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SharePoint Project

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- [Create Project\(#Create_Project\)](#)
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Create Project

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Purpose: GMS needs to keep a track of all fund allocation done via third-party software like SharePoint. These SharePoint projects need to be updated in the GMS system for which the SharePoint projects option has been created.

Usage: A new SharePoint Project can be created only by a GMS Admin user. To create a new project, click on the Create Project menu item present under the Create Project menu.

This menu is only available to GMS Admin user.

Create New Project

Pooled Fund **Turkey**

Organization *

Cluster *

Project Title *

Field Descriptions:

- **Organization** (text box): Enter the Organization name for which the sharepoint project is being created for.
- **Cluster** (drop down box): Displays the cluster s available in the pooled fund.
- **Project Title** (text box): Enter the project title.

Click on the **Save** button to create the new sharepoint project.

After creation of the new sharePoint project, the project listing screen will be displayed. Select the appropriate project by clicking on the **edit** icon for which further details need to be updated.

MoU Draft
MoU Draft

Submit for MoU Clearance MoU

Save & Stay Save & Exit [Add Comments] [More Comments]

MoU Draft MoU Clearance Counter Sign By IP Dib.1 Fin.Rep./Extn. Extn. Clearance Fin. Report Clearance Ext. Audit Ext. Audit By ASB Dib.2 Refund Closure Documents SharePoint Project Tracking

Project Created By: on 28/12/2016 10:09:07 PM

| | | | |
|--|---------------------------|----------------|-----------|
| Organisation | Alaafeai Fund | Cluster | Education |
| GMS Project code | TUR-00/0000/ER/E/NGO/0000 | | |
| SharePoint Project code | | | |
| Project start date (HC signature on MoU): | | | |
| Project End Date | | | |

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

| | | | |
|-----------------------------------|---------------------------|-------------------------------------|----------------------|
| Project Title * | Create Sharepoint project | | |
| Sub Number | <input type="text"/> | Submission Date | <input type="text"/> |
| Original Budget | <input type="text"/> | Date of Recommendation by RB | <input type="text"/> |
| SharePoint Project Code | <input type="text"/> | HC Endorsement Letter Date | <input type="text"/> |
| Date MoU Draft Sent to ASB | <input type="text"/> | | |

Save & Stay Save & Exit

Comments for Tab MoU Draft

Leave Comment:

CBPF GRANT MANAGEMENT SYSTEM (GMS)

The user will require to fill in the information for the following tabs.

- [MoU Draft\(#MoU Draft\)](#)
- [MoU Clearance\(#MoU_Clearance\)](#)
- [Counter Sign by IP\(#Counter_Sign_by_IP\)](#)
- [Disbursement 1\(#Disbursement_1\(Dib. 1\)\)](#)
- [Financial Report/Extension\(#Financial_Report/Extension\)](#)
- [Extension Clearance\(#Extension_Clearance\)](#)
- [Financial Report Clearance\(#Financial_Report_Clearance\)](#)
- [Ext.Audit\(#External_Audit\)](#)
- [Ext.Audit by ASB\(#External_Audit_by_ASB\)](#)
- [Disbursement 2\(#Disbursement_2\)](#)
- [Refund\(#Refund\)](#)
- [Closure\(#Closure\)](#)
- [Documents\(#Documents\)](#)
- [SharePoint Project Tracking\(#SharePoint_Project_Tracking\)](#)

Each tab is described below in detail. The user can add Project-level comments which would be displayed on the top right section of the page. The Tab-level comments would be displayed at the bottom of the page. The user can also enter Tab level comments using the comment icon displayed on the page. Please remember to keep saving the inputted data by clicking on the **Save & Stay** button or **Save & Exit Project** button.

MoU DraftTOP(#top)

MoU Draft is the first status of a SharePoint Project. This tab is editable by HFU only. The HFU would be able to view the following details of the project and edit the same.

MoU Draft
MoU Draft

Submit for MoU Clearance MoU

Save & Stay Save & Exit [Add Comments] [More Comments]

MoU Draft MoU Clearance Counter Sign By IP Dib.1 Fin.Rep./Extn. Extn. Clearance Fin. Report Clearance Ext. Audit Ext. Audit By ASB Dib.2 Refund Closure Documents SharePoint Project Tracking

Project Created By: on 28/12/2016 10:09:07 PM

| | | | |
|--|---------------------------|----------------|-----------|
| Organisation | Alaafeai Fund | Cluster | Education |
| GMS Project code | TUR-00/0000/ER/E/NGO/0000 | | |
| SharePoint Project code | | | |
| Project start date (HC signature on MoU): | | | |
| Project End Date | | | |

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

| | | | |
|-----------------------------------|---------------------------|-------------------------------------|----------------------|
| Project Title * | Create Sharepoint project | | |
| Sub Number | <input type="text"/> | Submission Date | <input type="text"/> |
| Original Budget | <input type="text"/> | Date of Recommendation by RB | <input type="text"/> |
| SharePoint Project Code | <input type="text"/> | HC Endorsement Letter Date | <input type="text"/> |
| Date MoU Draft Sent to ASB | <input type="text"/> | | |

Save & Stay Save & Exit

Comments for Tab MoU Draft

Leave Comment:

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Field Description:

- **Project Title** (Text box): Enter the title for the SharePoint project.
- **Sub Number** (Text box): Enter the sub number.
- **Submission Date** (Date dropdown box): Enter the project submission date.
- **Original Budget** (Text box): Enter the original budget allocated for the project.
- **Date of Recommendation by RB** (Date dropdown box): Enter the date of recommendation by RB.
- **SharePoint project code** (Text box): Enter the project code.
- **HC Endorsement Letter Date** (Date dropdown box): Enter the HC endorsement letter date.
- **Date MoU Draft Sent to ASB** would be the date when the project moves from “MoU Draft” status to “MoU Clearance by ASB” status.

