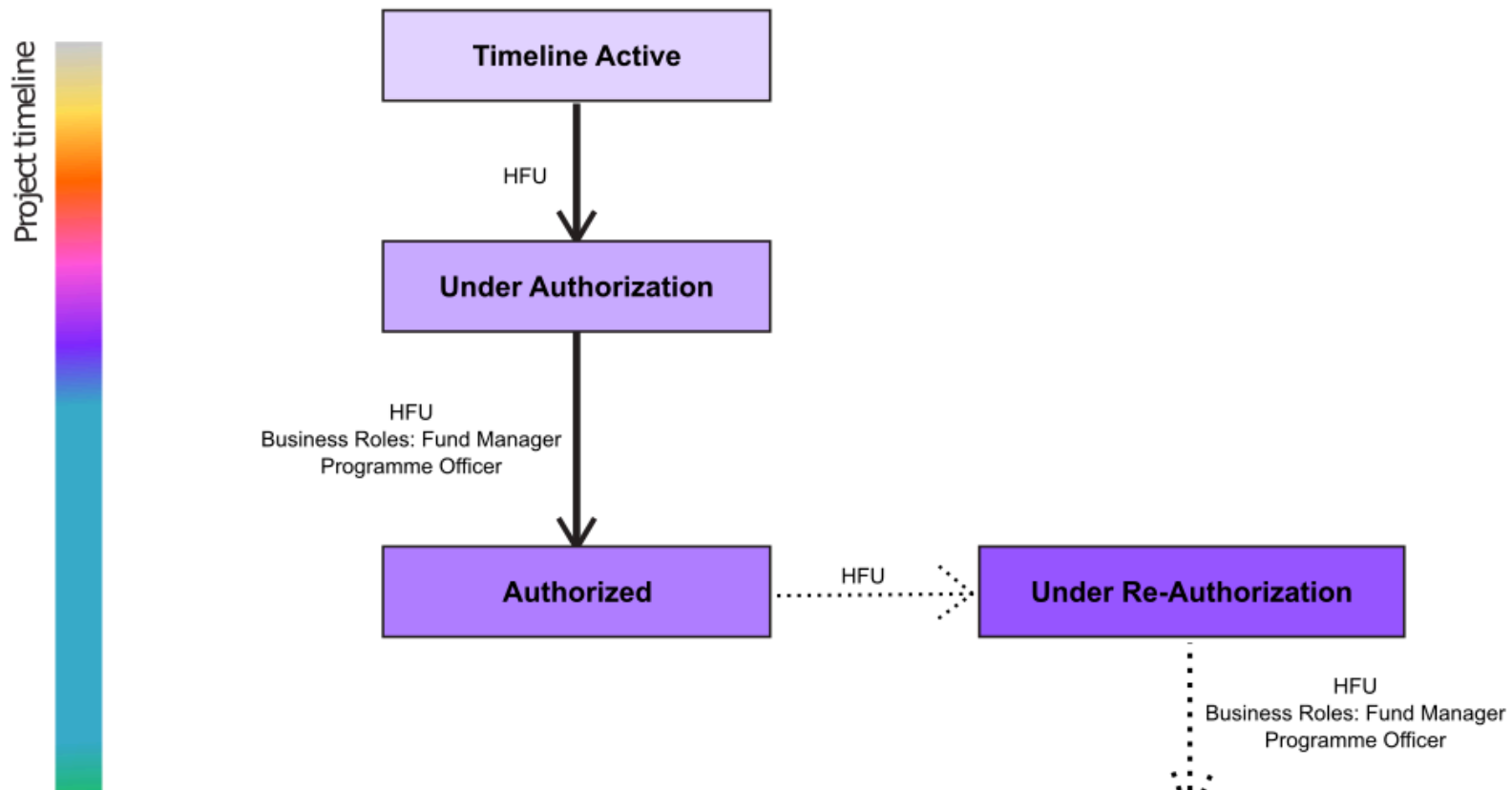
- Reporting instances :
 - Interim Financial Report
 - Final Financial Report
 - Progress Narrative Report
 - Final Narrative Report

- Monitoring instances:
 - Financial Spot Check (FSC)
 - Field Visit
 - Remote Call
 - Web-based survey
 - Third Party
 - Peer Monitoring
 - Ad hoc visit

The above instances must be created and activated by the HFU for each project through the Timelines Tab of the Project , according to the Partner's risk level and the project's characteristics as set by the CBPF's Operational Modalities.

