Project Proposal Template and Submission

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Once an Allocation is launched, the HFU will open the Project Submission timeframe in GMS. The implementing partners who have successfully undergone the online eligibility process (Due Diligence / Capacity Assessment) will be able to view the open call and create a proposal.

Note: The implementing partners whose Due Diligence and Capacity Assessment have not been finalized and approved will not be able to apply, nor view the Project Submission timeframe.
From the Partner Home Page, the implementing partner will be able to see the guidance and details provided with the Project Submission timeframe.

- Submission deadline: Announces until when (day, month, year, and local time) the submission is open, and in how many days it will expire.
- Create New Project: Icon that allows to create the Project Proposal. If the icon indicates RA, the allocation is a reserve allocation and if it indicates SA, it is a Standard Allocation.
- Allocation Type Document: Displays the documents that outline the priorities of the allocation, e.g. the Allocation Strategy Paper.
- Cluster Priorities: Shows the cluster, priorities activities, and geographical cluster priorities for the allocation.
- Cluster Objectives: Displays which cluster specific objectives and HRPs have been linked to the allocation.

Creating a Project Proposal

In the Partner Home page, the user can click on the “Create New Project” icon.
This will open the “create project” page, where all the basic details of the project will need to be outlined. Please note that the data can be modified once the project proposal has been created.

After filling out the information, the partner can click on [Create project]. The Project Proposal will be generated, based on the details provided.
The 8+3 Project Proposal

The 8+3 Project proposal template aims to reflect OCHA's alignment with the Grand Bargain requirements. These simplified and streamlined requirements, referred to as ‘GPPI 8+3’, will be used across all 18 CBPFs. With 8 core questions and 3 additional mandatory questions, this template allows for a more harmonized form.
Field Descriptions:

- Project Title: Title defined by the implementing partner for the project.
- Allocation Type Category: (Filled in by OCHA Staff if relevant only).
- Fund Project Code: Code generated automatically by the system as a reference for the project. The four or five last numbers of the code are unique to the project and will allow to refer to the project.
- Planned Start/End Date: Refers to the project’s implementation Start/End Dates (day/month/year), which can be selected from the calendar provided.
- Project Duration: Project Duration will be calculated automatically based on the Start/End Date selected and will appear in months and days.
- Project Budget in US$: Automated from the data provided in the budget tab of the proposal, includes the PSC and Audit Cost.
- Project Summary (max 4,000): Provides a description of the project, including reference to how the differential needs, concerns, and priorities of the Affected Persons of different gender, age, and categories.
- Other Funding Secured for this Project: Provides the value and source if any other funds have been secured – if not, it can remain blank.
- Organization Focal Point contact details: Details of the person in charge of the project proposal submission for the implementing partner.
- Does specific needs assessment exist for this project (max 4,000): Explains the specific needs of the target group(s), and the existing capacity and gaps, barriers to adequate participation by sex and age, and underlying factors. Aims to outline the existing capacity and gaps, share how the needs assessment was conducted and list the baseline data as well as how the number of beneficiaries was developed. In addition, indicated references to assessments (Multi-cluster/sector Initial Rapid Assessments)
- Grant Request Justification: Describes the proposed intervention, how the activities of the project will contribute to addressing the needs identified, with reference to the relevant cluster(s)’s Strategic Response Plan(s).
- Link to Allocation Strategy (max 4,000): Describes how the project fits with the Fund’s Strategic Objectives and Cluster/Sector Specific Objectives (for Standard allocations) OR justifies why the project should be considered for funding (for Reserve allocations).

Modifying the Clusters

The existing cluster(s) can be modified from the cover page, by the user at any draft stage by clicking on the [Modify Cluster] button.

The cluster can be changed by selecting the desired cluster from the dropdown box. Another cluster can be added by clicking on the + icon. To remove a cluster, the - icon can be used. The total percentage should be equal to 100.

To view the project impact if the clusters are changed, the user can click on the [Validate Impact] button.
Click on the [Save] button to accept the impact and save the changes made.