After updating the relevant data, click on the **Submit to MoU Clearance** to allow the project to move from “MoU Draft” status to “MoU Clearance by ASB” status.

MoU Clearance[TOP](#)([#top](#))

MoU Clearance tab is editable only by FCS Finance. The FCS Finance user would be able to view and edit the following details of the project in this tab.

MOU Clearance
MoU Clearance

Submit to IP for Counter Signed Return to MoU Draft

Save & Stay Save & Exit [Add Comments] [More Comments]

MoU Draft **MoU Clearance** Counter Sign By IP Dib.1 Fin.Rep./Extn. Extn. Clearance Fin. Report Clearance Ext. Audit Ext. Audit By ASB Dib.2 Refund Closure **Documents** SharePoint Project Tracking

Project Created By: abc@xyz.com on 28/12/2016 10:09:07 PM Project Last Updated By: abc@xyz.com on 28/12/2016 10:47:31 PM

| | | | |
|--|---------------------------|----------------------|---------------------------|
| Organisation | Alaafeai Fund | Cluster | Education |
| GMS Project code | TUR-00/0000/ER/E/NGO/0000 | Project Title | Create Sharepoint project |
| SharePoint Project code | 1/2/3/4 | | |
| Project start date (HC signature on MoU): | | | |
| Project End Date | | | |

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

| | | | |
|--|----------------------|--------------------------|----------------------|
| Payee Id | <input type="text"/> | Approved Budget * | <input type="text"/> |
| MPTF Transaction Reference Number | <input type="text"/> | 1st Installment Amount * | <input type="text"/> |
| Date of correct & completed draft received | 28/12/2016 | Date MoU Cleared by ASB | |

Save & Stay Save & Exit

Comments for Tab MoU Clearance

Leave Comment:

Field Description:

CBPF GRANT MANAGEMENT SYSTEM (GMS)

- **Payee Id** (Text box): Enter the payee id details.
- **Approved Budget** (Text box): Enter the Approved budget for the SharePoint project.
- **MPTF Transaction Reference Number** (Text box): Enter the MPTF Transaction Reference Number.
- **1st Instalment Amount** (Text box): Enter the 1st instalment amount allocated for the project.
- **Date MoU Cleared by ASB** would be the date when the project moves from “MoU Clearance” status to “Counter Signed by IP” status.

If any clarification required, click on the **Return to MoU Draft** button to send it back to the HFU. After updating the relevant data, click on the **Submit to IP for Counter Signed** button to allow the project to move from “MoU Clearance” status to “Counter Signed by IP” status.

Counter Sign by IPTOP(#top).

Counter Sign by IP tab is editable only by HFU. The HFU user would be able to view and edit the following details of the project in this tab.

Counter signed by IP
Counter Signature By IP

Submit for first Disbursement Withdraw Project Return to MoU Clearance Cancel Project

Save & Stay Save & Exit [Add Comments] [More Comments]

MoU Draft MoU Clearance Counter Sign By IP Dib.1 Fin.Rep./Extn. Extn. Clearance Fin. Report Clearance Ext. Audit Ext. Audit By ASB Dib.2 Refund Closure Documents SharePoint Project Tracking

Project Created By:abc@xyz.com on 28/12/2016 10:09:07 PM Project Last Updated By:abc@xyz.com on 28/12/2016 11:13:12 PM

| | | | |
|--|---------------------------|----------------------|---------------------------|
| Organisation | Alaafeai Fund | Cluster | Education |
| GMS Project code | TUR-00/0000/ER/E/NGO/0000 | Project Title | Create Sharepoint project |
| SharePoint Project code | 1/2/3/4 | | |
| Project start date (HC signature on MoU): | | | |
| Project End Date | | | |

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

| | | | |
|--|----------------------|------------------------------|----------------------|
| Date HC Signature on MoU date * | <input type="text"/> | Date MoU signed by IP | <input type="text"/> |
| Project End Date | <input type="text"/> | Project Duration * | <input type="text"/> |
| Date MoU cleared by ASB received by FM | 28/12/2016 | MoU Clearance Time (in days) | |

Save & Stay Save & Exit

Comments for Tab Counter Signature By IP

Leave Comment:

Field Description:

CBPF GRANT MANAGEMENT SYSTEM (GMS)

- **Date HC Signature on MoU date** (Date dropdown box): Enter the date on which HC signed on the MoU.
- **Date MoU Signed by IP** (Date dropdown box): Enter the date on which the IP signed on the MoU.
- **Project End Date** (Date dropdown box): Enter the existing project end date provided for the project.
- **Project Duration** (Text box): Enter the duration for the project.
- **MoU Clearance Time (in days)** would be the number of days between the dates when the project moved in and out of “MoU Clearance “ status.

After updating the relevant data, click either of the buttons.

- **Submit for first Disbursement** to allow the project to move from “Counter Signed by IP” status to “Disbursement 1” status.
- **Withdraw Project** allows for project closure.
- **Return to MoU Clearance** to redirect the project to FCS Finance for further clarification.
- **Cancel Project** will cancel the project. There will be no further action taken on this project.

[Disbursement 1\(Dib. 1\)TOP\(#top\)](#)

Disbursement 1 tab is editable only by FCS Finance. The FCS Finance user would be able to view and edit the following details of the project in this tab.

