Role Management

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Define Roles:

- AGENCY/PARTNER – (also referred to as Implementing Partner (IP)) – An NGO, INGO, UN Agency or IOM, who creates a project proposal with GMS to request funds for a particular project, and manages the life-cycle of the project through the GMS (reporting, revisions, auditing, etc).
- HUMANITARIAN FINANCING UNIT (HFU) – Unit within the OCHA Country Office responsible for the daily management of all programmatic and financial aspects of the CBPF projects within GMS.
- CLUSTER COORDINATOR – The Cluster Coordinator, or relevant representatives from cluster member agencies, who through their membership of Review Committees take part in the review of project proposals, reports, and project revisions as required.
- ADVISOR OF CUTTING ISSUES / SPECIALIST - Technical advisors on specific cross-cutting issues such as gender, protection environment, who participate in the review of projects and, where required, reports and revision requests.
- HUMANITARIAN COORDINATOR (HC) – Senior UN representative in a country leading humanitarian response. The HC is the custodian of, and accountable for, the Country-based Pooled Fund.
- OCHA FINANCE – FCS Finance located at the Headquarter's level, who ensures IP financial reporting is in compliance with OCHA Financial Standard of Operations. This is done by their review of project proposal's budgets, financial reports and the disbursement of funds per the terms of the Grant Agreement generated in GMS.
- FCS ADMIN - FCS Administrators are the Desk Officers that make up the Programs and Operations Unit (POU) of FCS.
- GMS ADMIN – This is the System Administrator access to the system.

User Approval:

Navigation: System Setup

Purpose: To Approve a user via GMS Online User Registration.

Usage:

1. **Online User Registration**: Click on the **User Name** (email address hyperlink) of the person you wish to approve.
2. **System Users**, click on 'Approve', ensure they are 'Active' and 'Allow workflow Mail Notifications' and verify all other profile information is correct. For example, make sure that in the Organization field 'Not applicable for OCHA / cluster staff’ is selected for Cluster Coordinator's user approval, or Cluster field 'Not applicable for Agencies' is selected for Agencies/Partners approval.
Field Descriptions:

**User details:**

- **Full names:** User's first and last name
- **User names:** User's registered email address
- **Email:** User's registered email address
- **Approve (checkbox)** Select if you would like to approve this user's registration. Deselect if you do NOT want to approve this user's registration.
Profile details:

- **Send Mail Notification on Approval of this user (checkbox)** - Select if you would like this user to receive an email notification of their approved user registration request.
- **Is Active? (checkbox)** – Select if you would like this user to be active in the system and be capable of performing functions assigned to this user's group. Deselect this user, if you no longer wish for this user to be able to perform any function relates to its user group.

**Profile details:**

- **Pooled Funds (drop down menu)** – The country GMS platform that this user is registered for.
- **User Group (drop down menu)** – The User Group that this user belongs to.
- **Is Primary Group? (checkbox)** – Is the primary user group the user will belong to.
- **Organization (drop down menu)** – If the user is part of the Agency/Partner user group, select the organisation the user belongs to. (*Please note, the organization must be created first). If this user is not an Agency/Partner, then this field should be 'Not applicable for OCHA/cluster staff' users.
- **Cluster (drop down menu)** – If the user is part of a Cluster Coordinator user group, select which cluster the user will belong to. If the user is not a Cluster Coordinator, this field should be 'Not applicable for Agencies'.
- **Allow workflow Mail Notifications (checkbox)** – Select if this user is to receive any email notifications as it pertains to their user group, and/or organisation or cluster.
- **Clusters for Notification (checkboxes)** – If you desire this user to receive email notifications for a particular cluster or group of clusters, select the relevant clusters here. Ideally, this checkbox should not be used for agency/partners and all users that are not Cluster Coordinators.

Setting up multiple roles: [Top]

Setting up multiple roles provides two options:

1. **To give yourself multiple roles**
2. **To give someone else multiple roles**

**To give yourself multiple roles:**

*Navigation:* System Setup > User Management > System Users

*Purpose:* To Create multiple profiles for yourself.

*Usage:*

1. **System Users:** When you first go to the Profile page, you will see your own profile information. If you want to give yourself additional roles, proceed to step 2.
2. Select [Click here to add new profile]
3. Add, additional role by filling in profile details. *Please note: If you edit your HFU profile and change it to another user group, you will not be able to get back your HFU role again.

**Field Descriptions:**

**User details:**
- **Full names:** User's first and last name
- **User names:** User's registered email address
- **Email:** User's registered email address
- **Approve (checkbox):** Select if you would like to approve this user's registration. Deselect if you do NOT want to approve this user's registration.
- **Send Mail Notification on Approval of this user (checkbox):** Select if you would like this user to receive an email notification of their approved user registration request
- **Is Active? (checkbox):** Select if you would like this user to be active in the system and be capable of performing functions assigned to this user's group. Deselect this user, if you no longer wish for this user to be able to perform any function relates to its user group.
Profile details:

- Pooled Funds (drop down menu) - The country GMS platform that this user is registered for
- User Group (drop down menu) - The User Group that this user belongs to
- Is Primary Group? (checkbox) - Is the primary user group the user will belong to
- Organization (drop down menu) - If the user is part of the Agency/Partner user group, select the organisation the user belongs to. (*Please note, the organization must be created first). If this user is not an Agency/Partner, then this field should be 'Not applicable for OCHA/cluster staff' users.
- Cluster (drop down menu) - If the user is part of a Cluster Coordinator user group, select which cluster the user will belong to. If the user is not a Cluster Coordinator, this field should be 'Not applicable for Agencies'.
- Allow workflow Mail Notifications (checkbox) - Select if this user is to receive any email notifications as it pertains to their user group, and/or organisation or cluster.
- Clusters for Notification (checkboxes) - If you desire this user to receive email notifications for a particular cluster or group of clusters, select the relevant clusters here. Ideally, this checkbox should not be used for agency/partners and all users that are not Cluster Coordinators.

