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> HFU(/en/content/hfu) > How to Manage the Quick Filters

## How to Manage the Quick Filters

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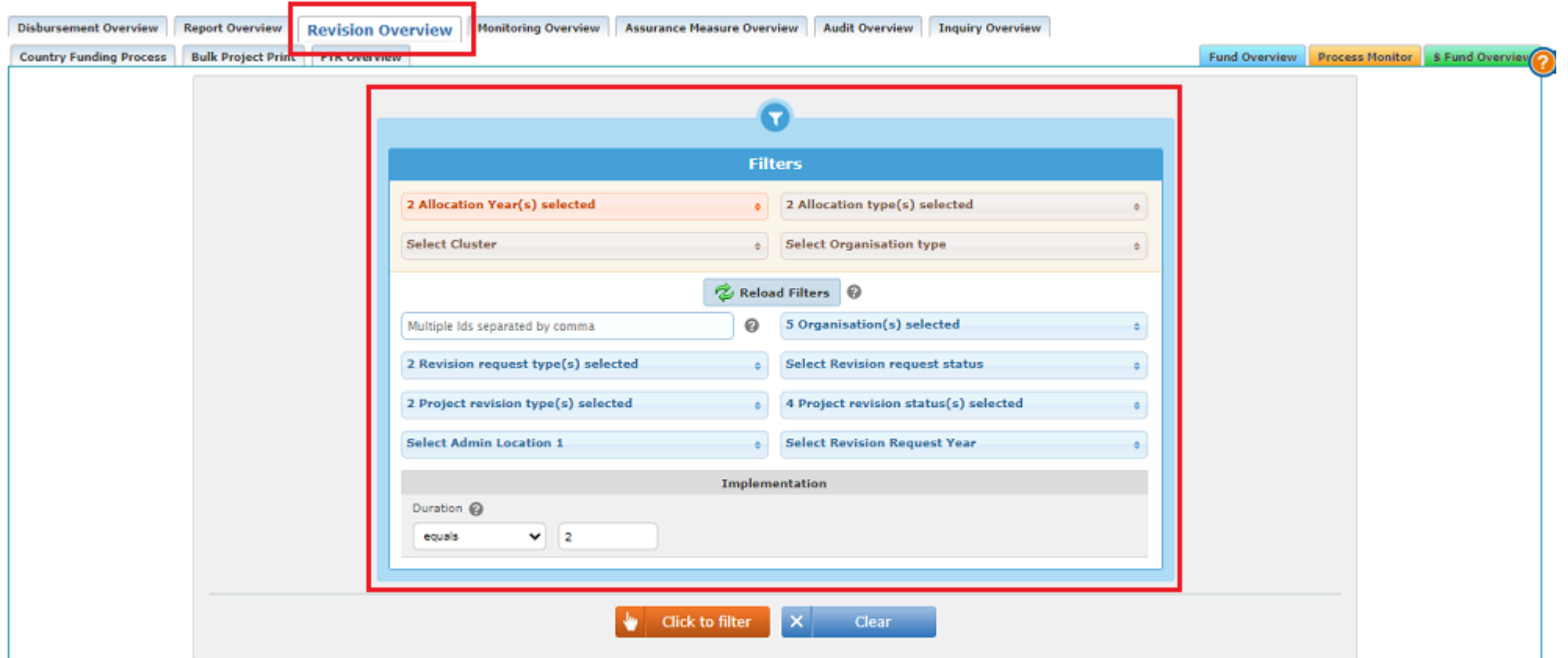
**Please note, this page is only accessible to the HFU Admin user role. If you wish to configure Quick Filters, please contact [gms-support@un.org](mailto:gms-support@un.org) to be granted the HFU Admin user role.**

### I) What are the Quick Filters on the GMS?

There are on the GMS several modules where users can search through and access the project's instances data, for instance for listing purposes, or to find a specific project.

To generate the list of projects, users can use filters to tailor the findings to their search options. For instance, in the screenshot below, we used the 'Revision Overview' module and applied several filters.

