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## Report overview

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### I. Purpose\_

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The Report Overview tool of the GMS allows users to display all (or filtered) active and inactive reporting instances (financial and narrative reports) in a Pooled Fund, as configured in the project's Timelines based on the Operational Modalities.

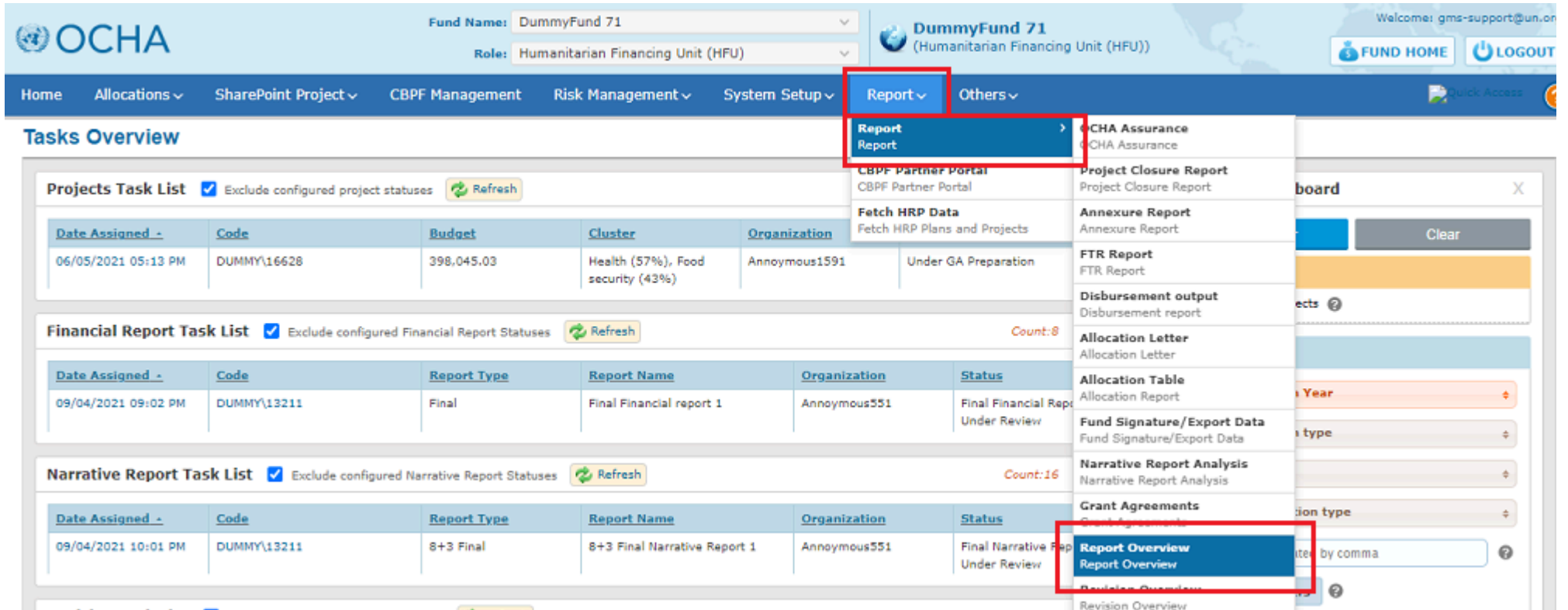
The generated list can be extracted as an Excel sheet, and both Timelines links and report instances can be reached from the Report Overview through hyperlinks.

## II. Navigation\_

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To access the Report Overview tool, please follow this navigation: *Report > Report > Report Overview*

CBPF GRANT MANAGEMENT SYSTEM (GMS)



The screenshot shows the OCHA GMS interface for 'DummyFund 71'. The 'Report' dropdown menu is open, listing various report types. The 'Report Overview' option is highlighted with a red box. Below the menu, three task lists are visible: Projects Task List, Financial Report Task List, and Narrative Report Task List. The Narrative Report Task List includes a report titled '8+3 Final Narrative Report 1' with a status of 'Final Narrative Report Under Review'.