LOGICAL FRAMEWORK
Field Descriptions:

- **Overall Project Objective**: Describes the overall objective(s) to be achieved through the project.
- **Cluster Objectives**: Objective selected from the list of cluster objectives in the Response Plan for the project’s cluster. Indicates one objective per line but allows for several rows if needed.
- **Humanitarian Response Plan (HRP) Objectives**: Strategic objective linked to the selected cluster objective as defined in the Response Plan.
- **Percentage of Activities**: Indicates the percentage of activities that contribute to each cluster indicated. The total must be 100%.
- **Contribution the cluster/sector Objectives**: How the project will contribute to the cluster/sector selected.
- **Outcome**: Indicates the percentage of activities that contribute to each cluster indicated. The total must be 100%.
- **Output**: Describes the intended outcome. Each outcome must be linked to one output, description, assumptions and risks, activities, and indicators.
- **Output**: Describes the intended output. Each output must be linked to at list one activity and one cluster indicator- additional custom indicators may be added.
- Indicator: Two types of cluster indicators are available: custom or standard. The system will require at least one standard indicator per output. When applicable, the breakdown by age and gender is required.
- Activity: At least one activity must be linked to the output. The activities selected will automatically appear in the work plan and the locations tabs.
- Additional Targets: Describes any additional targets to those mentioned above.

How to fill out the logframe page:

1. Adding at least one cluster objective and one Humanitarian Response Plan (HRP) Objective for each cluster: Select the cluster and HRP objective from the list in each drop down. Add the percentage of activities accordingly.

Note: the total percentage of activities for each cluster must be 100%.

If you wish to add an additional cluster and HRP objective, click on [Add Sector Objective], otherwise click on the [Save & Stay] button.

2. Adding an outcome: Click on [Add Outcome], and fill out the narrative in the popup box. To save the data, click on the [Save] button.
3. Adding one Output for each Outcome: Click on [Add Output] and fill out the narrative in the popup box. To save the data, click on the [Save] button.

4. Adding at least one Standard Indicator per Output: Click on [Add Indicator], select “standard”, the respective cluster and the indicator from the dropdown list, and fill out the different fields. To save the data, click on the [Save] button.

Note: you can add multiple standard/customs Indicators per output, but the system will require at least one of them to be a standard one.
5. Adding at least one activity per output: Click on [Add Activity], and fill out the narrative field. To save the data, click on the [Save] button.

Note: The system will automatically update the message informing the user of what field remains to be added in order to validate the cluster information.
How to modify the logframe’s elements:

To edit an activity/output/indicator of the logframe, please click on the edit icon at the right hand side of the associated line.

To delete an activity/indicator/output/outcome, please click on the delete icon at the right hand side of the associated line.

*Please note,* It is not possible to delete an output without first deleting its associated activities/indicators. Similarly, it is not possible to delete an outcome without first deleting its associated outputs.

If you want to delete an activity/output/outcome but notice that the delete icon is greyed out and that it is not possible to click on it, it means that the linked activities have already been associated with a work plan, a sub-implementing partner and a location. You can check if this is the case by clicking on the information icon at the right-hand side of the activity line.
In order to delete an activity already associated with these elements, users must unlink this activity in the other tabs, namely the Work Plan tab, the Other Info tab and the Locations tab.

- **Work Plan tab**: untick the boxes linked to the activity you wish to delete.

- **Other Info tab**: if applicable, delete the sub-implementing partner associated with the activity by clicking on the delete icon on the right hand side of the activity line.
Location: delete the activity by clicking on the delete icon ✗ on the right hand side of the activity line.

For each tab, save all your changes by clicking on ‘Save and Stay’.

Once all traces of this activity has been removed, you can come back to the logical framework tab and click on the reactivated delete icon ✗ of the activity line.
*Please note,* If the information icon is still at the right-hand side of the activity line, and you cannot see the delete icon, then the activity is still active under one of the previous three tabs. Click on the information icon to know which tab is still active.

To delete an output, delete all its indicators and all its related activities by repeating the above process, and click on the delete icon at the right-hand side of its line.

