

Tools for better allocation process

- [Process Monitor](#)
- [Bulk Status Move](#)

Process Monitor [TOP](#)

Navigation: Report > Report > Process Monitor.

Purpose: The Process Monitor Report helps to identify the average number of days between various stages of the project lifecycle.

Usage:

- To generate a Process Monitor Report, click on the Process Monitor sub menu under Reports menu.
- A user can monitor the progression of projects through the various project workflow statuses within a particular allocation.

Process Monitor							
Disbursement Overview		Report Overview		Revision Overview		Monitor Overview	
Audit Overview		Country Funding Process		Bulk Project Print		Fund Overview	
Fund Overview		Process Monitor		Fund Overview			
▼ Standard Allocation - 2016							
Project Instance Type Status	Submission of Proposal (Project Draft)	Strategic review (Under Pre-SR)	Strategic review (Under SR)	Strategic review (SR Assessed)	Strategic review (SR Rejected)	Strategic review (Under HC endorsement)	Strategic review (Under HC endorsement)
Average # of days(# of Projects)	< 1 day(73)	19(73)	3(66)	< 1 day(66)	118(10)	< 1 day(66)	< 1 day(66)
▼ Rolling basis - 2016							
Project Instance Type Status	Submission of Proposal (Project draft)	Submission of Proposal (Under Pre-SR)	Strategic review (Under SR)	Strategic review (SR Assessed)	Technical Review (Under TR CC/Specialist)	Technical Review (Under TR HFU)	Technical Review (Under TR HFU)
Average # of days(# of Projects)	< 1 day(36)	2(36)	10(36)	6(35)	1(34)	7(34)	1(34)
▼ Standard Allocation - 2015							
Project Instance Type Status	Submission of Proposal (Project Draft)	Strategic review (Under SR)	Strategic review (SR Assessed)	Strategic review (SR Rejected)	Strategic review (Under HC endorsement)	Technical Review (Under TR review)	Technical Review (Under TR HFU)
Average # of days(# of Projects)	< 1 day(94)	17(94)	< 1 day(94)	511(43)	< 1 day(94)	14(51)	3(50)

For example:

Projects within a particular project status are timed on how long a project takes to complete that particular status.

For Allocation: Standard Allocation – 2016

Project Instance: Submission of Proposal, Project Status: Project Draft

- The average number of days that **73** projects took to clear through this project status was **less than 1 day**.

Whereas, in the Project Instance: Strategic Review, Project Status: Under SR

- The average number of days that **66** projects took to clear through this project status was **3 days**.

Bulk Status Move [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

Current Status

Instance Type * Instance Status *

Cluster Organization

Next Status

Alert triggered?

Screen 2:

Bulk Status Move

Current Status

Instance Type * Cluster

Next Status

Workflow Action Status

|Standard-Project Draft|-->|Standard-Under Pre-SR|-<Ager

Alert triggered?

#	Fund Code	Project Title	Organization	Cluster	Status
1	CBPF-15/0000/naveen/ED-H/INGO/0000	Ankul Test	Agency for Technical Cooperation and Development	Education (23%), Health (77%)	Ready

Project Log
Project Log
Project Log
Project Log

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

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