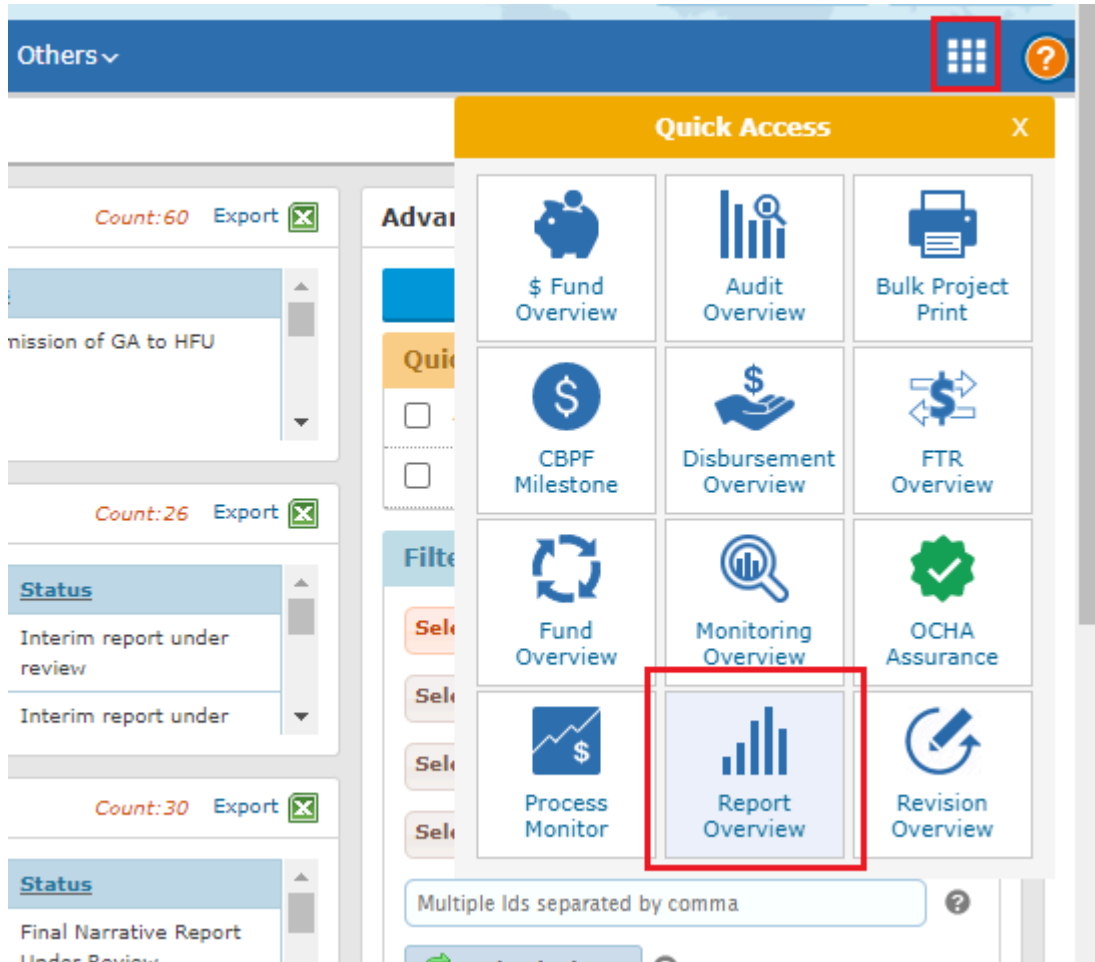
Date Assigned -	Code	Budget	Cluster	Organization	Under GA Preparation
06/05/2021 05:13 PM	DUMMY\16628	398,045.03	Health (57%), Food security (43%)	Annoymous1591	Under GA Preparation

Date Assigned -	Code	Report Type	Report Name	Organization	Status
09/04/2021 09:02 PM	DUMMY\13211	Final	Final Financial report 1	Annoymous551	Final Financial Report Under Review

Date Assigned -	Code	Report Type	Report Name	Organization	Status
09/04/2021 10:01 PM	DUMMY\13211	8+3 Final	8+3 Final Narrative Report 1	Annoymous551	Final Narrative Report Under Review

You can also access the Report Overview through the [Quick Access](#) .

