GMS Allocations' and project's workflows

- **Project**
  - Standard Allocation
  - Reserve Allocation
  - MPTF Project workflows
    - [English version](#)
    - [Version française](#)
- Interim Financial Reporting
- Progress Narrative Reporting
- Final Financial Reporting
- Final Narrative Reporting
- Timeline
- Monitoring
- Disbursement
- Revision Request
- Project Revision
- Audit

- How to view the project's workflow directly on GMS? (HFU/OCU only)

Project [Top](#)

Standard Allocation

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Published on CBPF GRANT MANAGEMENT SYSTEM (GMS). Date of creation: 10 Apr 2021
Country-Based Pooled Funds
Reserve Allocation

MPTF Projects Workflow

Step 1: Submission of Proposal
Step 2: Strategic Review
Step 3: Technical Review
Step 4: Final Approval and Signature
Step 5: Disbursement
Step 6: Implementation and Reporting
Step 7: Project Closure
**English Version:**

*Standard Allocation*
Version Française:

Allocation Standard
GMS Workflow
Country-Based Pooled Funds
Allocation Standard (MPTF)
Version française

Légende
Step 1: Soumission de la Proposition de Projet
Step 2: Examen Stratégique
Step 3: Examen Technique
Step 4: Approbation Finale et Signature
Step 5: Déboursement
Step 6: Mise en Œuvre et Rapportage
Step 7: Clôture du Projet

Published on CBPF GRANT MANAGEMENT SYSTEM (GMS). Date of creation: 10 Apr 2021
HOME - https://gms.unocha.org
Interim Financial Reporting [Top]

You can find a detailed explanation for Interim Financial Reporting under the Reporting section.

GMS INTERIM FINANCIAL REPORTING WORKFLOW

Progress Narrative Reporting [Top]
You can find a detailed explanation for Progress Narrative Reporting under the Reporting section.

Final Financial Reporting Top

You can find a detailed explanation for Final Financial Reporting under the Reporting section.
Final Narrative Reporting [Top]

You can find a detailed explanation for Final Narrative Reporting under the Reporting section.
Timeline **Top**

The timeline tab present in the project enables users to set up timelines for various activities like narrative reporting timelines, Disbursement tranches timeline etc. Projects timelines must be set up and approved by the Fund Managers before the signature of the Grant Agreement. To learn how to set up and validate the Timelines, please refer to the dedicated article of this Help Portal: [Timelines Validation](#).
Monitoring

One can have multiple instances of monitoring to enable the monitoring of various stages in a project lifecycle.

The HFU will activate the monitoring instance, fill in the necessary information, and update the recommended actions. The HFU can then send them to the Implementing Partner or Cluster Coordinator, as necessary. An email alert will be sent to the IP/CC based on the party who receives the task. The IP and CC will have access to update the recommended actions only and no other data. Once done, they should send the monitoring instance back to the HFU. Once the information is verified, the HFU can update the status as “Monitoring Completed”.
Disbursement Top
You can find a detailed explanation for disbursement under the Disbursement section.

Revision Request Top
You can find a detailed explanation for Revision Request under the Project Revision section.
Project Revision [Top]

You can find a detailed explanation for Project Revision under the Project Revision section.
GMS PROJECT REVISION WORKFLOW
(STEP 2)

Project revision in draft

Project revision under review

Project revision under Finance review

Project revision under Cluster review

Project revision reviewed and cleared by HFU

Under HC approval (no GA Amendment needed)

GA Amendment preparation

HC approval and signature of GA

IP signature of GA Amendment

HFU review of signed GA Amendment

EO clearance of GA Amendment

Project revision approved

OVERWRITE (HFU)
 Audit Top

You can find a detailed explanation for Project Audit under the What is Project Audit in GMS section.

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How to access the Project's workflows directly on the GMS? (HFU only) Top

**Navigation:** System Setup > Workflow Management > View Project Workflow
**Purpose:** HFU officers and OCU officers can view the workflows directly on GMS. This allows to see all the workflow's steps for a defined instance according to the Allocation's type.