### Revision Overview



The screenshot displays the 'Revision Overview' page with a navigation bar containing tabs for Disbursement Overview, Report Overview, **Revision Overview**, Monitoring Overview, Assurance Measure Overview, Audit Overview, and Inquiry Overview. Below this are secondary tabs for Country Funding Process, Bulk Project Print, and PRK Overview. On the right side, there are tabs for Fund Overview, Process Monitor, and Fund Overview with a help icon. The main content area features a 'Filters' panel with the following options:

- 2 Allocation Year(s) selected
- 2 Allocation type(s) selected
- Select Cluster
- Select Organisation type
- Reload Filters
- Multiple Ids separated by comma
- 5 Organisation(s) selected
- 2 Revision request type(s) selected
- Select Revision request status
- 2 Project revision type(s) selected
- 4 Project revision status(s) selected
- Select Admin Location 1
- Select Revision Request Year
- Implementation section with a 'Duration' dropdown set to 'equals' and a value of '2'.

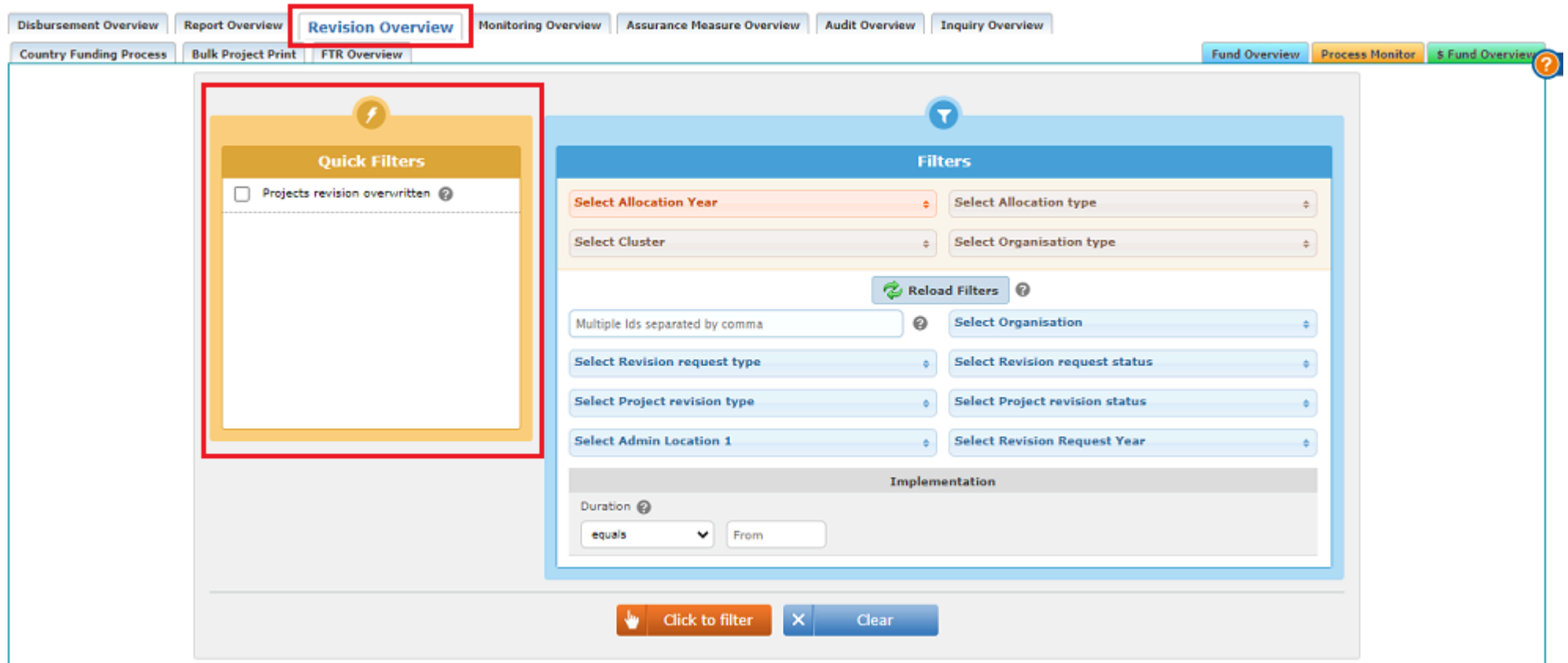
At the bottom of the filters panel, there are two buttons: 'Click to filter' and 'Clear'.

