Admin Configuration

- How to manage pool fund configuration data
- How to use Bulk Instance Status Creation screen
- How to perform Bulk Instance Status Move on project
- How to manage company details data
- How to manage report images
- How to manage Menus
- How to manage Cost Tracking Component
- How to manage Risk Components
- How to manage Dashboard Sections
- How to manage Due Diligence Checklist
- How to migrate Organization & Cluster for Project

Project Admin Access
- Non Project Admin Access
- Manage Pool Fund Monitor
- Contributions
- Bulk Timeline Activation
- Global Task List

How to manage pool fund configuration data

**Navigation:** System Setup > Configuration Setup > Application Parameters

**Purpose:** The configuration used in the application for a particular pooled fund is stored in this config table. It is stored in the key value format.

**Usage:**

- To edit config key and values saved for pool fund click on [Edit] link. It will populate the controls with saved values for selected config key. Update the value and click on [Save] button to update the values.
### Application Parameters

#### Pool fund configuration

<table>
<thead>
<tr>
<th>Config key</th>
<th>Config value</th>
<th>Config description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ActivateStatusForReserveReporting</td>
<td>140</td>
<td>Activate Status for Reserve Report. Will be used by Timeline to set Inactive Instance Status for Narrative / Financial Reporting</td>
</tr>
<tr>
<td>ActivateStatusForStandardReporting</td>
<td>187</td>
<td>Activate Status for Standard Report. Will be used by Timeline to set Inactive Instance Status for Narrative / Financial Reporting</td>
</tr>
<tr>
<td>AdminContactEmail</td>
<td><a href="mailto:test@test.org">test@test.org</a></td>
<td>Email Id of Admin who would be responsible to update Non-editable project sections if required</td>
</tr>
<tr>
<td>AdminContactPerson</td>
<td>Nicolas Rost</td>
<td>Admin Contact Person who would be responsible to update Non-editable project sections if required</td>
</tr>
<tr>
<td>AdminContactSkype</td>
<td>ERFFEKEN</td>
<td>Skype Id of Admin who would be responsible to update Non-editable project sections if required</td>
</tr>
<tr>
<td>AllowedUserGroupsToChangeAdmins</td>
<td>1</td>
<td>This configuration stores comma separated values of usergroups who will have permission to edit Linked Orgs</td>
</tr>
<tr>
<td>AllowFinancialReportTypes</td>
<td>1,2,3,4</td>
<td>This is the pool fund based financial report types configuration which will only allow users of current pool fund to have access to these types of financial reports. This is the comma separated value of financial report types. The value is stored in ConfigValue Column. 1 - Indicates Financial Report Type A, 2 - Indicates Financial Report Type B, 3 - Indicates Financial Report Type C, 4 - Indicates Financial Report Type D</td>
</tr>
<tr>
<td>AllowNarrativeReportTypes</td>
<td>1,2,3</td>
<td>This is the pool fund based narrative report types configuration which will only allow users of current pool fund to have access to these types of narrative reports. This is the comma separated value of narrative report types. The value is stored in ConfigValue Column. 1 - Indicates Narrative Report Type A, 2 - Indicates Narrative Report Type B, 3 - Indicates Narrative Report Type C</td>
</tr>
<tr>
<td>Approved</td>
<td>176,107</td>
<td>Approved status</td>
</tr>
<tr>
<td>AutoActivateReportUsingJob</td>
<td>Y</td>
<td>Checks if Financial / Narrative Reports can be activated through Activation Job (Y/N)</td>
</tr>
<tr>
<td>CostTypeDescription</td>
<td>Direct, Support</td>
<td>Comma separated list of description of valid cost type values.</td>
</tr>
<tr>
<td>CostTypeValues</td>
<td>D,E</td>
<td>Comma separated values of cost types. The first value is default</td>
</tr>
<tr>
<td>CreateProjectWithDueDateApproval</td>
<td>True</td>
<td>The Value would be True or False. True would indicate that the NGO Organizations can create project only when their due diligence is approved. False defines that there is no need of due diligence to be approved for a NGO Organization to be able to create Project.</td>
</tr>
<tr>
<td>DaysForFinancialReportActivation</td>
<td>45</td>
<td>Number of days based on which Active Date would be computed in Timelines for Financial Final Report</td>
</tr>
<tr>
<td>DaysForNarrativeReportActivation</td>
<td>30</td>
<td>Number of days based on which Active Date would be computed in Timelines for Narrative Final Report</td>
</tr>
<tr>
<td>DaysForFinancialNarrativeReportActivation</td>
<td>15</td>
<td>Number of days based on which Active Date would be computed in Timelines for Financial Interim Report</td>
</tr>
<tr>
<td>DaysForNarrativeNarrativeReportActivation</td>
<td>15</td>
<td>Number of days based on which Active Date would be computed in Timelines for Narrative Interim Report</td>
</tr>
</tbody>
</table>

### Field Descriptions:

- **Config Key**: Key name of config
- **Config Value**: Value of key which is used in combination with the key name to set parameters.
- **Description**: Brief description of config

