

CBPF GRANT MANAGEMENT SYSTEM (GMS)

PARTNER(/content/partner)	HFU(/content/hfu)	CBPF FINANCE(/content/cbpf-finance)	CLUSTER
Guest(/content/guest)			COORDINATOR(/content/cluster-coordinator)

> PARTNER(/content/partner) > Tool Tips

Tool Tips

[Download this Page\(/page/print/pdf/node/155\)](/page/print/pdf/node/155)

The following are navigation tool tips that should prove useful to a user in navigating through GMS:

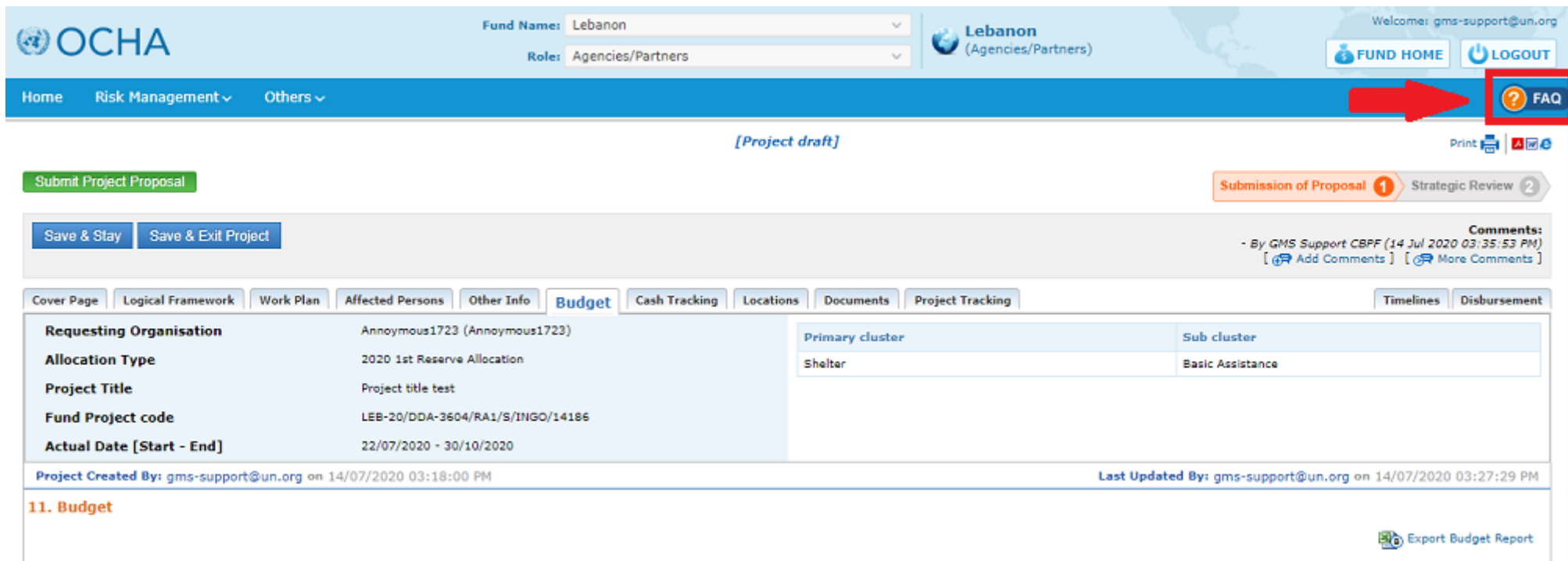
- [FAQ Icon\(#FAQ_icon\)](#).
- [Field Description and/or Requirement\(#field_desc_req\)](#).
- [Save Often!\(#save_often\)](#).
- [Print\(#print\)](#).
- [Red tabs Blue tabs\(#red_tabs_blue_tabs\)](#).
- [Orange buttons versus Green buttons\(#orange_vs_green_btns\)](#).
- [Making Comments\(#making_comments\)](#).
- [Viewing Comments\(#viewing_comments\)](#).
- [Action Icons\(#action_icons\)](#).
- [Quick Access \(for HFU/OCU/FCS/HC/CC users only\)\(#quick_access\)](#).

FAQ icon

CBPF GRANT MANAGEMENT SYSTEM (GMS)


The FAQ tooltip is accessible on all pages of the GMS. It redirects to a guidance note dedicated to the page.

In the example below, upon clicking on the FAQ tooltip of the Project's proposal page / the Budget tab, a new tab will open in your browser, opening the specific related section in the 'Project proposal template and submission' article of the Help portal.



