

[PARTNER\(/EN/CONTE](#)

[HFU\(/EN/CONTENT/H](#)

[CBPF](#)

[CLUSTER](#)

[> HFU\(/en/content/hfu\)](#) > [OneGMS HFU Home Page](#)

HFU Home Page

[Download this Page\(/page/print/pdf/node/203\)](#)

- I) [\(#HFU_homepage_overview\)Home page Overview\(#HFU_homepage_overview\)](#)
- II) [How to navigate through the Tasks Overview Dashboard?\(#task_overview_dashboard\)](#)
 - 1) [Customize the Tasks Overview Dashboard\(#customizing_task_lists\)](#)
- III) [Quick Access Tool\(#QUICK_ACCESS\)](#)
- IV) [Advance Switchboard\(#ADVANCE_SWITCHBOARD\)](#)



I) Home Page Overview

The Humanitarian Financing Unit (HFU) home page automatically displays all the tasks pertaining to projects that currently require the HFU's action or attention.

CBPF GRANT MANAGEMENT SYSTEM (GMS)

The HFU home page also includes several features that will allow you to navigate through the OneGMS and access the wanted content:

CBPF GRANT MANAGEMENT SYSTEM (GMS)



Grant Management System
Fund Name: Yemen
Role: Humanitarian Financing Unit (HFU)
Welcome: gms-support@un.org
English
FUND HOME
LOGOUT

[Home](#)
[Allocations](#)
[SharePoint Project](#)
[CBPF Management](#)
[Risk Management](#)
[System Setup](#)
[Report](#)
[Others](#)

Tasks Overview 7

Projects Task List Exclude configured project statuses Count:48 Export

Date Assigned	Code	Budget	Cluster	Organization	Status
17 Nov 2022 03:24 PM	CBPF-YEM-22-S-INGO-20279	3,698,754.60	Shelter, NFI and Camp Coordination / Management		Under TR HFU
26 Aug 2021 02:56 PM		2,599,994.06	Camp Coordination / Management (50%),		Budget Cleared

Financial Report Task List Exclude configured Financial Report Statuses Count:26 Export

Date Assigned	Code	Report Type	Report Name	Organization	Status
25 Aug 2021 12:11 PM		Interim	Interim Financial report 1		Interim report under review
22 Aug 2021 11:39 AM		Interim	Interim Financial report 1		Interim report under review

Narrative Report Task List Exclude configured Narrative Report Statuses Count:22 Export

Date Assigned	Code	Report Type	Report Name	Organization	Status
26 Aug 2021 03:16 PM		8+3 Progress	8+3 Progress Narrative Report 2		Progress Report under review
25 Aug 2021 09:46 PM		8+3 Progress	8+3 Progress Narrative Report 1		Progress Report under review

Revision Task List Exclude configured Revision Statuses Count:3 Export

Date Assigned	Code	Revision Name	Revision Type	Organization	Status
---------------	------	---------------	---------------	--------------	--------

Advance Switchboard 9

Click to filter Clear

Quick Filters

Approved

Budget cleared

Filters

Select Allocation Year

Select Allocation type

Select Cluster

Select Organisation type

Multiple Ids separated by comma

Reload Filters

Select Organisation

Select Admin Location 1

Select Project Status

Select Reports status

Implementation

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Date Assigned ▲	Code	Revision Name	Revision Type	Organization	Status
25 Aug 2021 05:31 PM		Revision 1	Project Revision		HFU review of signed GA amendment

1- The Fund you are registered in;

2- Your OneGMS user role;

3- The **Fund Home button**, click on this button to access your Fund's home;

4- The **log out button**: click on this button to log out;

5- **Menu options** at the top, which are accessible from every page of the OneGMS;

6- **Quick Access tooltip**, which is accessible in every page of the OneGMS;

7- The **Tasks Overview Dashboard**; which allows an easy access to all pending tasks, sorted thematically.

8- A **[Customize Task list] button**(#customizing_task_lists); which allows to customize your Tasks Overview dashboard, namely, to show/hide your task lists.

10- The Advance Switchboard section to easily find a project.

A detailed explanation of the sections is given below under sections titled "Tasks Overview(#task_overview_dashboard)", "Quick Access(#QUICK_ACCESS)" and "Advance Switchboard"(#ADVANCE_SWITCHBOARD).

II) How to navigate through the Tasks Overview Dashboard?