<table>
<thead>
<tr>
<th>Config Name</th>
<th>Config Description</th>
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<table>
<thead>
<tr>
<th>Config Name</th>
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</tr>
</thead>
<tbody>
<tr>
<td>ActivateStatusIdForReserveReporting</td>
<td>This stores an interim status id used for when a narrative / financial report is created in the timelines tab but has not been activated yet. This status must be defined in &quot;Timeline&quot; instance type for Reserve allocation source. In case this configuration is not configured correctly, an error will be thrown when a narrative / financial report timeline is saved from the Timeline tab for Reserve projects.</td>
<td>Narrative and Financial Reporting section in Timelines Tab</td>
</tr>
<tr>
<td>ActivateStatusIdForStandardReporting</td>
<td>This stores an interim status id used for when a narrative / financial report is created in the timelines tab but has not been activated yet. This status must be defined in &quot;Timeline&quot; instance type for Standard allocation source. In case this configuration is not configured correctly, an error will be thrown when a narrative / financial report timeline is saved from the Timeline tab for Standard Projects.</td>
<td>Narrative and Financial Reporting section in Timelines Tab</td>
</tr>
<tr>
<td>AdminContactEmail</td>
<td>This is the email address displayed on read-only section in the project's cover page tab. The read-only section displayed on top of the cover page tab. In case this information needs to be updated, the user must send a request to the mentioned email id.</td>
<td>Cover Page tab of a project</td>
</tr>
<tr>
<td>AdminContactPerson</td>
<td>This is the name of the person displayed on the read-only section in project's cover page tab. The read-only section is displayed on top of the cover page tab.</td>
<td>Cover Page tab of a project</td>
</tr>
<tr>
<td>AdminContactSkype</td>
<td>This is the Skype Id of the person displayed on the read-only section in project's cover page tab. The read-only section is displayed on top of the cover page tab.</td>
<td>Cover Page tab of a project</td>
</tr>
<tr>
<td>AllowedUsergroupsToChangeAdmins</td>
<td>This is a comma-separated list of user group ids. These user group ids can perform additional actions in the system that cannot be performed by normal users. These actions allow the user to save organization details and change Action (URL) of a Menu.</td>
<td>Manage Menus and Manage Organizations</td>
</tr>
<tr>
<td>AllowFinancialReportTypes</td>
<td>This configuration stores comma-separated values of the types of Financial Reports that are allowed for the pooled fund. The Report Types configured here are only visible to the user in Financial Report section of Timelines tab. It is also used in the Report Overview section to display the column headers.</td>
<td>Financial Reporting section in Timelines Tab</td>
</tr>
<tr>
<td>AllowNarrativeReportTypes</td>
<td>This configuration stores comma-separated values of the types of Narrative Reports that are allowed for the pooled fund. The Report Types configured here are only visible to the user in Narrative Report section of Timelines tab. It is also used in the Report Overview section to display the column headers.</td>
<td>Narrative Reporting section in Timelines Tab</td>
</tr>
<tr>
<td>Approved</td>
<td>This configuration stores comma-separated values of Approved status ids for Project Instance Type. This configuration stores values for both Standard and Reserve allocation source. This configuration should ideally store only the first approved status ids for both Standard and Reserve. The system internally computes further status ids using the Status Order value of status ids configured.</td>
<td>Used In - 1. Landing Page 2. Web API for loading project information 3. GMS DW ETL for loading project information</td>
</tr>
<tr>
<td>AuthCodeTimestampValidDurationInSeconds</td>
<td>On trying to navigate to other pooled fund from Global Task List, we perform a series of validations. One of the validation is to validate a timestamp that is passed as a parameter from the source pooled fund. The timestamp is considered valid only if it is within the number of seconds mentioned in this configuration. If the timestamp exceeds the allowed value, then the users request to the navigate to another pooled fund is disallowed.</td>
<td>Global Task List</td>
</tr>
<tr>
<td>AutoActivateReportUsingJob</td>
<td>This configuration is to check if we can activate Narrative / Financial Reports based on the Timeline Activation Date using an SQL Job. Allowed Values are Y or N.</td>
<td>SQL Job for Report Activation</td>
</tr>
<tr>
<td>CostTypeDescription</td>
<td>Comma Separated Values for the Description of Cost Types allowed for the pooled Fund.</td>
<td>Used in Budget and all related modules like Financial Reporting, Budget Revision and Prints</td>
</tr>
<tr>
<td>CostTypeValues</td>
<td>Comma Separated Values for the Cost Type values allowed for the pooled Fund. The first value in this configuration is used as the default value in the Budget Tab.</td>
<td>Used in Budget and all related modules like Financial Reporting, Budget Revision and Prints</td>
</tr>
<tr>
<td>CountryCode</td>
<td>This is the Country Code or the pooled Fund code that is used to generate the Project Code.</td>
<td>Generate Project Code in Create Project</td>
</tr>
<tr>
<td>CreateProjectWithDueDilApproval</td>
<td>This configuration is used in the Agency home page to determine, if an agency user can create project only if Due Diligence approved. The values accepted are True or False. True indicates that the agency user needs to have Due Diligence approved in order to Create a new Project. False would allow Agency users to create project irrespective of their Due Diligence Status.</td>
<td>Create Project Section in Agency Home Page</td>
</tr>
<tr>
<td>Config Name</td>
<td>Config Description</td>
<td>Used In</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>DaysForFinalFinancialReportActivation</td>
<td>This configuration is used to compute the Active date of a Final Financial Report based on the Due Date entered by the user. The Active date is computed by deducting the configured number of days from the Due Date entered by the user.</td>
<td>Financial Report section in Timelines Tab</td>
</tr>
<tr>
<td>DaysForFinalNarrativeReportActivation</td>
<td>This configuration is used to compute the Active date of a Final Narrative Report based on the Due Date entered by the user. The Active date is computed by deducting the configured number of days from the Due Date entered by the user.</td>
<td>Narrative Report section in Timelines Tab</td>
</tr>
<tr>
<td>DaysForInterimFinancialReportActivation</td>
<td>This configuration is used to compute the Active date of an Interim / Progressive Financial Report based on the Due Date entered by the user. The Active date is computed by deducting the configured number of days from the Due Date entered by the user.</td>
<td>Financial Report section in Timelines Tab</td>
</tr>
<tr>
<td>DaysForInterimNarrativeReportActivation</td>
<td>This configuration is used to compute the Active date of an Interim / Progressive Narrative Report based on the Due Date entered by the user. The Active date is computed by deducting the configured number of days from the Due Date entered by the user.</td>
<td>Narrative Report section in Timelines Tab</td>
</tr>
<tr>
<td>DaysForMonitoringActivation</td>
<td>This configuration is used to compute the Active date of a Monitoring based on the Due Date entered by the user. The Active date is computed by deducting the configured number of days from the Due Date entered by the user.</td>
<td>Monitoring Section in Timelines Tab</td>
</tr>
<tr>
<td>DisbursementReserveEndStatusId</td>
<td>This configuration is no longer used</td>
<td></td>
</tr>
<tr>
<td>DisbursementReserveStartStatusId</td>
<td>This configuration is no longer used</td>
<td></td>
</tr>
<tr>
<td>DisbursementStandardEndStatusId</td>
<td>This configuration is no longer used</td>
<td></td>
</tr>
<tr>
<td>DisbursementStandardStartStatusId</td>
<td>This configuration is no longer used</td>
<td></td>
</tr>
<tr>
<td>FinalReportStatuses</td>
<td>This configuration stores comma-separated list of user groups who can enter UNDP Financial Report details as an Agency user. The user groups mentioned in the configuration would be able to enter values of column B and E in UNDP Financial Report</td>
<td>UNDP Financial Report</td>
</tr>
<tr>
<td>FinanceHeadName</td>
<td>This configuration is used in the Grant Agreement for displaying the Finance Head Name in the generated agreement Grant Agreement</td>
<td></td>
</tr>
<tr>
<td>FinancialReportActivationDays</td>
<td>In Agency Home Page, an agency user can activate financial report for projects. However, only projects that have started implementation (Actual Start Date) before the configured number of days can be activated by agency user</td>
<td>Agency Home Page</td>
</tr>
<tr>
<td>FinancialReportAdminTabStatusIdReserve</td>
<td>This configuration is no longer used</td>
<td></td>
</tr>
<tr>
<td>FinancialReportAdminTabStatusIdStandard</td>
<td>This configuration is no longer used</td>
<td></td>
</tr>
<tr>
<td>FinancialReportUNDPAgencyRoleIds</td>
<td>This configuration stores comma-separated list of user groups who can enter UNDP Financial Report details as an Agency user. The user groups mentioned in the configuration would be able to enter values of column C and F in UNDP Financial Report</td>
<td>UNDP Financial Report</td>
</tr>
<tr>
<td>FinancialReportUNDPAllowedBalanceVariancePercent</td>
<td>This configuration would set the maximum allowed variance to the Balance columns in UNDP Financial Report for each Budget Section. In case the variance exceeds this configuration, then the Balance would be displayed as invalid. However, tab would not be set to Invalid in this case</td>
<td>UNDP Financial Report</td>
</tr>
<tr>
<td>FinancialReportUNDPAllowedTotalVariancePercent</td>
<td>This configuration would set the maximum allowed variance to the Total Expenditure Percentage in UNDP Financial Report. In case the variance exceeds this configuration, then the Total Expenditure Percentage would be displayed as invalid. However, tab would not be set to Invalid in this case</td>
<td>UNDP Financial Report</td>
</tr>
<tr>
<td>FinancialReportUNDPRoleIds</td>
<td>This configuration stores comma-separated list of user groups who can enter UNDP Financial Report details as an UNDP user. The user groups mentioned in the configuration would be able to enter values of column C and F in UNDP Financial Report</td>
<td>UNDP Financial Report</td>
</tr>
<tr>
<td>FTSCHFDonorId</td>
<td>This configuration stores the CHF Donor Id in the FTS System. This configuration is used to display the FTS Contribution information for an OPS project in the Project Tabs</td>
<td>All Project related tabs</td>
</tr>
<tr>
<td>FundCode</td>
<td>Fund Code is an additional parameter that is used in generating the project code. In case it is not required it can be set to blank or empty.</td>
<td>Generate Project Code in Create Project</td>
</tr>
<tr>
<td>HumanCoordinatorName</td>
<td>This configuration is used in the ERF Grant Agreement and used as the default value for Humanitarian Coordinator Name. This configuration value is used in the generated Grant Agreement for Humanitarian Coordinator Name</td>
<td>Grant Agreement</td>
</tr>
<tr>
<td>InterimReportStatuses</td>
<td>This configuration is used to store the Interim Narrative Report Statuses. This configuration is no longer used</td>
<td></td>
</tr>
<tr>
<td>IsMultiClusterVisible</td>
<td>This configuration is used in the Create Project to determine if users should be allowed to create Multi-Cluster project. Allowed Configuration Values are &quot;true&quot; and &quot;false&quot;. This configuration is no longer used</td>
<td>Create Project</td>
</tr>
<tr>
<td>IsMultiYearVisible</td>
<td>This configuration is used in the Create Project to determine if users should be allowed to create Multi-Year project. Allowed Configuration Values are &quot;true&quot; and &quot;false&quot;. This configuration is no longer used</td>
<td>Create Project</td>
</tr>
</tbody>
</table>