To delete an outcome, delete all its indicators, its related activities and its related outputs by repeating the above process, and click on the delete icon at the right-hand side of its line.

WORKPLAN
In the workplan, the activities listed in the logical framework will be displayed against the project implementation duration and timeframe, in order to allow the user to link each activity against its timelines, i.e. the months of implementation for the activity.

The months where the project implementation is scheduled to take place will be shown in blue, and the green numbers will refer to the number of duration of the implementation. For each activity, the user will be required to tick the month(s) during which the activity will be taking place.

Note: The work plan page will be updated in case the activities or the start/end date of the project are amended.

**AFFECTED PERSONS**

Field Descriptions:

- **Directly Affected Persons:** They include the following categories: Host communities, Internally Displaced People, Refugees, Others. When selecting the “others” category, details will be required in the adjacent box. Note: The sum of each category is summed in the total column and row, and the overall total is displayed in the screen.
- **Persons with Disabilities:** Out of the total of directly Affected Persons, how many are persons with disabilities. Note: The number of PWD in each column (Men, Women, Boys, Girls) cannot be greater than the total sum of each column of directly Affected Persons.
- **Indirect Beneficiaries:** Indicates an estimate of people who could use the service in addition to the people targeted in the project.

Note: The information provided for the directly Affected Persons will be used in the locations tab.
Field Descriptions:

- Accountability to the Affected Persons: Describes how affected populations and specific beneficiaries have been and will be involved throughout the project cycle.
- Protection Mainstreaming and GBV: Describes how the proposed project mainstreams protection.
- GAM Reference Number: Documentation on the GAM tool, including frequently asked questions and self-guided training materials, can be found on the IASC Gender and Age Marker website - https://iascgenderwithagemarker.com/
- Gender with Age Marker Code: The IASC Gender Marker is utilized by all CBPFs throughout the programme cycle: prospective partners are required to indicate the Gender Marker code as part of the project proposal, and to report on how gender and GBV was addressed during implementation.
- Risk Management: Describes how the risks to project/program implementation were identified, managed, and mitigated, including any operational, security, financial, personnel management or other relevant risks.
- Access: Explains how the organization is able to operate in, or plans to access the areas where the project will be implemented.
- Monitoring and Reporting: Describes the specific arrangements for monitoring and reporting the progress of the project.
- Exit Strategy and Sustainability: Describes the exit strategy and closure steps for the project or program, and an assessment of the sustainability of the results.
- Coordination and Complementarity: Describes any coordination efforts, any synergies that developed, and recommendations for improving coordination in the future.
- Sub Implementing Partner(s): Shows if any Sub-Grants to implementing partners have been planned.

How to add Sub-Implementing Partners

You can add Sub-Implementing Partners at the bottom of the ‘Other Info’ tab of the project proposal template, at section 10.

Type the Sub-Implementing Partner’s (Sub IP) name. If they are not yet approved in the GMS, tick the box ‘Under Approval Partners’.

If you cannot find the Sub-IP in the drop-down list, you need to add it manually. To do so, click on [Click here].

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HOME - https://gms.unocha.org
In the pop-up window, enter the information in the following fields:

- **Acronym**: enter the Sub-IP’s acronym
- **Partner Type**: select the Sub IP’s type of organization from the drop-down list
- **Partner Name**: enter the Sub IP’s name
- **Contact**: although this field is not a mandatory, we strongly encourage IPs to enter the contact details of their Sub-IP (e.g. email address, phone number, contact name, website URL etc.)

Click on [Save].

Enter the information in the mandatory fields:

- **Partner Name**: enter the partner’s name and select it from the drop-down list.
- **Budget in US$**: enter the budget that will be sub-granted to the Sub-IP.
- **Activities towards implementation**: select from the drop-down list the activities in which the sub IP will be included, or that the Sub IP will implement. The activities are automatically drawn from the Logical framework tab. If you can’t find the relevant activities in the list, add them first in the Logical Framework tab.

Click on [Add] to save the Sub IP.

