User Registration

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What is User Registration? Top

In order to use the Grant Management System (GMS), all users must register on the platform and have their account approved. Only after account approval can you access the GMS and work on the platform.

Different categories of users coexist on the GMS, including, but not limited to:

- Agencies/Partners
- Humanitarian Financing Unit
- Cluster Leads and Support Officers
- FCS Finance
- Humanitarian Coordinator
- Oversight and Compliance, etc.

The user roles, as configured during the registration process, determine the user’s subsequent home page and system rights.
All categories of users must register, however, the process for Agencies/Partners is slightly different. If you fall under the category ‘Agencies/Partners’ (namely, if you are a member of a NGO/UN agency/Red Cross/Red Crescent Society and wish to apply for CBPF funding) please read the section below before registering on the GMS.

For all other user roles, you can skip directly to the section 'how to register in the GMS (all users)'.

**SPECIFIC REGISTRATION PROCESS FOR AGENCIES/PARTNERS (NGOs, Red Cross/Red Crescent and UN agencies)**

Within the Grant Management System (GMS), the user role of CBPF partners is called “Agencies/Partner”.

Each Agency/Partner must be registered and enrolled as an organization in its corresponding CBPF GMS before an individual user can register, be linked to, and access GMS under the organization’s profile.

The registration of CBPF partners is hence two-fold:

- **Step 1:** Registration and enrollment of the organization on GMS

The organization should contact the HFU and send them the necessary documentation to be registered and enrolled on GMS.

- **Step 2:** User registration of individuals within a registered organization on GMS

Once the organization is enrolled on GMS, the HFU will notify the partner and instruct them to proceed with the individual user registration, which allows a user to gain access to the organization’s profile on the system. Individual registration requests are then reviewed and approved by the HFU country team usually within 48 hours from the submission.

To learn how to register as an individual, please refer to the section of this article below: how to register in the GMS (all users).

**Important note for Agencies/Partners:** Registering your organization and gaining access to GMS does not mean that your organization is now eligible for funding by OCHA CBPF. While the GMS registration is the first step of the partner eligibility process, the organization must complete its Due Diligence and Capacity Assessment, which will in turn determine the eligibility of the organization.

**How to register on GMS: for all users**

**PHASE 1: HUMANITARIAN ID REGISTRATION**

GMS identification procedure is directly linked to the Humanitarian ID platform. As a new user, you will therefore need to create a Humanitarian ID (HID) account. If you already have a HID account, you can skip this step and move to phase 2.

To create a HID account, go to https://humanitarian.id/register
Fill in all the fields from the registration form and click on [register].

Register

Sign up for a Humanitarian ID account. Doing so will give you access to Humanitarian ID as well as a growing number of related humanitarian community sites.

Email

Email address

First Name

First name

Last Name

Last name

Password

Passwords must be at least 8 characters long, contain at least one number, one uppercase character and one lowercase character.

Your password

Password (confirm)

Your password
You will receive an email from info@humanitarian.id to confirm the newly set up account. If you don’t see the email in your inbox, please check your spams. Click on the link provided by HID to confirm the account.

**Important note:** The HID confirmation link is only valid for 7 days! If the user does click on the link to confirm registration within 7 days, the account will be deleted, and the user will need to register again.

When your account is confirmed, you will see this confirmation pop-up window, and you can proceed to Phase 2.
PHASE 2: SUBMISSION OF THE REGISTRATION REQUEST ON THE GMS

Now that you are registered on Humanitarian ID, the GMS will use these HID credentials to record your profile.

Go to the GMS Homepage by entering this address in the navigation bar of your browser: https://cbpf.unocha.org/

Click on [Login].
You will be redirected to the Humanitarian ID login page. Insert your HID user details and click on [login].

The first time you log into the GMS, the system will request access to your humanitarian ID account. Click on [Allow].
Upon first access to the GMS, users must fill in several fields to create their profile. This important 2-steps process will determine your profile’s characteristics.

**Step 1:**

1. Select the CBPF you wish to register in;

2. Select your User Role, this important step will determine your subsequent homepage and system rights.
GMS Focus: User role’s selection

Select your Primary User Group form the list, according to the following directions:

➢ Implementing Partners should select Agencies/Partners
➢ Cluster and Sector leads should select Clusters leads and support officers
➢ OCHA Field Officers, Guest users should be selected by internal or external users who would be interested to view projects or part of the allocation cycle
➢ Others should be selected by any user that would require a different profile such as HFU, HC, Finance…
Step 2 (UN Agencies/Implementing Partners and Cluster Coordinators only):

- Select your Organization your profile will be linked to (Implementing Partners and Cluster Coordinators only)
  - Agency/Partners: if your organization does not appear in the drop-down list, please contact your respective HFU.
  - Cluster Coordinators: For the Organization field, select 'Not applicable for OCHA / cluster staff'.
- Select the cluster your profile will be linked to (Cluster Coordinators only)
  - Agency/Partner: for the Cluster field, select 'Not applicable for Agencies'.