CBPF GRANT MANAGEMENT SYSTEM (GMS)



The screenshot displays the OCHA GMS interface. At the top, a blue navigation bar contains the text "Others" with a dropdown arrow and a grid icon highlighted by a red box. Below this is a yellow "Quick Access" panel with a close button (X). The panel contains a grid of icons for various functions: \$ Fund Overview, Audit Overview, Bulk Project Print, CBPF Milestone, Disbursement Overview, FTR Overview, Fund Overview, Monitoring Overview, OCHA Assurance, Process Monitor, Report Overview (highlighted with a red box), and Revision Overview. To the left of the Quick Access panel, there are several filter and status sections. The first section shows "Count: 60" and an "Export" button, with a dropdown menu containing "Commission of GA to HFU". The second section shows "Count: 26" and an "Export" button, with a "Status" dropdown menu containing "Interim report under review" and "Interim report under". The third section shows "Count: 30" and an "Export" button, with a "Status" dropdown menu containing "Final Narrative Report Under Review". At the bottom of the Quick Access panel, there is a search input field with the placeholder text "Multiple Ids separated by comma" and a help icon.

### III. Filters\_

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To generate a Report Overview, select one or more filters present on the left corner of the page, and click on **[click to filter]**.

**\*Please note**, all the filters mentioned above would be applied on the project data and not on the project reports and timelines data.

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Report Overview

[Disbursement Overview](#)
[Report Overview](#)
[Revision Overview](#)
[Monitoring Overview](#)
[Assurance Measure Overview](#)
[Audit Overview](#)
[Inquiry Overview](#)

[Country Funding Process Overview](#)
[Fund Overview](#)
[Process Monitor](#)
[\\$ Fund Overview](#)

[Click to filter](#)
[Clear](#)

**Filters**

Select Allocation type ▾

Select Organisation type ▾

Select Cluster ▾

Is Approved

Project code: (Type last 3 digit code)

Multiple ids separated by comma

?

**Implementation**

Date ?

From (dd/mm/yyyy) [calendar icon] To (dd/mm/yyyy) [calendar icon]

Duration ?

equals ▾ From

More Filters +

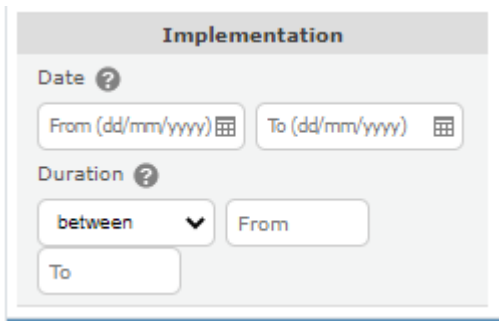
**Filters Description:**

- **Allocation Type** (drop down box): List of all projects submitted in the GMS system with the allocation type and year for the pooled fund.
- **Organization Type** (drop down box): List of Organization Type in the pooled fund.(International NGO, National NGO, Other, UN Agency)
- **Cluster** (drop down box): List of clusters defined for the pooled fund.
- **Is Approved** (tick box): Tick this box to only view approved projects

CBPF GRANT MANAGEMENT SYSTEM (GMS)

- **Project Code** (*text box*): Search a project by Project Code. Enter the last 3 digits of the project code, you can enter multiple codes separated by commas.
- **Implementation** :
  - Date: Enter the project start and/or end date(s)
  - Duration: Select the duration option in the drop-down list (equals, less than, greater than, between) and enter the project’s duration in months.

*If you choose the ‘between’ option, a new field will appear. You will then be requested to add a ‘from’ duration and a ‘to’ duration.*