The screenshot shows the OCHA GMS interface. At the top, there is a navigation bar with the OCHA logo, a dropdown menu for 'Fund Name' (set to Lebanon), and another dropdown for 'Role' (set to Agencies/Partners). To the right, it says 'Welcome: gms-support@un.org' and has buttons for 'FUND HOME' and 'LOGOUT'. Below this is a blue navigation bar with 'Home', 'Risk Management', and 'Others'. A red arrow points to a 'FAQ' button with a question mark icon, which is highlighted with a red box. Below the navigation bar, the page title is '[Project draft]'. There are buttons for 'Submit Project Proposal', 'Save & Stay', and 'Save & Exit Project'. A progress indicator shows 'Submission of Proposal 1' and 'Strategic Review 2'. A comments section shows a comment from 'GMS Support CBPF' dated 14 Jul 2020. Below this is a tabbed interface with tabs for 'Cover Page', 'Logical Framework', 'Work Plan', 'Affected Persons', 'Other Info', 'Budget' (selected), 'Cash Tracking', 'Locations', 'Documents', 'Project Tracking', 'Timelines', and 'Disbursement'. The 'Budget' tab is active, showing a table with columns for 'Primary cluster' and 'Sub cluster'. The table contains one row: 'Shelter' under 'Primary cluster' and 'Basic Assistance' under 'Sub cluster'. Below the table, it says 'Project Created By: gms-support@un.org on 14/07/2020 03:18:00 PM' and 'Last Updated By: gms-support@un.org on 14/07/2020 03:27:29 PM'. At the bottom, there is a section titled '11. Budget' and an 'Export Budget Report' button.

CBPF GRANT MANAGEMENT SYSTEM (GMS)



OCHA CBPF GRANT MANAGEMENT SYSTEM (GMS) - SUPPORT / HELP PORTAL

Welcome, Hortense Thursday, Oct 15, 2020 10:50:30 AM | Logout

PARTNER > HFU > FCS FINANCE > CLUSTER COORDINATOR > GUEST >

Project Proposal Template and Submission

Getting started with the GMS

- Grants Management System (GMS) Overview
- User Registration
- GMS Agency / Partner Home Page
- Organization Info
- Tool Tips

Eligibility Process

- Due Diligence
- Capacity Assessment

Project Proposal Template and Submission


View Edit Access control

Download this Page

- How to create a Project Proposal
- The 8+3 Project Proposal
 - Cover Page
 - Logical Framework
 - Work Plan
 - Affected Persons
 - Other Information
 - **Budget**
 - Cash Tracking
 - Locations

Field Description and/or Requirement

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Field Description and/or Requirement:  The question mark (?) icon will provide you with a field description, whereas the asterisk (*) icon will notify you that the field is required.

CBPF GRANT MANAGEMENT SYSTEM (GMS)

[Under final TR review]

Print   

[Send final TR to HFU](#) [Send back to IP](#)

Strategic Review **2** Technical Review **3** HC Final Approval **4**

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

Comments: Description of cost has been c...
 - By *Muhammad Jugosa* (07 Oct 2015 01:16:42 PM)
[\[Add Comments \]](#) [\[More Comments \]](#)

[Cover Page](#) [Background](#) [Logical Framework](#) [Work Plan](#) [M & R Details](#) [Other Info](#) [Budget](#) [Locations](#) [Documents](#) [Project Tracking](#) [Project Admin](#) [Timelines](#) [Disbursement](#)

Project Created By: *youssef.jugosa@unicef.org* on 30/08/2015 12:28:00 PM Last Updated By: *Elizabeth.Lock@save-the-children.org* on 28/09/2015 12:40:00 PM

This section cannot be edited. For any changes, please contact administrator : *Aisha Hummerda* (*Hummerda@un.org*); Skype: *Aishahummerda*

Requesting Organisation XX (Test Organization)
Allocation Type HPF 2015 Second Standard Allocation