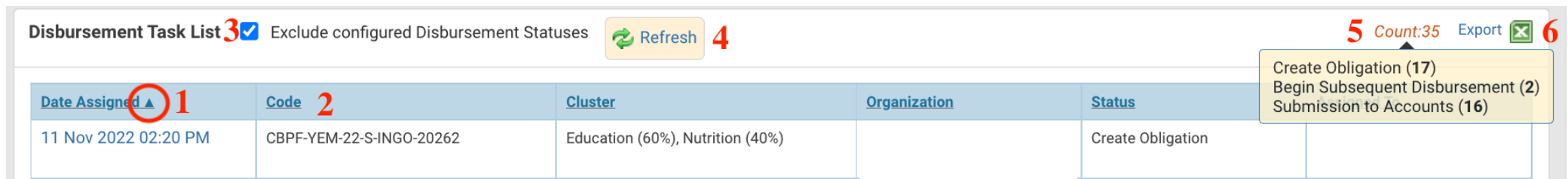
The tasks overview section in the home page will display the following lists depending on the rights given to the user role.

- Projects Task List
- Disbursement Task List
- Report (financial and narrative) Task List
- Revision Task List
- Audit Task List
- Sharepoint Projects Task List

CBPF GRANT MANAGEMENT SYSTEM (GMS)

- Timelines Task List
- Monitoring Task List
- Refund Task List

Each task list has been provided with certain common functionalities which are mentioned below:



The screenshot shows a 'Disbursement Task List' interface. At the top left, there is a title 'Disbursement Task List' followed by a checked checkbox and the text 'Exclude configured Disbursement Statuses'. To the right is a 'Refresh' button. Further right, it shows 'Count:35' and an 'Export' button. A table below has columns for 'Date Assigned', 'Code', 'Cluster', 'Organization', and 'Status'. A tooltip is visible over the 'Status' column, listing task counts: 'Create Obligation (17)', 'Begin Subsequent Disbursement (2)', and 'Submission to Accounts (16)'. Numbered callouts (1-6) point to specific UI elements: 1 points to the 'Date Assigned' column header, 2 to the 'Code' column header, 3 to the checkbox, 4 to the 'Refresh' button, 5 to the 'Count:35' text, and 6 to the 'Export' button.

1. The **Date Assigned** column in every task list provides you with a link to open individual task items.

The information in this column can be sorted chronologically. An upward arrow indicates that the information is in ascending order and downward arrow indicates descending order.

2. The **Code** column provides you with a link opening the project proposal.

3. The **'Exclude configured [instance] statuses'** option. HFU officers can request the OneGMS Support by email to exclude specific statuses from their task lists. Hence, the requested statuses are hidden by default from the task list. However, you can still view the excluded ones and access the full list of pending tasks by un-ticking this box.

4. A **'Refresh'** option, allowing users to update the task list.

5. The **Count** option available on each task list provides you with the number of tasks currently present in the task list and a mouseover action would provide you with a status count of the tasks.

6. An **'Export to Excel'** option, which enables the user to extract the filtered information into an excel sheet.

1) Customize the Tasks Overview Dashboard

CBPF GRANT MANAGEMENT SYSTEM (GMS)

You can choose to hide, show or set as default view the task lists by clicking on **[Customize Task List]**.

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Tasks Overview

Projects Task List Exclude configured project statuses



Count:11 Export

Date Assigned ▲	Code	Budget	Cluster	Organization	Status
21 Nov 2022 09:04 AM	CBPF-YEM-22-R-INGO-20281	214,000.00	Education		Under TR Finance
26 Aug 2021 02:01 PM		248,716.00	Health		EO agreement clearance
26 Aug 2021 12:39 PM		799,700.88	Health (71%), Nutrition (29%)		EO agreement clearance
26 Aug 2021 10:34 AM		473,727.18	Camp Coordination / Management		EO agreement clearance
26 Aug 2021 10:26 AM		414,807.53	Protection		EO agreement clearance
25 Aug 2021 01:51 PM		554,473.27	Health (57%), Nutrition (43%)		EO agreement clearance
25 Aug 2021 01:43 PM		297,125.65	Health (57.1%), Nutrition (42.9%)		EO agreement clearance
25 Aug 2021 01:28 PM		750,174.20	Health		EO agreement clearance
25 Aug 2021 01:21 PM		3,100,000.00	Education (25%), Camp		EO agreement clearance