The Quick Filters concept gives **HFU Admin users** the flexibility to create their own set of quick filters, depending on their search needs.

# CBPF GRANT MANAGEMENT SYSTEM (GMS)

When configured, the Quick Filters window appears in the module's Overview page as shown in the screenshot below.

## Revision Overview



The screenshot displays the 'Revision Overview' page with the following elements:

- Navigation Tabs:** Disbursement Overview, Report Overview, **Revision Overview** (highlighted), Monitoring Overview, Assurance Measure Overview, Audit Overview, Inquiry Overview, Country Funding Process, Bulk Project Print, FTR Overview, Fund Overview, Process Monitor, & Fund Overview.
- Quick Filters (highlighted with a red box):** A panel with a lightning bolt icon containing a checkbox labeled 'Projects revision overwritten' with a help icon.
- Filters (highlighted with a blue box):** A panel with a funnel icon containing:
  - Select Allocation Year (dropdown)
  - Select Allocation type (dropdown)
  - Select Cluster (dropdown)
  - Select Organisation type (dropdown)
  - Reload Filters (button with refresh icon and help icon)
  - Multiple Ids separated by comma (input field with help icon)
  - Select Organisation (dropdown)
  - Select Revision request type (dropdown)
  - Select Revision request status (dropdown)
  - Select Project revision type (dropdown)
  - Select Project revision status (dropdown)
  - Select Admin Location 1 (dropdown)
  - Select Revision Request Year (dropdown)
  - Implementation:** Duration (dropdown with 'equals' selected) and From (input field)
- Buttons:** 'Click to filter' (orange button with hand icon) and 'Clear' (blue button with 'x' icon).

## CBPF GRANT MANAGEMENT SYSTEM (GMS)

In our example, we added a check box 'projects revision overwritten'. This means that if users check this box and clicks on **[click to filter]**, only the overwritten revisions will be displayed.

**\*Please note** that it is also possible to apply the [revision overwritten] filter with the regular filters' section. However, it is quicker to only have one check box to tick.

Hence the Quick Filter concept is also here to provide a quick application of a filter which is often used, without having to scroll down the filter drop-down list to find the filter.

Quick Filters can be configured for the following modules:


- Project Overview (*the filter section below the advance switchboard in the Home Page*)
- Report Overview
- Revision Overview
- Audit Overview
- Disbursement Overview
- Monitoring Overview

### II) How to manage quick filters?

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To add, edit or delete quick filters, follow this navigation: *System Setup > Configuration Setup > Manage Quick Filters*

**Please note, this page is only accessible to the HFU Admin user role. If you wish to configure Quick Filters, please contact [gms-support@un.org](mailto:gms-support@un.org)(mailto:gms-support@un.org) to be granted the HFU Admin user role.**



Fund Name: DummyFund 71

Role: Humanitarian Financing Unit (HFU)



**DummyFund 71**  
(Humanitarian Financing Unit (HFU))

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

### Tasks Overview

**Projects Task List**  Exclude configured project statuses Refresh

Date Assigned ▾	Code	Budget	Cluster
06/05/2021 05:13 PM	DUMMY\16628	1,399,067.80	Health (57%), Food security (43%)

**Financial Report Task List**  Exclude configured Financial Report Statuses Refresh

Date Assigned ▾	Code	Report Type	Report Name
09/04/2021 09:02 PM	DUMMY\13211	Final	Final Financial repor

**Configuration Setup**  
Configuration Setup

**Manage Quickfilters**  
Manage Quickfilters

**Clusters**  
Clusters and Sub-sector management

**Manage SRC Scorecards**  
Manage Strategic Review Scorecards

**Manage Standard Activities**  
Manage Standard Activities


**Manage Quickfilters**  
Manage Quickfilters

**Operation Modality Configuration**  
Operation Modality Configuration

**Status**

Final Financial Report Under Review

In this page, you can see the list of the Overview modules along with the related Quick Filters, if any.




