The Humanitarian Financing Unit (HFU) home page automatically displays all the items that currently require the HFU’s input and approval of tasks pertaining to a project at all levels. The HFU Home Page is divided into three sections which are:

- **Tasks Overview**: Displays the task lists depending on the rights given to the user role.
- **Quick Access**: Enables one to quickly access sections in the GMS as per requirement and the rights given to the user role.
- **Advance Switchboard**: Enables to set filters to optimize quick data retrieval.

A detailed explanation of the sections is given below under sections titled "Tasks Overview", "Quick Access" and "Advance Switchboard".

*HFU Home Page Overview Top*

HFU Home Page

- **HFU Home Page Overview**
- **Tasks Overview**
- **Quick Access**
- **Advance Switchboard**
- **Export Documents**
Tasks Overview

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

- The task list is mentioned in a tabular format whereby the information in the table can be sorted on the basis of each column and the sorted column will be highlighted with an arrow. An upward arrow indicates that the information is in ascending order and downward arrow indicates descending order.
- There is an ‘Export to Excel’ option available which enables the user to extract the filtered information into an excel sheet.
- 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. For e.g. Under Audit(2).
- The Date Assigned column in every task list provides you with a link to open individual task items.
- Put a check mark in the check box if you do not wish to display items which have been set by the Admin to be excluded from the list. For e.g. if the Admin has excluded projects having status ‘Project Closed’, then projects having this status will not be displayed.

A brief description of each task list and its columns is given below:

**Projects Task list:**
- **Date assigned**: Displays the date and time when the project was assigned to HFU.
- **Code**: Displays the GMS generated project code.
- **Budget**: Displays the budget allocated to the project.
- **Cluster**: Displays the primary cluster group the project belongs to, if multiple clusters exist then a percentage wise breakup of cluster allocation is shown.
- **Organization**: Displays the Implementing Partner’s organization name.
- **Status**: Displays the current status of the project.

**Disbursement Task list:**
- **Date assigned**: Displays the date and time when the disbursement task was assigned to HFU.
- **Code**: Displays the GMS generated project code.
- **Cluster**: Displays the primary cluster group the project belongs to, if multiple clusters exist then a percentage wise breakup of cluster allocation is shown.
- **Organization**: Displays the Implementing Partner’s organization name.
- **Status**: Displays the current status of the disbursement.
- **Assigned To**: Displays details of the user assigned to the task other than one who is currently logged in.

**Report Task list:**
- **Date assigned**: Displays the date and time when the task was assigned to HFU.
- **Code**: Displays the GMS generated project code.
- **Report Type**: Displays the report type. E.g. Narrative Report (Progressive or Final) or Financial Report (Interim or Final).
- **Report Name**: Displays the GMS generated report name.
- **Status**: Displays the current status of the report.

**Revision Task list:**
- **Date assigned**: Displays the date and time when the Revision task was assigned to HFU. 🛠 icon displays that the user can only enter comments for the project as there is no workflow action defined for the user.
- **Code**: Displays the GMS generated project code.
- **Revision Type**: Displays the revision type. E.g. Project Revision or Revision Request.
- **Status**: Displays the current status of the revision.

**Audit Task list:**

- **Date assigned**: Displays the date and time when the audit task was assigned to HFU.
- **Code**: Displays the GMS generated project code.
- **Balance Due**: Displays the balance amount due to OCHA by the Implementing Partner.
- **Ineligible Expenditure**: Displays the details captured from the Audit section.
- **Audit Status**: Displays the current status of the audit.

**Sharepoint Projects Task list:**

- **Date assigned**: Displays the date and time when Sharepoint project was assigned to HFU.
- **Project Code**: Displays the GMS generated project code created at the time of Sharepoint migration.
- **Sharepoint Project Code**: Displays the Sharepoint project code.
- **Budget**: Displays the budget allocated to the project.
- **Organization**: Displays the Implementing Partner’s organization name.
- **Status**: Displays the current status of the project.

**Quick Access**

Quick Access tool enables one to quickly access sections in the GMS and the tools displayed in the Quick Access panel depends on the system functions made available for the user role by the Admin.