Click on [Save and stay] or [Save and Exit Project] to save the entered information in the GMS.
*Please note,* Once added, Sub IP lines cannot be edited. To change the data entered, you need to delete the Sub IP by clicking on the red cross on the right-hand side of its line, and create a new Sub IP line, with the correct information.

**BUDGET**
### 1. Staff and Other Personnel Costs

<table>
<thead>
<tr>
<th>Code</th>
<th>Budget Line Description</th>
<th>Remarks</th>
<th>D/S/ A</th>
<th>Unit</th>
<th>Unit Cost</th>
<th>Duration Cost</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1</td>
<td>Protection Officer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.2</td>
<td>Security Guard</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Total: 5,000.00

### 2. Supplies, Commodities, Materials

<table>
<thead>
<tr>
<th>Code</th>
<th>Budget Line Description</th>
<th>Remarks</th>
<th>D/S/ A</th>
<th>Unit</th>
<th>Unit Cost</th>
<th>Duration Cost</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1</td>
<td>Medical Supplies</td>
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</tbody>
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Total:

### 3. Equipment

<table>
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<tr>
<th>Code</th>
<th>Budget Line Description</th>
<th>Remarks</th>
<th>D/S/ A</th>
<th>Unit</th>
<th>Unit Cost</th>
<th>Duration Cost</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.1</td>
<td>Computer</td>
<td></td>
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</table>

Total:
### 4. Contractual Services

<table>
<thead>
<tr>
<th>Code</th>
<th>Budget Line Description</th>
<th>Remarks</th>
<th>D / &amp; O</th>
<th>Quantity</th>
<th>Unit Cost</th>
<th>Duration</th>
<th>Total Cost</th>
</tr>
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<td>4.4</td>
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<td>4.5</td>
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**Total**

### 5. Travel

<table>
<thead>
<tr>
<th>Code</th>
<th>Budget Line Description</th>
<th>Remarks</th>
<th>D / &amp; O</th>
<th>Quantity</th>
<th>Unit Cost</th>
<th>Duration</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
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</table>

**Total**

### 6. Transfers and Grants in Counterparts

<table>
<thead>
<tr>
<th>Code</th>
<th>Budget Line Description</th>
<th>Remarks</th>
<th>D / &amp; O</th>
<th>Quantity</th>
<th>Unit Cost</th>
<th>Duration</th>
<th>Total Cost</th>
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</tbody>
</table>

**Total**
Field Descriptions:

- Budget line description: Description text explaining what the money is spent on.
- D/S: Direct/Support – Indicates whether this expense is a direct expense towards the project implementation (e.g. salary of a hired professional) OR support cost (e.g. health insurance of the employees).
- Unit Quantity: Number of items needed.
- Unit cost: Cost of each item.
- Duration: number of days/months this particular item is needed in case it is repetitive
- % charges to ERF: percentage of this expense applied to the current project. This is necessary sometimes for international organizations have multiple ongoing projects with shared resources.

Budget Categories:

1. Staff and Other Personnel Costs
2. Supplies, Commodities, Materials
3. Equipment
4. Contractual Services
5. Travel
6. Transfers and Grants to Counterparts
7. General Operating and Other Direct Costs

The budget line breakdown allows the partners to add the breakdown for a budget line. Once a budget line is saved a blue icon will appear at the end, that will open the breakdown dialog box.
Field Descriptions:

- **CTP**: refers to all programs where cash or vouchers for goods or services is directly provided to beneficiaries. In the context of humanitarian assistance, the term is used to refer to the provision of cash or vouchers given to individuals, household or community recipients; not to governments or other state actors.
- **CTP Modality**: refers to the form of assistance – e.g. cash transfer, vouchers, in-kind, service delivery, or a combination (modalities).
- **Objectives**: Defines if the transfer is designed to achieve sector specific objectives (e.g. purchase of shelter materials) or support overall basic needs (e.g. multi-purpose).
- **Cluster**: If the objective selected is “sector specific”, this field will be enabled in order to inform which sector-specific objectives is the intervention designed to achieve.
- **Conditionality**: Are there prerequisite activities or obligations that a recipient must fulfill in order to receive assistance.
- **Restriction**: Is the transfer restricted to specific vendors or to access per-determined goods/services (restricted) or can it be used with any vendor or to access any good (unrestricted).
- **Value of Cash**: Indicates the estimated value of cash that will be transferred to people assisted through each modality.
Upon accessing the Locations tab, a blank locations map will be displayed. By adding the locations per Budget and Affected Persons, the map will be automatically updated and populated.