Fund Name:

Role:

**DummyFund 71**  
(Humanitarian Financing Unit (HFU))



[FUND HOME](#)
[LOGOUT](#)

Welcome: gms-support@un.org

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

### Manage Quick Filters


**Project Overview Filters**

Filter Name	Operator	User Group	Order	Update Details	Action
FCS Finance: TR review	IN				[Edit] [Delete]
FCS Finance: Disbursement	IN				[Edit] [Delete]
FCS Finance: MoU review	IN				[Edit] [Delete]
FCS Finance: User task inbox	IN				[Edit] [Delete]
Approved projects	>=	Auditors, FCS Finance, GMS Admin team (HQ FCS), Humanitarian Financing Unit (HFU)	1		[Edit] [Delete]
Approved projects	>=		1		[Edit] [Delete]

**Report Overview Filters**

No Quickfilters found

**Revision Overview Filters**

Filter Name	Operator	User Group	Order	Update Details	Action
Projects revision overwritten		GMS Admin team (HQ FCS), Humanitarian Financing Unit (HFU)	1		[Edit] [Delete]

CBPF GRANT MANAGEMENT SYSTEM (GMS)

**Monitor Overview Filters**  
No Quickfilters found



**Disbursement Overview Filters**  
No Quickfilters found

**Audit Overview Filters**

Filter Name	Operator	User Group	Order	Update Details	Action
test quickfilter - audit approved by finance	=	FCS Finance, GMS Admin team (HQ FCS), Humanitarian Financing Unit (HFU)	1		[Edit] [Delete]

Add New Quickfilter

**A. ADDING A NEW QUICK FILTER**

CBPF GRANT MANAGEMENT SYSTEM (GMS)

To add a new Quick Filter, go to the bottom of this page, and click on **[Add new Quick Filter]**.

Disbursement Overview Filters
No Quickfilters found

Audit Overview Filters					
Filter Name	Operator	User Group	Order	Update Details	Action
test quickfilter - audit approved by finance	=	FCS Finance, GMS Admin team (HQ FCS), Humanitarian Financing Unit (HFU)	1		<a href="#">[Edit]</a> <a href="#">[Delete]</a>

**Add New Quickfilter**

In the 'Add/Edit Quick Filter page', fill the mandatory and optional fields, following the guidance provided below the screenshot.



# CBPF GRANT MANAGEMENT SYSTEM (GMS)

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Add/Edit Quickfilters

<b>Filter Name:</b>	<input type="text"/>														
<b>Description:</b>	<div style="border: 1px solid #ccc; height: 80px;"></div>														
<b>Operator:</b>	<input type="text" value="Select Operator"/>														
<b>Filter Type:</b>	<table border="1"> <thead> <tr> <th>Overview tab</th> <th>Order</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Project Overview</td> <td><input type="text"/></td> </tr> <tr> <td><input type="checkbox"/> Report Overview</td> <td><input type="text"/></td> </tr> <tr> <td><input type="checkbox"/> Revision Overview</td> <td><input type="text"/></td> </tr> <tr> <td><input type="checkbox"/> Monitor Overview</td> <td><input type="text"/></td> </tr> <tr> <td><input type="checkbox"/> Disbursement Overview</td> <td><input type="text"/></td> </tr> <tr> <td><input type="checkbox"/> Audit Overview</td> <td><input type="text"/></td> </tr> </tbody> </table>	Overview tab	Order	<input type="checkbox"/> Project Overview	<input type="text"/>	<input type="checkbox"/> Report Overview	<input type="text"/>	<input type="checkbox"/> Revision Overview	<input type="text"/>	<input type="checkbox"/> Monitor Overview	<input type="text"/>	<input type="checkbox"/> Disbursement Overview	<input type="text"/>	<input type="checkbox"/> Audit Overview	<input type="text"/>
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<input type="checkbox"/> Audit Overview	<input type="text"/>														
<b>User Group:</b>	<input type="text" value="Select User Group"/>														
<b>Status:</b>	<table border="1"> <tr> <td><b>Instance Type:</b></td> <td><input type="text" value="Select Instance Type"/></td> </tr> <tr> <td><b>Standard Status:</b></td> <td><input type="text" value="Select Standard Status"/></td> </tr> <tr> <td><b>Reserve Status:</b></td> <td><input type="text" value="Select Reserve Status"/></td> </tr> </table>	<b>Instance Type:</b>	<input type="text" value="Select Instance Type"/>	<b>Standard Status:</b>	<input type="text" value="Select Standard Status"/>	<b>Reserve Status:</b>	<input type="text" value="Select Reserve Status"/>								
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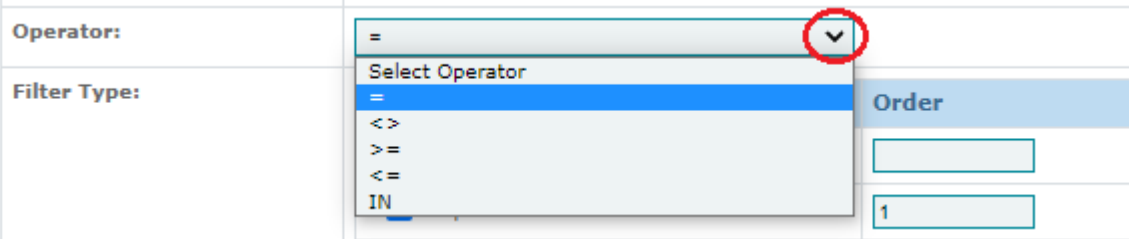
CBPF GRANT MANAGEMENT SYSTEM (GMS)