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>Directs the user to the $ Fund Overview tab where user can view a summary breakdown of projects budgets in the form of cost tracking components as per allocation.</td>
<td>Navigation: Report &gt; $ Fund Overview</td>
<td>You can find a detailed explanation to $ Fund Overview section under HFU Admin -&gt; Reports -&gt; $ Fund Overview in the GMS User Manual.</td>
</tr>
<tr>
<td>Tool Name</td>
<td>Description</td>
<td>Navigation</td>
<td>Additional Information</td>
</tr>
<tr>
<td>----------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------------</td>
<td>----------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Bulk Project Print</strong></td>
<td>Directs the user to the Bulk Project Print Tab where the user can do a bulk project print in various formats.</td>
<td>Navigation: Report &gt; Bulk Project Print</td>
<td>You can find a detailed explanation to Bulk Project Print section under HFU Admin -&gt; Reports -&gt; Bulk Project Print in the GMS User Manual.</td>
</tr>
<tr>
<td><strong>Fund Overview</strong></td>
<td>Directs the user to the Fund Overview Tab where the user can view the status flow of the project cluster wise.</td>
<td>Navigation: Report &gt; Fund Overview</td>
<td>You can find a detailed explanation to Fund Overview section under HFU Admin -&gt; Reports -&gt; Fund Overview in the GMS User Manual.</td>
</tr>
<tr>
<td><strong>Funding Process</strong></td>
<td>Directs the user to the Funding Process Tab where the user can review projects that has reached selected ‘Fund Milestones’</td>
<td>Navigation: Report &gt; Funding Process</td>
<td>You can find a detailed explanation to Funding section under HFU Admin -&gt; Reports -&gt; Global Funding Process in the GMS User Manual.</td>
</tr>
<tr>
<td><strong>Monitor Overview</strong></td>
<td>Directs 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>Navigation: Report &gt; Monitor Overview</td>
<td>You can find a detailed explanation to the Monitor Overview under HFU Admin -&gt; Reports -&gt; Monitor Overview in the GMS User Manual.</td>
</tr>
<tr>
<td><strong>Process Monitor</strong></td>
<td>Directs the user to the Process Monitor where the user can monitor the progression of projects through the various project workflow statuses within a particular allocation.</td>
<td>Navigation: Report &gt; Process Monitor</td>
<td>You can find a detailed explanation to Process Monitor section under HFU Admin -&gt; Reports -&gt; Process Monitor in the GMS User Manual.</td>
</tr>
<tr>
<td>Tool Name</td>
<td>Description</td>
<td>Navigation</td>
<td>Additional Information</td>
</tr>
<tr>
<td>-----------</td>
<td>-------------</td>
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<td>------------------------</td>
</tr>
<tr>
<td>Report Overview</td>
<td>Directs the user to the Report Overview Tab which focuses on providing the user with reports regarding a project.</td>
<td>Navigation: Report &gt;Report Overview</td>
<td>You can find a detailed explanation to Report Overview section under HFU Admin -&gt; Reports -&gt; Report Overview in the GMS User Manual</td>
</tr>
<tr>
<td>Revision Overview</td>
<td>Directs 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>You can find a detailed explanation to Revision Overview section under HFU Admin -&gt; Reports -&gt; Revision Overview in the GMS User Manual</td>
</tr>
</tbody>
</table>

**Advance Switchboard**

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 irrespective of the user role.
Following are the filter options available for an HFU user role:

Under the Quick Filters section:

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

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 all projects submitted in the GMS system with the allocation type and year for the pooled fund. (Standard or Reserve Allocation based upon the 'Calling for proposal' or 'Rolling Basis' that currently exists).
- **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.

Based upon the criteria selected above, click the **Reload Filters** button to load the filtering options below.

- **Select Organization** (drop down box): List of organization names available for the filtered projects in the pooled fund.
- **Select Admin Location** (drop down box): Lists the regional locations in the country for which the user is registered for.
- **Select Project Duration** (drop down box): Lists the duration periods set for the projects in the pooled fund. (1 month to 19 months)
- **Select Project Status** (drop down box): Lists the statuses currently available 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 financial reports available for the pooled fund on which basis projects can be filtered.

Additional option filter for projects within specific Implementation Date.

Then click the **Click to filter** button to generate the **Tasks Overview**.

To reset the entire filters, click the **Reload Filters** button (i.e. Select Allocation Year, Select Allocation Type, Select Cluster, Select Organization type). Click the **Clear** button to reset the entire Advance Switchboard filters.