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<thead>
<tr>
<th>Config Name</th>
<th>Config Description</th>
<th>Used In</th>
</tr>
</thead>
<tbody>
<tr>
<td>NarrativeReportApprovalStatus</td>
<td>This configuration stores comma-separated approval status ids for all types of Narrative Report (i.e. Progressive / Final). This configuration stores values for Standard as well as Reserve projects.</td>
<td>Used in - 1. Timeline Tab to determine activation of other reports. 2. Revision Activation to determine the last approved narrative report to be used in Revision of a project Report / Extn Tab in Sharepoint Projects</td>
</tr>
<tr>
<td>NoOfDaysforExternalReportingDueDate</td>
<td>This configuration is used to compute the Financial Report Due Date in Report / Extn tab of Sharepoint projects. The Financial Report Due Date is computed by adding the configured number of days to the current date</td>
<td>Allocation Type Configuration</td>
</tr>
<tr>
<td>OPSCountryId</td>
<td>This configuration stores the Country Id of the pooled Fund in OPS System. This configuration is used in Allocation Type Configuration page to load the list of OPS Appeals for the configured country</td>
<td></td>
</tr>
<tr>
<td>PercentageForAdmin1</td>
<td>This configuration was used to determine if the Location Percentage distribution should be defined at the Admin Level 1 or on the entire Location Line saved. This configuration is no longer used</td>
<td>Project Admin and Project Tabs</td>
</tr>
<tr>
<td>PerformanceMonitoringScoringTypeld</td>
<td>This configuration was used in Performance Index. This configuration is no longer used</td>
<td>Project Admin and Project Tabs</td>
</tr>
<tr>
<td>ProjectAdminTabStatusIdReserve</td>
<td>This configuration stores the status Id of a Reserve Project. The Project Admin tab will be displayed to the user only after the project reaches this configured status</td>
<td>Project Workflow</td>
</tr>
<tr>
<td>ProjectAdminTabStatusIdStandard</td>
<td>This configuration stores the status Id of a Standard Project. The Project Admin tab will be displayed to the user only after the project reaches this configured status</td>
<td>Fund Overview Used In - 1. Timeline Tab 2. Revision Activation to determine the last approved financial report to be used in Revision of a project 3. Financial Report to compute Liquidation amount</td>
</tr>
<tr>
<td>ProjectContractApprovalStatusIds</td>
<td>This configuration stores the comma-separated Project statuses of Contract / Grant Agreement Approval. When a user changes the status of a project to one of these configured values, a validation is performed to check if the Due Diligence of the project's organization is Approved. In case the Due Diligence is not approved the user would not be allowed to change the workflow status. This configuration stores project status for both Standard and Reserve Projects. This configuration value can be set to blank / empty in case this functionality should not be implemented</td>
<td>Project Workflow</td>
</tr>
<tr>
<td>ProjectTypeInstanceId</td>
<td>This configuration stores the Instance Type of Project. This configuration is used in Fund overview</td>
<td></td>
</tr>
<tr>
<td>ReserveApprovedFinancialReportStatus</td>
<td>This configuration stores the comma-separated statuses of Financial Report. This configuration stores the approved statuses for all types of Financial Reports (Progressive / Final). This configuration is used only for Reserve Financial Reports</td>
<td>Used In - 1. Narrative Report to get only Approved Monitoring information 2. Timeline Tab 3. Monitoring Overview to determine if Monitoring is yet to be approved after Due Date has been passed</td>
</tr>
<tr>
<td>ReserveApprovedMonitoringStatus</td>
<td>This configuration stores the Approved Status Id for Monitoring. This configuration is used only for Reserve Monitoring only</td>
<td></td>
</tr>
<tr>
<td>ReserveDraftStatusId</td>
<td>This configuration used to store the Draft Status Id for Reserve Projects. This configuration is no longer used</td>
<td>Cover Page tab of a project</td>
</tr>
<tr>
<td>ReserveProcessStatusIds</td>
<td>This configuration stores the comma-separated list of Reserve Process Statuses. If a project is within these configured process statuses, then the user would not be able to view the Actual Start Date and Actual End Date in the Cover Page tab</td>
<td>Revision Tabs</td>
</tr>
<tr>
<td>ReserveProjectIdentificationProcessStatusId</td>
<td>This configuration is no longer used</td>
<td>Revision Tabs</td>
</tr>
<tr>
<td>ReserveProjectRevisionApprovalStatusId</td>
<td>This configuration stores the status Id of Revision Approval. The Overwrite button in Revision tabs is displayed to the user only if the revision reaches this specific configuration. This configuration is used only for Reserve Project Revisions</td>
<td></td>
</tr>
<tr>
<td>ReserveRevisionOverwritten</td>
<td>This configuration stores the status id of Revision Instance Type. Once a Revision is successfully overwritten, the Revision is moved to this configured status. This configuration is used only for Reserve Project Revisions</td>
<td>Revision Tabs</td>
</tr>
<tr>
<td>Config Name</td>
<td>Config Description</td>
<td>Used In</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>RevisionRequestApprovalStatusIds</td>
<td>This configuration stores comma-separated Approved status ids for Revision Request. We display the Revision Sections tab in the Revision Request module only after a request reaches the configured status. This configuration stores value for both Standard and Reserve Revision Requests</td>
<td>Used In -  1. Revision Request  2. Project Admin to check if Revision Request is approved</td>
</tr>
<tr>
<td>RevisionRequestCancelStatusIds</td>
<td>This configuration stores comma-separated Cancellation status ids for Revision Request. Once a revision Request reaches this configured status, the revision request is considered as closed and user can then create a new Revision Request for the project. This configuration stores value for both Standard and Reserve Revision Requests</td>
<td>Used In -  1. Revision Request</td>
</tr>
<tr>
<td>StandardApprovedFinancialReportStatus</td>
<td>This configuration stores the comma-separated statuses of Financial Report. This configuration stores the approved statuses for all types of Financial Reports (Progressive / Final). This configuration is used only for Standard Financial Reports</td>
<td>Used In -  1. Revision Request  2. Project Admin to check if Revision Request is approved</td>
</tr>
<tr>
<td>StandardApprovedMonitoringStatus</td>
<td>This configuration stores the Approved Status Id for Monitoring. This configuration is used only for Standard Monitoring only</td>
<td>Used In -  1. Narrative Report to get only Approved Monitoring information  2. Timeline Tab  3. Monitoring Overview to determine if Monitoring is yet to be approved after Due Date has been passed</td>
</tr>
<tr>
<td>StandardDraftStatusId</td>
<td>This configuration used to store the Draft Status Id for Standard Projects. This configuration is no longer used</td>
<td>Cover Page tab of a project</td>
</tr>
<tr>
<td>StandardProcessStatusIds</td>
<td>This configuration stores the comma-separated list of Standard Process Statuses. If a project is within these configured process statuses, then the user would not be able to view the Actual Start Date and Actual End Date in the Cover Page tab</td>
<td>Revision Tabs  2. Project Admin to check if Revision Request is approved</td>
</tr>
<tr>
<td>StandardProjectIdentificationProcessStatusId</td>
<td>This configuration is no longer used</td>
<td></td>
</tr>
<tr>
<td>StandardProjectRevisionApprovalStatusId</td>
<td>This configuration stores the status Id of Revision Approval. The Overwrite button in Revision tabs is displayed to the user only if the revision reaches this specific configuration. This configuration is used only for Standard Project Revisions</td>
<td>Revision Tabs  2. Project Admin to check if Revision Request is approved</td>
</tr>
<tr>
<td>StandardRevisionOverwritten</td>
<td>This configuration stores the status id of Revision Instance Type. Once a Revision is successfully overwritten, the Revision is moved to this configured status. This configuration is used only for Standard Project Revisions</td>
<td>Revision Tabs  2. Project Admin to check if Revision Request is approved</td>
</tr>
<tr>
<td>TaskAssignmentAutoExpirationInSeconds</td>
<td>In Task Assignment module, once the assignment has expired, we display a prompt to the user to indicate the same. This dialog will be displayed to the user for the number of seconds configured here. Once the number of seconds are lapsed, the will be automatically saved and the assignment would be released</td>
<td>Task Assignment</td>
</tr>
<tr>
<td>TaskAssignmentExpirationInMinutes</td>
<td>This configuration stores the number of minutes of inactivity from the assigned user that would cause the assignment to expire</td>
<td>Task Assignment</td>
</tr>
<tr>
<td>TaskAssignmentExpirationWarningInMinutes</td>
<td>In task assignment, we display a warning to the assigned user before expiration of a task. The configuration stores the number of minutes before expiration the warning would be displayed</td>
<td>Task Assignment</td>
</tr>
<tr>
<td>TaskAssignmentProcessIntervalInMinutes</td>
<td>In task assignment, a background process runs that checks for information related to the Task Assignment, like release request, expiration warning and other such details. This configuration stores the interval in number of minutes after which the process would be executed</td>
<td>Task Assignment</td>
</tr>
<tr>
<td>TaskAssignmentReleaseRequestCountPerUser</td>
<td>This configuration stores the maximum number of release request a user can create for a Task Assignment</td>
<td>Task Assignment</td>
</tr>
<tr>
<td>TimeZone</td>
<td>This configuration stores the Time Zone of the pooled Fund. This Time Zone is used in Allocation Window Setup to determine the UTC Time for a window</td>
<td>Allocation Window Setup</td>
</tr>
</tbody>
</table>

**How to use Bulk Instance Status Creation screen** [Top](#)

**Navigation:** System Setup > Workflow Management > Bulk Instance Status Creation

**Purpose:** To create new instance for timelines, disbursements and project extensions
Usage:
- Select Project Status, Allocation Type, Cluster and Organization on (Screen 1) and click [Get Projects] button. It will list down the projects belonging to the selected filter criteria.
- Select the projects from the grid for which the new instance is to be created.
- Select instance type and/or alert category which will be linked to this activity and click on [Perform Bulk Action].
- A dialog will be opened (Screen 2) where the new instance can be created by clicking on [Proceed to Update Status] button.

Screen 1:

Bulk Instance Status Creation

<table>
<thead>
<tr>
<th>Search Projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Status</td>
</tr>
<tr>
<td>Cluster</td>
</tr>
<tr>
<td>Allocation Type</td>
</tr>
<tr>
<td>Organization</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Instance Creation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instance Type</td>
</tr>
<tr>
<td>Alert</td>
</tr>
</tbody>
</table>

Screen 2:
Field Descriptions:

**Screen 1:**
- **Project Status:** Status List of projects
- **Allocation Type:** Allocation Type of the projects
- **Cluster:** Cluster list
- **Organization:** Organizations of the project
- **Instance Type:** Instance Type list
- **Alert:** Alert list (alert will triggered on bulk action)

How to perform Bulk Instance Status Move on project [Top](#)

**Navigation:** System Setup > Workflow Management > Bulk Status Move

**Purpose:** To move multiple projects from one status to another perform bulk move of the projects from one status to next status.
Usage:
- Select Instance Type, Instance Status, Cluster and Organization on **Screen 1** and click **[Get Projects]** button. It will list down all the projects falling in the filter criteria.
- Select required projects from the grid which are required to be moved to next status.
- In the "Workflow Action Status" list, select the status to which status the selected projects need to be moved. "Alert triggered" should be checked if alerts are to be associated with this activity.
- Click on **[Perform Bulk Action]** button.
- A dialog will open **(Screen 2)** on which selected projects are displayed. Click on **[Proceed to Update Status]** button to move the selected projects to the required status.

