HFU Home Page

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HFU Home Page Overview

The Humanitarian Financing Unit (HFU) home page automatically displays all the tasks pertaining to projects that currently require the HFU’s action or attention.

The HFU Home Page also includes several features that will allow you to navigate through the GMS and access the wanted content:
1- The Fund you are registered in;
2- Your GMS user role;
3- The log out button: click on this button to log out;
4- The Fund Home button, click on this button to access your Fund’s home.
5- Menu options at the top, which are accessible in every page of the GMS;
6- Quick Access tooltip, which is accessible in every page of the GMS;
7- A FAQ button which redirects to the according guidance in the Help portal, this feature is accessible in every page of the GMS.
8- The Tasks Overview Dashboard; which allows an easy access to all pending tasks, sorted thematically.
9- A Customize Task list button; which allows to customize your Tasks Overview dashboard, namely to show/hide your task lists.
10- A Search button; which shows the Advance Switchboard section.

A detailed explanation of the sections is given below under sections titled "Fund Home", "Tasks Overview", "Quick Access", "Advance Switchboard" and "FAQ tooltip".
How to navigate through the Tasks Overview Dashboard?

The tasks overview section in the home page will display the following lists depending on the rights given to the user role.

- Projects Task List
- Disbursement Task List
- Report (financial and narrative) Task List
- Revision Task List
- Audit Task List
- Sharepoint Projects Task List
- Timelines Task List
- Monitoring Task List
- Refund Task List

Each task list has been provided with certain common functionalities which are mentioned below:

1. The **Date Assigned** column in every task list provides you with a link to open individual task items. The information in this column can be sorted chronologically. An upward arrow indicates that the information is in ascending order and downward arrow indicates descending order.

2. The **Code** column provides you with a link opening the project proposal.

3. The ‘Exclude configured [instance] statuses’ option. HFU officers can request GMS Support by email to exclude specific statuses from their task lists. Hence, the requested statuses are hidden by default from the task list. However, you can still view the excluded ones and access the full list of pending tasks by un-ticking this box.

4. A ‘Refresh’ option, allowing users to update the task list.

5. The **Count** option available on each task list provides you with the number of tasks currently present in the task list and a mouseover action would provide you with a status count of the tasks.

6. An ‘Export to Excel’ option, which enables the user to extract the filtered information into an excel sheet.
CUSTOMIZING THE TASK OVERVIEW DASHBOARD

You can choose to hide, show or set as default view the task lists by clicking on [Customize Task List].

In the pop-up window, tick the boxes of the task lists’ names to select them. Then click on one of the three different options:
- **Set as default**: this will configure the selected task lists as appearing by default on your GMS homepage,
- **Refresh**: This will temporarily configure your dashboard as per your selection. However, to set this configuration as permanent, you will need to click on [set as default].
- **Cancel**: click on this button to close the pop-up window, this will have no impact on the dashboard.
The Quick Access tool, accessible on all pages of the GMS, enables users to quickly access sections in the GMS.

To access the Quick Access tool, click on this icon on the right-hand side of the menu bar:

![Quick Access Icon]