Disbursement 1
Disbursement 1

[Submit for Financial Reporting / Project Extension](#) [Return to Counter Signature](#)

[Save & Stay](#) [Save & Exit](#) [[Add Comments](#)] [[More Comments](#)]

MoU Draft | MoU Clearance | Counter Sign By IP | **Dib.1** | Fin.Rep./Extn. | Extn. Clearance | Fin. Report Clearance | Ext. Audit | Ext. Audit By ASB | Dib.2 | Refund | Closure | **Documents** | SharePoint Project Tracking

| | | | |
|--|---------------------------|---|---------------------------|
| Project Created By: abc@xyz.com on 28/12/2016 10:09:07 PM | | Project Last Updated By: abc@xyz.com on 28/12/2016 11:48:18 PM | |
| Organisation | Alaafeai Fund | Cluster | Education |
| GMS Project code | TUR-00/0000/ER/E/NGO/0000 | Project Title | Create Sharepoint project |
| SharePoint Project code | 1/2/3/4 | | |
| Project start date (HC signature on MoU): | 28/12/2016 | | |
| Project End Date | 31/12/2016 | | |

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

| | | | |
|---|---|--|---|
| Project End Date | <input type="text" value="31/12/2016"/> | 1st Disbursement Due Date | <input type="text" value="07/01/2017"/> |
| OBMO/OBLA Number: | <input type="text"/> | Date OBMO/OBLA sent to UNOG | <input type="text"/> |
| Date OBMO/OBLA approved by UNOG | <input type="text"/> | PYIN/RCTP | <input type="text"/> |
| Date Invoice/RCTP sent to UNOG | <input type="text"/> | Date of Disbursement of funds from UNOG to Partner * | <input type="text"/> |
| Date Counter Signed MoU Received by ASB | 28/12/2016 | Disbursement Time (in days) | |

[Save & Stay](#) [Save & Exit](#)

Comments for Tab Disbursement1

Leave Comment:



CBPF GRANT MANAGEMENT SYSTEM (GMS)

Field Description:

- **Project End Date** (Date Dropdown box): Enter the project end date.
- **1st Disbursement Due Date** (Date Dropdown box): Enter the first disbursement due date.
- **OBMO/OBLA Number** (Text box): Enter the OBMO/OBLA number.
- **Date OBMO/OBLA sent to UNOG** (Date Dropdown box): Enter the date.
- **Date OBMO/OBLA approved by UNOG** (Date Dropdown box): Enter the date.
- **PYIN/RCTP** (Text box): Enter the PYIN/RCTP details.
- **Date Invoice/RCTP sent to UNOG** (Date Dropdown box): Enter the date.
- **Date of Disbursement of funds from UNOG to Partner** (Date Dropdown box): Enter the date.
- **Disbursement Time (in days)** would be the date when the project moves from “Disbursement 1” status to “Financial Reporting / Project Extension” status.



If any clarification required, click on the **Return to Counter Signature** button to send it back to the HFU. After updating the relevant data, click on the **Submit for Financial Reporting / Project Extension** button to allow the project to move from “Disbursement 1” status to “Financial Reporting / Project Extension” status.

Financial Report/Extension[TOP\(#top\)](#)

Financial Report/Extension tab is editable only by HFU. The HFU user would be able to view and edit the following details of the project in this tab. Click on the **Project Extension Requested** checkbox if the user wishes to extend the project end date.

Report and Extention
Financial Report / Project Extension

[Submit for Project Extension Clearance](#)
[Submit for Financial Reporting clearance \(UN Projects\)](#)
[Submit for External Audit \(Non-UN Projects\)](#)
[Return to Disbursement](#)

[Save & Stay](#)
[Save & Exit](#)
[ Add Comments] [ More Comments]

[MoU Draft](#)
[MoU Clearance](#)
[Counter Sign By IP](#)
[Dib.1](#)
[Fin.Rep./Extn.](#)
[Extn. Clearance](#)
[Fin. Report Clearance](#)
[Ext. Audit](#)
[Ext. Audit By ASB](#)
[Dib.2](#)
[Refund](#)
[Closure](#)
[Documents](#)
[SharePoint Project Tracking](#)

Project Created By: abc@xyz.com on 28/12/2016 10:09:07 PM
 Project Last Updated By: abc@xyz.com on 29/12/2016 09:23:23 PM

| | | | |
|--|---------------------------|----------------------|---------------------------|
| Organisation | Alaafeai Fund | Cluster | Education |
| GMS Project code | TUR-00/0000/ER/E/NGO/0000 | Project Title | Create Sharepoint project |
| SharePoint Project code | 1/2/3/4 | | |
| Project start date (HC signature on MoU): | 28/12/2016 | | |
| Project End Date | 31/12/2016 | | |

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

Project Extension Requested

| Reports | | | |
|--|----------------------|--------------------------------------|----------------------|
| Date Financial Report Due | 31/03/2017 | Date Financial Report Received by FM | <input type="text"/> |
| Final Expenditure Reported By IP | <input type="text"/> | | |
| Date NCE Submitted for Clearance by FM | 29/12/2016 | Date ASB Cleared NCE Request | <input type="text"/> |

[Save & Stay](#)
[Save & Exit](#)

Comments for Tab Report Extension

Leave Comment:



CBPF GRANT MANAGEMENT SYSTEM (GMS)

Field Description:

- **Date Financial Report Received by FM** (Date Dropdown box): Select the date.
- **Final Expenditure Reported By IP** (Text box): Enter the final expenditure reported by Implementing Partner.
- **Date ASB Cleared NCE Request** would be the date when FCS Finance clears the NCE request in the Extn. Clearance stage, if an extension to the project has been requested.

Screenshot when checkbox for Project Extension Requested is checked.

| | | | |
|--|----------------------|--|----------------------|
| Project Extension Requested <input checked="" type="checkbox"/> | | | |
| Extension | | | |
| No Of Project Extension | 1 | Date Project Extension Requested | <input type="text"/> |
| Request Length Of Duration(Months) | <input type="text"/> | Project End Date After NCE Approval | <input type="text"/> |
| <input type="button" value="Save & Stay"/> | | <input type="button" value="Save & Exit"/> | |

Field Description:

- **Date Project Extension Requested** (Date Dropdown box): Enter date when project extension was requested.
- **Request Length Of Duration(Months)** (Text box): Enter the length of extension duration in months.
- **Project End Date After NCE Approval** (Date Dropdown box): Enter the new end date for project completion.