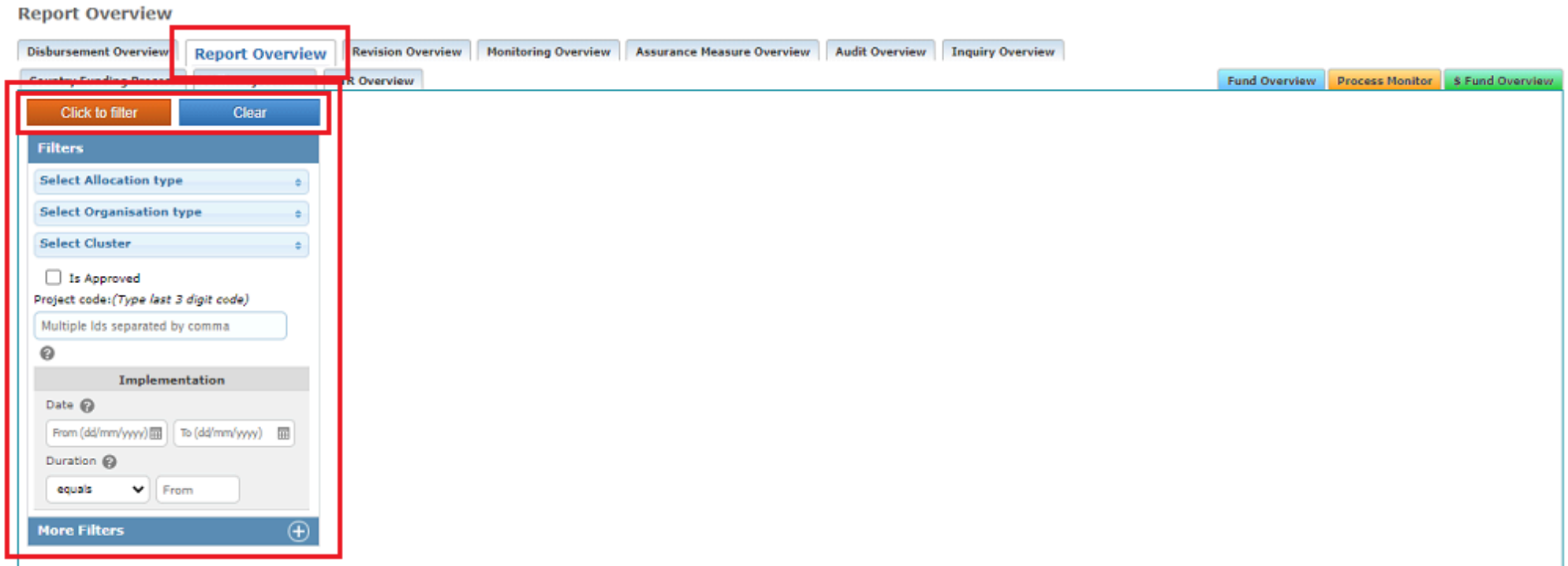


The screenshot shows a filter panel titled "Implementation". Under the "Date" heading, there are two date pickers: "From (dd/mm/yyyy)" and "To (dd/mm/yyyy)". Under the "Duration" heading, there is a dropdown menu currently set to "between", and two input fields labeled "From" and "To" for specifying duration values.

Additional filters are available under the [\[More Filters\]](#) button.



CBPF GRANT MANAGEMENT SYSTEM (GMS)



Additional filters description:

- **Organization** (*drop down box*): List of organization names registered for the pooled fund.
- **Project Status** (*drop down box*): Lists the type of allocation source and the name of the project status.
- **Year created** (*drop down box*): Lists the years of allocation available in the GMS system for the pooled fund. Select a year when the project was created.
- **Admin Location 1** (*drop down box*): Lists the regional locations in the country for which the user is registered for.



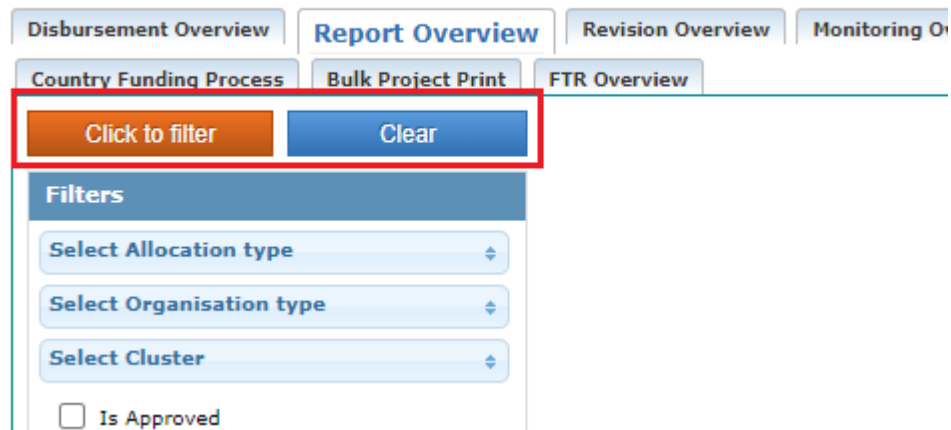
## CBPF GRANT MANAGEMENT SYSTEM (GMS)

- **Report Status** (*drop down box*): Lists of financial and narrative reports available for the pooled fund on which basis projects can be filtered.