Disbursement Task List Exclude configured Disbursement Statuses



Count:35 Export

Date Assigned ▲	Code	Cluster	Organization	Status	Assigned To
11 Nov 2021 12:30 PM	CBPF-YEM-22-R-INGO-20282	Education (60%), Nutrition (40%)		Create Obligation	

CBPF GRANT MANAGEMENT SYSTEM (GMS)

In the pop-up window, tick the boxes of the task lists' names to select them. Then click on one of the three different options:

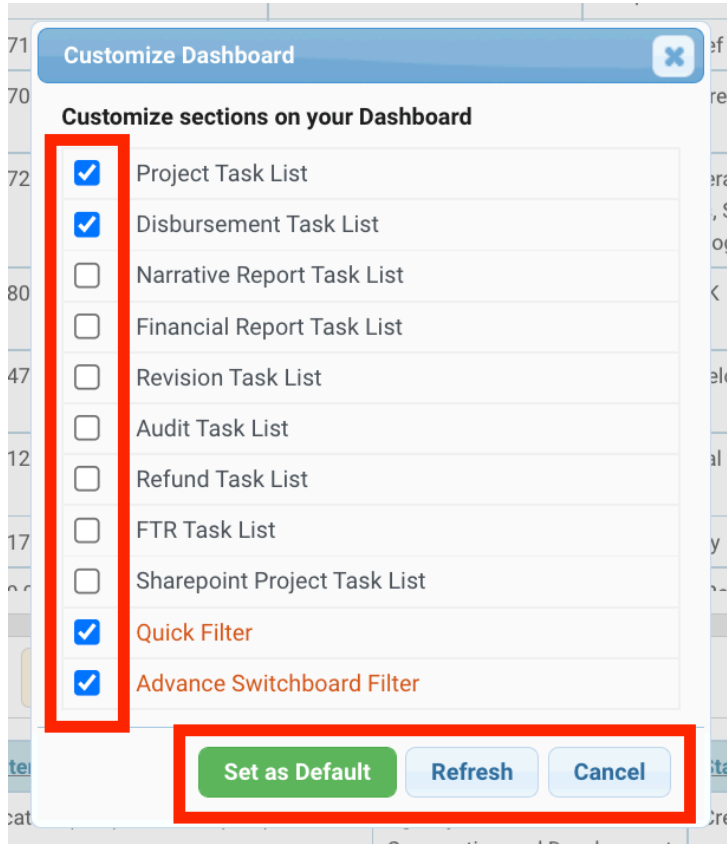
- **Set as default:** this will configure the selected task lists as appearing by default on your OneGMS homepage,
- **Refresh:** This will temporarily configure your dashboard as per your selection. However, to set this configuration as permanent, you will need to click on **[Set as Default]**.
- **Cancel:** click on this button to close the pop-up window, this will have no impact on the dashboard.

11 NOV 2021 02:20 PM	CBPF-YEM-22-SINGU-20202	Education (60%), Nutrition (40%)	Create Obligation
25 Aug 2021 09:15 PM		Food Security and Agriculture (79%), Water, Sanitation and Hygiene (21%)	Create Obligation
25 Aug 2021 08:49 PM		Shelter/Non-food items	Create Obligation
		Shelter/Non-food items	Create Obligation

▲ Customize Task List

© 2020. All Rights Reserved.

CBPF GRANT MANAGEMENT SYSTEM (GMS)

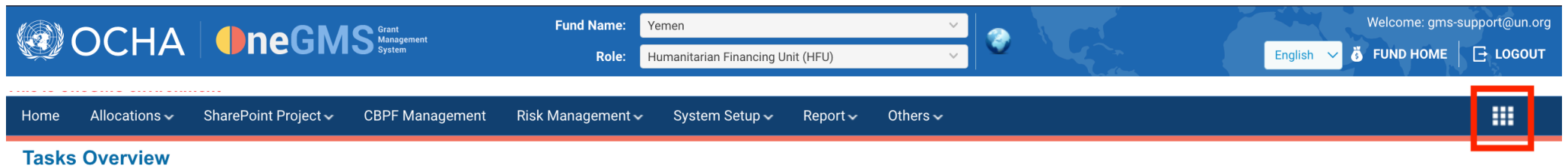


III) Quick Access tool

CBPF GRANT MANAGEMENT SYSTEM (GMS)

The Quick Access tool, accessible on all pages of the OneGMS, enables users to quickly access sections in the OneGMS.