If any clarification required, click on the **Return to Disbursement** button to send it back to FCS Finance. After updating the relevant data, click on the **Submit for Project Extension Clearance** button if an extension for the project duration has been requested else Click on the **Submit for Financial Reporting clearance (UN Projects)** button for UN Projects or Click on the **Submit for External Audit (Non-UN Projects)** button for Non-UN projects.

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Extension Clearance[TOP\(#top\)](#).

Extension tab is editable only by FCS Finance. The FCS Finance user would be able to view and edit the following details of the project in this tab.

Project Extension Clearance
Project Extension Clearance

[Approve Extension request](#) [Return to Project extension request](#)

[Save & Stay](#) [Save & Exit](#) [[Add Comments](#)] [[More Comments](#)]

[MoU Draft](#)
[MoU Clearance](#)
[Counter Sign By IP](#)
[Dib.1](#)
[Fin.Rep./Extn.](#)
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[Fin. Report Clearance](#)
[Ext. Audit](#)
[Ext. Audit By ASB](#)
[Dib.2](#)
[Refund](#)
[Closure](#)
[Documents](#)
[SharePoint Project Tracking](#)

| | | | |
|--|---------------------------|---|-------------|
| Project Created By: abc@xyz.com on 21/12/2016 03:39:08 PM | | Project Last Updated By: abc@xyz.com on 29/12/2016 10:45:10 PM | |
| Organisation | Alaafeai Fund | Cluster | Agriculture |
| GMS Project code | TUR-00/0000/ER/E/NGO/0000 | Project Title | Sharepoint |
| SharePoint Project code | | | |
| Project start date (HC signature on MoU): | 29/12/2016 | | |
| Project End Date | | | |

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

| | |
|-------------------------------------|----------------------|
| Project End Date After NCE Approval | <input type="text"/> |
| Date ASB Cleared NCE Request | <input type="text"/> |

[Save & Stay](#) [Save & Exit](#)

Comments for Tab Extension Clearance

Leave Comment:

Field Description:

CBPF GRANT MANAGEMENT SYSTEM (GMS)

- **Project End Date After NCE Approval** (Date Dropdown box): Enter new end date for the project.
- **Date ASB Cleared NCE Request** would be the date when FCS Finance clears the NCE request.

If any clarification required, click on the **Return to Project Extension Request** button to send it back to HFU. After updating the relevant data, click on the **Approve Extension Request** button for the extension of project.

Financial Report Clearance[TOP\(#top\)](#)

Financial Report Clearance Extension tab is applicable for UN projects and is editable only by FCS Finance. The FCS Finance user would be able to view and edit the following details of the project in this tab.

Financial Reporting
Financial Reporting

[Submit for External Audit](#) [Return to Financial reporting request](#)

[Save & Stay](#) [Save & Exit](#) [\[Add Comments \]](#) [\[More Comments \]](#)

[MoU Draft](#)
[MoU Clearance](#)
[Counter Sign By IP](#)
[Dib.1](#)
[Fin.Rep./Extn.](#)
[Extn. Clearance](#)
[Fin. Report Clearance](#)
[Ext. Audit](#)
[Ext. Audit By ASB](#)
[Dib.2](#)
[Refund](#)
[Closure](#)
[Documents](#)
[SharePoint Project Tracking](#)

Project Created By: abc@xyz.com on 21/12/2016 03:39:08 PM Project Last Updated By: abc@xyz.com on 29/12/2016 10:51:28 PM

| | | | |
|--|---------------------------|----------------------|-------------|
| Organisation | Alaafeai Fund | Cluster | Agriculture |
| GMS Project code | TUR-00/0000/ER/E/NGO/0000 | Project Title | Sharepoint |
| SharePoint Project code | | | |
| Project start date (HC signature on MoU): | 29/12/2016 | | |
| Project End Date | 22/12/2016 | | |

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

| | |
|---------------------------------------|----------------------|
| Refund from implementing partner | <input type="text"/> |
| Date Financial Report Received By ASB | 29/12/2016 |

[Save & Stay](#) [Save & Exit](#)

Comments for Tab Reporting

Leave Comment:

Field Description:

CBPF GRANT MANAGEMENT SYSTEM (GMS)

- **Refund from Implementing partner** (text box): Enter the amount to be received from the Implementing partner.
- **Date Financial Report Received by ASB** would be the date when FCS Finance received the financial report.



If any clarification required, click on the **Return to Financial reporting request** button to send it back to HFU. After updating the relevant data, click on the **Submit for External Audit** button for external audit.

External Audit[TOP](#)([#top](#)).

External Audit tab is editable only by HFU. The HFU user would be able to view and edit the following details of the project in this tab.

External Audit
External Audit

[Submit External Audit to ASB](#) [Return to Financial reporting clearance](#)

[Save & Stay](#) [Save & Exit](#) [ Add Comments] [ More Comments]

[MoU Draft](#)
[MoU Clearance](#)
[Counter Sign By IP](#)
[Dib.1](#)
[Fin.Rep./Extn.](#)
[Extn. Clearance](#)
[Fin. Report Clearance](#)
[Ext. Audit](#)
[Ext. Audit By ASB](#)
[Dib.2](#)
[Refund](#)
[Closure](#)
[Documents](#)
[SharePoint Project Tracking](#)

| | | | |
|--|---------------------------|---|---------------------------|
| Project Created By: abc@xyz.com on 28/12/2016 10:09:07 PM | | Project Last Updated By: abc@xyz.com on 29/12/2016 10:32:01 PM | |
| Organisation | Alaafeai Fund | Cluster | Education |
| GMS Project code | TUR-00/0000/ER/E/NGO/0000 | Project Title | Create Sharepoint project |
| SharePoint Project code | 1/2/3/4 | | |
| Project start date (HC signature on MoU): | 28/12/2016 | | |
| Project End Date | 31/12/2016 | | |