Then click on [**Click to filter**] to generate the report overview.

Click the [**Clear**] button to reset the entire filters.

### Report Overview



The screenshot displays the 'Report Overview' section of the GMS interface. At the top, there are several navigation tabs: 'Disbursement Overview', 'Report Overview' (which is highlighted in blue), 'Revision Overview', and 'Monitoring Overview'. Below these, there are more tabs: 'Country Funding Process', 'Bulk Project Print', and 'FTR Overview'. A red box highlights two buttons: 'Click to filter' (orange) and 'Clear' (blue). Below the buttons is a 'Filters' section with three dropdown menus: 'Select Allocation type', 'Select Organisation type', and 'Select Cluster'. At the bottom of the filters, there is a checkbox labeled 'Is Approved'.

**GMS Tip : How to personalize the Overview's filters' section? \_**

HFU Admin users can personalize all Overviews' filter sections of the GMS. To do so, HFU Admin user roles can use the Quick Filters page of the GMS to create quick filters, allowing for easier and quicker data search.

## Report Overview


Disbursement Overview **Report Overview** Revision Overview Monitoring Overview Assu

Country Funding Process Bulk Project Print FTR Overview


Click to filter


Clear

### Quick filters

Projects Under Final Reporting 

### Filters

Select Allocation type 

Select Organisation type 

Select Cluster 

Is Approved

Project code: *(Type last 3 digit code)*

Multiple Ids separated by comma



To know how to manage the quick filters please refer to [this article\(/content/how-manage-quick-filters\)](/content/how-manage-quick-filters).

#### IV. Generated Report Overview\_

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CBPF GRANT MANAGEMENT SYSTEM (GMS)

Report Overview

Disbursement Overview | **Report Overview** | Revision Overview | Monitoring Overview | Assurance Measure Overview | Audit Overview | Inquiry Overview

Country Funding Process | Bulk Project Print | FTR Overview | Fund Overview | Process Monitor | \$ Fund Overview

Click to filter | Clear

**Filters**

3 Allocation type(s) selected

Select Organisation type

Select Cluster

Is Approved

Project code:(Type last 3 digit code)

Multiple ids separated by comma

**Implementation**

Date  From (dd/mm/yyyy)  To (dd/mm/yyyy)

Duration  equals  From

More Filters +

Number of Projects: 22 Export to Excel

#	Primary Cluster	Project Code [Allocation] Atlas Number	Org	Project Title	8+3 Final Narrative Reports	8+3 Progress Narrative Reports	Interim Financial Reports	Final Financial Reports
1.	WASH (50%), Food security (50%)	DUMMY\16623 [2020 1st Standard Allocation]	Anonymous 199	Dummy Info	29/11/2021 - 29/12/2021 Timeline Inactive	09/06/2021 - 24/06/2021 Timeline Inactive	27/07/2021 - 11/08/2021 Interim report active 08/06/2021 - 23/06/2021 Interim report certified by FCS for disbursement	13/11/2021 Timeline Inactive
2.	Health	DUMMY\16659 [2020 1st Standard Allocation]	Anonymous 551	Dummy Info	31/08/2021 - 31/10/2021 Timeline Inactive	01/03/2021 - 26/03/2021 Progress Report under review	07/01/2021 - 22/01/2021 Interim report certified by FCS for recording	31/08/2021 Timeline Inactive
3.	Protection	DUMMY\16665 [2020 1st Standard Allocation]	Anonymous 617	Dummy Info	31/08/2021 - 31/10/2021 Timeline Inactive	01/03/2021 - 26/03/2021 Progress Report under review	21/04/2021 - 06/05/2021 Interim report certified by HFU Finance for recording 07/01/2021 - 22/01/2021 Interim report certified by FCS for recording	31/08/2021 Timeline Inactive
4.	Protection (71%), Health (29%)	DUMMY\16647	Anonymous 203	Dummy Info	31/08/2021 - 31/10/2021	01/03/2021 - 26/03/2021	07/01/2021 - 22/01/2021	31/08/2021

The results are listed on the right of the filters' section.

