Setup of Allocation Type

- How to create an allocation
- How to configure an allocation
  - Link an allocation with its cluster priorities
  - Link an allocation with the allocation cycle time table
  - Link an allocation with the HRP and SSO
    - Create SSO (Sector Specific Objectives)
    - Create HRP SO
  - Link an allocation with a Cost Tracking Component
- How to add an allocation Type Document

How to create an allocation Top

Navigation: System Setup > Allocation Management > Manage Allocation Types

To create new allocation, fill all the mandatory information which is marked with a red asterisk and click on the [Save Record] button. The green asterisk shows the fields that will be published in the Business Intelligence (BI) platform.

To edit the allocation type click on [Edit] link to populate the controls with the respective Allocation type information which can be changed and saved by clicking on [Save Record] button.

Note: The information displayed in the Primary Details section cannot be edited after the creation of the first project proposal. Please contact GMS Support should you require further assistance in changing the details. The SRC Scorecard cannot be changed once the scoring has been initiated.
### Field Descriptions:

<table>
<thead>
<tr>
<th>Field Description</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allocation Title</td>
<td>(Required) Enter the title of the allocation.</td>
</tr>
<tr>
<td>Publish</td>
<td>(Optional) Select if the allocation is published.</td>
</tr>
<tr>
<td>Allocation Summary</td>
<td>(Optional) Enter a summary of the allocation. (Click here to add documents)</td>
</tr>
<tr>
<td>Allocation Source</td>
<td>(Required) Select the source of the allocation.</td>
</tr>
<tr>
<td>Project Code Abbreviation</td>
<td>(Required) Enter the project code abbreviation.</td>
</tr>
<tr>
<td>Allocation Year</td>
<td>(Required) Select the allocation year.</td>
</tr>
<tr>
<td>Audit Code Type</td>
<td>(Optional) Select the audit code type.</td>
</tr>
<tr>
<td>Location Mapped Code</td>
<td>Enter the location mapped code.</td>
</tr>
<tr>
<td>Minimum Location Level for Budget</td>
<td>(Optional) Select the minimum location level for budget.</td>
</tr>
<tr>
<td>Minimum Location Level for Beneficiary</td>
<td>(Optional) Select the minimum location level for beneficiary.</td>
</tr>
</tbody>
</table>

### Additional Details

- **Emergency**
  - (Optional) Select options
  - [Refresh FTS Emergency List]

- **HRP Plan**
  - (Optional) Select options
  - [Refresh FTS Emergency List]

- **SRC Scorecard**
  - (Optional) Select options

- **Expected Launch Date of Allocation Strategy**
  - (Optional) Select options

- **Manned Allocation Budget (in USD)**
  - (Optional) Select options

- **Project Submission Start Date and Time**
  - (Optional) Select options

- **Project Submission Block Date and Time**
  - (Optional) Select options

**Message before project submission block date:**

(Note: Include [Date, Time, Timezone] Placeholder in your comment to include Date, Time and timezone in your message.)

**Message after project submission block date:**

(Note: Include [Date, Time, Timezone] Placeholder in your comment to include Date, Time and timezone in your message.)
• **Primary Details:** Provides the core details of the allocation. This part cannot be edited after the creation of the first project.
  - **Allocation Title:** Name of the allocation.
  - **Publish:** Tick the box to publish the allocation into the Business Intelligence (BI) platform. This will also show if any of the documents linked to the allocation will be visible to partners and published in the BI.
  - **Allocation Summary:** Description that will appear as an additional narrative in the Business Intelligence (BI) platform.
  - **Allocation Source:** Type of Allocation (Reserve or Standard).
  - **Project Code Abbreviation:** Abbreviation to generate project code.
  - **Allocation Year:** Year in which Allocation is created.
  - **Audit Cost Type:** Type of Audit Cost (Percent or Fixed).
  - **Location Mapped Code:** Automated field which will display the location year version.
  - **Minimum Location Level for Budget:** Allows the user to select the Admin Location level required for the budget distribution in the locations tab, and the reporting.
  - **Minimum Location Level for Beneficiary:** Allows the user to select the Admin Location level required for the Affected Persons distribution in the locations tab, and the reporting.
  - **Allow Project Proposal Quarter Planning:** Indicates whether Budget Quarter planning is allowed for project proposal (relevant for UNDP funds)
  - **Allow Project Proposal Cost Effectiveness Analysis:** Enables the option to generate a Cost Effectiveness Analysis linked to the budget.
  - **Show Standard Activities:** Enable standard activities to be displayed, instead of only customized activities.