Note: Please ensure that the information for the Budget, Logframe activities, and the Affected Persons has been correctly filled out prior to entering the locations data.

**Adding a budget per location**

1. Click on the button [Add Budget Location].
2. To select the desired location, tick the box next to the location name. Please note that the minimum Admin Level location (e.g. Governorate, District, Provinces, …) required will be displayed on the right hand side of the page.
To display all the available options on the different location levels, click on the black arrow adjacent to the location name.
If there is no box next to the location name, the location cannot be selected as it does not meet the minimum Admin Level location requirements.

However, the user can go beyond the minimum requirements: for example, if the required Admin Level location required is a Governorate (Admin Level 1), a District (Admin Level 2) can be selected.

Note: The minimum location level can differ for Affected Persons and Budget locations (e.g. requiring a Budget location level of Admin level 1 and an Affected Persons locations at Admin level 2).

Upon selection of the location, you will be automatically redirected to the selected location budget page – click on [Cancel] to go back or follow the next step to move forward.

3. Insert the percentage of the budget that is aimed for the selected location, and the break down per cluster.

Once the fields have been filled out, click on [Save] if you wish to add a new location, or [Save and Distribute Affected Persons] to move to the next step and add a target number of Affected Persons for this location.
Please note the following:

- The total budget percentage must amount 100%, between the different locations. E.g. if one location percentage is 50%, the sum of the remaining location(s) percentage will need to equal to 50%. There is no restriction to how many locations can be selected.

- For each total budget location percentage, the total percentage selected for the location will need to be fully distributed amongst the cluster(s). The system will enable to select “0%” but will not allow a blank field. E.g. if one location percentage is 50%, the total percentage of a project with two clusters will need to be equal to 50%.

- Once a value is inserted in the total budget location percentage, the system will automatically populate the percentage assigned to each cluster, based on the project cluster break down. This is only a suggestion and can be manually amended by the user.

- Next to the total budget location percentage, a greyed out figure with green indicates the remaining percentage for the total budget locations. If no locations have been selected prior to the action, the value will indicate “100%”.

- In addition to the indication of the remaining percentage for the total location, the system will automatically calculate and display the US$ value for each of the percentages, based on the budget and the percentage provided.
### Adding Affected Persons per location

1. By clicking on [Save and Distribute Affected Persons] or by clicking on [Add Affected Persons] on a saved budget location, you will be directed to the “Add New Affected Persons” page.
2. Select the desired location by ticking the box next to the location name. Only the locations selected in the “budget per location” section will be available.

Note: The minimum location level to select, as defined by the HFU, is displayed on the right-hand side.
Upon selection of the location, you will be automatically redirected to the selected location for Affected Persons page – click on [Cancel] to go back or follow the next step to move forward.

3. Insert the percentage of the budget that is aimed for the selected location, and provide the breakdown of targeted Affected Persons per category.
Please note the following:

- Once a value is inserted in the budget percentage field, the system will automatically populate the budget percentage to each cluster, based on the project cluster break down. This is only a suggestion and can be manually amended by the user.
- Next to each category of “Men, Women, Boy, Girls” field, a greyed out figure with green indicates the remaining Affected Persons that have not been counter for so far, compared against the total number targeted in the Affected Persons tab.

4. Fill out the Affected Persons per cluster break down. From the dropdown in the “Activities linked” field, select the relevant activities.
Note: If one cluster is not relevant for the location, the user can select “No Activities performed and Affected Persons targeted for this cluster” and the section for the cluster will be greyed out.