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By default, the results are sorted based on the due date in a descending order. In other words, the project with the highest timeline due date would be displayed on top. However, users can use the 4 first columns (except Columns Number (#)) on the left to sort the projects differently. For instance, by clicking on the column title **[Organization]**, the project will be displayed by Organizations, in an alphabetical order.

Report Overview

Disbursement Overview | **Report Overview** | Revision Overview | Monitoring Overview | Assurance Measure Overview | Audit Overview | Inquiry Overview

Country Funding Process | Bulk Project Print | FTR Overview | Fund Overview | Process Monitor | \$ Fund Overview

Click to filter | Clear | Number of Projects: 21 | Export to Excel

#	Primary Cluster	Project Code [Allocation] Atlas Number	Org	Project Title	Progress Narrative Reports	Final Narrative Reports	8+3 Final Narrative Reports	8+3 Progress Reports
1.	Food security	DUMMY\16558 [2020 1st Standard Allocation]	Anonymous 1101	Dummy Info			31/01/2021 - 31/03/2021 Final Narrative Report Under Review	19/11/2020 Progress Report
2.	Food security	DUMMY\16658 [2020 1st Standard Allocation]	Anonymous 1126	Dummy Info			30/04/2021 - 30/06/2021 Timeline Inactive	01/12/2020 Progress Report

*Note: The 'Org' column header in the table above is circled in red in the original image.*

If you click on second time on the column title (for instance, **[Org]**), the order will revert. In our example, the projects will be listed in a reverse alphabetical order. The order is illustrated with the orange arrow.

## Report Overview

[Disbursement Overview](#) | 
 [Report Overview](#) | 
 [Revision Overview](#) | 
 [Monitoring Overview](#) | 
 [Assurance Measure Overview](#) | 
 [Audit Overview](#) | 
 [Inquiry Overview](#)

[Country Funding Process](#) | 
 [Bulk Project Print](#) | 
 [FTR Overview](#)

[Click to filter](#) | 
 [Clear](#) | 
 Number of Projects: 21

#	Primary Cluster	Project Code [Allocation] Atlas Number	Org	Project Title	Progress Narrative Reports	Final Narrative
1.	Protection	DUMMY\16665 [2020 1st Standard Allocation]	Anonymous 617	Dummy Info		
2.	Gender-Based Violence (30%), COVID-19 (70%)	DUMMY\15761 [2020 2nd Reserve Allocation]	Anonymous 609	Dummy Info		

**Filters**

3 Allocation type(s) selected

Select Organisation type

Select Cluster

Is Approved

Project code: (Type last 3 digit code)

Multiple ids separated by comma

---

**Implementation**

Date ?

From (dd/mm/yyyy) To (dd/mm/yyyy)

Duration ?

### ACCESSING THE PROJECT'S TIMELINES OR THE REPORTS MODULES

Each timeline's Active and Due Date for a project is displayed as a hyperlink. In case the Report timeline has not been activated, the user will be navigated to the timeline page for

## CBPF GRANT MANAGEMENT SYSTEM (GMS)

the project.


In case the report has been activated (i.e. Reporting has started against the report timeline), then the user will be navigated to the narrative or financial report page based on the report type.

The current status of report is displayed below the report's dates.



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Number of Projects: 22

Export to Excel 

#	Primary Cluster	Project Code [Allocation] Atlas Number	Org	Project Title	8+3 Final Narrative Reports	8+3 Progress Narrative Reports	Interim Financial Reports	Final Financial Reports
1.					29/11/2021 - 29/12/2021 Timeline Inactive	09/06/2021 - 24/06/2021 Timeline Inactive	27/07/2021 - 11/08/2021 Interim report active	13/11/2021 Timeline I
2.	Health	DUMMY\16659 [2020 1st Standard Allocation]	Anonymous 551	Dummy Info	31/08/2021 - 31/10/2021 Timeline Inactive	01/03/2021 - 26/03/2021 Progress Report under review	07/01/2021 - 22/01/2021 Interim report certified by FCS for recording	31/08/2021 Timeline I
3.	Protection	DUMMY\16647 [2020 1st Standard Allocation]	Anonymous 551	Dummy Info	31/08/2021 - 31/10/2021 Timeline Inactive	01/03/2021 - 26/03/2021 Progress Report under review	21/04/2021 - 06/05/2021 Interim report certified by HFU Finance for recording 07/01/2021 - 22/01/2021 Interim report certified by FCS for recording	31/08/2021 Timeline I
4.	Protection (71%), Health (29%)	DUMMY\16647	Anonymous 551	Dummy Info	31/08/2021 - 31/10/2021	01/03/2021 - 26/03/2021	07/01/2021 - 22/01/2021	31/08/2021