4. Click the [Save Profile] button.

To give someone else multiple roles: Top

Navigation: System Setup > User Management > System Users

Purpose: To Create multiple profiles for someone else

Usage:

1. Click on the [User List] tab and search for that user. Select with one, multiple or none (to get full list of users regardless of their user group) then select [Click to filter] button.

System Users

<table>
<thead>
<tr>
<th>User Details</th>
<th>User List</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency</td>
<td>All</td>
</tr>
<tr>
<td>User Group</td>
<td>All</td>
</tr>
<tr>
<td>User Name</td>
<td></td>
</tr>
</tbody>
</table>

Field Descriptions:

- Agency (drop down menu): The organisation the user belongs to
- User Group (drop down menu): The user group the user belong to
- User Names (text box): The user’s partial or full name

2. Select the user and on the User Details tab, select the [Click here to add new profile] button, and add the additional role by filling in Profile Details and click on the [Save profile] button.
Field Descriptions:

User details:

- **Full names**: User's first and last name
- **User names**: User's registered email address
- **Email**: User's registered email address
- **Approve** (checkbox): Select if you would like to approve this user's registration. Deselect if you do NOT want to approve this user's registration.
- **Send Mail Notification on Approval of this user** (checkbox): Select if you would like this user to receive an email notification of their approved user registration request
- **Is Active?** (checkbox): Select if you would like this user to be active in the system and be capable of performing functions assigned to this user's group. Deselect this user, if you no longer wish for this user to be able to perform any function relates to its user group.

Profile details:

- **Pooled Fund**: [Select option]
- **User Group**: [Select option]
- **Organization**: [Select option]
- **Cluster**: [Select option]
- **Allow workflow Mail Notifications**: [Select option]
- **Clusters for Notification**: [Select options]
- **Pooled Funds (drop down menu)** - The country GMS platform that this user is registered for
- **User Group (drop down menu)** - The User Group that this user belongs to
- **Is Primary Group? (checkbox)** - Is the primary user group the user will belong to
- **Organization (drop down menu)** – If the user is part of the Agency/Partner user group, select the organisation the user belongs to. (*Please note, the organization must be created first). If this user is not an Agency/Partner, then this field should be 'Not applicable for OCHA/cluster staff' users.
- **Cluster (drop down menu)** – If the user is part of a Cluster Coordinator user group, select which cluster the user will belong to. If the user is not a Cluster Coordinator, this field should be 'Not applicable for Agencies'.
- **Allow workflow Mail Notifications (checkbox)** – Select if this user is to receive any email notifications as it pertains to their user group, and/or organisation or cluster.
- **Clusters for Notification (checkboxes)** – If you desire this user to receive email notifications for a particular cluster or group of clusters, select the relevant clusters here. Ideally, this checkbox should not be used for agency/partners and all users that are not Cluster Coordinators.

**Please Note:**
- Only members of HFU should have multiple roles.
- When you are approving a Implementing Partner, please ensure their profile registration information. Make sure 1. You know who you are approving access to, 2. Ensure they are asking to be assigned to the correct user group and organisation.

**Update a User:** Top

**Navigation:** System Setup > User Management > System Users > [User List] tab

**Purpose:** To update a user's profile

**Usage:** Locate the user, in the User List tab; once you have clicked on the user for their user profile to appear, click on [Edit] for the particular role you would like to change. Make the appropriate changes and then select [Save profile].

1. Select the user and on the User Details tab,

2. Locate the user's role that you want to change, and click on [Edit].

The organisation the user belongs to

The user group the user belong to

The user's partial or full name

The user's role that you want to change, and click on [Edit].
3. Then select [Click here to add new profile], make the necessary changes to the role within the profile and click on [Save profile].
Field Descriptions:

User details:

- **Full names**: User's first and last name
- **User names**: User's registered email address
- **Email**: User's registered email address
- **Approve (checkbox)** - Select if you would like to approve this user's registration. Deselect if you do NOT want to approve this user's registration.
- **Send Mail Notification on Approval of this user (checkbox)** - Select if you would like this user to receive an email notification of their approved user registration request
- **Is Active? (checkbox)** - Select if you would like this user to be active in the system and be capable of performing functions assigned to this user's group. Deselect this user, if you no longer wish for this user to be able to perform any function relates to its user group.

Profile details:
- **Pooled Funds (drop down menu)** - The country GMS platform that this user is registered for.
- **User Group (drop down menu)** - The User Group that this user belongs to.
- **Is Primary Group? (checkbox)** - Is the primary user group the user will belong to.
- **Organization (drop down menu)** – If the user is part of the Agency/Partner user group, select the organisation the user belongs to. (*Please note, the organization must be created first). If this user is not an Agency/Partner, then this field should be 'Not applicable for OCHA/cluster staff' users.
- **Cluster (drop down menu)** – If the user is part of a Cluster Coordinator user group, select which cluster the user will belong to. If the user is not a Cluster Coordinator, this field should be 'Not applicable for Agencies'.
- **Allow workflow Mail Notifications (checkbox)** – Select if this user is to receive any email notifications as it pertains to their user group, and/or organisation or cluster.
- **Clusters for Notification (checkboxes)** – If you desire this user to receive email notifications for a particular cluster or group of clusters, select the relevant clusters here. Ideally, this checkbox should not be used for agency/partners and all users that are not Cluster Coordinators.

**Please Note:** You cannot remove a user, therefore please deactivate the user by clicking on 'Is Active?' checkbox and deselect uncheck the checkbox and contact your respective FCS Desk Officer.