II) Timelines workflow

GMS TIMELINES WORKFLOW

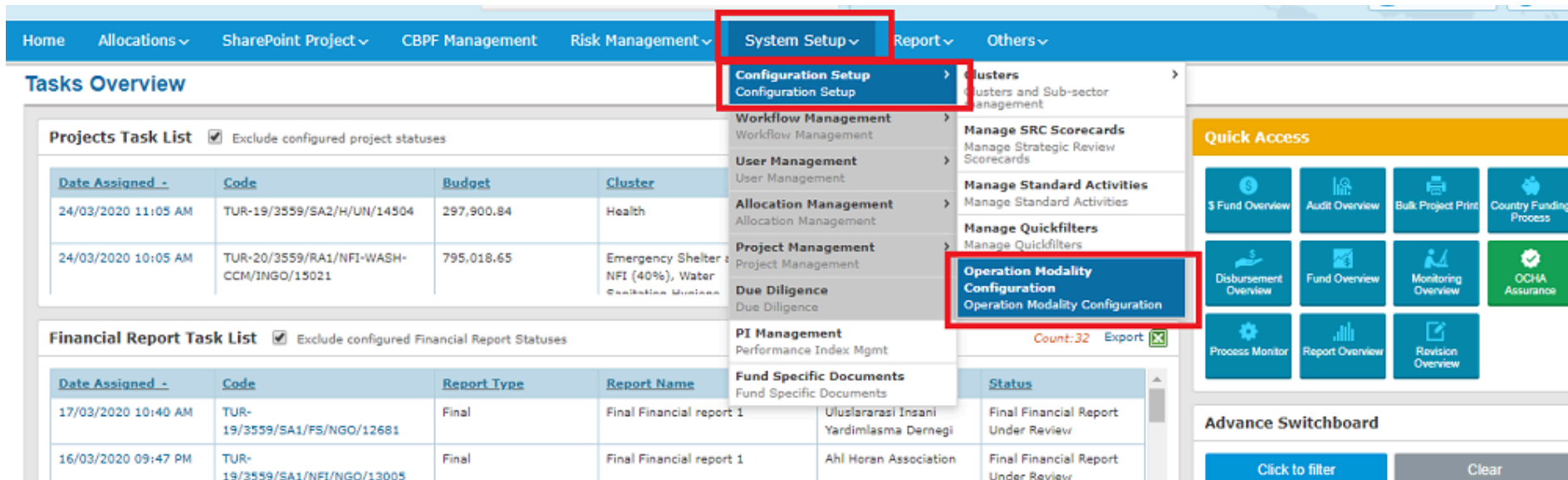


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III) The link between the Timelines and the Operational Modalities

Re-Authorized

The Timelines configuration is based on the Operational Modalities validated by the Advisory Board and inputted in the GMS. To access the Operational Modalities in the GMS, please go to **System Setup -> Configuration Setup -> Operation Modality Configuration**.



The screenshot shows the GMS navigation menu. The 'System Setup' dropdown is open, and 'Operation Modality Configuration' is highlighted with a red box. Below the menu, there are two task lists: 'Projects Task List' and 'Financial Report Task List'. The 'Projects Task List' table is as follows:


Date Assigned -	Code	Budget	Cluster
24/03/2020 11:05 AM	TUR-19/3559/SA2/H/UN/14504	297,900.84	Health
24/03/2020 10:05 AM	TUR-20/3559/RA1/NFI-WASH-CCM/INGO/15021	795,018.65	Emergency Shelter NFI (40%), Water

The 'Financial Report Task List' table is as follows:

Date Assigned -	Code	Report Type	Report Name	Status
17/03/2020 10:40 AM	TUR-19/3559/SA1/FS/NGO/12681	Final	Final Financial report 1	Final Financial Report Under Review
16/03/2020 09:47 PM	TUR-19/3559/SA1/NFI/NGO/13005	Final	Final Financial report 1	Final Financial Report Under Review

The below screenshot illustrates the Operational Modalities module. Click on **[view]** of one of the Template lines to access the detailed modalities.