Insert or amend the existing cluster budget percentage distribution. Please ensure that the total for all the clusters amounts to the total for the selected location.

Proceed with filling out the respective cluster’s Affected Persons breakdowns.

Ensure that the sum of each category/gender/age for all cluster breakdowns reflects the totals provided in the Affected Persons for each category/gender/age.

Click on [Save].

5. To edit the saved values for the targeted Affected Persons, expand the location data, and click on [Edit] in the Affected Persons section.
6. The steps need to be repeated for each location until the location tab is valid (i.e. no more red tab, and no more error message in red).
Once the data is filled out, the user will be able to see a summary or a cluster view of the information.

Cluster view:
The locations related errors preventing the page from being validated - explained
The sum of percentage Budget distribution must be 100:

- **What does it mean**: the sum of the budget percentage allocated to your different locations is lesser or greater than 100%. In the summary view, check the “% Linked” column of the budget location, the total will indicate your sum of percentage Budget Distribution.
- **How to fix it**: Select the location(s) with an incorrect “% Linked”, and click on edit to update the percentage Budget Distribution for the location. You can repeat the action until all your locations percentage Budget Distribution are correct, and your total “% Linked” is 100%.

Each Location in Budget distribution must link to minimum one location in Affected Persons distribution:

- **What does it mean**: There is no affected persons related data assigned to the budget location.
- **How to fix it**: Next to the location box, click on the Add Affected Persons button, and insert the related information.
Total percentage in Affected person distribution must be 100:

- **What does it mean:** the sum of the budget percentage allocated to the Affected Persons different locations is lesser or greater than 100%. In the summary view (available for selection on the right hand side), check the “% Linked” column of the Affected Persons, it will indicate your total budget percentage distribution for the Affected Persons, for all locations.

- **How to fix it:** Select the Affected Persons location(s) with an incorrect “% Linked”, and click on edit to update the percentage Budget Distribution for the location. You can repeat the action until all your Affected Persons budget distribution is correct, and your total “% Linked” is 100%.

Total Affected persons against gender and type must match with numbers under “Affected Persons” tab:

- **What does it mean:** Once the page is completed, the number of Affected persons per gender (Men, Women, Boys, Girls) and type (Host communities, IDPs, Returnees, Refugees, other) that you entered against the locations should be the same than information you provided in the Section 5 of the project proposal (the “Affected Persons” tab).

  The green box next to each Gender/Type should be 0. If a value remains in the green box, it means that you have affected persons that have not been distributed (e.g. a “10” in the green box) or you have distributed more affected persons than you initially targeted (e.g. a “-50” in the green box).
How to fix it: Click on the edit button next to the Affected Persons box for a specific location, and update the incorrect Affected persons number per gender and type as required per your initial information you provided in the Section 5 of the project proposal.

* Please note: If the information in the Section 5 of the project proposal is incorrect, you can update it directly from the Affected Persons tab, and the changes will be reflected here.

**Total Percentage of Affected Person distribution must match with the percentage of Budget Distribution for each location:**

- **What does it mean:** The “% Linked” for your Affected Persons location(s) is greater or lesser than the budget % Linked for the location.

- **How to fix it:** Select the Affected Persons location(s) with an incorrect “% Linked”, and click on edit to update the percentage Budget Distribution for Affected Persons in the location.

* Please note: if required, you can also directly update the budget “% Linked” for the location, by clicking on the edit button at the budget location level.
Percentage of Budget distribution must be equal to cluster-wise budget distribution for each location:

- **What does it mean:** In a multi-cluster project, the sum of the budget percentage for the clusters doesn’t match the total budget percentage in the location.

- **How to fix it:** Click on the edit button of the budget location’s line and change the budget percentages associated with the clusters.

Percentage of Affected person distribution must be equal to Cluster-wise distribution for each location:

- **What does it mean:** In a multi-cluster project, the total percent of Affected Person Location for a cluster doesn’t match the cluster budget percentages breakdown in the location.