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

**Tasks Overview**

<table>
<thead>
<tr>
<th>#</th>
<th>Admin Actions</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>Due Diligence</th>
<th>View Version(s)</th>
<th>Export Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td><img src="image" alt="Admin Actions" /> <img src="image" alt="Print Proposal" /></td>
<td>Health (100%)</td>
<td>YEM/02/0000/15A 0000/Health/NGO/0000 [First Standard Allocation - April 2016]</td>
<td>ABO</td>
<td>Emergency life-saving health services in two governorates(Hajjah &amp; Hodidah)2016</td>
<td>350,222.77</td>
<td>Implementation &amp; Reporting</td>
<td>10-Jul-2016</td>
<td>15-Feb-2017</td>
<td>Due Diligence approved</td>
<td>Project Log</td>
<td><img src="image" alt="Export Documents" /></td>
</tr>
<tr>
<td>2.</td>
<td><img src="image" alt="Admin Actions" /> <img src="image" alt="Print Proposal" /></td>
<td>Protection (53.5%), Child Protection Sub-cluster (46.5%)</td>
<td>YEM/02/0000/15A 0000/Health/NGO/0000 [First Standard Allocation - April 2016]</td>
<td>ABS</td>
<td>Provision of life-saving assistance for gender-based violence survivors and children victims/survivors in Hodidah and Hajjah</td>
<td>429,780.11</td>
<td>Implementation &amp; Reporting</td>
<td>20-Jul-2016</td>
<td>20-Feb-2017</td>
<td>Due Diligence approved</td>
<td>Version(1)</td>
<td><img src="image" alt="Export Documents" /></td>
</tr>
<tr>
<td>3.</td>
<td><img src="image" alt="Admin Actions" /> <img src="image" alt="Print Proposal" /></td>
<td>Health (70%), Water, Sanitation and Hygiene (30%)</td>
<td>YEM/02/0000/15A 0000/Health/NGO/0000 [Second Standard Allocation - September 2016]</td>
<td>ABO</td>
<td>Integrated essential health &amp; WASH services in two districts (Al-Tahra, Al-Qana'a) Hodidah2017</td>
<td>650,259.60</td>
<td>EO agreement adherence</td>
<td>01-Feb-2017</td>
<td>30-Sep-2017</td>
<td>Due Diligence approved</td>
<td>Project Log</td>
<td><img src="image" alt="Export Documents" /></td>
</tr>
<tr>
<td>4.</td>
<td><img src="image" alt="Admin Actions" /> <img src="image" alt="Print Proposal" /></td>
<td>Water, Sanitation and Hygiene (57%), Food Security and Agriculture (26%), Nutrition (27%)</td>
<td>YEM/02/0000/15A 0000/Health/NGO/0000 [First Standard Allocation - April 2016]</td>
<td>AOF</td>
<td>Multi-sectoral (WASH, Food and Nutrition) emergency assistance to the conflict-affected vulnerable population in Yemen</td>
<td>1,720,000.00</td>
<td>Implementation &amp; Reporting</td>
<td>07-Aug-2016</td>
<td>05-Aug-2017</td>
<td>Due Diligence approved</td>
<td>Version(2)</td>
<td><img src="image" alt="Export Documents" /></td>
</tr>
<tr>
<td>5.</td>
<td><img src="image" alt="Admin Actions" /> <img src="image" alt="Print Proposal" /></td>
<td>Nutrition (30%), Health (20%)</td>
<td>YEM/02/0000/15A 0000/Health/NGO/0000 [Second Standard Allocation - September 2016]</td>
<td>AOF</td>
<td>Emergency nutrition and health service provision and strengthening technical capacity for effective nutritional needs analysis and program design in Yemen</td>
<td>1,300,000.00</td>
<td>Disbursement</td>
<td>05-Dec-2016</td>
<td>05-Dec-2017</td>
<td>Due Diligence approved</td>
<td>Project Log</td>
<td><img src="image" alt="Export Documents" /></td>
</tr>
</tbody>
</table>

A brief description of the columns displayed 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 proposal.
  - Edit: Clicking on this icon will allow editing the project proposal. This icon will be displayed only if the current user has the ability to edit in the current project status.
• **Primary Cluster**: Displays the primary cluster group to which the project proposal belongs to.
• **Project Code [Allocation]**: Displays the system generated project code and call for proposal 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.
• **Project Log**: Displays the current project’s status (action description) and the date and who initiated such action(s) as well as comments.
• **Export Documents**: Enables the user to export all project documents with respect to type of instances. i.e. Reports, Revisions, Monitoring, and Disbursement. A detailed explanation of the function is given below.

Click the **Show Filters** button to revert to the Advance Switchboard present on the HFU 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.

### Export Documents

The user can now select the type of instance from which documents need to be retrieved (i.e. Reports, Revisions, Monitoring, and Disbursement). The total size of the selected documents is displayed to the user.

Click on the **Export Documents** icon to display the Export Project Documents window.

**Export Project Documents**

![Export Project Documents](image)

Select the check boxes of instances for which documents need to be retrieved. Click on the the **Retrieve Documents** button to display the list of documents available for the selected instances.
By default, all the documents would be selected. Click on the **Export** button to export the documents or click on the **Close** button to return back to the project listing screen.

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