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

| | | | |
|---|----------------------|--|----------------------|
| Date External Audit triggered by FM * | <input type="text"/> | Date Draft Audit report received by FM | <input type="text"/> |
| Date Draft Audit report cleared | <input type="text"/> | Date Final Audit report due | <input type="text"/> |
| Date Final Audit received by FM * | <input type="text"/> | Final Expenditure cleared by Audit | <input type="text"/> |
| Final Expenditure cleared by Fund Manager | <input type="text"/> | FM Comments * | <input type="text"/> |

[Save & Stay](#) [Save & Exit](#)

Comments for Tab External Audit

Leave Comment:



CBPF GRANT MANAGEMENT SYSTEM (GMS)

Field Description:

- **Date External Audit triggered by FM** (Date Dropdown box): Enter date when external audit was triggered by Fund Manager.
- **Date Draft Audit report received by FM** (Date Dropdown box): Enter date when draft audit report was received by Fund Manager.
- **Date Draft Audit report cleared** (Date Dropdown box): Enter date when draft audit report was cleared.
- **Date Final Audit report due** (Date Dropdown box): Enter date when final audit report is due.
- **Date Final Audit received by FM** (Date Dropdown box): Enter date when final audit report was received by Fund Manager.
- **Final Expenditure cleared by Audit** (Text box): Enter the final expenditure cleared by Audit.
- **Final Expenditure cleared by Fund Manager** (Text box): Enter the final expenditure cleared by Fund Manager.
- **FM Comments** (Text box): Enter the comments of the Fund Manager.

If any clarification required, click on the **Return to Financial reporting clearance** button to send it back to FCS Finance. After updating the relevant data, click on the **Submit External Audit to ASB** button to submit the audit to FCS Finance for external auditing.

External Audit by ASBTOP(#top)

External Audit tab is editable only by FCS Finance. The FCS Finance user would be able to view and edit the following details of the project in this tab.

External Audit By ASB
External Audit By ASB

Submit to Disbursement 2 Trigger Refund from IP/Agency Submit for Project Closure

Save & Stay Save & Exit [Add Comments] [More Comments]

MoU Draft MoU Clearance Counter Sign By IP Dib.1 Fin.Rep./Extn. Extn. Clearance Fin. Report Clearance Ext. Audit **Ext. Audit By ASB** Dib.2 Refund Closure Documents SharePoint Project Tracking

| | | | |
|--|---------------------------|---|---------------------------|
| Project Created By: abc@xyz.com on 28/12/2016 10:09:07 PM | | Project Last Updated By: abc@xyz.com on 03/01/2017 03:16:45 PM | |
| Organisation | Alaafeai Fund | Cluster | Education |
| GMS Project code | TUR-00/0000/ER/E/NGO/0000 | Project Title | Create Sharepoint project |
| SharePoint Project code | 1/2/3/4 | | |
| Project start date (HC signature on MoU): | 28/12/2016 | | |
| Project End Date | 31/12/2016 | | |

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

| | | | |
|------------------------------------|----------------------|------------------------------|----------------------|
| Date Final Audit Received By ASB * | <input type="text"/> | Expenditure Cleared By Audit | <input type="text"/> |
| Total Expenditure Cleared By ASB * | <input type="text"/> | Authorized Vs Audited | <input type="text"/> |
| ASB Comment | <input type="text"/> | | |

Save & Stay Save & Exit

Comments for Tab External Audit By ASB

Leave Comment:



CBPF GRANT MANAGEMENT SYSTEM (GMS)

Field Description:

- **Date Final Audit Received By ASB** (Date Dropdown box): Enter date when final audit was received by FCS Finance.
- **Expenditure Cleared By Audit** (Text box): Enter the expenditure cleared by Audit.
- **Total Expenditure Cleared By ASB** (Text box): Enter the total expenditure cleared by FCS Finance.
- **Authorised Vs Audited** (Text box): Enter the Authorised Vs Audited differences.
- **ASB Comment** (Text box): Enter the comments of the FCS Finance.

Click on the **Submit to Disbursement 2** button if any funds remaining to give to the Implementing Partner else click on the **Trigger Refund from IP/Agency** button to trigger any excess amount to be refunded by the IP/Agency to the pooled fund. If there is no disbursement or refund applicable, click on the **Submit for Project Closure** button to close the project.

Disbursement 2[TOP\(#top\)](#)

Disbursement 2 tab is editable only by FCS Finance. The FCS Finance user would be able to view and edit the following details of the project in this tab.

Disbursement 2
Disbursement 2

[Submit for Project Closure](#) [Return to External Audit](#)

[Save & Stay](#) [Save & Exit](#)

[[Add Comments](#)] [[More Comments](#)]

MoU Draft | MoU Clearance | Counter Sign By IP | **Dib.1** | Fin.Rep./Extn. | Extn. Clearance | Fin. Report Clearance | Ext. Audit | Ext. Audit By ASB | **Dib.2** | Refund | Closure | **Documents** | SharePoint Project Tracking

Project Created By:abc@xyz.com on 28/12/2016 10:09:07 PM

Project Last Updated By:abc@xyz.com on 03/01/2017 04:52:05 PM

| | | | |
|--|---------------------------|----------------------|---------------------------|
| Organisation | Alaafeai Fund | Cluster | Education |
| GMS Project code | TUR-00/0000/ER/E/NGO/0000 | Project Title | Create Sharepoint project |
| SharePoint Project code | 1/2/3/4 | | |
| Project start date (HC signature on MoU): | 28/12/2016 | | |
| Project End Date | 31/12/2016 | | |

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

| | | | |
|---------------------------------------|---|-----------------------------|--------------------------------------|
| Date 2nd Installment Disbursement Due | <input type="text" value="02/02/2017"/> | Actual Installment to pay * | <input type="text" value="1500.00"/> |
| 2nd Installments Disbursement Date * | <input type="text"/> | | |

[Save & Stay](#) [Save & Exit](#)

Comments for Tab Disbursement2

Leave Comment:



CBPF GRANT MANAGEMENT SYSTEM (GMS)

Field Description:

- **Date 2nd Installment Disbursement Due** (Date dropdown box): Enter the date on which the 2nd instalment disbursement is due.
- **Actual Installment to pay** (Text box): Enter the actual disbursement amount to be paid to Implementing partner.
- **2nd Installments Disbursement Date** (Date dropdown box): Enter the date on which 2nd instalment disbursement was done to IP.