**Screen 1:**

**Bulk Status Move**

<table>
<thead>
<tr>
<th>Current Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instance Type</td>
</tr>
<tr>
<td>Cluster</td>
</tr>
<tr>
<td>Organization</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Next Status</th>
</tr>
</thead>
</table>

[Alert triggered?]

**Screen 2:**
Field Descriptions:

Screen 1:
- **Instance Type**: list of all the instances
- **Instance Status**: All the statuses for selected instance
- **Cluster**: list of all the clusters for the pool fund
- **Organization**: List of all the organizations in the pool fund
- **Workflow Action Status**: List of Next statuses to which project can move
- **Alert triggered**: Alert associated with action

How to manage company details data Top

**Navigation**: System Setup > Configuration Setup > Application Parameters

**Purpose**: To update information saved in company detail table.

**Usage**:
- To edit information saved in company detail table updated values given in "Controls" section and click on [Save] button to update the values.
### Field Descriptions:

- **Company Name**: Name of the application
- **Country**: Pool fund name
- **Address**: Address of office
- **Physical Address**: Physical address of office
- **Telephone**: Phone number
- **Mobile**: Mobile number of contact person
- **Town**: Town name
- **Email**: Email address of contact person
How to manage report images

**Navigation:** System Setup > Configuration Setup > Application Parameters

**Purpose:** To add/delete images for the report.

**Usage:**

- To add image for reports enter report name, mime type of image, upload image and click on **Save** button to upload image. Added image can be viewed in the grid.

![Report Image Upload](image.png)

**Field Descriptions:**

- **Report Name:** Name of the report
- **Mime Type:** MIME type of the image
- **Select Image:** Header image for the report
- To delete added image click on **Delete** link and it will delete the record for selected row.

How to manage Menus

**Navigation:** System Setup > Configuration Setup > Manage Menus

**Purpose:** To manage (create/edit) menus.

**Usage:** The menus can also be displayed on the basis of currently active menus in the system. Check on the Show Only Active Menus checkbox and click on Search button to display the active menus. Default all the menus available in the system are displayed in a tabular format.

- To create a new menu item, click on **Add New Menu** button.
### Field Descriptions:

- **Menu ID** (text box): Name of the Menu
- **Caption** (text box): Name of the Menu ID which will be displayed as Caption on the Menu.
- **Description** (text box): Description of the Menu ID to be displayed along with the Caption.
- **Is Main Menu** (check box): If checked, the menu ID will be displayed as a part of the Main Menu.
- **Parent Menu** (drop down box): If **Is Main Menu** field is unchecked, then the parent menu under which this menu ID will be displayed needs to be selected.
- **Action** (text box): On selection of this menu ID by the user, what action has to be performed needs to be mentioned here.
- **Order** (text box): The order in which this menu ID will be displayed.
- **Is Active** (check box): If checked, this menu ID will be active and available in the GMS System.
- **Icon** (drop down box): Select the icon to be displayed with this menu ID.
- **Is Quick Access** (check box): If checked, this menu ID will be displayed as a part of the Quick Access panel in the home page of the Users as defined by the Admin.
- **Quick Access Link CSS** (drop down menu): If Quick Access field is checked, this field allows to select the icon to be displayed in the Quick Access panel.

Click on the **Save Record** button to save the menu ID.
To edit the information of an existing menu ID, click on **Edit** action present in the Added Menus table. On clicking the Edit link, it will populate the information of selected menu ID. Change the values and click on **Save Record** button to update the information of the menu ID.

**How to manage Cost Tracking Component**

**Navigation:** System Setup > Configuration Setup > Manage Cost Tracking

**Purpose:** To manage various costs associated with a project such as Project budget, Program support Costs (PSC), Managing Agent Fees (MA Costs), Audit charges etc. A mouse over action above the *Info* icon for each Cost Tracking component would display the allocation types linked with the component and the total cost for each component.

**Usage:**

- To create a new Cost Tracking component, click on **Add New Component** button.

### Manage Cost Tracking Component

<table>
<thead>
<tr>
<th>Description</th>
<th>Cost Tracking Type</th>
<th>Pre-Defined Values</th>
<th>Existing Cost Tracking</th>
<th>Percentage</th>
<th>Visible To Budget</th>
<th>Applicable for UN</th>
<th>Applicable for NGOs</th>
<th>Action</th>
<th>Update Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Budget without PSC</strong></td>
<td>Pre-defined values</td>
<td>Total Project Budget (Excluding PSC Cost)</td>
<td></td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>PSC Cost</strong></td>
<td>Pre-defined values</td>
<td>PSC Cost</td>
<td></td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Test - Bank Fixed Cost</strong></td>
<td>Fixed Cost</td>
<td>PSC Cost</td>
<td></td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Audit Charges (Fixed Cost)</strong></td>
<td>Fixed Cost</td>
<td></td>
<td></td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Audit Charges (Percentage)</strong></td>
<td>Formula</td>
<td>Project Budget without PSC</td>
<td>1.50</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>MA Charges (OCHA I)</strong></td>
<td>Formula</td>
<td>Project Budget without PSC</td>
<td>3.00</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>MA Charges (OCHA II)</strong></td>
<td>Formula</td>
<td>Audit Charges (Fixed Cost) + Audit Charges (Percentage)</td>
<td>13.00</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Field Descriptions:**

- **Description** (text box): Name of the Cost Tracking Component
- **Cost Tracking Type** (drop down menu): Describes the Cost tracking type, which are
  - Pre-defined values—The costing is based on any of the four existing pre-defined values, which are
    - Total Project Budget (Excluding PSC Cost)
    - PSC Cost
- Total Project Budget (Including PSC Cost)
- Total Reimbursement for Project
  - Formula - The costing is based on a formula which is a combination of pre-defined values and existing formula in the system.
  - Fixed Cost – The costing is fixed, not changeable.
- **Cost Mode** (drop down menu): Describes the costing group to which the Cost Tracking component belongs to, which are
  - Managing Agent Cost
  - Reimbursement
  - Audit Cost
  - Project Cost
  - Bank Charges
- **Pre-Defined Values** (drop down menu): The costing is based on any of the four existing pre-defined values, which are
  - Total Project Budget (Excluding PSC Cost)
  - PSC Cost
  - Total Project Budget (Including PSC Cost)
  - Total Reimbursement for Project
- **Order Index** (text box): Describes the order in which the Cost Tracking component will be recomputed if more than one Cost Tracking component is associated with an allocation.
- **Applicable to UN Agencies** (check box): If Checked, then the Cost Tracking component is applicable to UN Agencies
- **Applicable for Non-UN Agencies** (check box): If Checked, then the Cost Tracking component is applicable to Non-UN Agencies
- **Is Calculated** (check box): If Checked, then the Cost tracking component will be calculated by the GMS System.
- **Visible to Budget** (check box): If Checked, the Cost Tracking components to be displayed in the Budget tab when the user opens an instance in the “Project Status” (Either Applicable to UN Agencies or Applicable for Non-UN Agencies checkbox has to be selected along with this option).
- **Visible in GA** (check box): If Checked, the Cost Tracking components are shown in the Grant Agreement. (Either Applicable to UN Agencies or Applicable for Non-UN Agencies checkbox has to be selected along with this option).
- Click on the Save button to save the Cost Tracking Component.

**Note:**

If **Cost Tracking Type** is is selected as ‘Formula’, then the additional fields displayed are:

- Below the **Cost Mode** field, Click on the Check box **Show Advanced**, if a complex formula that involves more than one Cost Tracking component has to be define.

To add additional existing Tracking formula click on the button. The operator + or – can be used to either add or subtract from the existing formula.

OR

- Select either from the **Pre-Defined Values** (drop down menu) or **Existing Tracking Formula** (drop down menu)
- **Formula Percentage** (text box): What percentage value to be taken.
- The **Formula Preview** field will display the formula for previewing.

If **Cost Tracking Type** is is selected as ‘Fixed Cost’, then the additional field displayed are:
• **Fixed Cost – (Default)** (text box): Describes the fixed cost applicable to the Cost Tracking Component. Specify different values for audit cost for a range of project budget values (instead of a percentage).

**Note:** This feature is only visible for GMS Admin/FCS. Therefore, HFUs need to inform FCS in case the percentage, range/fixed audit costs for the fund change.

- To edit the information of an existing Cost Tracking component, Click on the **Edit** icon present in the **Action** Column of the Added Records table. On clicking the **Edit** icon, it will populate the information of selected cost component. Change the values and click on **Save** button to update the information of the Cost Tracking component.

