

## [Cluster Coordinator Home Page](#)

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### Cluster Coordinator Home Page Overview [Top](#)

The Cluster Coordinator home page automatically displays all the items that currently require the Cluster Coordinator's input and approval to move the project to the next stage. The Cluster Coordinator Home Page is divided into three sections, which are:

- **Tasks Overview** : Displays the task lists depending on the rights given to the user role.
- On the right hand side of the home page you will find tools like
  - **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](#)".

## Tasks Overview

The screenshot displays the 'Tasks Overview' dashboard. It features three main task lists on the left, each with a table header and a 'Count:0' indicator. The 'Projects Task List' has columns for Date Assigned, Code, Budget, Cluster, Organization, and Status. The 'Report Task List' has columns for Date Assigned, Code, Report Type, Report Name, Organization, and Status. The 'Revision Task List' has columns for Date Assigned, Code, Revision Type, Organization, and Status. On the right, there is a 'Quick Access' section with three buttons: Monitoring Overview, Report Overview, and Revision Overview. Below that is an 'Advance Switchboard' section with a 'Click to filter' button and a 'Clear' button. The 'Filters' section contains several dropdown menus: Select Allocation Year, Select Allocation type, Select Cluster, Select Organisation type, Select Organisation, Select Admin Location 1, Select Project duration, Select Project Status, and Select Reports status. There is also a date range selector for 'Implementation Date' with 'From' and 'To' fields.


### Tasks Overview [Top](#)

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
- Revision Task List
- Audit Task List

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

- The task list is displayed 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 [Code](#).

- There is an 'Export to Excel' option available **Export**  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 show the number of instances present in various workflow stages. For e.g. Under Audit(2).
- The Date Assigned column **Date Assigned** in every task list provides you with a link to open individual task items.
- If the check mark in the check box 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.

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 the Cluster Coordinator.
- **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 organisation 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 the Cluster Coordinator.
- **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 organisation 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 the Cluster Coordinator.
- **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 the Cluster Coordinator.
- **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 the Cluster Coordinator.
- **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.

## Quick Access [Top](#)

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 Cluster Coordinator Home Page are:

Tool Name	Description	Navigation	Additional Information
 <a href="#">Global Task List</a>	Directs the user to the Global Task list which enables the user to access all the projects across multiple pooled funds for which the user has access.	Navigation: Allocations >Global Task List	You can find a detailed explanation to the Global Task list under Administrator-> Global Task List in the GMS User Manual.
 <a href="#">Monitor Overview</a>	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.	Navigation: Report >Monitor Overview	You can find a detailed explanation to the Monitor Overview under HFU Admin -> Reports -> Monitor Overview in the GMS User Manual.
 <a href="#">Report Overview</a>	Directs the user to the Report Overview Tab which focuses on providing the user with reports regarding a project.	Navigation: Report >Report Overview	You can find a detailed explanation to Report Overview section under HFU Admin -> Reports -> Report Overview in the GMS User Manual
 <a href="#">Revision Overview</a>	Directs the user to the Revision Overview Tab which displays all revision requests and revision associated with a project.	Navigation: Report >Revision Overview	You can find a detailed explanation to Revision Overview section under HFU Admin -> Reports -> Revision Overview in the GMS User Manual

## Advance Switchboard [Top](#)

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.

**Advance Switchboard**

Click to filter Clear

**Quick Filters**

Approved by HC ?

First disbursement completed ?

**Filters**

Select Allocation Year

Select Allocation type

Select Cluster

Select Organisation type

Multiple Ids separated by comma

Reload Filters ?

Select Organisation

Select Admin Location 1

Select Project duration

Select Project Status

Select Reports status

Implementation Date ?

From (dd/mm/yyyy) To (dd/mm/yyyy)

Following are the filter options available:

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 1**(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.

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

Show Filters 		Number of Projects: 45											Export Project Summary 	Export Full Dump 
#	Admin Actions	Primary Cluster	Project Code [Allocation]	Org	Project Title	Budget	Project Status	Start Date	End Date	Due Diligence	View Version(s)			
1.	 	Protection	TUR-00/0000/SA 0000/P/INGO/0000 [Standard Allocation]	AAR Japan	Casualty Survey and Risk Education in western Aleppo and Idleb	338,359.36	Implementation & Reporting	01-Jul-2016	31-Dec-2016	Due Diligence approved		<a href="#">Project Log</a>		
2.	 	Water Sanitation Hygiene	TUR-00/0000 /RA/WASH /INGO/0000 [Rolling basis]	ACTED	Emergency support to newly displaced households from Aleppo	988,972.65	Implementation & Reporting	01-Mar-2016	31-May-2016	Due Diligence approved		<a href="#">Project Log</a>		
3.	 	Education	TUR-00/0000/SA 0000/E/INGO/0000 [Standard Allocation]	ACTED	TEST EXTRA REPORT on 17/6/2016	350,328.22	Implementation & Reporting	01-Jun-2016	30-Jun-2016	Due Diligence approved		<a href="#">Project Log</a>		
4.	 	Emergency Shelter and NFI	TUR-00/0000/SA 0000/NFI/INGO/0000 [Standard Allocation]	ACTED	Supporting Syrian households to cope with the winter season 2016-2017	520,828.49	IP counter-signature	01-Aug-2016	31-Jan-2017	Due Diligence approved		<a href="#">Project Log</a>		
5.	 	Food Security	TUR-00/0000/RA/FS /INGO/0000 [Rolling basis]	Ai.Bi.	Emergency food security intervention in support to newly displaced people from Northern Rural Aleppo	250,053.65	Implementation & Reporting	01-Mar-2016	31-May-2016	Due Diligence approved		<a href="#">Project Log</a>		
6.	 	Protection	TUR-00/0000/SA 0000/P/INGO/0000 [Standard Allocation]	Ai.Bi.	Establishing structured and outreach CP services among the Besieged areas of Homs and Rural Damascus.	605,888.04	Implementation & Reporting	01-Jun-2016	28-Feb-2017	Due Diligence approved		<a href="#">Project Log</a>		
7.	 	Food Security	TUR-00/0000/RA/FS	CARE	Responding to urgent food needs for new	498,009.48	Implementation &	29-Feb-2016	30-Mar-2016	Due		<a href="#">Project Log</a>		

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):** Displaysif 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.

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

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