Primary cluster	Sub cluster
Education	None

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

Project Title *	<input type="text" value="Return to school: supporting access to education for 6,000 children in Kobane town"/>	Allocation Type Category	<input type="text" value="Select"/>
Planned project duration *	<input type="text" value="3 months"/>	Project budget in US\$	<input type="text" value="220,000.39"/> <small>(given automatically from budget tab. Includes Actual Implementation Cost)</small>
Fund Project code	Internal <small>(Generated automatically)</small> XXX-15/0000/SA2/E/INGO/0000	External/Organization's Project code (if any)	<input type="text"/>
Planned Start Date *	<input type="text" value="01/10/2015"/>	Planned End Date *	<input type="text" value="31/12/2015"/>
Actual Start Date <small>(as per Agreement)</small>	<input type="text" value="01/10/2015"/>	Actual End Date <small>(as per Agreement)</small>	<input type="text" value="31/12/2015"/>
Project Summary *	<p>Please provide a description of the project.</p> <p>The project will facilitate the return to formal education for 6,000 girls and boys in Kobane town through the provision of essential teaching and learning materials as well as small-scale infrastructure repairs to four schools in Kobane. All activities will be implemented in collaboration with the Kobane department of education.</p>		



Please provide a description of the project.

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Save Often!

Save Buttons: 'Save & Stay' versus 'Save & Exit'



It is recommended that the user continuously save their work in the GMS. There are two saving options available: 'Save & Stay' will save the work and let the user remain on the screen they are working on. The 'Save & Exit Project' option allows the user to save and exit the project.




Print

Print Users can export the documents that they are drafting, reviewing or viewing on the GMS in PDF, Word or HTML, by clicking on the respective icons at the top right of the screen when they are inside the document (project proposal, reports).

At various stages within the project lifecycle, a user is able to print out field information to help them gather the required GMS field data in order to input into GMS at a later date. For instance, a user can print out a project proposal. Note: you can download narrative documents in Word, and budgets/financial reports in Excel.

CBPF GRANT MANAGEMENT SYSTEM (GMS)


[Under final TR review]

Print   

Send final TR to HFU Send back to IP

Strategic Review 2 Technical Review 3 HC Final Approval 4

Save & Stay Save & Exit Project


Comments: Description of cost has been c...
- By *Yusef Jugosa* (07 Oct 2015 01:16:42 PM)
[ Add Comments] [ More Comments]

Cover Page Background Logical Framework Work Plan M & R Details Other Info Budget Locations Documents Project Tracking Project Admin Timelines Disbursement

Project Created By: *yusef.jugosa@unicef.org* on 30/08/2015 12:28:00 PM Last Updated By: *Elizabeth.Lock@save-the-children.org* on 28/09/2015 12:40:00 PM

Red tabs Blue tabs

[Under final TR review]

Print   

Send final TR to HFU Send back to IP

Strategic Review 2 Technical Review 3 HC Final Approval 4

Save & Stay Save & Exit Project

Comments: Description of cost has been c...
- By *Yusef Jugosa* (07 Oct 2015 01:16:42 PM)
[ Add Comments] [ More Comments]

Cover Page Background Logical Framework Work Plan M & R Details Other Info Budget Locations Documents Project Tracking Project Admin Timelines Disbursement

Project Created By: *yusef.jugosa@unicef.org* on 30/08/2015 12:28:00 PM Last Updated By: *Elizabeth.Lock@save-the-children.org* on 28/09/2015 12:40:00 PM

Tabs that are in Red, indicate that there are still required fields within that tab that need to be filled in. Please note, you will not be able to save the contents within the tab until all required fields are entered.

Tabs that are in Blue, indicate that all required fields within the tab have been filled out and the contents within the tab has been saved.

Orange buttons versus Green buttons

CBPF GRANT MANAGEMENT SYSTEM (GMS)

PP Re-draft

Send to TR Recommended




Orange buttons are often used for the administrative purposes of pushing a project through to the next project status in the allocation workflow. Green buttons are often used by Agency/Partner to take some type of action such as 'Submit'

Making Comments

A user with edit or read-only rights to a project proposal, can make comments at the project level as well as at the project proposal tab level.

To make comments at the project level, the user is to first log into GMS, and select the desired project within their Home Page. Once within the desired project proposal, click on the 'Add Comments' hyperlink, located at the top left corner of screen. Once you have clicked on this link, a Project Comments window will appear. Add your comments in the space provided and press 'Save' when done.

