

Tool Tips

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

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

FAQ icon[Top](#)

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.

OCHA Lebanon (Agencies/Partners) Fund Name: Lebanon Role: Agencies/Partners Welcome: gms-support@un.org FUND HOME LOGOUT

Home Risk Management Others **FAQ**

[Project draft] Print

Submit Project Proposal Submission of Proposal 1 Strategic Review 2

Save & Stay Save & Exit Project

Comments: - By GMS Support CBPF (14 Jul 2020 03:35:53 PM) [Add Comments] [More Comments]

Cover Page Logical Framework Work Plan Affected Persons Other Info **Budget** Cash Tracking Locations Documents Project Tracking Timelines Disbursement

Requesting Organisation	Annoymous1723 (Annoymous1723)	Primary cluster	Sub cluster
Allocation Type	2020 1st Reserve Allocation	Shelter	Basic Assistance
Project Title	Project title test		
Fund Project code	LEB-20/DDA-3604/RA1/S/INGO/14186		
Actual Date [Start - End]	22/07/2020 - 30/10/2020		

Project Created By: gms-support@un.org on 14/07/2020 03:18:00 PM Last Updated By: gms-support@un.org on 14/07/2020 03:27:29 PM

11. Budget Export Budget Report

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

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

PARTNER HFU FCS FINANCE CLUSTER COORDINATOR GUEST

Project Proposal Template and Submission

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

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 [Top](#)

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.

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  (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:  on 30/08/2015 12:28:00 PM Last Updated By:  on 28/09/2015 12:40:00 PM

This section cannot be edited. For any changes, please contact administrator : [Ascha Hummel](mailto:Ascha.Hummel@un.org) (Hummel@un.org); Skype: [AschaHummel](#)

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 *	Return to school: supporting access to education for 6,000 children in Kobane town		Allocation Type Category	Select
Planned project duration *	3 months		Project budget in US\$	220,000.39 (given automatically from budget tab. Includes Actual Implementation Cost)
Fund Project code	Internal (Generated automatically)	XXX-15/0000/SA2/E/INGO/0000	External/Organization's Project code (if any)	
Planned Start Date *	01/10/2015		Planned End Date *	31/12/2015
Actual Start Date (as per Agreement)	01/10/2015		Actual End Date (as per Agreement)	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.

Save Often! [Top](#)

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

Save & Stay Save & Exit Project

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 [Top](#)

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.

[Under final TR review]

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 [User Name] (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: [User Name] on 30/08/2015 12:28:00 PM Last Updated By: [User Name] on 28/09/2015 12:40:00 PM

Red tabs Blue tabs [Top](#)

[Under final TR review]

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

Project Created By: [User Name] on 30/08/2015 12:28:00 PM Last Updated By: [User Name] 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 [Top](#)

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 [Top](#)

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.

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  

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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'.

Always save your comments before closing this section or changing the tabs. 

Add Comments here 

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Viewing Comments [Top](#)

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'.

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.

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



Action Icons [Top](#)