The available workflows in this page are listed below:

- Project;
- Interim Financial Report;
- Full Narrative Report;
- Disbursement;
- Timeline;
- Final Narrative Reporting;
- Progress Narrative Reporting;
- Final Financial Reporting;
- Monitoring;
- Revision Request;
- Revision;
- Audit;
- Extraordinary Financial Reporting;
- Refunds;
- Internal Investigation Audit;
- Forensic Audit;
- Special Audit;
- OIOS investigation Audit;
- Assurance Measures;
- UNDP Investigation Audit.

**Usage:**

Select the 'Instance Type' from the drop down list.

Select the 'Allocation Source' from the drop down list.
Select the 'show only active workflows' checkbox if you wish to view only the currently active workflow's steps on the GMS.
## View Project Workflow

<table>
<thead>
<tr>
<th>Project Status</th>
<th>Next Project Status</th>
<th>User Group</th>
<th>Button text (Options)</th>
<th>Instance Type</th>
<th>Status Order</th>
<th>Is Active</th>
<th>Save / Allow Comments</th>
<th>Hex Alerts / Count</th>
<th>Update Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - Interim report active</td>
<td>R - Interim report under review</td>
<td>Agencies/Partners</td>
<td>Submit interim financial report for review</td>
<td>Interim Financial Reporting</td>
<td>1</td>
<td>Yes</td>
<td>Yes / Yes</td>
<td>Yes / 1</td>
<td></td>
</tr>
<tr>
<td>2 - Interim report re-draft</td>
<td>R - Interim report under review</td>
<td>Agencies/Partners</td>
<td>Re-submit interim financial report for review</td>
<td>Interim Financial Reporting</td>
<td>3</td>
<td>Yes</td>
<td>Yes / Yes</td>
<td>Yes / 1</td>
<td></td>
</tr>
<tr>
<td>3 - Interim report under review</td>
<td>R - Interim report re-draft</td>
<td>Humanitarian Financing Unit (HFU)</td>
<td>Send back to IP for Re-Draft</td>
<td>Interim Financial Reporting</td>
<td>5</td>
<td>Yes</td>
<td>No / Yes</td>
<td>Yes / 1</td>
<td></td>
</tr>
<tr>
<td>4 - Interim report approved by HFU for disbursement</td>
<td>R - Interim report approved by HFU for disbursement</td>
<td>Humanitarian Financing Unit (HFU)</td>
<td>Approved on behalf of / as Fund Manager for PCS review and disbursement</td>
<td>Interim Financial Reporting</td>
<td>10</td>
<td>Yes</td>
<td>No / Yes</td>
<td>Yes / 1</td>
<td></td>
</tr>
<tr>
<td>5 - Interim report approved by HFU</td>
<td>R - Interim report approved by PCS for recording</td>
<td>PCS Finance</td>
<td>Read and Certified by PCS for disbursement</td>
<td>Interim Financial Reporting</td>
<td>12</td>
<td>Yes</td>
<td>No / Yes</td>
<td>Yes / 1</td>
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</tr>
<tr>
<td>6 - Interim report approved by HFU</td>
<td>R - Interim report approved by PCS for recording</td>
<td>PCS Finance</td>
<td>Send Back to HFU</td>
<td>Interim Financial Reporting</td>
<td>15</td>
<td>Yes</td>
<td>No / Yes</td>
<td>Yes / 1</td>
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<tr>
<td>7 - Interim report approved by HFU</td>
<td>R - Interim report approved by PCS for recording</td>
<td>PCS Finance</td>
<td>Send Back to PCS Finance</td>
<td>Interim Financial Reporting</td>
<td>20</td>
<td>Yes</td>
<td>No / Yes</td>
<td>No</td>
<td></td>
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</table>

Click on the **[Search]** button to activate the search task.
You can also export the search results as an Excel document by clicking on [export to Excel].
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