Save Save & Back Back

**Fields description:**

- **Filter Name** (mandatory - text box): Enter the name of the quick filter to be created.
- **Description** (text box): Enter the description of the filter. This description will be displayed by hovering on the question mark icon next to the filter (see screenshot below)
- **Operator** (drop down box): Select the operators desired for the filter from the provided list.

Quick GMS Focus on operators: the operator is linked to the status condition of the quick filter. For instance, if you select "=" as operator, and then "project draft" in the status option, this will filter only the projects in draft. If you select ">" and "project draft", this will filter all project that have moved above the "project draft" stage of the workflow.



- **Filter Type – Overview tab** (checkbox): Select the tabs for which the filter is applicable. If you wish to create a Quick Filter for all overviews, please tick all boxes.
- **Filter Type – Order** (checkbox): Please insert in this field a number (1, 2 etc.), this number represents the rank orders if there are several quick filters.
- **User Group:** (drop down box): Select the user group for which this filter is applicable.

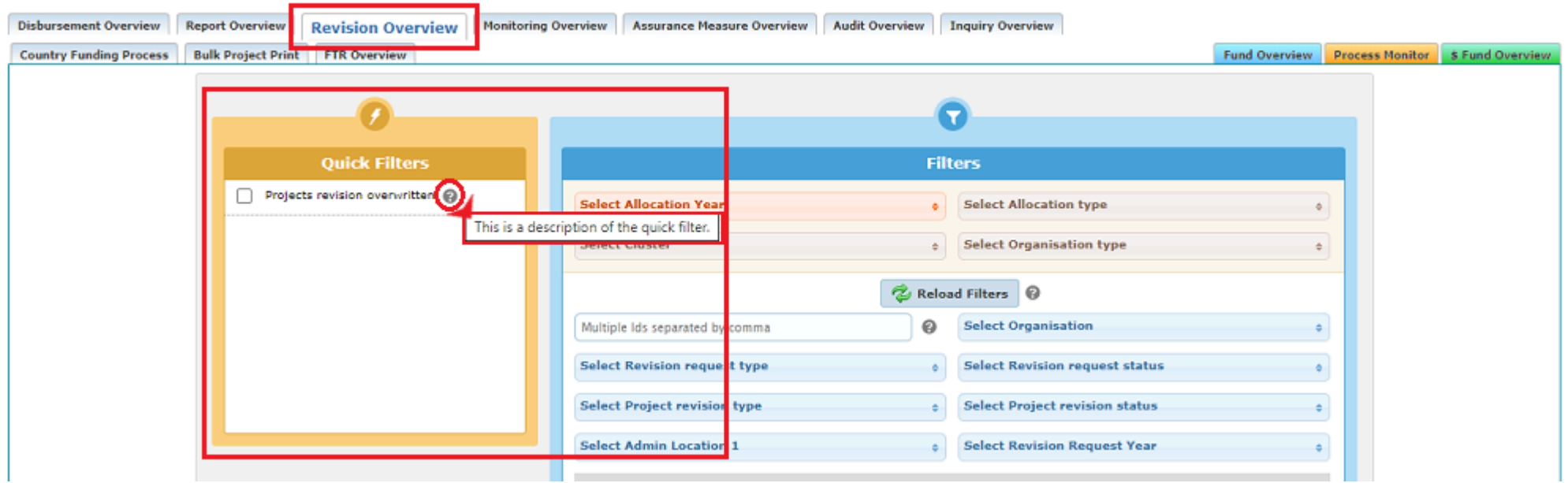
## CBPF GRANT MANAGEMENT SYSTEM (GMS)