CBPF GRANT MANAGEMENT SYSTEM (GMS)

[Under final TR review] Print   

Send final TR to HFU Send back to IP

Strategic Review 2 Technical Review 3 HC Final Approval 4

Save & Stay Save & Exit Project

Comments: Description of cost has been c...
 - By *Youssef Jugeen* (07 Oct 2015 01:16:42 PM)
[Add Comments](#) [More Comments](#)

Cover Page Background Logical Framework Work Plan M & R Details Other Info Budget Locations Documents Project Tracking

Project Admin Timelines Disbursement

Project Created By: *youssef.jugeen@unicef.org* on 30/08/2015 12:28:00 PM Last Updated By: *Elizabeth.Lock@save-the-children.org* on 28/09/2015 12:40:00 PM

This section cannot be edited. For any changes, please contact Ramonada@un.org; Skype: [Arshathkhanada](#)

Requesting Organisation XX (Test Organization)

Allocation Type HPF 2015 Second Standar

Mandatory fields are marked with an asterisk *. Always save

Project Title *	Return to school: supporting access t
Planned project duration ? *	3 months
Fund Project code	Internal (Generated automatically) XXX
Planned Start Date *	01/10/2015
Actual Start Date (as per Agreement)	01/10/2015
Project Summary ? *	The project will facilitate the return activities will be implemented in col

Project Comments X

Comments for project in "Under final TR review"

Status Changed From: TR-3 draft **To:** Under final TR review

By: *youssef.jugeen@unicef.org*, *Agencies/Partners* (07/10/2015 01:16 PM)
 Description of cost has been changed i.e. direct to support and BoQ ia also uploaded.

[View Previous Comments](#)

Save Cancel

	Sub cluster
	None

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Comments for Cover Page

By Date By Status [View all comments](#)

Leave Comment:


Add Comments here →



By hannah@bigheart.org On 5/4/2015 05:30:30 (TR-1 draft)

1) Question - • BENEFICIARIES: the number of beneficiaries is not clear please specify? Answer - Beneficiaries are broken down above as 965 households / 5,790 direct beneficiaries. This includes 1216 men, 1216 women, 1621 boys and 1737 girls.

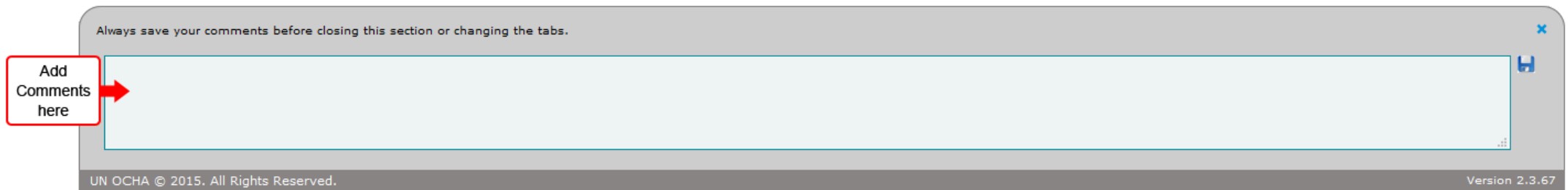
By drossi@sy.goal.ie On 23/3/2015 03:01:58 (Under 1st TR review)

• BENEFICIARIES: the number of beneficiaries is not clear please specify

Comments icon → 

To add comments at the tab level, either go to the bottom of the tab and enter the comments within the comments section provided. Or click on the comments icon  located on the lower right margin of the screen. After comments are made, please do not forget to press 'Save'.  Once you click on the comments icon, a comments window will appear, enter comments within this window and press 'Save'.




CBPF GRANT MANAGEMENT SYSTEM (GMS)



Viewing Comments

A user can view comments that have been made on the project proposal by clicking on the 'More Comments' hyperlink to review 'Workflow Status Comments'.

CBPF GRANT MANAGEMENT SYSTEM (GMS)

[Under final TR review] Print   

Send final TR to HFU
Send back to IP
Strategic Review 2
Technical Review 3
HC Final Approval 4

Save & Stay
Save & Exit Project

Comments: Description of cost has been c...
 - By *Yusuf Jugosa* (07 Oct 2015 01:16:42 PM)
[\[Add Comments \]](#) [\[More Comments \]](#)

Cover Page
Background
Logical Framework
Work Plan
M & R Details
Other Info
Budget
Locations
Documents
Project Tracking
Project Admin

Project Created By: *yusuf.jugosa@unicef.org* on 30/08/2015 12:28:00 PM Last Updated By: *Kathleen.Lock@save-the-children.org* on 28/09/2015 10:28:00 PM

This section cannot be edited. For any changes, please contact: *(yusuf.jugosa@unicef.org)*; **Skype:** *AsahathComments*

Requesting Organisation XX (Test Organization)

Allocation Type HPF 2015 Second Stand...