1. Click on the INACTIVE report's dates to access the project's Timelines tab.



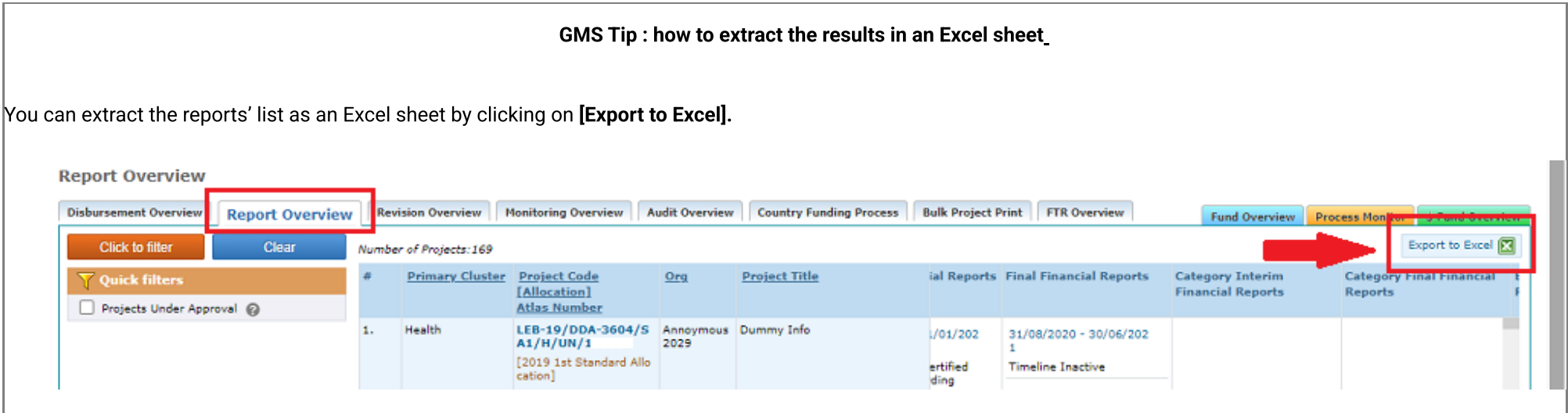
Click on the ACTIVE report's dates to access the report module

Click on the project code to access the project's cover page

Current status of the report

**GMS Tip : how to extract the results in an Excel sheet\_**

You can extract the reports' list as an Excel sheet by clicking on **[Export to Excel]**.



The screenshot shows the 'Report Overview' section of the GMS interface. At the top, there is a navigation bar with several tabs: Disbursement Overview, **Report Overview** (highlighted with a red box), Revision Overview, Monitoring Overview, Audit Overview, Country Funding Process, Bulk Project Print, FTR Overview, Fund Overview, Process Monitoring, and Fund Overview. Below the navigation bar, there are buttons for 'Click to filter' and 'Clear', and a 'Number of Projects: 169' indicator. A 'Quick filters' section is visible on the left with a checkbox for 'Projects Under Approval'. The main content is a table with the following columns: #, Primary Cluster, Project Code [Allocation] Atlas Number, Org, Project Title, Final Reports, Final Financial Reports, Category Interim Financial Reports, and Category Final Financial Reports. The first row of data shows: 1., Health, LEB-19/DDA-3604/S A1/H/UN/1 [2019 1st Standard Allocation], Anonymous 2029, Dummy Info, /01/202, 31/08/2020 - 30/06/2021, and Timeline Inactive. In the top right corner of the table area, there is an 'Export to Excel' button with a green checkmark icon, which is highlighted with a red box and a red arrow pointing to it.