- **Status – Instance Type** (drop down box): Select the instance type from the list provided.
- **Status – Standard Status** (drop down box): Select the standard statuses from the list provided.
- **Status – Reserve Status** (drop down box): Select the reserve statuses from the list provided.
- **Filter Condition** (text box): This section requires technical knowledge. Only GMS Admin user role can enter inputs in this box. This is not a necessary step in the quick filter configuration.
- **Sorting Condition** (text box): This section requires technical knowledge. Only GMS Admin user role can enter inputs in this box. This is not a necessary step in the quick filter configuration.

After configuring the quick filter, please click on **[Save]** or **[Save and Back]**.

The quick filter will be added to the Overview module(s) (you will need to refresh the page to see the quick filter).

Revision Overview



The screenshot shows the 'Revision Overview' page with several navigation tabs. The 'Revision Overview' tab is highlighted with a red box. Below the tabs, there are two main sections: 'Quick Filters' and 'Filters'. The 'Quick Filters' section is highlighted with a red box and contains a filter 'Projects revision overwritten' with a question mark icon. A tooltip points to this icon with the text 'This is a description of the quick filter.' The 'Filters' section contains various dropdown menus for selection, including 'Select Allocation Year', 'Select Allocation type', 'Select Organisation type', 'Select Organisation', 'Select Revision request type', 'Select Revision request status', 'Select Project revision type', 'Select Project revision status', 'Select Admin Location 1', and 'Select Revision Request Year'. There is also a 'Reload Filters' button with a question mark icon.

**B. EDITING A QUICK FILTER**

To edit a Quick Filter, go to the ['Manage Quick Filter' page \(#manage\\_quick\\_filters\)](#), and click on **[edit]** of the Quick Filter line.

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Manage Quick Filters

Project Overview Filters					
Filter Name	Operator	User Group	Order	Operator Icons	Action
FCS Finance: TR review	IN				[Edit] [Delete]
FCS Finance: Disbursement	IN				[Edit] [Delete]
FCS Finance: MoU review	IN				[Edit] [Delete]
FCS Finance: User task inbox	IN				[Edit] [Delete]
Approved projects	>=	Auditors, FCS Finance, GMS Admin team (HQ FCS), Humanitarian Financing Unit (HFU)	1		[Edit] [Delete]
Approved projects	>=		1		[Edit] [Delete]

In the 'Add/Edit' quick filter page, edit the Quick Filter and click on **save**. To learn more on each of the fields on this page, [please refer to this section of the article. \(#add\\_quickfilter\)](#).

CBPF GRANT MANAGEMENT SYSTEM (GMS)

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Add/Edit Quickfilters

<b>Filter Name:</b>	<input type="text"/>														
<b>Description:</b>	<div style="border: 1px solid #ccc; height: 80px;"></div>														
<b>Operator:</b>	<input type="text" value="Select Operator"/>														
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<b>Sorting Condition:</b>	<div style="border: 1px solid #ccc; height: 80px;"></div>														



Save Save & Back Back

**C. DELETING A QUICK FILTER**

To delete a Quick Filter, go to the 'Manage Quick Filter' page, and click on **[delete]** of the Quick Filter line.

**Please note**, if the Quick Filter was configured for several Overviews, you need to delete the Quick Filter in all Overview Filter Section if you wish to delete it everywhere.

**Manage Quick Filters**

Project Overview Filters						
Filter Name	Operator	User Group	Order	Update Status		Action
FCS Finance: TR review	IN					[Edit] [Delete]
FCS Finance: Disbursement	IN					[Edit] [Delete]
FCS Finance: MoU review	IN					[Edit] [Delete]
FCS Finance: User task inbox	IN					[Edit] [Delete]
Approved projects	>=	Auditors, FCS Finance, GMS Admin team (HQ FCS), Humanitarian Financing Unit (HFU)	1			[Edit] <b>[Delete]</b>
Approved projects	>=		1			[Edit] [Delete]