**Note:** If the Cost Tracking component has already been linked to allocations, then during the edit mode, you will be able to see a listing of all the allocations linked with the selected Cost Tracking component at the top right corner of the screen.

It is advisable that the user re-compute for all the allocations because once a Cost Tracking component is changed all the projects that use this component must be updated so as to reflect the new formula/percentage changes to the planned costs of the projects. This can be done using the Recalculation options available here.

**Recompute All Allocations**

**Linked Allocation Types**

- **Rolling basis (2014)**
- **Standard Allocation (2014)**
- **Standard Allocation (2015)**
- **Rolling basis (2015)**

Click on **Recompute All Allocations** icon to re-compute all allocations or click on re-compute icon beside the allocation name to re-compute for a specific allocation.

On click of any of the above options, a dialog box will be displayed that shows the list of projects belonging to the allocation type in a tabular format.
If one or more Cost Components are used to calculate this Cost Component, then a message will be displayed mentioning the order in which the other Cost Components need to be recomputed before re-computing the selected Cost Component.

A budget range option is provided to filter projects depending on the budget of the project.

A brief description of each column is given below:

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selection box</td>
<td>Enables the user to select the projects for which re-computation is required.</td>
</tr>
<tr>
<td>Project Code</td>
<td>Displays the GMS generated project code.</td>
</tr>
<tr>
<td>Cluster</td>
<td>Displays the primary cluster group the project belongs to, if multiple clusters exist then a percentage wise breakup of cluster allocation is shown.</td>
</tr>
<tr>
<td>Organization</td>
<td>Displays the Implementing Partner’s organisation name.</td>
</tr>
<tr>
<td>Allocation Type</td>
<td>Displays the type of Allocation.</td>
</tr>
<tr>
<td>Budget</td>
<td>Displays the budget of the project.</td>
</tr>
<tr>
<td>Current Value</td>
<td>Displays the current value of the Cost Component.</td>
</tr>
<tr>
<td>Recomputed Value</td>
<td>Displays the recomputed value of the Cost Component.</td>
</tr>
<tr>
<td>Difference</td>
<td>Displays the difference between the current value and recomputed value of the Cost Component. If the value is displayed in red colour that the recommended value is less than the current value.</td>
</tr>
<tr>
<td>Status</td>
<td>Displays the current status.</td>
</tr>
</tbody>
</table>
For **Cost Tracking Type** “Fixed Cost”, the following fields are displayed:

- **Fixed Cost** (text box): Enter the numeric value of the revised fixed cost.
- **Skip Projects having Non-Zero value** (check box): Select the checkbox, if projects having a fixed cost component already defined to be skipped from being re-calculated.

Select the projects which are to be re-computed and click on the **Start Recomputation** button to re-compute the Cost Tracking Component.

- To delete a Cost Tracking component, Click on the Delete icon present in the Action Column of the Added Records table.

**Note:** The Delete icon will only be displayed if the Cost Tracking component is not linked with any allocations.

How to manage Risk Components

**Navigation:** System Setup > Configuration Setup > Manage Risk Components.

**Purpose:** To manage (create/edit/delete) risk components along with their risk parameters and ranges for a pooled fund.

**Usage:**

The Risk Components are displayed in two separate sections. The first section shows Risk Components that do not have any risk parameters defined. The second section shows Risk Components that have risk parameters defined.

- To create a new risk component, click on button.
### Field Descriptions:

- **Description (text box):** Name of the Risk Component.
- **Risk Usage Type (drop down box):** Describes whether this Risk Component is used to compute Project or Partner risk.
- **Max Risk Value (text box):** It is the maximum value of the component scores as defined in the System.
- **Component Type (drop down box):** Defines the type of risk. Currently following Risk Component Types defined in the system.
  - CA (Capacity Assessment)
  - PI (Performance Index)
- Partner Risk
- Location
- Standard Activity
- Partner Project Risk

**Risk Ranges**: Defines the ranges for the Risk Component.

<table>
<thead>
<tr>
<th>Description</th>
<th>Start Range</th>
<th>End Range</th>
<th>CSS Class</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Select CSS</td>
</tr>
</tbody>
</table>

- **Description** (text box): Name of the risk range.
- **Start Range** (text box): A start range value.
- **End Range** (text box): An end range value. The end range should be equal to the Max Risk Value and if multiple ranges exist, at least one of the risk ranges value should be equal to the Max Risk Value.
- **CSS Class** (drop down box): CSS class to be used.

To add multiple Risk Ranges for the component, click on the **Add Risk Ranges** button.

To delete an existing Risk Range, click on the delete **X** icon present.

An example:
For a risk range defined with the following parameters as Name is “Poor”, Start Range is 0, End Range is “20.00” and CSS Class is configured as “Red”, so if the risk value for this risk component is computed as 12, then the risk value will be displayed as “Poor” and it would be displayed in a Red background.

- **Risk Parameters** (check box): If checked, the value of the Risk Component would be computed based on the risk value of one or more existing Risk Components.

- **Component** (drop down box): Enables to select one of the existing Risk Component as a risk parameter.
- **Weightage** (text box): Defines the weightage of this parameter in computation of the final risk value for the Risk Component.
  - **Note**: The total of the weightage of all non-exclusive Risk Parameters must be 100.
- **Computation Type** (drop down box): Defines the pre-defined functions in the system that are used to determine how the score for the risk parameter should be computed.
- **Exclusive** (check box): If checked, it will determine if this Risk Parameter will be exclusive. If a Risk Component has an “Exclusive” parameter, then it will be given first preference in the risk value computation. If the value returned from the exclusive parameter is 0 then only the score of other parameters would be considered for computation. In case this exclusive parameter returns a value greater than 0, then the risk component will directly be considered with the maximum risk available for the component.
  - **Note**: Only one Risk parameter can be defined as Exclusive.

To add additional Risk Parameters, click on the **Add Risk Parameter** button.

To delete an existing Risk parameter, click on the delete **X** icon.

- **Order Index** (text box): The order in which this Risk Component will be computed by the system.
- **Can Create Score Card** (check box): If checked, this Risk Component can be used to identify the risk components on which Score cards can be defined.
• **Is Locked** (check box): If checked, it will deactivate the Risk Component from being used in the system and if this component is used as a parameter for another Risk Component, then this Risk component will be ignored for computation of the risk.

  • Click on the **Save Record** button to save the Risk Component.

  • To edit the information of an existing Risk Component, Click on **Edit** icon present in the Added Records table. On clicking the **Edit** icon, it will populate the information of selected Risk Component. Change the values and click on **Save** button to update the information of the Risk Component.

  • To delete a Risk Component, Click on the **Delete** icon present in the Action Column of the Added Records table.

    **Note:** The **Delete** icon will only be displayed if the Risk Component is not used as a parameter for another Risk Component.

How to manage Dashboard Sections

**Navigation:** System Setup > Configuration Setup > Manage Dashboard Sections

**Purpose:** To show/hide specific sections such as Task lists, Project Filter, Quick Access etc to individual user roles after logging in.

**Usage:** Manage Dashboard section is a tool used to configure the project dashboard to display the tasks queue with respect to individual user groups.

  • To create a new Dashboard setting for a user group:
Field Descriptions:

- **User Group** (drop down box): Select the user group to which this Dashboard setting is applicable to.
- **Dashboard Section** (drop down box): Select the Dashboard Section to which access is provided for based on the user group.
- **Excluded Statuses**: For each pooled fund available in the GMS system, you can configure what statuses can be excluded while displaying information for Standard and Reserved funds in the Project Dashboard.

  - For example: For the Pooled fund: Turkey, User Group: Agencies/Partners, in the Project Task List Dashboard section only projects having the following statuses Standard – Project Draft, Standard – Under Pre-SR, Standard – Pre-SR Rejected would be excluded, all other projects having statuses different from the above mentioned will be displayed.
  - Click on the **Save** button to save the Dashboard Settings.

- To edit the information of an existing Dashboard setting for a user group, Click on **Edit** icon 🖐️ present in the **Action** Column of the User Group Dashboard Section Links table. On clicking the **Edit** icon, it will populate the information of selected Dashboard setting. Change the values and click on **Save** button to update the information.

- To delete a Dashboard setting for a user group, Click on the **Delete** icon ✗ present in the **Action** Column of the User Group Dashboard Section Links table.

How to manage Due Diligence Checklist Top
### Purpose:
To manage (create/edit/delete) Due Diligence Checklist for implementing partners in a pooled fund.