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Home Allocations ▾ SharePoint Project ▾ CBPF Management Risk Management ▾ System Setup ▾ Report ▾ Others ▾ 













Manage Operation Modalities

[Add New Template](#)

Global Operation Modality Templates

Template Code	Template Name	Scope	Start Date	End Date	Approved On	Status	Clone	Actions
CBPF001	Operation Modality - v1.0	Global	01/01/2001		01/01/2001	Approved		

Pooled Fund Operation Modality Templates

Template Code	Template Name	Scope	Start Date	End Date	Approved On	Status	Clone	Actions
LEB004	Lebanon Humanitarian Fund - 2019 OM	Lebanon	16/01/2019		16/01/2019	Approved		
LEB003	Lebanon Humanitarian Fund - 2018 OM	Lebanon	01/03/2018	15/01/2019	01/03/2018	Approved		 
LEB002	Lebanon Humanitarian Fund - 2017 OM	Lebanon	01/04/2017	28/02/2018	01/04/2017	Approved		 
LEB001 	Lebanon Humanitarian Fund - 2015/2016 OM	Lebanon	01/01/2002	31/03/2017	01/01/2002	Approved		 

The detailed operational modalities list the reporting and monitoring requirements according to the projects' characteristics.

Operation Modality
Approved

Close [More Comments]

Operation Modality Template Tracking

Created By: gms-support@un.org Created On: 19/02/2020 18:46:17

Mandatory fields are marked with an asterisk *

* Template Name: Lebanon Humanitarian Fund - 2019 OM Template Code: **LEB004**

* Start Date: 16/01/2019 End Date: [] * Advisory Approved Date: 16/01/2019 * Scope: Global Pooled Fund

Note : (New) Operation modality template's end date is open ended still the other template is added and approved, when approved the start date of that template will be updated as an end date of this open ended template

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CBPF OM Document(s)

Document Title	Action
Lebanon Humanitarian Fund - 2018 (LEB004) -Lebanon(DDA-3604) - LHF Operational Manual 2019 - FINAL.PDF	[View]

Operation Modalities

Partner Type	Risk Level	Duration	Budget	Disbursements	Financial Reporting	Narrative Reporting	Monitoring
Non UN	High	0 - 7	0.00 - 250000.00	2 (60.00%-40.00%)	Interim- Yes Final- Yes	8+3 Progress- Yes (1) 8+3 Final- Yes	Monitoring Visit- 1 Financial Spot Check- 1
Non UN	High	0 - 7	250000.00 - 500000.00	2 (50.00%-50.00%)	Interim- Yes Final- Yes	8+3 Progress- Yes (1) 8+3 Final- Yes	Monitoring Visit- 1 Financial Spot Check- 1
Non UN	High	7 - 12	0.00 - 250000.00	3 (40.00%-40.00%-20.00%)	Interim- Yes Final- Yes	8+3 Progress- Yes (1) 8+3 Final- Yes	Monitoring Visit- 1 Financial Spot Check- 1
Non UN	High	7 - 12	250000.00 - 800000.00	3 (40.00%-30.00%-30.00%)	Interim- Yes Final- Yes	8+3 Progress- Yes (1) 8+3 Final- Yes	Monitoring Visit- 1 Financial Spot Check- 1
Non UN	Low	0 - 7	0.00 - 250000.00	1 (100.00%)	Interim- No Final- Yes	8+3 Progress- Yes (1) 8+3 Final- Yes	

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When the HFU opens the Timelines tab of the project's , the first section, entitled 'Operation Modality Details' captures the assurance requirements that will be applied to the project, as entered and saved in the Operational Modality module on GMS. It also indicates the Operational Modality line linked to the project under the green box: Linked OM ID. The first part of the code represents the OM Template Code, and the second part of the code represents the operational modality line inside the template.