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

Edit Proposal


Activate Financial Report

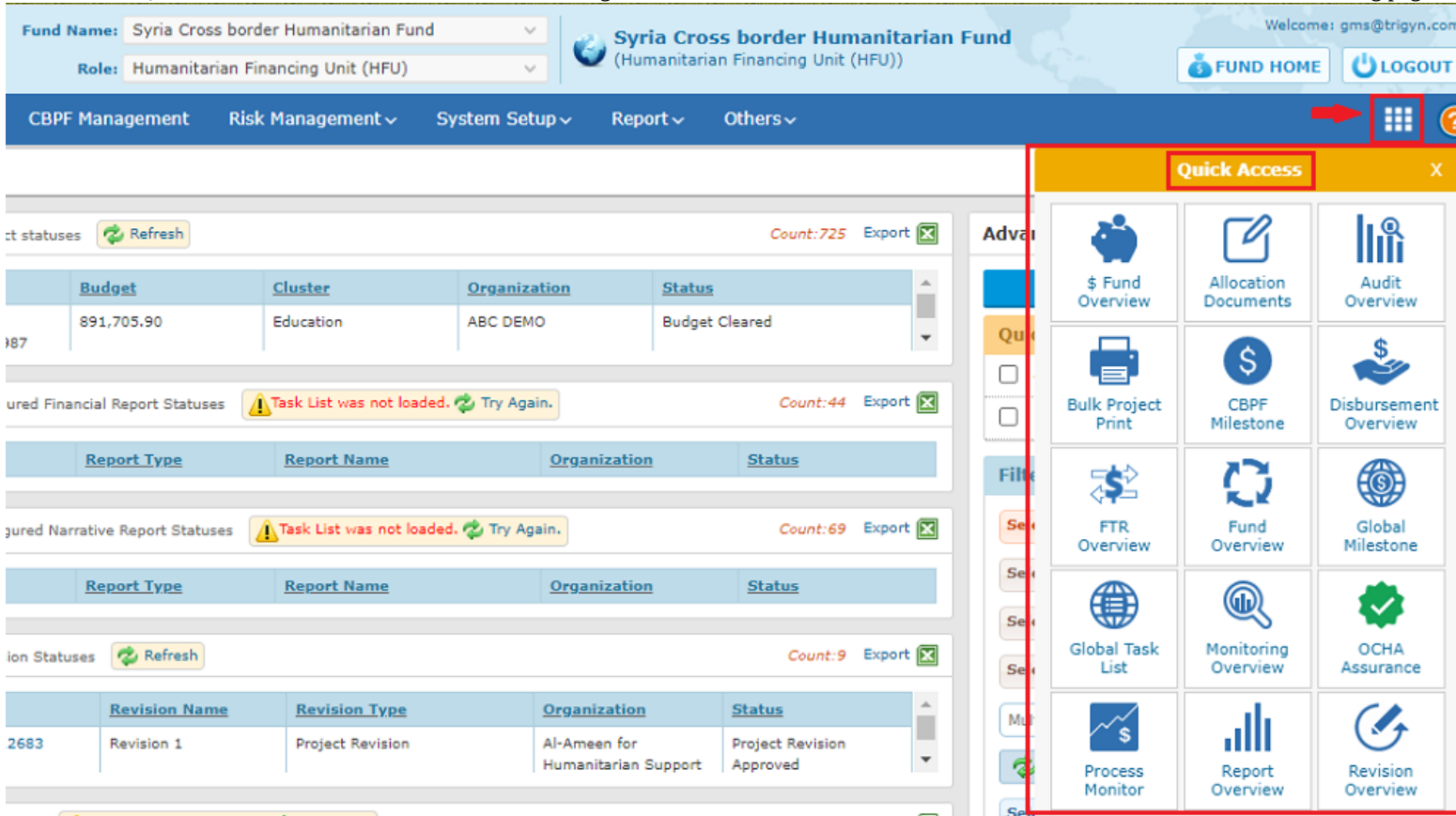
Print Proposal

View Proposal

The Quick Access (not available to Agency/Partner user role) [Top](#)

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 displays the GMS interface for the Syria Cross border Humanitarian Fund. The top navigation bar includes 'Fund Name: Syria Cross border Humanitarian Fund', 'Role: Humanitarian Financing Unit (HFU)', and user information 'Welcome: gms@brigyn.com'. The main menu contains 'CBPF Management', 'Risk Management', 'System Setup', 'Report', and 'Others'. A red arrow points to a grid icon in the top right corner, which opens the 'Quick Access' panel. This panel contains 15 icons for various system functions: \$ 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, and Revision Overview. The main content area shows several tables with data for budget, financial report, narrative report, and revision statuses.

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

Report Type	Report Name	Organization	Status
Task List was not loaded. Try Again.			

Report Type	Report Name	Organization	Status
Task List was not loaded. Try Again.			

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

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

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