- **How to fix it:** Click on the edit button of the location’s affected persons line and change the budget percentage associated with the clusters.
Total Percentage of Affected person cluster-wise distribution must match with the percentage of Budget cluster-wise Distribution for each location:

- **What does it mean:** In a multi-cluster project, the budget percentage breakdown by clusters specified for affected persons doesn’t match the budget percentage breakdown allocated to the location.

- **How to fix it:** Click on the edit button of the budget location’s line and change the budget percentages associated with the clusters.

Affected persons distribution under each Cluster for a location cannot go above the distribution at the location level.

- **What does it mean:** In a multi-cluster project, the number of affected persons provided in the affected persons’ cluster breakdown is higher than the number of affected persons provided in the generic location level affected persons.
Please note, the SUM of affected persons in the clusters’ breakdown can be higher than the total inputted. This is due to the fact that one person can benefit from activities in two different clusters. This person will be counted in both clusters, but the overall number of affected persons will not count this person twice. If the sum of the Affected persons’ breakdown of the two clusters can be higher than the total inputted, however, the number of affected persons in one cluster cannot.

How to fix it: Click on the edit icon of the location’s affected persons’ line and input the correct number in both affected persons’ clusters breakdowns.

* Please note, the SUM of affected persons in the clusters’ breakdown can be higher than the total inputted. This is due to the fact that one person can benefit from activities in two different clusters. This person will be counted in both clusters, but the overall number of affected persons will not count this person twice. If the sum of the Affected persons’ breakdown of the two clusters can be higher than the total inputted, however, the number of affected persons in one cluster cannot.

Total of Affected person distribution in clusters for a location cannot be less than the distribution at the location level:

- **What does it mean**: The sum of affected persons specified in the clusters’ breakdown is less than the number of affected persons provided in the generic location level affected persons’ breakdown.
- **How to fix it**: Click on the edit icon of the location affected persons’ line and input a correct number in either the generic affected persons breakdown, or a correct sum of affected persons in the cluster breakdown.

* Please note, the sum of affected persons in the clusters’ breakdown can be HIGHER (not less) than the total inputted. This is due to the fact that one person can benefit from activities in two different clusters. This person will be counted in both clusters, but the overall number of affected persons will not count this person twice.
Each Affected Persons location distribution of type: "Other(s)" must provide details:

- **What does it mean**: The details linked to the Other category have not been selected.
- **How to fix it**: Click on the edit button next to affected persons location box. Under the Affected Persons breakdown, click on the “Other” drop down to see all the options. Click on the box to select the details.

*Please note*, this error only applies if an Other(s) category has been created on the Affected Persons’ tab of the Project Proposal form (section 5 of the form). If the Other(s) category in itself is incorrect, please edit the category in the Affected Persons’ tab of the project proposal form and save the new data before coming back to the Locations’ tab.
Within the Documents tab, a user can upload documents pertaining to their project proposal, including the Grant Agreement. By clicking on the 'Add Document' button, an Upload Document window will appear. Within this window select the Category type that best represents the type of document that will be uploaded. The Categories available are: audit and closure, budget, disbursement, Grant Agreement (and amendment), monitoring, project supporting documents, revision related documents, and revision request documents. Next, by clicking on the [Choose File] button the user will be able to select the document that needs uploading. Lastly, as an option the user can add Document Comments in the textbox provided. Click on the [Upload] button to upload the desired document.

Note: the file types allowed in the system are .docx,.pdf,.doc,.jpg,.gif,.xls,.xlsx. and the maximum file size allowed is 4.86 MB.

Upon clicking on the Download All Files button the user can download all files present on this tab.
TIPS FOR FILLING OUT A PROJECT PROPOSAL

*: Indicates any mandatory field

?: Hover over this tooltip to see a description of the field

FAQ?: Click on this tooltip to be redirected to the Help Portal page connected to the page

Print?: Click on this tooltip to print a version of the proposal

Download?: Click this tooltip to download a version of the proposal (Pdf, Word or html)

Add Comments?: Click on this tooltip to add a comment at the project level, or go at the bottom of each page to leave a comment at the page level

Save & Exit Project: Click on [Save] to save the information entered, and on [Save & Exit Project] to save and go back to the home page. Please do not forget to save often to avoid loss of data
HOW TO SUBMIT A PROJECT PROPOSAL  Top

When all the required information has been provided, the tabs of the project proposal will be blue, and the project will be ready to be submitted.