If the Operation Modality Details do not show any Linked OM Id to the Timelines, it means that either the duration or the budget of the project are out of range with respect to the CBPF operational modalities. To learn more about this case, please refer to [this article\(/content/fill-and-authorize-timelines-0?query=00487946-1370-4f1f-b349-e2d6f4426c56#OneGMS%20Focus:%20the%20project%20is%20not%20linked%20to%20any%20Operational%20Modality%20line\)](/content/fill-and-authorize-timelines-0?query=00487946-1370-4f1f-b349-e2d6f4426c56#OneGMS%20Focus:%20the%20project%20is%20not%20linked%20to%20any%20Operational%20Modality%20line).

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[Add Comments] [More Comments]

Cover Page Logical Framework Work Plan Affected Persons Other Info Budget Cash Tracking Locations Documents Project Tracking Project Admin Timelines Disbursement

Requesting Organisation	NP (Nonviolent Peaceforce (Iraq))		Primary cluster		Sub cluster
Allocation Type	2019 2nd Reserve Allocation		Coordination and Support Services		None
Project Title	Test				
Fund Project code	TUR-19/3559/RA2/CCS/INGO/14964				
Actual Date [Start - End]	15/03/2020 - 24/08/2020				

Mandatory fields are marked with an asterisk *. Always save your information before changing tabs.

Operation Modality Details

Project Duration	15/03/2020 - 24/08/2020	Project Budget	\$378,000.00	Partner Project Risk	Medium (72.00) ⓘ
# of Disbursements (in % of Total)	2 (80.00 - 20.00)	Needs Financial Report For Disbursement	Yes	Needs Year-End Report	N/A (under-development)
# of Progress Narrative Report	1 ⓘ	# of Monitoring required	1 ⓘ	# of Spot Check required	1 ⓘ

I confirm and authorize the Operation Modality generated below ⓘ

Last Authorized By:


Disbursement Tranches

Lock Project Tabs

Tranche #	Tranche %	Tranche Amount	Actual Disbursed Amount
Total Project Budget		378,000.00	

Users can also hover over the information icon ⓘ of this green box to know the title of the Operational Modality template.

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Project Admin	Timelines	Disbursement
Sub cluster		
None		
Linked OM Id: TUR004/915 		
Operation Modality - Turkey - 2019		
N/A (under-development)		
1		

The OM ID and the template's name provided enables the users to check the modality line in the Operation Modality module of GMS (in our case example, the project is linked to OM ID 914 of the Template TUR004 or 'Operation Modality – Turkey – 2019').

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911	Non UN	High	7 - 10	250000.00 - 800000.00	3 (40.00%-30.00%-30.00%)	Interim- Yes Final- Yes	Progress- Yes (2) Final- Yes	Monitoring Visit- 1 Financial Spot Check- 1
1116	Non UN	High	10 - 36	250000.00 - 800000.00	3 (40.00%-30.00%-30.00%)	Interim- Yes Final- Yes	8+3 Progress- Yes (3) 8+3 Final- Yes	Monitoring Visit- 2 Financial Spot Check- 1
918	Non UN	Low	0 - 7	0.00 - 400000.00	1 (100.00%)	Interim- No Final- Yes	Final- Yes	
912	Non UN	Low	0 - 7	400000.00 - 10000000.00	2 (80.00%-20.00%)	Interim- Yes Final- Yes	Final- Yes	
910	Non UN	Low	7 - 36	0.00 - 400000.00	1 (100.00%)	Interim- No Final- Yes	Progress- Yes (1) Final- Yes	
911	Non UN	Low	7 - 36	400000.00 - 10000000.00	2 (80.00%-20.00%)	Interim- Yes Final- Yes	Progress- Yes (1) Final- Yes	Monitoring Visit- 1
913	Non UN	Medium	0 - 7	0.00 - 250000.00	1 (100.00%)	Interim- No	Progress- Yes (1)	
914	Non UN	Medium	0 - 7	250000.00 - 700000.00	2 (80.00%-20.00%)	Interim- Yes Final- Yes	Progress- Yes (1) Final- Yes	Monitoring Visit- 1 Financial Spot Check- 1
916	Non UN	Medium	10 - 36	0.00 - 250000.00	2 (80.00%-20.00%)	Interim- Yes Final- Yes	Progress- Yes (1) Final- Yes	Monitoring Visit- 1 Financial Spot Check- 1
917	Non UN	Medium	7 - 36	250000.00 - 1200000.00	2 (60.00%-40.00%)	Interim- Yes Final- Yes	Progress- Yes (1) Final- Yes	Monitoring Visit- 1 Financial Spot Check- 1
935	UN	High	0 - 6	0.00 - 15000000.00	1 (100.00%)	Category Interim- No Category Final- Yes	Final- Yes	
937	UN	High	6 - 36	0.00 - 15000000.00	1 (100.00%)	Category Interim- No Category Final- Yes	Progress- Yes (1) Final- Yes	
922	UN	Low	0 - 6	0.00 - 15000000.00	1 (100.00%)	Category Interim- No Category Final- Yes	Final- Yes	
924	UN	Low	6 - 36	0.00 - 15000000.00	1 (100.00%)	Category Interim- No Category Final- Yes	Progress- Yes (1) Final- Yes	
939	UN	Medium	0 - 6	0.00 - 15000000.00	1 (100.00%)	Category Interim- No Category Final- Yes	Final- Yes	
941	UN	Medium	6 - 36	0.00 - 15000000.00	1 (100.00%)	Category Interim- No Category Final- Yes	Progress- Yes (1) Final- Yes	