Mandatory fields are marked with an asterisk *. Always save

Project Title *	Return to school: supporting access...
Planned project duration ? *	3 months
Fund Project code	Internal (Generated automatically) XXX
Planned Start Date *	01/10/2015
Actual Start Date (as per Agreement)	01/10/2015
Project Summary ? *	The project will facilitate the return activities will be implemented in co...

Workflow Status Comments

Status Changed From: TR-3 draft **To:** Under final TR review

By: *yusuf.jugosa@unicef.org*, Agencies/Partners (07/10/2015 01:16 PM)

Description of cost has been changed i.e. direct to support and BoQ ia also uploaded.

Status Changed From: Under TR3 HFU **To:** TR-3 draft

By: *ks@un.org*, Humanitarian Financing Unit (HFU) (06/10/2015 10:29 AM)

1.1, 1.3: Not direct costs. Pls change to Support cost

5.1, 5.2 move to category 7 and change from direct cost to support cost

Pls upload BoQ for 2.1, 2.2, 2.3, "vehicle running costs" (5.2) and for 7.1

Pls. address all commetns latest by Wednesday 07 October 2015 14:00 hrs. Turkey time

Status Changed From: Under 3rd TR review **To:** Under TR3 HFU

Close

Sub cluster

None	
------	--

Save

More Comments

CBPF GRANT MANAGEMENT SYSTEM (GMS)

Or at the bottom of each project proposal tab, view the comments trail provided within. The comments trail will provide you with who made the comment, the date and time stamp of the comment, the workflow project status in which the comment was made, and the comment itself.

Comments for Cover Page

By Date By Status [View all comments](#)

Leave Comment:

By hannah@bigheart.org On 5/4/2015 05:30:30 (TR-1 draft)



Comments History 1) Question - • BENEFICIARIES: the number of beneficiaries is not clear please specify? Answer - Beneficiaries are broken down above as 965 households / 5,790 direct beneficiaries. This includes 1216 men, 1216 women, 1621 boys and 1737 girls.

By drossi@sy.goal.ie On 23/3/2015 03:01:58 (Under 1st TR review)

• BENEFICIARIES: the number of beneficiaries is not clear please specify

Action Icons

CBPF GRANT MANAGEMENT SYSTEM (GMS)

		Camp Coordination / Management	TUR-14/CP/CCM/INGO/0000
2.	 		000/R/FS/I
		Education	TUR-15/0000/CP/E/INGO/0000
4.		Food Security	TUR-15/0000/CP/FS/INGO/0000

Edit Proposal (points to edit icon)


Print Proposal (points to print icon)

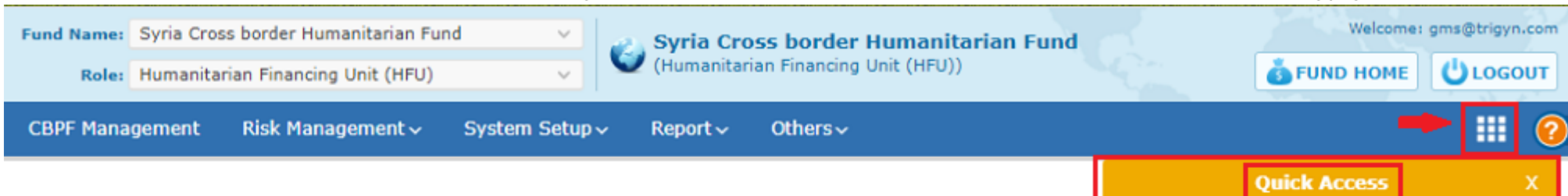
Activate Financial Report (points to financial report icon)

View Proposal (points to view icon)

The Quick Access (not available to Agency/Partner user role)