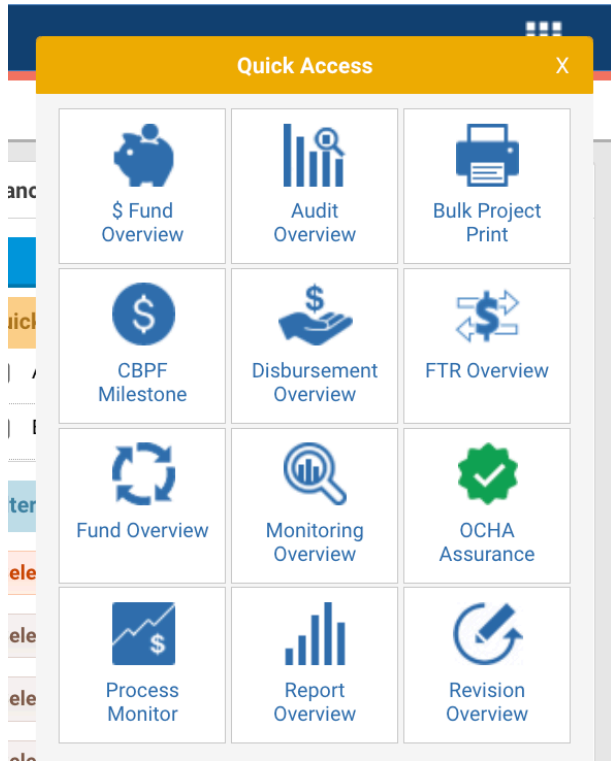
To access the Quick Access tool, click on this icon  on the right-hand side of the menu bar:



The screenshot shows the top navigation area of the OneGMS interface. On the left, there are the OCHA and oneGMS logos. In the center, there are dropdown menus for 'Fund Name' (set to 'Yemen') and 'Role' (set to 'Humanitarian Financing Unit (HFU)'). On the right, there is a 'Welcome' message for 'gms-support@un.org', a language selector set to 'English', and links for 'FUND HOME' and 'LOGOUT'. Below the header is a dark blue navigation bar with white text links: 'Home', 'Allocations', 'SharePoint Project', 'CBPF Management', 'Risk Management', 'System Setup', 'Report', and 'Others'. A red-bordered box highlights a 3x3 grid icon (the Quick Access tool) located at the far right of this navigation bar.

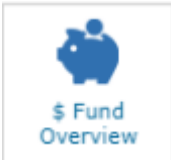


The tools displayed in the Quick Access panel depend on the system functions made available for your user role by the OneGMS Admin team.

CBPF GRANT MANAGEMENT SYSTEM (GMS)






The tools displayed in the Quick Access panel for HFU home page are:



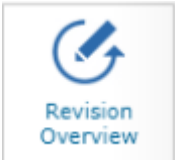
CBPF GRANT MANAGEMENT SYSTEM (GMS)

Tool Name	Description	Navigation
 <p>(/content/reports-0#\$_Fund_Overview)</p> <p>\$_ Fund Overview(/en/content/fund-balance-and-fund-overview-0?query)</p>	<p>This option redirects the user to the \$ Fund Overview tab which provides a summary breakdown of projects budgets in the form of cost tracking components as per allocation.</p>	<p>Report > Report > \$ Fund Overview</p>
 <p>Audit Overview(/en/content/audit-overview-0)</p>	<p>This option redirects the user to the Audit overview and search tool, which enables users to search for and access an overview of projects under an audit-related workflow stage.</p>	<p>Report > Report > Audit Overview</p>
 <p>Bulk Project Print(/content/reports-0#Bulk_Project_Print)</p>	<p>This option redirects the user to the Bulk Project Print Tab where the user can do a bulk project print in various formats.</p>	<p>Report > Report > Bulk Project Print</p>




CBPF GRANT MANAGEMENT SYSTEM (GMS)

Tool Name	Description	Navigation
 <p>Fund Overview(/en/content/reports-0#Fund_Overview)</p>	<p>This option redirects the user to the Fund Overview Tab where the user can view the status flow of the project cluster wise.</p>	<p>Report > Report > Fund Overview</p>
 <p>C(node/181#Funding_Process)BPF Milestones(/en/content/cbpf-milestones-0?query)</p>	<p>This option redirects the user to the Funding Process Tab where the user can review projects that has reached selected 'Fund Milestones'</p>	<p>Report > Report > Funding Process</p>
 <p>Disbursement (/content/reports-0#Disbursement_Overview)Overview(/en/content/disbursement-overview-0?query)</p>	<p>The Disbursement overview lists the status of the disbursement workflow for all or filtered projects. User can search the disbursement information using different search criteria.</p>	<p>Report > Report > Disbursement Overview</p>