Click on [Submit Registration].
The CBPF in-country office will approve your account within 48 hours. Please note you might not receive a confirmation email.

How to approve new user registrations in the GMS? (HFU only) Top

To approve a registration request on the GMS, go to your GMS home page, and click directly on [System Set up], without scrolling the drop-down menu.

In the Online User Registration page, click on the username of the person you wish to approve. To find a username, you can click on Ctrl+F and search for the person’s name.
You will be redirected to the ‘System Users’ page. You can also access a registration request by going to System Setup > User Management > System Users > User List tab and searching for the name of the user.

On the “System Users” page:

- Tick the 'Approve' box,
- Ensure they are ticked as 'Active',
- Send Mail Notification on Approval of the user (optional),
- Tick the 'Allow workflow Mail Notifications’ box (if applicable); 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.

Then, click on [Save profile].
System Users Field Descriptions:

**User details:**

- **Full names:** User's first and last name
- **Usernames:** 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 organization 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 organization or cluster.
• **Clusters for Notification** (checkboxes) – If you want 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.

**How to log in the GMS as a registered user?**

Once your registration has been approved, you can log on to the CBPF GMS using your email address and password.

1. Go to the GMS home page by entering this URL in the navigation bar of your browser: [https://cbpf.unocha.org/](https://cbpf.unocha.org/)
2. Click on [Login].
3. Enter your HID credentials and click on [Login].
How to edit user information

CHANGES IN USERNAME

Users can manage their profile, and change their username, through the Humanitarian ID (HID) by going on the HID platform at this address: https://humanitarian.id/

The changes from HID are automatically reflected in the GMS - changes cannot be done directly in the GMS platform.
Log in to HID by entering your credentials and clicking on [Login].

In your HID landing page, hover over your name at the top right corner, and select [Profile] from the dropdown menu.
Click on the pencil icon to edit your profile’s information.

You can change your username in the top section. Don’t forget to click on the approval icon to save your changes.
When a user modifies his/her name in HID, the username in GMS will be updated upon the next successful login on the GMS. The GMS will maintain a log of the user’s old full name for reference purposes.

**CHANGES IN EMAIL ID**

To change your email ID, you must log in the HID platform at this address: [https://humanitarian.id/](https://humanitarian.id/).
and access your profile’s section. In your profile page, click on the pencil icon.

Then, locate the Email section in the Contact Information column, on the left side of your screen. Select in the drop-down list whether the new email is for personal or professional use, then enter the new email in the field below and click on the ‘+’ icon.
Once you add your new email address on HID, the system will request you to confirm it. Go to your email inbox, you should have received a verification email from HID, containing a confirmation link. Click on the link to verify your email.
Go back to your profile section in HID and tick the box next to your newly saved email address. It will become your primary email address.
Once your primary email is updated in HID you will no longer be able to login the GMS with the old email address. To login the GMS, use your newly saved and updated primary email address.

**Please note**, the existing GMS user profile (linked with the old e-mail ID) will be deactivated by HFU for security reasons. The user is required to submit a new registration on the GMS (phase 2 of User registration) with the new e-mail ID (marked as primary in HID). In such cases, a user will only be able to access the system after the new profile is approved by the HFU, which can take up to 48 hours.

The HFU will be able to see a comment displayed in the GMS user profile to indicate that the user was deactivated because the e-mail ID was modified in HID.
CHANGES OF PASSWORD

Users can change their password by login in the HID platform at this address: https://humanitarian.id/

Click on your username at the top-right corner of the HID landing page, and click on [Preferences] from the dropdown menu.

Within the account preferences users can select [Change Password] from the menu.

Enter your current password, your new password and confirm the new password. After filling out this information the user needs to click on the [Update password] button.
HOW TO RETRIEVE A FORGOTTEN PASSWORD?

If you have forgotten your password, you can reset your password by clicking on [Forgot/Reset password] in the GMS/HID login page.
In the Reset Password page, enter your email address, and click on [Reset Password].
When clicking on this button, you will receive an e-mail with a link to reset your password. Click on it to be redirected to new screen, requesting you to enter a new password. The password needs to fulfill all password requirements. Then, click on [Reset Password].
Once the password has been reset, you will be redirected to the Login page of HID. In the Login screen which displays the message ‘Your password was successfully reset. You can now login.’, enter your email address and your new password, and click on [login] to access the GMS.
Specific cases: multi-users/multi-pooled funds registration

The following specific registrations cannot be processed by the users themselves as they require action from the HFU and GMS support team.

- If the staff member has left the previous Y Humanitarian Fund and only needs access to X Humanitarian Fund GMS.
- If the staff member has left the previous Y Humanitarian Fund, its user account has been deactivated and now and only needs access to X Humanitarian Fund GMS.
- If the staff member/partner is an HQ/regional staff who needs access to several Humanitarian Funds GMS.

For all aforementioned cases, please send your request to both your HFU country team and GMS Support (gms-support@un.org), with a detailed explanation of your current situation.