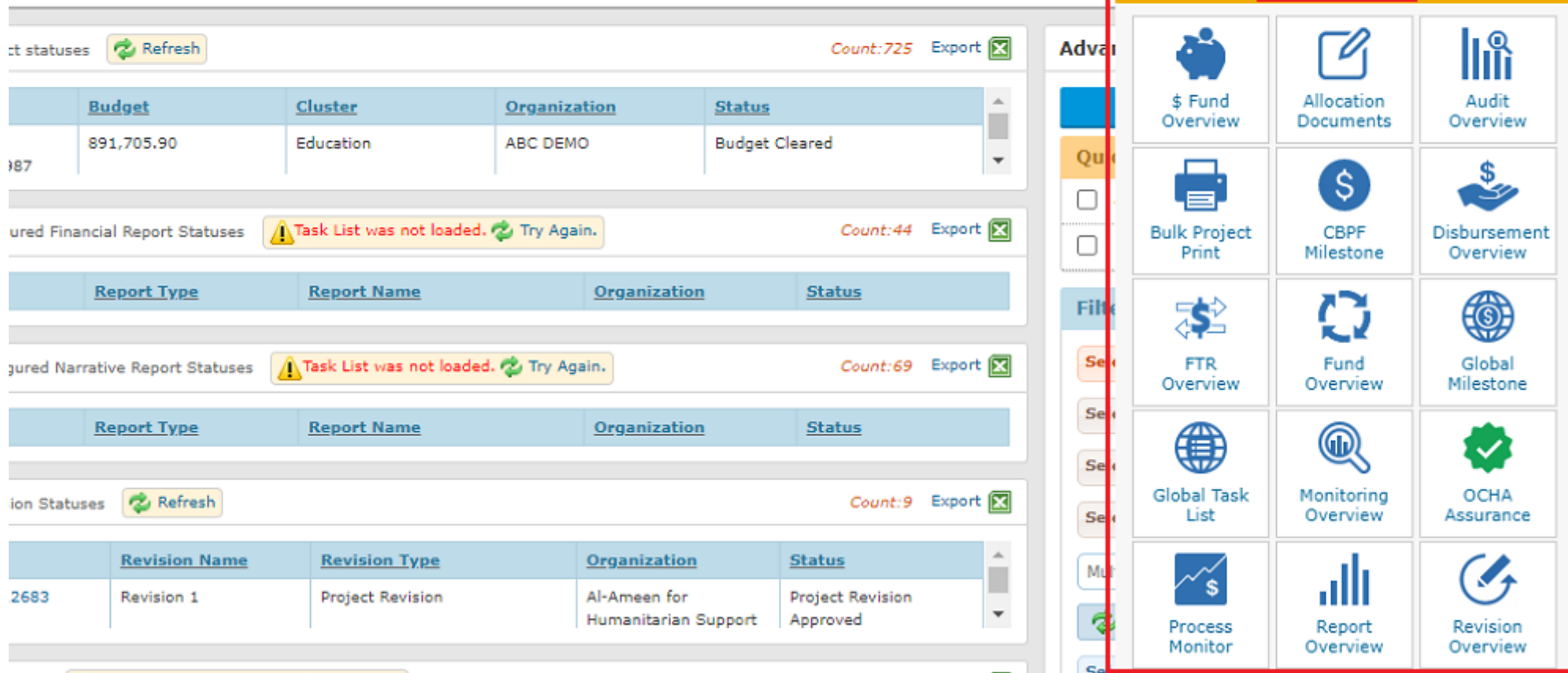
The Quick Access tool, accessible on all pages of the GMS, enables users to quickly access sections in the GMS.

To access the Quick Access tool, click on this icon  on the right-hand side of the menu bar, then click on one of the icons to access its according page on the GMS.



The screenshot shows the GMS user interface. At the top, there are dropdown menus for 'Fund Name: Syria Cross border Humanitarian Fund' and 'Role: Humanitarian Financing Unit (HFU)'. To the right, it says 'Welcome: gms@trigyn.com' and has 'FUND HOME' and 'LOGOUT' buttons. Below this is a blue navigation bar with 'CBPF Management', 'Risk Management', 'System Setup', 'Report', and 'Others'. On the right side of this bar is a grid icon (Quick Access) and a help icon. A red arrow points to the grid icon. Below the navigation bar, a yellow 'Quick Access' panel is visible with a close button 'X'.

CBPF GRANT MANAGEMENT SYSTEM (GMS)



The screenshot displays the GMS interface with several report status sections and a Quick Access panel on the right.

Approved Financial Report Statuses (Count: 725)

Budget	Cluster	Organization	Status
891,705.90	Education	ABC DEMO	Budget Cleared

Approved Narrative Report Statuses (Count: 44)

Report Type	Report Name	Organization	Status

Revision Statuses (Count: 9)

Revision Name	Revision Type	Organization	Status
Revision 1	Project Revision	Al-Ameen for Humanitarian Support	Project Revision Approved

Quick Access Panel (Right Side):

- \$ Fund Overview
- Allocation Documents
- Audit Overview
- Bulk Project Print
- CBPF Milestone
- Disbursement Overview
- FTR Overview
- Fund Overview
- Global Milestone
- Global Task List
- Monitoring Overview
- OCHA Assurance
- Process Monitor
- Report Overview
- Revision Overview

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