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Tool Name	Description	Navigation
<div style="text-align: center;">  <p>Process Monitor</p> </div> <p>Process Monitor(/en/content/process-monitor-0?query)</p>	<p>This option redirects the user to the Process Monitor where the user can monitor the progression of projects through the various project workflow statuses within an allocation.</p>	<p>Report > Report > Process Monitor</p>
<div style="text-align: center;">  <p>Report Overview</p> </div> <p>Report Overview(/en/content/report-overview-0?query)</p>	<p>This option redirects the user to the Report Overview Tab which focuses on providing the user with reports regarding a project.</p>	<p>Report > Report > Report Overview</p>
<div style="text-align: center;">  <p>Revision Overview</p> </div> <p>Revision Overview(/en/content/revision-overview-0?query)</p>	<p>This option redirects the user to the Revision Overview Tab which displays all revision requests and revision associated with a project.</p>	<p>Navigation: Report > Revision Overview</p>

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Tool Name	Description	Navigation
<div style="text-align: center;">  <p>OCHA Assurance</p> </div> <p>OCHA Assurance(/en/content/ocha-assurance-dashboard?query)</p>	<p>OCHA Assurance dashboard provides a consolidate data output from single/multiple pooled funds based for single/multiple allocation years, including the total number of projects with audit status, financial reporting status, program report status, and monitoring actions status with respect to the filters set.</p>	<p>Report > Report > OCHA Assurance</p>
<div style="text-align: center;">  <p>Monitoring Overview</p> </div> <p>Monitoring Overview(/en/content/monitoring-overview-0?query)</p>	<p>This option redirects the user to the Monitor Overview tab which enables the user to access the pooled Fund Monitors created to keep track of Implementing Partner's performance.</p>	<p>Report > Report > Monitoring Overview</p>
<div style="text-align: center;">  <p>FTR Overview</p> </div> <p>FTR Overview(/en/content/ft-overview-0?query)</p>	<p>The FTR Overview enables users to access the data related to Fund Transfer Request.</p>	<p>Report > Report > FTR Overview</p>

IV) Advance Switchboard

The Advance Switchboard is by default shown in the homepage, unless it has been unticked from the **[Customize Task List]** pop-up window.

CBPF GRANT MANAGEMENT SYSTEM (GMS)

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Tasks Overview

Projects Task List Exclude configured project statuses Refresh Count:11 Export

Date Assigned ▲	Code	Budget	Cluster	Organization	Status
21 Nov 2022 09:04 AM	CBPF-YEM-22-R-INGO-20281	214,000.00	Education		Under TR Finance
26 Aug 2021 02:01 PM		248,716.00	Health		EO agreement clearance
26 Aug 2021 12:39 PM		799,700.88	Health (71%), Nutrition (29%)		EO agreement clearance
26 Aug 2021 10:34 AM		473,727.18	Camp Coordination / Management		EO agreement clearance
26 Aug 2021 10:26 AM		414,807.53	Protection		EO agreement clearance
25 Aug 2021 01:51 PM		554,473.27	Health (57%), Nutrition (43%)		EO agreement clearance
25 Aug 2021 01:43 PM		297,125.65	Health (57.1%), Nutrition (42.9%)		EO agreement clearance
25 Aug 2021 01:28 PM		750,174.20	Health		EO agreement clearance
25 Aug 2021 01:21 PM		210,000.00	Education (55%), Camp		EO agreement clearance

Disbursement Task List Exclude configured Disbursement Statuses Refresh Count:35 Export

Date Assigned ▲	Code	Cluster	Organization	Status	Assigned To
11 Nov 2022 02:20 PM	CBPF-YEM-22-S-INGO-20262	Education (60%), Nutrition (40%)		Create Obligation	
25 Aug 2021 09:15 PM		Food Security and Agriculture (79%), Water, Sanitation and Hygiene (21%)		Create Obligation	
25 Aug 2021 08:49 PM		Shelter/Non-food items		Create Obligation	
25 Aug 2021 08:48 PM		Shelter/Non-food items		Create Obligation	
25 Aug 2021 08:47 PM		Education		Create Obligation	
25 Aug 2021 08:46 PM		Education		Create Obligation	

Advance Switchboard Close

Click to filter Clear

Quick Filters

Approved ?