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

The tools displayed in the Quick Access panel for HFU Home Page are:
<table>
<thead>
<tr>
<th>Tool Name</th>
<th>Description</th>
<th>Navigation</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>$ Fund Overview</td>
<td>This option redirects the user to the $ Fund Overview tab which provides a summary breakdown of projects budgets in the form of cost tracking components as per allocation.</td>
<td>Report &gt; Report &gt; $ Fund Overview</td>
<td>Please access more information on this tool by clicking <a href="#">here</a>.</td>
</tr>
<tr>
<td>Allocation Documents</td>
<td>This option redirects the user to the Allocations’ Documents page of the GMS, where you can upload/download and share documents pertaining to the funding allocations.</td>
<td>System set up &gt; allocation management &gt; document management</td>
<td>Please access more information on this page by clicking <a href="#">here</a>.</td>
</tr>
<tr>
<td>Audit Overview</td>
<td>This option redirects the user to the Audit overview and search tool, which enables users to search for and access an overview of projects under an audit-related workflow stage.</td>
<td>Report &gt; Report &gt; Audit Overview</td>
<td>Please access more information on this tool by clicking <a href="#">here</a>.</td>
</tr>
<tr>
<td>Tool Name</td>
<td>Description</td>
<td>Navigation</td>
<td>Additional Information</td>
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</tr>
<tr>
<td>Bulk Project Print</td>
<td>This option redirects the user to the Bulk Project Print Tab where the user can do a bulk project print in various formats.</td>
<td>Report &gt; Report &gt; Bulk Project Print</td>
<td>Please access more information on this tool by clicking <a href="https://gms.unocha.org">here</a>.</td>
</tr>
<tr>
<td>Fund Overview</td>
<td>This option redirects the user to the Fund Overview Tab where the user can view the status flow of the project cluster wise.</td>
<td>Report &gt; Report &gt; Fund Overview</td>
<td>Please access more information on this tool by clicking <a href="https://gms.unocha.org">here</a>.</td>
</tr>
<tr>
<td>CBPF Milestones</td>
<td>This option redirects the user to the Funding Process Tab where the user can review projects that has reached selected ‘Fund Milestones’</td>
<td>Report &gt; Report &gt; Funding Process</td>
<td>Please access more information on this tool by clicking <a href="https://gms.unocha.org">here</a>.</td>
</tr>
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<td>Tool Name</td>
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</tr>
<tr>
<td>Disbursement Overview</td>
<td>The Disbursement overview lists the status of the disbursement workflow for all or filtered projects. User can search the disbursement information using different search criteria.</td>
<td>Report &gt; Report &gt; Disbursement Overview</td>
<td>Please access more information on this tool by clicking here.</td>
</tr>
<tr>
<td>Process Monitor</td>
<td>This option redirects the user to the Process Monitor where the user can monitor the progression of projects through the various project workflow statuses within an allocation.</td>
<td>Report &gt; Report &gt; Process Monitor</td>
<td>Please access more information on this tool by clicking here.</td>
</tr>
<tr>
<td>Report Overview</td>
<td>This option redirects the user to the Report Overview Tab which focuses on providing the user with reports regarding a project.</td>
<td>Report &gt; Report &gt; Report Overview</td>
<td>Please access more information on this tool by clicking here.</td>
</tr>
<tr>
<td>Tool Name</td>
<td>Description</td>
<td>Navigation</td>
<td>Additional Information</td>
</tr>
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<tr>
<td>Revision Overview</td>
<td>This option redirects the user to the Revision Overview Tab which displays all revision requests and revision associated with a project.</td>
<td>Navigation: Report &gt; Revision Overview</td>
<td>Please access more information on this tool by clicking <a href="#">here</a>.</td>
</tr>
<tr>
<td>OCHA Assurance</td>
<td>OCHA Assurance dashboard provides a consolidate data output from single/multiple pooled funds based for single/multiple allocation years, including the total number of projects with audit status, financial reporting status, program report status, and monitoring actions status with respect to the filters set.</td>
<td>Report &gt; Report &gt; OCHA Assurance</td>
<td>Please access more information on this tool by clicking <a href="#">here</a>.</td>
</tr>
<tr>
<td>Monitoring Overview</td>
<td>This option redirects the user to the Monitor Overview tab which enables the user to access the pooled Fund Monitors created to keep track of Implementing Partner’s performance.</td>
<td>Report &gt; Report &gt; Monitoring Overview</td>
<td>Please access more information on this tool by clicking <a href="#">here</a>.</td>
</tr>
<tr>
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<tr>
<td>Global Task List</td>
<td>The 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.</td>
<td>Allocations &gt; Global Task List</td>
<td>Please access more information on this tool by clicking here.</td>
</tr>
<tr>
<td>Global Milestones</td>
<td>Directs the user to the Global Funding process page where the user can review the averages and milestones per Pooled Fund.</td>
<td>Report &gt; Report &gt; Global Milestones</td>
<td>Please access more information on this tool by clicking here.</td>
</tr>
<tr>
<td>FTR Overview</td>
<td>The FTR Overview enables users to access the data related to Fund Transfer Request.</td>
<td>Report &gt; Report &gt; FTR Overview</td>
<td>Please access more information on this tool by clicking here.</td>
</tr>
</tbody>
</table>

**Advance Switchboard**

The Advance Switchboard is by default shown in the homepage, unless it has been unticked from the [Customize Task List] pop-up window. In this case, it is accessible on prompt of the button [search].
<table>
<thead>
<tr>
<th>Code</th>
<th>Budget</th>
<th>Cluster</th>
<th>Organization</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>TUR:20/3555/DST/NGO/14997</td>
<td>991,705.90</td>
<td>Education</td>
<td>ABC DEMO</td>
<td>Budget Cleared</td>
</tr>
</tbody>
</table>
The Advance Switchboard enables the user to display projects from the Pooled Fund based on the filter criteria selected. The data retrieved displays all projects which are in the GMS system for the selected pooled fund.
Following are the filter options available for an HFU user role:
Under the Quick Filters section (this section’s filters might differ according to your pooled fund):

- Approved by HC (check box): Select the checkbox to display projects approved by HC for the pooled fund.
- First disbursement completed (check box): Select the checkbox to display projects which have completed the first disbursement status.
- Approved Projects (check box): Select the checkbox to display only the approved projects.

*Please note,* you can hover over the question mark icon near the filter’s title to access more information.

Under the Filters section:

- Select Allocation year (drop down box): Lists the years of allocation available in the GMS system for the pooled fund.
- Select Allocation Type (drop down box): List of allocations related to the pooled fund. (Standard or Reserve Allocation).
- Select Cluster (drop down box): List of clusters defined for the pooled fund.
- Select Organization type (drop down box): List of Organization Type in the pooled fund. (International NGO, National NGO, Other, UN Agency)
- Project Code (text box): Search a project by Project Code.
- Select Organization (drop down box): List of organization names for organizations that have created a project in the pooled fund.
- Select Admin Location 1 (drop down box): Lists the regional locations in the country.
- Select Project Status (drop down box): Lists the project statuses currently available in the pooled fund. for the filtered projects. The list of choices applies for both Standard and Reserve Allocation Project Statuses.
- Select Report Status (drop down box): Lists of narrative and financial reports available for the pooled fund on which basis projects can be filtered.