The required instances (disbursement tranches, reporting and monitoring) specified in the OM are captured under the 'Operation Modality Details' section of the Timelines' tab.

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Cover Page Logical Framework Work Plan Affected Persons Other Info Budget Cash Tracking Locations Documents Project Tracking Project Admin Timelines Disbursement

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Project Title	Test				
Fund Project code	TUR-19/3559/RA2/CCS/INGO/14964				
Actual Date [Start - End]	15/03/2020 - 24/08/2020				

Mandatory fields are marked with an asterisk *. Always save your information before changing tabs.

Operation Modality Details Linked OM Id: TUR004/914 ⓘ

Project Duration	15/03/2020 - 24/08/2020	Project Budget	\$378,000.00	Partner Project Risk	Medium (72.00) ⓘ
# of Disbursements (in % of Total)	2 (80.00 - 20.00)	Needs Financial Report For Disbursement	Yes	Needs Year-End Report	N/A (under-development)
# of Progress Narrative Report	1 ⓘ	# of Monitoring required	1 ⓘ	# of Spot Check required	1 ⓘ

I confirm and authorize the Operation Modality generated below ⓘ Last Authorized By:

Disbursement Tranches

Lock Project Tabs

Tranche #	Tranche %	Tranche Amount	Actual Disbursed Amount
Total Project Budget		378,000.00	

Please note: we are currently updating this tab. As of today, only the Progress Narrative report and the monitoring instances are linked this way.

OneGMS Focus: WHO can do WHAT in the Timelines' tab?

For accountability reasons, only specific HFU users have full editing rights on this tab.

While any HFU user can create/activate an instance or edit the due dates in the Timelines tab, all actions related to waivers and authorizing the Timelines are restricted to specific GMS Business Roles: Fund Manager and the GMS Programme Officer.

All HFU staff can, at any time in the Timelines tab:

- Add a new instance;
- Activate an instance;
- Edit the due date of an instance;
- Deactivate an instance;
- Edit the active date of an instance;
- Edit the instance type of an instance.

The Fund Manager is accountable for all waivers and Timelines saved in the system.

Therefore, **the Fund Manager can**, at any time in the Timelines tab, in addition to the basic HFU system rights:

- Add waivers for missing OM-compliant instances;
- Delete an OM compliant instance by providing a waiver;
- Add waivers to the top section if the linked OM line has not been identified by the GMS (in case the duration and/or budget of the project exceeds the maximum set by the operational modalities),
- Edit or delete a waiver;
- Mark/Unmark the OM Compliant checkbox of report/monitoring instances;

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- Authorize the Timelines.

The HFU Programme Officer Business Role can, at any time in the Timelines tab, in addition to the HFU basic system rights:

- Edit a waiver;
- Mark/Unmark the OM Compliant checkbox of report/monitoring instances;
- Authorize the Timelines.

Only the Fund Manager and Programme Officer business roles can authorize/re-authorize the Timelines on GMS.