Filters

Select Allocation Year ▼

Select Allocation type ▼

Select Cluster ▼

Select Organisation type ▼

Multiple Ids separated by comma ?

Refresh Reload Filters ?

Select Organisation ▼

Select Admin Location 1 ▼

Select Project Status ▼

Select Reports status ▼

Implementation

Date ?

From (dd MMM yyyy) To (dd MMM yyyy)

Duration ?

equals ▼ From

CBPF GRANT MANAGEMENT SYSTEM (GMS)

The Advance Switchboard enables the user to display projects from the Pooled Fund based on the filter criteria selected. The data retrieved displays all projects which are in the OneGMS system for the selected pooled fund.

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Advance Switchboard X

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

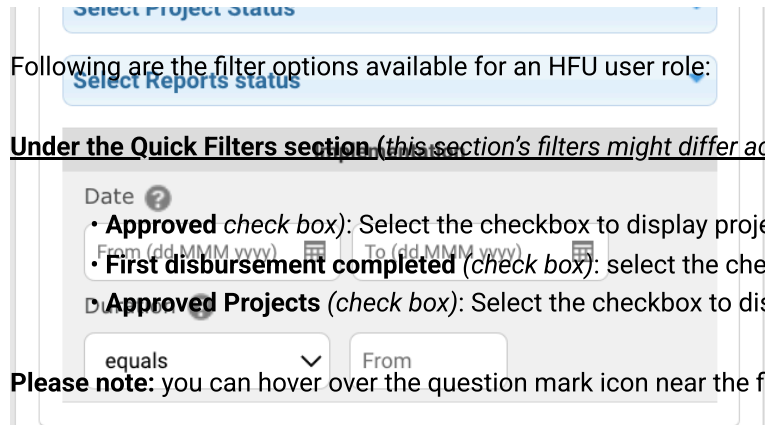
Quick Filters

- Approved ?
- Budget cleared ?

Filters

- Select Allocation Year ▼
- Select Allocation type ▼
- Select Cluster ▼
- Select Organisation type ▼
- Multiple Ids separated by comma ?
- [Reload Filters](#) ?
- Select Organisation ▼
- Select Admin Location 1 ▼
- Select Project Status ▼

CBPF GRANT MANAGEMENT SYSTEM (GMS)

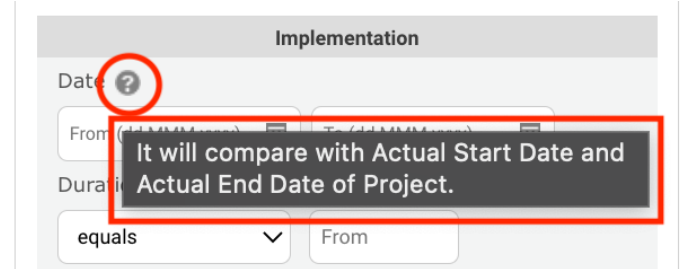


Following are the filter options available for an HFU user role:

Under the Quick Filters section (this section's filters might differ according to your pooled fund):

- **Approved** (checkbox): Select the checkbox to display projects approved by EO for the pooled fund.
- **First disbursement completed** (checkbox): select the checkbox to display projects which have completed the first disbursement status.
- **Approved Projects** (checkbox): Select the checkbox to display only the approved projects.

Please note: you can hover over the question mark icon near the filter's title to access more information.



Under the Filters section:

- **Select Allocation year** (drop down box): lists the years of allocation available in the OneGMS system for the pooled fund.
- **Select Allocation Type** (drop down box): list of allocations related to the pooled fund (Standard or Reserve Allocation).
- **Select Cluster** (drop down box): list of clusters defined for the pooled fund.
- **Select Organization type** (drop down box): list of Organization Type in the pooled fund (International NGO, National NGO, Other, UN Agency).
- **Project Code** (text box): Search a project using its project code.