If any clarification required, click on the **Return to External Audit** button to send it back to FCS Finance. After updating the relevant data, click on the **Submit for Project Closure** button to close the project.

RefundTOP(#top)

Refund tab is editable only by FCS Finance. The FCS Finance user would be able to view and edit the following details of the project in this tab.

Refund From IP/Agency
Refund From IP/Agency

[Send Back to Audit](#) [Submit for Project Closure](#)

[Save & Stay](#) [Save & Exit](#) [[Add Comments](#)] [[More Comments](#)]

[MoU Draft](#)
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[Dib.1](#)
[Fin.Rep./Extn.](#)
[Extn. Clearance](#)
[Fin. Report Clearance](#)
[Ext. Audit](#)
[Ext. Audit By ASB](#)
[Dib.2](#)
[Refund](#)
[Closure](#)
[Documents](#)
[SharePoint Project Tracking](#)

| | | | |
|--|---------------------------|---|---------------------------|
| Project Created By: abc@xyz.com on 28/12/2016 10:09:07 PM | | Project Last Updated By: abc@xyz.com on 03/01/2017 04:41:01 PM | |
| Organisation | Alaafeai Fund | Cluster | Education |
| GMS Project code | TUR-00/0000/ER/E/NGO/0000 | Project Title | Create Sharepoint project |
| SharePoint Project code | 1/2/3/4 | | |
| Project start date (HC signature on MoU): | 28/12/2016 | | |
| Project End Date | 31/12/2016 | | |



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

| | | | |
|---------------------------|-----------------------------------|--------------------------------|----------------------|
| Refund from UN Agency/IP | <input type="text" value="0.00"/> | Date Refund From IP Due | <input type="text"/> |
| Date Notification To IP * | <input type="text"/> | Date Refund From IP Recieved * | <input type="text"/> |

[Save & Stay](#) [Save & Exit](#)

Comments for Tab Refund

Leave Comment:

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Field Description:

- **Refund from UN Agency/IP** (Text box): Enter the amount of funds to be returned by UN Agency/IP.
- **Date Refund From IP Due** (Date dropdown box): Enter the date by which the refund amount is due.
- **Date Notification To IP** (Date dropdown box): Enter the date on which refund notification was sent to IP.
- **Date Refund From IP Recieved** (Date dropdown box): Enter the date on which the refund from IP was received.

If any clarification required, click on the **Send back to Audit** button to send it back to FCS Finance. After updating the relevant data, click on the **Submit for Project Closure** button to close the project.

ClosureTOP(#top)

Closure tab is editable only by FCS Finance. The FCS Finance user would be able to view and edit the following details of the project in this tab.

Project Closure
Project Closure

Complete Project Closure Return to External Audit Return to Refund from IP Return to 2nd Disbursement

Save & Stay Save & Exit [Add Comments] [More Comments]

MoU Draft MoU Clearance Counter Sign By IP Dib.1 Fin.Rep./Extn. Extn. Clearance Fin. Report Clearance Ext. Audit Ext. Audit By ASB Dib.2 Refund **Closure** Documents SharePoint Project Tracking

Project Created By:abc@xyz.com on 28/12/2016 10:09:07 PM Project Last Updated By:abc@xyz.com on 03/01/2017 05:00:06 PM

| | | | |
|--|---------------------------|----------------------|---------------------------|
| Organisation | Alaafeai Fund | Cluster | Education |
| GMS Project code | TUR-00/0000/ER/E/NGO/0000 | Project Title | Create Sharepoint project |
| SharePoint Project code | 1/2/3/4 | | |
| Project start date (HC signature on MoU): | 28/12/2016 | | |
| Project End Date | 31/12/2016 | | |

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

| | | | |
|----------------|----------------------|--------------------|----------------------|
| 6 Month Target | <input type="text"/> | PYIN/PYRA/JNLV #4 | <input type="text"/> |
| Bank Charges | <input type="text"/> | PSC * | <input type="text"/> |
| Audit Fees | <input type="text"/> | Total Project Cost | <input type="text"/> |

Save & Stay Save & Exit

Comments for Tab Project Closure

Leave Comment:



CBPF GRANT MANAGEMENT SYSTEM (GMS)

Field Description:

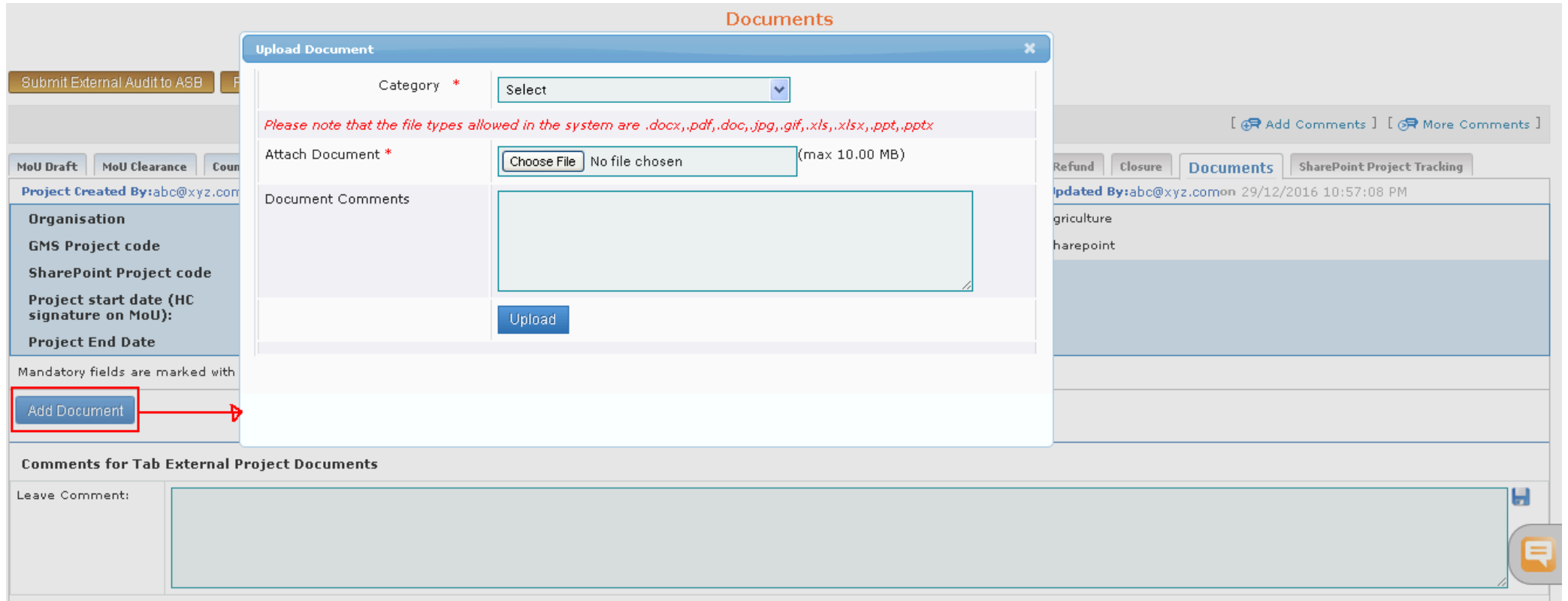
- **6 Month Target** (Text box): Enter the 6 month target achieved by the project.
- **PYIN/PYRA/JNLV #4** (Text box): Enter the PYIN/PYRA/JNLV #4 details.
- **Bank Charges** (Text box): Enter the bank charges incurred for the project.
- **PSC** (Text box): Enter the PSC charges incurred for the project.
- **Audit Fees** (Text box): Enter the Audit charges levied for the project.
- **Total Project Cost** (Text box): Enter the total project cost. (The value initially displayed will be total disbursement plus the other costing elements mentioned on the screen which can be edited as required)

If any clarification required, click on the **Return to External Audit** button to send it back to FCS Finance. Click on the **Return to Refund from IP** or **Return to 2nd Disbursement**, if any refund or disbursement changes need to be made for the project. After updating the relevant data, click on the **Complete Project Closure** button to finalize the project closure.

Documents[TOP](#)[\(#top\)](#).

Documents tab is editable only by HFU and FCS Finance. This tab enables the user to view, upload or delete documents related to the project. This tab will be visible during all the statuses of the project available before project closure.

CBPF GRANT MANAGEMENT SYSTEM (GMS)



The screenshot displays the OCHA GMS interface. A modal window titled "Upload Document" is open, featuring a "Category" dropdown menu, a "Please note that the file types allowed in the system are .docx,.pdf,.doc,.jpg,.gif,.xls,.xlsx,.ppt,.pptx" warning, an "Attach Document" field with a "Choose File" button and "No file chosen" text, and a "Document Comments" text area. An "Upload" button is located at the bottom of the dialog. On the main page, the "Add Document" button is highlighted with a red box, and a red arrow points from it to the dialog. The background shows a project summary with fields for "Organisation", "GMS Project code", "SharePoint Project code", "Project start date (HC signature on MoU)", and "Project End Date".

Click on **Add Document** button, to upload documents for the selected SharePoint project window will appear.

[SharePoint Project TrackingTOP\(#top\)](#)

CBPF GRANT MANAGEMENT SYSTEM (GMS)

SharePoint Project Tracking tab enables the user to track the SharePoint Project through its various statuses which contains details of when and what time the project had entered a particular status.

Project Tracking
External Audit

MoU Draft | MoU Clearance | Counter Sign By IP | Dib.1 | Fin.Rep./Extn. | Extn. Clearance | Fin. Report Clearance | **Ext. Audit** | Ext. Audit By ASB | Dib.2 | Refund | Closure | Documents | **SharePoint Project Tracking**

Project Created By:abc@xyz.com on 21/12/2016 03:39:08 PM

Project Last Updated By:abc@xyz.com on 29/12/2016 10:57:08 PM

| | | | |
|--|---------------------------|----------------------|-------------|
| Organisation | Alaafeai Fund | Cluster | Agriculture |
| GMS Project code | TUR-00/0000/ER/E/NGO/0000 | Project Title | Sharepoint |
| SharePoint Project code | | | |
| Project start date (HC signature on MoU): | 29/12/2016 | | |
| Project End Date | 22/12/2016 | | |

| | | |
|--------------------------------------|-----------------------|--------------------------------------|
| Financial Reporting | (29/12/2016 10:57 PM) | External Audit |
| | ↑ | |
| Financial Report / Project Extension | (29/12/2016 10:51 PM) | Financial Reporting |
| | ↑ | |
| Project Extension Clearance | (29/12/2016 10:49 PM) | Financial Report / Project Extension |
| | ↑ | |
| Financial Report / Project Extension | (29/12/2016 10:45 PM) | Project Extension Clearance |
| | ↑ | |
| Disbursement 1 | (29/12/2016 10:44 PM) | Financial Report / Project Extension |
| | ↑ | |
| Counter Signature By IP | (29/12/2016 10:43 PM) | Disbursement 1 |