### Usage:
- To create a new Due Diligence Checklist:

#### Manage Due Diligence Checklist

<table>
<thead>
<tr>
<th>Due Diligence Tabs</th>
<th>Checklist Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Due Diligence Tab</strong></td>
<td>Name of the tab to which the Due Diligence Checklist is applicable for</td>
</tr>
<tr>
<td><strong>Applicable for UN Agencies</strong></td>
<td>If Checked, then the Due Diligence Checklist is applicable for UN Agencies</td>
</tr>
<tr>
<td><strong>Is Locked</strong></td>
<td>If checked, it will deactivate the Due Diligence Checklist from being used in the system</td>
</tr>
</tbody>
</table>

### Field Descriptions:
- **Due Diligence Tabs** (drop down box): Name of the tab to which the Due Diligence Checklist is applicable for
  - Application Form
  - Bank Info
  - Due Diligence Document
- **Checklist Details** (text box): Describes the details regarding the checklist.
- **Applicable for UN Agencies** (check box): If Checked, then the Due Diligence Checklists is applicable for UN Agencies.
- **Is Locked** (check box): If checked, it will deactivate the Due Diligence Checklist from being used in the system.
- Click on the **Save** button to save the Due Diligence Checklist.
- To edit the information of an existing Due Diligence Checklist, click on the **Edit** link present in the Added Checklists table. On clicking the **Edit** link, it will populate the information of the selected checklist. Change the values and click on **Save** button to update the information.
To delete a Due Diligence Checklist, Click on the **Delete** link present in the Added Checklists table.

**Note:** The **Delete** link will only be displayed if the Due Diligence checklist is not linked to any organization.

How to migrate Organization & Cluster for project Top

**Navigation:** System Setup > Configuration Setup > Migrate Organization & Cluster for Project

**Purpose:** To manage (edit) multi-cluster allocation percentage for a project not yet approved by the system.

**Usage:**

- Select all or either **Allocation Year** or **Allocation Type** or **Cluster** or **Organization Type** or type in the **Project Code** and click on **Search** button to view the projects based on the selected filters. Click on the **Reset** button to remove the existing filters.

Migrate Project Organizations & Clusters

### Filters

<table>
<thead>
<tr>
<th>Field</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allocation Year</td>
<td><img src="image" alt="Select options" /></td>
</tr>
<tr>
<td>Allocation Type</td>
<td><img src="image" alt="Select options" /></td>
</tr>
<tr>
<td>Organization Type</td>
<td><img src="image" alt="Select options" /></td>
</tr>
<tr>
<td>Project Code</td>
<td><img src="image" alt="Search" /> <img src="image" alt="Reset" /></td>
</tr>
</tbody>
</table>

### Projects

<table>
<thead>
<tr>
<th>#</th>
<th>Primary Cluster</th>
<th>Project Code [Allocation]</th>
<th>Org</th>
<th>Project Title</th>
<th>Budget</th>
<th>Project Status</th>
<th>Start Date</th>
<th>End Date</th>
<th>Edt</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Food Security</td>
<td>TUR-00-0000/SA 0000/F5/0000/0000 [Standard Allocation]</td>
<td>IOM</td>
<td>Strengthening the Resilience of IDPs and Vulnerable Host Communities in Northern Syria through Provision of Livelihood Support</td>
<td>425,571.87</td>
<td>TR Non-Recommended</td>
<td>01-Jun-2016</td>
<td>28-Feb-2017</td>
<td>Edt</td>
</tr>
<tr>
<td>2</td>
<td>Health</td>
<td>TUR-00-0000/SA 0000/F6/0000/0000 [Standard Allocation]</td>
<td>QRCS</td>
<td>Establishing and activation a primary health care center in north rural area including CHWs program and Hygiene Promotion</td>
<td>412,212.50</td>
<td>IP counter-signature</td>
<td>01-Jun-2016</td>
<td>31-Dec-2016</td>
<td>Edt</td>
</tr>
<tr>
<td>3</td>
<td>Education</td>
<td>TUR-00-0000/SA 0000/E-P/NGO/0000 [Standard Allocation]</td>
<td>PUN</td>
<td>Providing Equitable and Quality Education and Psychosocial Support to Syrian School-aged Boys and Girls in the North of Syria</td>
<td>414,562.62</td>
<td>IP counter-signature</td>
<td>01-Jul-2016</td>
<td>31-Dec-2016</td>
<td>Edt</td>
</tr>
<tr>
<td>4</td>
<td>Education (60%), Protection (20%)</td>
<td>TUR-00-0000/SA 0000/E-P/NGO/0000 [Standard Allocation]</td>
<td>WH</td>
<td>Support the educational process And to avoid ERW</td>
<td>640,170.39</td>
<td>Under Pre-SR</td>
<td>01-Jul-2016</td>
<td>03-Jun-2017</td>
<td>Edt</td>
</tr>
<tr>
<td>5</td>
<td>Food Security</td>
<td>TUR-00-0000/SA 0000/F5/NGO/0000 [Standard Allocation]</td>
<td>DCA</td>
<td>Food security through livelihoods and economic support in Northern Syria and in Home</td>
<td>909,478.39</td>
<td>TR Non-Recommended</td>
<td>01-Jun-2016</td>
<td>30-May-2017</td>
<td>Edt</td>
</tr>
<tr>
<td>6</td>
<td>Health</td>
<td>TUR-00-0000/SA 0000/F5/0000/0000 [Standard Allocation]</td>
<td>SRD</td>
<td>The Provision of Trauma, PHC, RH, IMCI and Nutrition Health Services to IDP and Host Communities in Northern Syria and hard-to-reach besieged areas of Rural Damascus.</td>
<td>596,000.00</td>
<td>IP counter-signature</td>
<td>01-Jun-2016</td>
<td>28-Feb-2017</td>
<td>Edt</td>
</tr>
</tbody>
</table>

**Field Descriptions:**

- **Allocation Year** (drop down box): Displays the year for which Allocation is created.
- **Allocation Type** (drop down box): Displays the type of allocation
- **Cluster** (drop down box): Displays the cluster s available.
- **Organization Type** (drop down box): Displays the name of the organization (Implementing Partner)
- **Project Code**: (text box): Enter the project code for which details need to be shown.
For editing the percentage details of a multi-cluster project, click on the **Edit** link present in the Projects table. On clicking the **Edit** link, it will populate the information of the selected project.

In the **Requesting Organization** field, select the organization name as required.

- If original organization is of type Non UN, then the organization can be changed across the org-type. i.e. (Non-UN to UN) or (Non-UN to other Non-UN)
- If original organization is of the type UN, then only the organization can be changed within UN organization type only. i.e. (UN to UN only)

For a multi-cluster project, the primary cluster, sub cluster and percentage will be editable. Deletion of clusters is allowed provided at least one cluster has been selected and the total percentage value should be 100.

**Note**: Implementing partners can modify the clusters in the project itself if the project budget is yet to be cleared.

Change the values as required and click on **Validate Impact** button which will display a list of impacts applicable to the project on changing the Cluster.

To confirm the changes to the cluster click on the **Save** button.

**Navigation**: System Setup > User Management > Project Admin Access

**Purpose**: To provide access rights to selected user groups

**Usage**: Select desired Section Name, User Group and Access Right (all required fields), once done click 'Save'. Your entry should appear below the 'Save' and 'Clear' buttons. Once an entry has been created, you can click on the 'Edit Icon' under the Action column to revise the selected entry. Or the Delete Icon to delete the entry.
Field Descriptions:

- **Section Name**: (Drop down menu to choose from 'Tab Lock' versus 'Activation') This pertains to the two sections of the Project Admin tab, 1. Tab Lock section and 2. Activation section. Select the section in which you wish to provide access rights for a particular user.
- **User Group**: (Drop down menu listing of the various user groups in GMS) The user group that you want to provide access rights for.
- **Access Right**: (Drop down menu to choose from 'Not visible', 'View', and 'Edit') The access right being granted to the selected user group.
  - **Not visible** – This will give the selected user group no visibility to the section selected above within the Project Admin tab.
  - **View** – This will give the selected user group view-only access to see the section selected above within the Project Admin tab.
  - **Edit** - This will give the selected user group ability to make changes and perform actions on the section selected above within the Project Admin tab.

Non Project Admin Access [Top]

**Navigation**: System Setup > User Management > Non Project Admin Access

**Purpose**: To provide access rights to selected user groups

**Usage**: Select desired Section Name, User Group and Access Right (all required fields), once done click ‘Save’. Your entry should appear below the ‘Save’ and ‘Clear’ buttons. Once an entry has been created, you can click on the ‘Edit Icon’ under the Action column to revise the selected entry. Or the Delete Icon to delete the entry.
Navigation: System Setup > Configuration Setup > Manage Pool Fund Monitor

Purpose: Create a Pool Fund Monitor, allowing HFU to monitor and keep track of Implementing Partner's performance in completing a project.

Usage: In the Monitor Name field, type in the name of the Pool Fund Monitor you would like to create. If you would like to make this Pool Fund Monitor active, ensure the 'Is Active' checkbox is selected, once done click 'Save Record' button. Your entry should appear below the 'Save Record' and 'Clear' buttons. Once an entry has been created, you can click on the 'Edit Icon' under the Action column to revise the selected entry. Or the Delete Icon to delete the entry. If you wish to only deactivate the monitor, click on the Edit Icon, and uncheck the 'Is Active' checkbox and click on the 'Save Record' button.