CBPF GRANT MANAGEMENT SYSTEM (GMS)

- **Select Organization** (*drop down box*): list of organization names for organizations that have created a project in the pooled fund.
- **Select Admin Location 1** (*drop down box*): lists the regional locations in the country.
- **Select Project Status** (*drop down box*): lists the project statuses currently available in the pooled fund. for the filtered projects. The list of choices applies for both Standard and Reserve Allocation Project Statuses.
- **Select Report Status** (*drop down box*): lists of narrative and financial reports available for the pooled fund on which basis projects can be filtered.

Under the Implementation section:




- **Date** (*drop down box*): select the start and end dates to filter the relevant projects,
- **Duration** (*drop down box and text box*): choose the duration characteristic from the drop-down list, and insert the duration in the text box, to filter the relevant projects.











, Click on **[Reload Filters]** to reset the bottom filters and on **[Clear]** to reset the entire Advance Switchboard filters.

Example: A list of projects that meets a set of filter criteria

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Tasks Overview


Show Filters  Number of Projects:16 Export Project Summary  Export Full Dump 

#	Admin Actions	Primary Cluster	Project Code [Allocation]	Org	Project Title	Budget	Project Status	Start Date	End Date	Due Diligence	View Version(s)	Partner Project Risk	Partner Risk
1.	 	Food Security and Agriculture (60%), Health (40%)	CBPF-YEM-22-S-INGO-20224 <small>[1st Standard Allocation 2022]</small>		Provision of integrated assistance to flood-affected people in the northern province	685,335.00	Implementation & Reporting	01-Nov-2022	30-Apr-2023	Due Diligence approved			Medium
2.	 	Food Security and Agriculture (30%), Health (70%)	CBPF-YEM-22-S-INGO-20235 <small>[1st Standard Allocation 2022]</small>			976,492.70	Project Draft	28-Sep-2022	02-May-2023	Due Diligence approved			Medium
3.	 	Food Security and Agriculture	CBPF-YEM-22-S-INGO-20236 <small>[1st Standard Allocation 2022]</small>			0.00	Project Draft	29-Sep-2022	27-Sep-2023	Due Diligence approved			Medium
4.	 	Emergency Employment and Community Rehabilitation (50%), Shelter, NFI and Camp Coordination / Management (50%)	CBPF-YEM-22-S-INGO-20244 <small>[2nd Standard Allocation 2022]</small>		Provision of integrated assistance to flood-affected people in the northern province	692,300.70	Project Draft	03-Nov-2022	02-May-2023	Due Diligence approved			Medium
5.	 	Emergency Employment and Community Rehabilitation (50%), Shelter, NFI and Camp Coordination / Management (50%)	CBPF-YEM-22-S-INGO-20255 <small>[2nd Standard Allocation 2022]</small>		Project 123	0.00	Project Draft	09-Nov-2022	09-Nov-2023	Due Diligence approved			Medium

A brief description of the columns and buttons is given below:

- **Admin Actions:**

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Print Proposal  : clicking on this icon will print the project proposal.

View  : clicking on this icon will allow viewing the project on the OneGMS.

Edit  : clicking on this icon will allow editing the project on the OneGMS. This icon will be displayed only if the user can edit in the current project status.

- **Primary Cluster:** displays the primary cluster group(s) to which the project proposal belongs to.
- **Project Code [Allocation]:** displays the system generated project code and allocation that the project proposal belongs to.
- **Org:** displays the Implementing Partner's organization name
- **Project Title:** displays the project proposal's title.
- **Budget:** displays the project proposal's budget.
- **Project Status:** displays the current status the project.
- **Start Date:** displays the project's implementing start date.
- **End Date:** displays the project's implementing end date.
- **Due Diligence:** displays whether the Implementing Partner's Due Diligence has been approved or not.
- **View Version(s):** displays if project revisions have been made.
- **Partner Project Risk:** is determined at budget clearance stage of the project. At budget clearance, the partner's risk becomes the partner project's risk. The partner project risk is used to define the operational modalities applicable to this project. The partner project risk never changes, even if the partner's risk is re-calculated through the Partner Performance Index.
- **Partner Risk:** displays the current risk of the partner. It can be different from the Partner's project risk, as it can be re-calculated any time through the Partner Performance Index.

Click on the **[Show Filters]** button to revert to the Advance Switchboard present on the OneGMS Home page.

Click on the **[Export Project Summary]** button to export the project summary information in an Excel format.

Click on the **[Export Full Dump]** button to export the detailed project information in an Excel format.

CBPF GRANT MANAGEMENT SYSTEM (GMS)