Project Listing

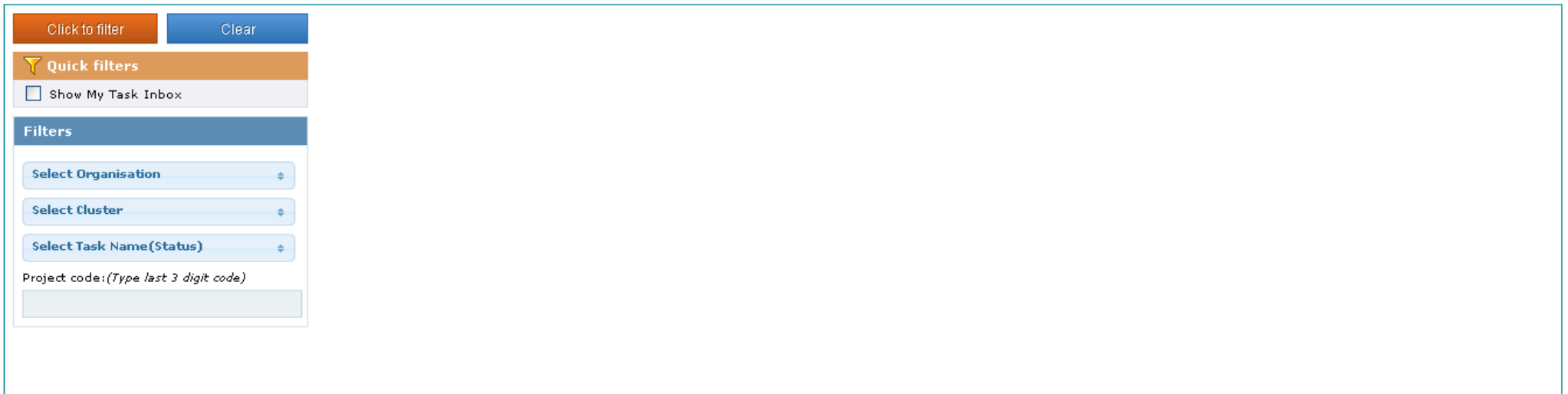
CBPF GRANT MANAGEMENT SYSTEM (GMS)

Navigation: SharePoint Project > SharePoint Project >Project Listing

Purpose: Allows searching for migrated SharePoint projects available in the selected pooled fund based on a search criterion.

Usage: To generate SharePoint Project Listing, select one or more filters present on the left corner of the page.

SharePoint Project Listing



The screenshot shows a sidebar for filtering SharePoint projects. At the top, there are two buttons: 'Click to filter' (orange) and 'Clear' (blue). Below these is a 'Quick filters' section with a yellow funnel icon and a checkbox labeled 'Show My Task Inbox'. Underneath is a 'Filters' section with a blue header. It contains three dropdown menus: 'Select Organisation', 'Select Cluster', and 'Select Task Name (Status)'. At the bottom of the filters section is a text input field labeled 'Project code: (Type last 3 digit code)'.

The Quick filters available are

Show my Task Inbox (check box): Select the checkbox if you wish to display the Sharepoint Projects Task List containing the projects on which the user can perform action based on their current role.

CBPF GRANT MANAGEMENT SYSTEM (GMS)


Additional filters available are







- **Select Organisation** (drop down box): List of organisation names registered for the pooled fund.
- **Select Cluster** (drop down box): List of clusters defined for the pooled fund.
- **Select Task Name(Status)** (drop down box): Lists of tasks applicable for a Sharepoint project and available for the pooled fund
- **Project Code** (text box): Search a project by Project Code.

Then click the **Click to filter** button to generate the project listing.

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



SharePoint Project Listing

>> *Number of Projects: 92* Export Full Dump 

| # |  | Task Name(Status) | Assigned Date | Project Code | Sharepoint Project Code | Sub Number | Org | Project Title | Budget | Cluster | Country |
|---|---|---------------------|-------------------|--------------------------------|-------------------------|------------|--|---|------------|-------------------------------------|---------|
| 2 |  | Financial Reporting | 18-Dec-2016 13:29 | YEM-00/X/0000/ER/CSS/UN/000 | DMA-ERF-0000-0000/100 | 0483/106 | United Nations Development Programm (UNDP) | Capacity Strengthening of Governorate Based National NGOs | 457,596.20 | Coordination and Support Services | Yemen |
| 3 |  | Project Closed | 07-Dec-2016 16:59 | YEM-00/X/0000/ER/WASH/INGO/000 | DMA-ERF-0000-0000/100 | 0483/127 | Danish Refugee Council (DRC) | Emergency WASH provision for conflict-affected communities in Abyan Governorate | 167,155.40 | Water, Sanitation and Hygiene | Yemen |
| 4 |  | Project Closed | 01-Dec-2016 21:57 | YEM-00/X/0000/ER/CSS/UN/000 | DMA-ERF-0000-0000/100 | 0483/132 | CARE International Yemen (NA) | Providing lifesaving support to conflict affected Syrians in Yemen | 406,092.85 | Emergency Shelter and NFIs | Yemen |
| 5 |  | Project Closed | 22-Nov-2016 11:19 | YEM-00/X/0000/ER/CSS/UN/000 | DMA-ERF-0000-0000/100 | 0483/149 | Democracy School (NA) | Prevention of Child Recruitment in High Priority Recruitment Hotspots in Yemen | 265,574.00 | Protection/Human Rights/Rule of Law | Yemen |
| 6 |  | Financial Reporting | 21-Nov-2016 15:43 | YEM-00/X/0000/ER/CSS/UN/000 | DMA-ERF-0000-0000/100 | 0483/165 | United Nations Children's Fund (UNICEF) | Monitor, Report and Respond to grave child right violations and Mine Risk Education (MRE) as a lifesaving response for conflict affected people and internally displaced people (IDPs), including boys and girls, in affected, prioritized districts in | 299,059.65 | Protection/Human Rights/Rule of Law | Yemen |

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Some of the features present in the Project Listing are:

- For each project displayed, the user can click on the action icon displayed to perform further action. On clicking the selected icon, the user would be redirected to the SharePoint project tab.
 -  allows the user to perform edit actions.
 -  allows the user to view the project.
- The data displayed to the user can be downloaded in an excel format using the **Export Full Dump** link.