To submit, click on the [Submit Project] button. The system will ask for a confirmation, and will provide the option to leave a comment in the project workflow.

![Submit Project Proposal](image)

Once the confirmation is given, a notification will be sent to the HFU, informing them that the project was submitted. The project will then become "read-only" for the partner, until it pushed to redraft at a later stage.

* Please note: implementing partners will not be able to submit the project proposal after the deadline set by in the allocation strategic paper. The allocation itself will no longer be visible on your homepage past the deadline, as you can see in the screenshot below. (In the screenshot below, the partner’s 2019 projects DRAFTS are blocked as the 2019 allocation reached the deadline. The project proposals can no longer be submitted. However, submitted projects are accessible, and the 2020 allocation is visible and the partner can create new projects).
REDRAFT OF A PROJECT PROPOSAL

Upon receiving a project proposal back for re-draft, the IP should receive an email alert indicating that the project proposal has been sent back. The partner can then log into GMS, go to their Home Page and select edit icon next to the project in need of being redrafted.
The tabs that have comments left on it, will have a red icon displayed next to the tab name. At the bottom of the tab, the comment message will be displayed.
The partner will be requested to review the comments and make the necessary changes before resubmitting the project proposal.

Project admin management tabs (HFU and FCS Finance only) Top

PROJECT ADMIN TAB
The Project Admin tab is composed of three sections:

- The Activation section,
- The Lock Tabs section; and
- The Cost Tracking section

1/ The Activation Section
This section allows HFU and/or FCS Finance to view the activation status of the following instance types:

- Disbursement of funds (the Disbursement Tab is automatically activated at Disbursement stage of the project)
- Timelines (the Timelines tab is automatically activated when the project’s budget is cleared),
- Project Revision Requests (this instance must be triggered from this tab),
Refunds (this instance can be triggered from this tab).

To activate a Project Revision Request or a Refund, select the relevant Alert message to be sent to the partner in the drop-down list, and click on [Activate].

To know more about each of the actions above, click on its link, it will redirect to the according article of this Help Portal.

2/ The Lock Tabs section
Throughout the initial stages of the project workflow (i.e. strategic and technical reviews), the HFU has the possibility to make some tabs non-editable to the Partner when the project is sent for re-draft by locking them from this Project Admin tab.
The HFU can either lock/unlock all tabs of the project proposal, or only a selection. To do so, tick the boxes of the tabs for which you wish to change the lock status, and click on [Change lock Status].

The Cost Tracking section
The Cost Tracking tab draws from the Cost Tracking elements that were included in the Allocation, as created by the HFU. HFU officers can edit the percentages and planned value of some cost tracking components in this tab. After editing the data, click on [Save Cost Tracking].

TIMELINES TAB
The Timelines’ tab allows authorized HFU officers to save and validate the timelines pertaining to the project, including disbursement tranches, reporting instances and monitoring instances.
To learn more about the timelines, please refer to this article [HERE](#).

**DISBURSEMENT TAB**
The Disbursement tab allows FCS Finance officers to save and validate the information related to the disbursement of funds for the project.
To learn more about disbursement, please refer to this article [HERE](#).

**REFUNDS TAB**
The Refunds tab allows HFU/FCS Finance officers to save and validate the information related to the refunds due by the Implementing Partner at the end of Project Implementation, during the Project Closure phase.
At the request of the HFU, the Partner can also process their refund and upload the relevant documents in this tab.
To learn more about refunds, please refer to this article [HERE](#).

**PROJECT CLOSURE TAB**
The Project Closure tab allows the HFU to save and validate the information related to the Project Closure phase.
To learn more about Project Closure, please refer to this article [HERE](#).