Field Descriptions:

- Monitor (textbox) Enter name of the pool fund monitor being created

The Pool Fund Monitor is located in the Timeline tab of an Implementing Partner's project proposal
### Operation Control Matrix

<table>
<thead>
<tr>
<th>Risk Level</th>
<th>Disbursements (in % of Total)</th>
<th>Needs Financial Report For Disbursement</th>
<th>Needs Narrative Progress Report</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Audits</td>
<td></td>
<td>Needs Narrative Final Report</td>
</tr>
</tbody>
</table>

### Disbursement Tranches

<table>
<thead>
<tr>
<th>Tranche #</th>
<th>Tranche %</th>
<th>Tranche Amount</th>
<th>Actual Disbursed Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Project Budget</td>
<td>0</td>
<td>13,444.21</td>
<td></td>
</tr>
</tbody>
</table>

### Narrative Report Timelines

*Full - default # of days to report are 15. Progressive - default # of days to report are 15. Final - default # of days to report are 30.*

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Report Name</th>
<th>Due Date</th>
<th>Active Date</th>
<th>Is Mandatory</th>
<th>Trigger Alert</th>
<th>Status</th>
<th>Update Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

### Financial Report Timelines

*Full - default # of days to report are 15. Final - default # of days to report are 45.*

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Report Name</th>
<th>Due Date</th>
<th>Active Date</th>
<th>Is Mandatory</th>
<th>Trigger Alert</th>
<th>Status</th>
<th>Update Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

### Monitoring

*Default # of days to report are 15.*

<table>
<thead>
<tr>
<th>Monitor Type</th>
<th>Due Date</th>
<th>Active Date</th>
<th>Monitor Name</th>
<th>Status</th>
<th>Update Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Contribution**

**Navigation:** Contribution

**Purpose:** To enlist the pledge status of donor’s contributions.
Usage:

- Enter the contribution id, select the year, indicate the donor, and the status of pledge given. Once entered, click on 'Add Contribution.'

**Contributions**

- **Contribution Id:** The unique identifier of a particular donor's pledge for a given year.
- **Year:** The year that the pledge has been made for.
- **Status:** The pledge status of: Pipeline, Pledge or Paid.
- **Donor:** The country donor.

**Bulk Timeline Activation**

**Navigation:** System Setup > Workflow Management > Bulk Timeline Activation

**Purpose:** Move multiple projects forward from project status to next project status within the project workflow OR activate a particular module for multiple projects.

**Usage:** Enter the project status, Cluster, Report Type, Allocation Type OR Organization OR a multiple of these filtering fields to locate desired projects and press 'Get Projects' button. Desired projects should appear below. Click on the checkbox next to desired projects that you wish to perform an action (or very top checkbox to select all), then click on 'Perform Bulk Action'.

**Field Descriptions:**

- **Contribution Id:** The unique identifier of a particular donor's pledge for a given year.
- **Year:** The year that the pledge has been made for.
- **Status:** The pledge status of: Pipeline, Pledge or Paid.
- **Donor:** The country donor.

Bulk Timeline Activation [Top]
Bulk Timeline Activation

Search Projects

Field Descriptions:
- **Project Status** (dropdown box): Select a project status from the list.
- **Cluster** (dropdown box): Select one or more cluster from the list.
- **Report Type** (dropdown box): Select one or more Report type from the list.
- **Allocation Type** (dropdown box): Select one or more Allocation type from the list.
- **Organization** (dropdown box): Select one or more organization from the list.

Click on **Get Projects** button to filter the data. Select the checkbox of the projects for which bulk action needs to be activated. Click on the **Perform Bulk Action** button to activate the bulk action.

Bulk Task Release

**Navigation:** System Setup > Workflow Management > Bulk Task Release

**Note:** Access to this feature will be given to HFU and GMS Admin only

**Purpose:** To unlock a task that has been locked by a user. This function is foreseen for a scenario in which a team member has taken on a GMS task assignment who is now absent and has not completed the task. The Bulk Task Release can then be utilized to release the assignment from the absent team member, so that the task can be appointed to someone else on the team.

**Usage:** Select the **Instance Type and Allocation Type** (required fields), and **Instance Status, Cluster, Organization** (optional fields) then press the ‘Get Locked Task’ button. Once the tasks have been located, select the task you wish to unlock and click on the ‘Release Selected Task’ button.
Field Descriptions:

- **Instance Type** (dropdown box): Select the instance type from the list provided.
- **Allocation Type** (dropdown box): Select one or more Allocation type from the list.
- **Instance Status** (dropdown box): Select one or more statuses for selected instance from the list.
- **Cluster** (dropdown box): Select one or more cluster from the list.
- **Organization** (dropdown box): Select one or more organization from the list.

**Note:** Once a task has been released, it will be made available for task assignment.

To take assignment of a task, click on [Take Assignment].
The following pop-up will be displayed, which will allow you to take the assignment of the task by clicking [Yes] or [No].
This is what an assigned task will look like. Once a user is done / no longer wishes to work on a task, the user can release the assignment again by clicking on [Release Assignment]. A task will be automatically released after a fixed period of time, the user can see the exact release time via the **Expiration** time.
Call for Proposals - Create New Project Top

**Navigation:** Allocations > Call for Proposals > Create New Project

**Purpose:** Initiate a 'Call for Proposal' Project Proposal on behalf of an organization.

**Usage:** Select the Requesting Organization, Allocation Type, enter Project Title, select the Cluster, Project Duration, Planned Start Date, and Planned End Date (all required fields) then click on the 'Create project' button.
Next, a draft Project Proposal will be initiated. Refer to the Project Submission on the General Section of the Help Portal on how to fill out the project proposal. Please note *the organization (the Implementing Partner) will need to perform the task of filling out the project proposal.

Call for Proposals – Standard Project Template Top

Navigation: Allocations > Call for Proposals > Standard Project Template

Published on CBPF GRANT MANAGEMENT SYSTEM (GMS). Date of creation: 30 Aug 2020
HOME - https://gms.unocha.org
**Purpose:** Generate a Standard Project Template

**Usage:** Select a Allocation Type from the drop down menu, then a 'Download Concept Note Template' OR 'Download Project Proposal Template' hyperlink should appear.

Click on this hyperlink, then the template in excel spreadsheet will appear at the lower left corner of the page.
Click on the template, to open up the template.

Rolling Basis - Create New Project  

**Navigation:** Allocations > Rolling Basis > Create New Project

**Purpose:** Initiate a 'Rolling Basis' Project Proposal on behalf of an organization.

**Usage:** Select the Requesting Organization, Allocation Type, enter Project Title, select the Cluster, Project Duration, Planned Start Date, and Planned End Date (all required fields) then click on the 'Create project' button.

<table>
<thead>
<tr>
<th>Requesting Organisation</th>
<th>AGTED (Agency for Technical Cooperation and Development)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allocation Type</td>
<td>Needs extra allocation - 2015</td>
</tr>
<tr>
<td>Project Title</td>
<td>Test Create Project</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Cluster</td>
<td></td>
</tr>
<tr>
<td>Is multi-cluster project?</td>
<td>Health</td>
</tr>
<tr>
<td></td>
<td>Select</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Project duration</td>
<td>2 months</td>
</tr>
<tr>
<td>Planned start date</td>
<td>28/09/2020</td>
</tr>
<tr>
<td>Planned end date</td>
<td>27/08/2023</td>
</tr>
</tbody>
</table>

Next, a draft Project Proposal will be initiated. Refer to the Project Submission on the General Section of the Help Portal on how to fill out the project proposal. Please note *the organization (the Implementing Partner) will need to perform the task of filling out the project proposal.*
Rolling Basis – Reserve Project Template

**Navigation**: Allocations > Rolling Basis > Reserve Project Template

**Purpose**: Generate Reserve Project Template

**Usage**: Select a Allocation Type from the drop down menu, then a 'Download Concept Note Template' OR 'Download Project Proposal Template' hyperlink should appear.

**Click on this hyperlink, then the template in excel spreadsheet will appear at the lower left corner of the page.**
Click on the template, to open up the template.

Manage Document Category [Top]

**Navigation:** System Setup > Configuration Setup > Manage Document Category

**Purpose:** Adding document category to a workflow or module

**Usage:** Type in Category Name, select Group, check the 'Is Visible' checkbox (if you want the document category to be visible), check the 'Is Mandatory' checkbox (if you want the document category to be compulsory) and click on the 'Save' button.
Manage Document Category

<table>
<thead>
<tr>
<th>Category</th>
<th>Group</th>
<th>Is Visible</th>
<th>Is Mandatory</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Supporting Documents</td>
<td>Project</td>
<td>Yes</td>
<td>No</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Report Documents</td>
<td>Financial Reporting, Narrative Reporting</td>
<td>Yes</td>
<td>No</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Allocation Type Documents</td>
<td>Allocation Type Documents</td>
<td>Yes</td>
<td>No</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Budget Documents</td>
<td>Disbursement, Project</td>
<td>Yes</td>
<td>No</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Scoring</td>
<td>Global Scoring</td>
<td>Yes</td>
<td>No</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Project Scoring</td>
<td>Global Scoring</td>
<td>Yes</td>
<td>No</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Partner Scoring</td>
<td>Global Scoring</td>
<td>Yes</td>
<td>No</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Application Form</td>
<td>Bank info</td>
<td>Yes</td>
<td>No</td>
<td>[Edit]</td>
</tr>
<tr>
<td>SharePoint Project</td>
<td>SharePoint Project</td>
<td>Yes</td>
<td>No</td>
<td>[Edit] [Delete]</td>
</tr>
<tr>
<td>Revision related Documents</td>
<td>Project, Revision</td>
<td>Yes</td>
<td>No</td>
<td>[Edit]</td>
</tr>
<tr>
<td>Financial Report Documents</td>
<td></td>
<td>Yes</td>
<td>No</td>
<td>[Edit] [Delete]</td>
</tr>
</tbody>
</table>

Field Descriptions:
- **Category**: (textbox) Name of the document category that has been created
- **Group**: (Drop-down menu) Name of workflow or module

To edit an existing Document Category, **click on the Edit hyperlink** associated with the document category. Make changes at the top of the screen and click the **'Update' button**.
To deactivate and delete a document category, click on the Edit hyperlink associated with the document category. Uncheck the 'Is Visible' checkbox at the top of the screen and click the 'Update' button.