• **Additional Details:** Provides the secondary details of the allocation. This part remains editable after the creation of the first project.
  - **Is Locked:** Indicates whether Allocation is locked.
  - **HRP Plan:** Link to the country HRP to enable project linkage in the project proposal.
  - **Emergency:** The specific emergency (ongoing conflict, disaster, etc.) for which allocation will be created.
  - **SRC Scorecard:** Shows which Strategy Review Scorecard will be linked to the allocation.
  - **Expected Launch Date of Allocation Strategy:** Indicates when the planning of the allocation started (i.e. start of the allocation lifecycle).
  - **Expected HC Approval Date of Last Project:** Indicates the estimate date of when the allocation approval process will close (i.e. end of the allocation lifecycle).
  - **Planned allocation Budget (in USD):** Displays the allocation budget planned.
  - **Project Submission Start Date and Time:** Indicates the start of the project submission timeframe (day/month/year, local timezone).
  - **Project Submission Block Date and Time:** Indicates the end of the project submission timeframe (day/month/year, local timezone).
  - **Message before project submission block date:** Message visible from the Partner Home Page informing of the end of the project submission timeframe (remaining days/hours)
  - **Message after project submission block date:** Message visible from the Partner Home Page informing that the project submission timeframe has been closed

How to configure an allocation [Top]

**Navigation:** System Setup > Allocation Management > Allocation Type Configuration

Upon accessing the page, all the added Allocation will be visible. To add an allocation to the page, see the prior step "How to create an allocation".

Click on the "Edit" tooltip to configure the allocation. The selected allocation and the different components will be visible at the top of the screen.
Click on the different available button to display the respective page.

**Allocation Type Configuration**

- Click on the [Cluster Priorities] button to configure the cluster priorities that will be defined for the allocation.
- Click on the [Allocation Cycle Time Table] button to create an allocation cycle for the allocation.
- Click on the [Manage HRP] button to link the HRP (Humanitarian Response Plan) and the SSO (Sector Specific Objective) to the allocation.
- Click on the [Link Cost Tracking Component] button to edit the default Cost Tracking components.

Link an allocation with its cluster priorities [Top]

Click [Cluster Priorities] button.
To add a new cluster priority, select the appropriate cluster, enter the cluster priority activities and geographical priorities and click on the button to save the detail.

Existing cluster priorities can be modified by clicking on the link.

Existing cluster priorities can be deleted by clicking on the link.

**Field Descriptions:**

- **Cluster:** Cluster
- **Cluster Priority Activities:** Activity for cluster
- **Cluster Geographical Priorities:** Detail for geographical priorities

Link an allocation with the allocation cycle time table Top

Click on the [Allocation Cycle Timetable] button.

Enter **From** date, **To** date, Responsible and Action field data and click on the "plus" button to save the detail. Existing Allocation Time table can be edited by clicking on the link. Existing Allocation Time table can be deleted by clicking on the link.

Field Descriptions:
• **From:** Start date for a particular responsibility in the selected Allocation
• **To:** End date for a particular responsibility in the selected Allocation
• **Responsible:** Person responsible for the set period of time
• **Action:** Action required to fulfil those responsibilities

Link an allocation with the HRP and SSO Top

Click on the [Manage HRP] button.

Type in the HRP SO Description and click on the Add icon 📄. Once you add the line, you are given the option to either 'Edit' or 'Link SSO' to this HRP. Click on [Link SSO] link to link HRP with SSO.