Under the Implementation section:

- Date (drop down box): Select the start and end dates to filter the relevant projects,
- Duration (drop down box and text box): choose the duration characteristic from the drop-down list, and insert the duration in the text box, to filter the relevant projects.
To reset the bottom filters, click the [Reload Filters] button

Click the [Clear] button to reset the entire Advance Switchboard filters.

**Example: A list of projects that meets a set of filter criteria.**

A brief description of the columns and buttons is given below:

- **Admin Actions:**
  
  - Print Proposal [ ]: Clicking on this icon will print the project proposal.
  
  - View [ ]: Clicking on this icon will allow viewing the project on GMS.
Edit ✒: Clicking on this icon will allow editing the project on GMS. This icon will be displayed only if the user can edit in the current project status.

• **Primary Cluster**: Displays the primary cluster group(s) to which the project proposal belongs to.
• **Project Code [Allocation]**: Displays the system generated project code and allocation that the project proposal belongs to.
• **Org**: Displays the Implementing Partner's organization name
• **Project Title**: Displays the project proposal's title.
• **Budget**: Displays the project proposal's budget.
• **Project Status**: Displays the current status the project.
• **Start Date**: Displays the project's implementing start date.
• **End Date**: Displays the project's implementing end date.
• **Due Diligence**: Displays whether the Implementing Partner's Due Diligence has been approved or not.
• **View Version(s)**: Displays if project revisions have been made.
• **Partner Project Risk**: Is determined at budget clearance stage of the project. At budget clearance, the partner’s risk becomes the partner project’s risk. The partner project risk is used to define the operational modalities applicable to this project. The partner project risk never changes, even if the partner’s risk is re-calculated through the Partner Performance Index.

• **Partner Risk**: Displays the current risk of the partner. It can be different from the Partner’s project risk, as it can be re-calculated any time through the Partner Performance Index.

Click the [Show Filters] button to revert to the Advance Switchboard present on the GMS Home page.
Click the [Export Project Summary] button to export the project summary information in an Excel format.
Click the [Export Full Dump] button to export the detailed project information in an Excel format.

**How to use the FAQ Tooltip?**

The FAQ tooltip is accessible on all pages of the GMS. It redirects to a guidance note dedicated to the page.

In the example below, upon clicking on the FAQ tooltip of the Grant Agreements’ page, a new tab will open on your browser, opening the specific related section in the ‘Preparation of Grant Agreement’ article of the Help portal.
### Grant Agreements

**Allocation Type**: KT STD 2020 - 2023  
**Agency Type**: Non-UN Organization

**Organization**: Select Organization  
**Status**: Select Status

**Report Format**: PDF  (For MS-Word format, Contact GMS Support)  
**Select only one project**

<table>
<thead>
<tr>
<th>Sr.No.</th>
<th>Code</th>
<th>Project Title</th>
<th>Sector</th>
<th>Organization</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>TUR-20/3539/K3A20/E/HNGO/14997</td>
<td>KT TEST PROJECT</td>
<td>Education</td>
<td>IOM (Spain)</td>
<td>$308,161.40</td>
</tr>
<tr>
<td>2</td>
<td>TUR-20/3539/K3A20/E/HNGO/15043</td>
<td>KT TEST Project</td>
<td>Education</td>
<td>IOM (Spain)</td>
<td>$181,450</td>
</tr>
</tbody>
</table>

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What is the Fund Home Page? [Top]

In the Fund Home page, users can view the following features:

- What is the Grant Agreement and when should it be generated on the GMS?
- Preliminary steps to generating the Grant Agreement (HFU/IP)
  - Validation of Timelines (HFU)
  - Granting authorization of project information (IP)
    - Bank Account Authorization
    - Project Start Date Authorization
    - Project Signatory Authorization
- How to generate the Grant Agreement? (HFU)
  - GMS Focus: Grant Agreement error icon
  - Uploading the generated GA on the project’s GMS page
- The signature process (HFU, IP, HC, EO)
  - Final HC approval and signature (HC)
    - Rejecting the Project Proposal
1- A **Login button**, to login to GMS
2- A **year tab**, allowing users to filter this page’s information per year,
3- A **list of all CBPFs**, enabling users to filter this page’s information per CBPF,
4- A **contributions/allocations section**, providing users with funding information on the pooled funds as follows:

   a. **Contributions**:  
      - The Fund Name,  
      - Commitments in US$ per Donor, and  
      - Paid Contributions in US$ per Donor.

   b. **Allocations**:  
      - the Fund Name  
      - The implementing partners (UN Agencies, International NGOs, national NGOs, Red Cross/Red Crescent Societies),
5. The **map** provides a broad overview of the CBPFs worldwide,
6. The **legend** completes the map, indicating the amounts allocated in US$ per CBPF.

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