To delete an existing Document Category, click on the Delete hyperlink associated with the document category. If you are sure you wish to delete the document category, click "Ok" in the 'Are you sure want to delete this record' pop-up window that appears next.

Report Type Alert Management

Navigation: System Setup > Configuration Setup > Report Type Alert Management

Purpose: Add Email Alert for Narrative Report and/or Financial Report

Usage: Select the Narrative Report Type OR Financial Report Type (drop-down menu options), then select the Alert (drop-down menu option). Then click on respective 'Save Narrative Alert' OR 'Save Financial Alert' button.
Field Descriptions:

- **Narrative Report Type:** (Drop-down menu) **Progress OR Final** – These are the two type of Narrative Reports to choose from, to be specific as to which type of narrative report you wish to create an email alert for.
- **Financial Report Type:** (Drop-down menu) **Interim OR Final** – These are the two type of Financial Reports to choose from, to be specific as to which type of financial report you wish to create an email alert for.

**Manage Standard Activities**

**Navigation:** System Setup > Configuration Setup > Manage Standard Activities

**Purpose:** Create standard activities for a particular cluster

**Usage:** Type in the Description of the Standard Activity, select the Cluster (drop-down menu), Allocation Year (drop-down menu). All fields are required. Next, click on the ‘Save Record’ button.
Click on the 'View linked projects' hyperlink to see projects that have used a particular standard activity.

Manage Quick Filters  Top

**Navigation:** System Setup > Configuration Setup > Manage Quick Filters

**Purpose:** Add Quick Filters to User Groups' Home Page for Project Overview, Report Overview, Revision Overview, Monitor Overview, Disbursement Overview and Audit Overview tabs.

**Usage:** Click on the 'Add New Quickfilter' button located at the lower left corner of the page. Click on the Save button to save the new filter details. Click on the Save & Back button if you wish to go back to the Manage Quick Filters screen.
### Manage Quick Filters

#### Project Overview Filters

<table>
<thead>
<tr>
<th>Filter Name</th>
<th>Operator</th>
<th>User Group</th>
<th>Order</th>
<th>Update Details</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>FCS Finance: TR review</td>
<td>IN</td>
<td>OCHA FCS system admin</td>
<td>1</td>
<td></td>
<td>[edit]</td>
</tr>
<tr>
<td>FCS Finance: Disbursement</td>
<td>IN</td>
<td></td>
<td></td>
<td></td>
<td>[edit]</td>
</tr>
<tr>
<td>FCS Finance: MoU review</td>
<td>IN</td>
<td></td>
<td></td>
<td></td>
<td>[edit]</td>
</tr>
<tr>
<td>FCS Finance: User task inbox</td>
<td>IN</td>
<td></td>
<td></td>
<td></td>
<td>[edit]</td>
</tr>
<tr>
<td>Preliminary review by HFU</td>
<td>IN</td>
<td>Humanitarian Financing Unit (HFU)</td>
<td>1</td>
<td></td>
<td>[edit]</td>
</tr>
</tbody>
</table>

#### Report Overview Filters

No Quickfilters found

#### Revision Overview Filters

No Quickfilters found

---

Add New Quickfilter
Field Descriptions:

- **Filter Name** (text box): Enter the name for the filter to be created.
- **Description** (text box): Enter the description of the filter.
- **Operator** (drop down box): Select the operators desired for the filter from the provided list.
- **Filter Type – Overview tab** (check box): Select the tabs for which the filter is applicable.
- **Filter Type – Order** (checkbox):
- **User Group** (drop down box): Select the user group for which this filter is applicable.
- **Status – Instance Type** (drop down box): Select the instance type from the list provided.
- **Status – Standard Status** (drop down box): Select the standard statuses from the list provided.
- **Status – Reserve Status** (drop down box): Select the reserve statuses from the list provided.
- **Filter Condition** (text box): Enter the filter conditions applicable.
- **Sorting Condition** (text box): Enter the sorting conditions applicable.

Global Task List [Top]

**Navigation:** Allocations > Global Task List

**Purpose:** Global Task list provides a common platform for the user to access the tasks associated with other pooled funds for which the user has been provided rights to.

**Usage:**

- If an user access the Global Task list with other roles other than that of an Administrator, the user will be able to see a task list of projects pending in other pooled funds depending on what configuration for the user account has been done in the External Pooled fund.
Global Task List

<table>
<thead>
<tr>
<th>Date Assigned</th>
<th>Pooled Fund</th>
<th>Code</th>
<th>Cluster</th>
<th>Organization</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>20/10/2016 11:00:25 AM</td>
<td>Afghanistan</td>
<td>AFG-00/000/DC/COS/UH/000</td>
<td>COORDINATION AND COMMON SERVICES</td>
<td>Office for the Coordination of Humanitarian Affairs</td>
<td>Under Closure</td>
</tr>
<tr>
<td>16/08/2016 08:08:01 PM</td>
<td>Afghanistan</td>
<td>AFG-15/0000/S41/H/IN30/000</td>
<td>HEALTH</td>
<td>JOHANNITER</td>
<td>Under Audit</td>
</tr>
</tbody>
</table>

Disbursement Task List

<table>
<thead>
<tr>
<th>Date Assigned</th>
<th>Pooled Fund</th>
<th>Code</th>
<th>Cluster</th>
<th>Organization</th>
<th>Status</th>
<th>#Days HE Sign</th>
<th>#Days EU Sign</th>
<th>Assigned To</th>
</tr>
</thead>
<tbody>
<tr>
<td>26/03/2016 09:26:19 PM</td>
<td>Afghanistan</td>
<td>AFG-00/81/COS/UH/000</td>
<td>COORDINATION AND COMMON SERVICES</td>
<td>Office for the Coordination of Humanitarian Affairs</td>
<td>Process Disbursement for</td>
<td>933</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Report Task List

<table>
<thead>
<tr>
<th>Date Assigned</th>
<th>Pooled Fund</th>
<th>Code</th>
<th>Report Type</th>
<th>Report Name</th>
<th>Organization</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>17/05/2016 06:55:39 AM</td>
<td>Afghanistan</td>
<td>AFG-08/000/SAI/H/IN30/000</td>
<td>Financial - Final</td>
<td>Final Financial Report 1</td>
<td>International Medical Corps UK</td>
<td>Final Financial Report under review</td>
</tr>
<tr>
<td>17/05/2016 06:56:14 AM</td>
<td>Afghanistan</td>
<td>AFG-08/0000/SA/4/H/IN30/000</td>
<td>Financial - Economic</td>
<td>Interim Financial Report 1</td>
<td>Agency for Assistance for</td>
<td>Final Financial report under review</td>
</tr>
</tbody>
</table>

Revision Task List

<table>
<thead>
<tr>
<th>Date Assigned</th>
<th>Pooled Fund</th>
<th>Code</th>
<th>Report Type</th>
<th>Report Name</th>
<th>Organization</th>
<th>Status</th>
</tr>
</thead>
</table>

Audit Task List

<table>
<thead>
<tr>
<th>Date Assigned</th>
<th>Pooled Fund</th>
<th>Code</th>
<th>Balance Due</th>
<th>Ineligible Expenditure</th>
<th>Organization</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/08/2016 08:08:01 PM</td>
<td>Afghanistan</td>
<td>AFG-00/000/SAI/H/IN30/000</td>
<td></td>
<td></td>
<td>JOHANNITER</td>
<td>Audit Ongoing</td>
</tr>
<tr>
<td>16/08/2016 09:45:39 PM</td>
<td>Afghanistan</td>
<td>AFG-00/0000/SAI/M3/H/IN30/000</td>
<td></td>
<td></td>
<td>CARE International</td>
<td>Audit Ongoing</td>
</tr>
</tbody>
</table>

SharePoint Task List

- Only an GMS Admin will be able to view and access the Global Task list
Global Task List

- **Select Pooled Fund** (drop down box): Lists all the pooled funds available in the GMS system.
- **Select Role** (drop down box): Lists the user role.
- If the check mark in the check box Exclude Configured Statuses is unchecked it will display items which have been set by the Admin to be excluded from the list. By default, the checkbox is checked. For e.g. If the Admin has excluded projects having status ‘Project Closed’, then projects having this status will be displayed on unchecking the check box.

Click on the **Search** button to generate the Global Task List.

Global Task List