**HRP Details**

<table>
<thead>
<tr>
<th>HRP SO Description</th>
<th>Allocation Type</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018:SD1: Save lives and reduce morbidity due to drought and acute food insecurity</td>
<td>2018 1st Reserve Allocation - 2018</td>
<td>📂 Edit 📂 Link SSO</td>
</tr>
<tr>
<td>2018-SD2: Protect and restore livelihoods</td>
<td>2018 1st Reserve Allocation - 2018</td>
<td>📂 Edit 📂 Link SSO</td>
</tr>
<tr>
<td>2018-SD3: Prepare for and respond to other humanitarian shocks, including natural disasters, conflict and displacement</td>
<td>2018 1st Reserve Allocation - 2018</td>
<td>📂 Edit 📂 Link SSO</td>
</tr>
</tbody>
</table>

To link SRP with the SSO, click on [Link SSO] button; a popup will be displayed.
Select the relevant Cluster(s) from the list. On doing so the SSO list will be populated for that cluster. Select one or more SSOs from the list and click on [Save] button to save the record.

Added Link will be displayed in the grid.

Existing HRP – SSO links can be modified by clicking on the [Edit] link.

Existing HRP – SSO links can be deleted by clicking on the ✖️ link.

Field Descriptions:

- **HRP Description**: The description of the HRP
- **Allocation Type**: The Allocation Type tied to this HRP Description
- **Action**: Edit OR Link SSO. **Edit** allows you to change the HRP Description /**Link SSO**: Ties this HRP to a Cluster Name and Sector Specific Objective

Note: if your SSO have been linked correctly they will appear linked to you allocation type (System Setup > Allocation Management >Allocation types > edit)
Create SSO (Sector Specific Objectives): Top

**Navigation:** System Setup > Allocation Management > Manage SSO.

- To add a SSO, go to the bottom of the page and enter a brief description of the sector specific objective and select a Cluster from the drop down list to which it needs to be linked, select the year, and click on the button to save the SSO.
- Click on [Edit] link to edit the added record on which the selected SSO will become updatable.
- User can delete existing SSO by clicking on link for a particular SSO.

**Note:** Delete option will be available only if the SSO is not linked with an HRP.

### Sector Specific Objective Details

<table>
<thead>
<tr>
<th>Cluster</th>
<th>Select Cluster</th>
<th>Year</th>
<th>Select SSO Year</th>
<th>Search</th>
</tr>
</thead>
</table>

Create HRP SO: Top

**Navigation:** System Setup > Allocation Management > Manage Global HRP SO.
To add an HRP, go to the top of the page and click on [Add HRP SO].
Select the HRP Year, HRP, and HRP SO from the drop down and add a description. Click on [Save]

Link Cost Tracking Component

Click on the [Link Cost Tracking Component] button.

To change any of the Cost tracking components, tick/untick the boxes available next to each line and click on [Save changes and recompute].
The Cost Tracking Components linked to the allocation will be tracked for each project under the project admin tab, and upon closure of the project.

Allocation Type Document

**Navigation:** System Setup > Allocation Management > Allocation Type Document

**Purpose:** This screen is used to view as well as upload documents that are associated to a particular Allocation Type.

**Usage:**
Within the Allocation Type Documents tab, a user can view as well as upload documents that are associated to a particular Allocation Type. The documents to upload are:

- Allocation Report
- Grant Agreements
- Allocation Strategy
- Timelines
- Partner Allocation - this will also make the documents uploaded in the category visible in the Business Intelligence.

Also comments in regards to the document can be included as well, when a particular file is upload.

Please also note that the 'Share selected documents' icon can be used to share documents that have been uploaded.

First, select the document that you want shared by clicking on the checkbox next to the document,

Second, a 'Share documents' window will appear with the selected document(s) and its category. Select the 'Alert' that should be accompanied with the document and Third, press 'Share'.