**Partner Profile**

- **What is the partner profile?**
- **How to access the partner profile?**
- **The partner profile search engine**
  - search engine
  - drop down lists’ features
  - selecting and accessing the partner’s profile
  - multiple partners’ profiles
  - additional features
- **What information are included in the profile page?**
  - homepage
  - overview
  - projects
  - financial information
  - reporting
  - assurances
  - sub implementing partners’ funding

**What is the partner profile?**

The partner profile is an information management feature of the Grant Management System (GMS). It enables Humanitarian Financing Units (HFU) and the Country Based Pooled Funds (CBPF) headquarters officers to access a full overview as a one-stop page of the implementing and sub-implementing partners’ information.

Data flow from the GMS and provides live information on partners and projects.

**How to access the partner profile?**
The partner profile is located in the CBPF Partner Portal.

To access the CBPF Partner Portal, go to: **homepage on the GMS -> Report -> CBPF Partner Portal.**

Once on the Partner Portal, go to **Partner Profile -> Search Partner Profile**
The partners profile search engine Top

SEARCH ENGINE

Below is the Partner Profile Search Engine. Fill in the different fields according to your search needs and click on [Search].

Field Description:

- **Partner Name**: Enter the name of the partner which profile you wish to see.
- **Acronym**: Enter the acronym of the partner which profile you wish to see.
- **Partner Type**: Select from the drop-down list the type of partner which profile you wish to see.
- **Pooled Fund**: Select from the drop-down list the wanted Humanitarian Pooled Fund.
- **Capacity Assessment Risk (CA Risk)**: Select from the drop-down list the capacity assessment risk of the partner(s) you wish to see
- **Partner Risk**: Select from the drop-down list the risk associated to the partner(s) you wish to see.
DROP DOWN LIST’ FEATURES

1. The drop-down lists enable the user to select all options at once. To select all options, tick the box ‘Select all'.

2. The drop-down lists themselves include a search engine. For instance, in the Partner Type field, users can type in the type of implementing/sub-implementing partners they are looking for and the system automatically selects the matching options.
To cancel the search in the drop-down list, click on the cross on the right side of the text entry field.
*Please note*, users must enter at least one research criteria. Leaving all fields blank will not trigger the search and the following error message will appear.

SELECTING AND ACCESSING THE PARTNER’S PROFILE

Upon clicking on search, the system selects the partners that match the inputted search parameters. A list of according **Direct** (implementing) and **Indirect** (sub-implementing) partners appears below the search bar.
From this list of matching partners, select one or several partners which profile you wish to see. To do so, tick the box(es) on the left-hand side of the corresponding line(s) and click on [View Profile].

*Please note,* Selecting one partner will allow the user to access an individual profile, with all information linked to the partner and its projects. In addition, the system also enables the user to select multiple partners and access their profiles at once, allowing a clear comparison between partners. To know more about multiple partners’ profile, please see the [Multiple Partners] section of this article.
To see the profile of all matching partners generated by the system according to the inputted search parameters, tick the box located at the top of the list, on the left of ‘Acronym’ and click on [View Profile].
MULTIPLE PARTNERS’ PROFILES

The system enables the user to select and access the profiles of multiple partners, in different humanitarian funds, of different types and risks.

All selected partners in the search engine will appear side by side in the partners’ profile page, allowing an easy comparison (see visual example below).

ADDITIONAL FEATURES

Print

If you wish to print the selected partner’s profile, click on the browser icon 📄 on the right hand side of the profile page.
The profile will be generated in another tab of the user’s browser. Users can then save the data as an image or print the profile by doing a right click on the newly opened page. Users can also share the data using the link of the newly opened page.

*Please note, unlike the Excel feature (see section below) this feature works on a page-by-page basis. Clicking on this icon will open a page displaying the data of the tab currently opened.

**Excel**

The system enables the users to download the raw data (without the visualizations) as an excel sheet. Click on the Excel icon on the right-hand side of the profile page to download all data included in the different tabs of the partner profile.

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**GMS Support Tip: how to export Partner's Profiles**

Generating a working Excel document of all partners: a complete list of eligible partners of the Fund, with due diligence and projects’ associated data.

**Step 1**: In the search engine, select only eligible partners

In the partner risk drop down list, select High, Medium and Low by ticking the according boxes.

**Please note**: you can also use it in conjunction with the partner type drop down list to select only the type of partner you are interested in. For example, you might want to exclude UN Agencies for a specific search.
Step 2: Click on [Search]

Step 3: Tick the box on the left-hand side of ‘Acronym’ to select all matching partners, and click on [View Profile]
Step 4: On the Partners’ Profile page, click on the Excel icon to download all the partners’ data in one excel document.

Step 5: The Excel file should have been downloaded and saved in the ‘Downloads’ folder of the user’s computer.

What information is included in the partner profile?

The information found in the partner’s profile flow from the GMS, namely from the due diligence process, the capacity assessment and partner’s risk results and the projects’ data.

HOMEPAGE

On the homepage, in addition to the partner’s information, the user can see the search filters that led to this profile and a ‘Back to search’ button. Click on [Back to search] to input different research filters and parameters.
The Partner’s profile is composed of 6 tabs: Overview, Projects, Financial Information, Reporting, Assurances, and Sub-implementing partner funding.

**OVERVIEW**

In the overview tab, users can access information on:

- **Partner Information**

**Fields Description**

- Name and acronym of the partner
- Humanitarian Fund
- Alternate Name
- Organization Type
- Partner Registration date
• Due diligence status
• Eligibility date
• Capacity Assessment (CA) risk
• CA risk assigned on
• Partner Risk
• First Allocation Date

...and the following information:
### Sections description:

- Legal Representative
- Highest ranking official
- Focal person in headquarters
- Other focal person
- Organization Headquarters location
- Organization Main Office Location
- Organization sub office location
The Projects tab is an overview of all the projects submitted by the partner. The top section (Partner Information) recaps the essential information, while the bottom section (Projects Details) is a breakdown of all projects.

**Fields Description (first section: Partner Information)**

- Humanitarian Fund
- Number of projects funded
Fields Description (second section: Projects Details)

- Project code
- Project title
- Allocation
- Status
- Project dates
- Budget
- Cluster
- Locations

*Please note, you can access the project page on GMS by clicking on the project’s code (framed in red in the picture).

FINANCIAL INFORMATION

The Financial Information tab gives an overview of the partners financing history of funded projects. It is composed of two sections: Partners Information, and Project Details. Like the Projects tab, partners information is a recap of essential data, while projects details is a breakdown of information for each submitted project.
Fields Description (first section: Partner Information)

- Partners’ name and acronym
- Humanitarian Fund
- Number of Projects Disbursed
- Total approved funding
- Direct funding: Direct funding represents the amount allocated by the CBPF to the principal implementing partner (e.g. not including the sub-implementing partners)
- Indirect funding: Indirect funding represents the amount allocated by the CBPF to a partner and transferred to a sub-implementing partner.
- Total net funding: Net funding represents the total amount received by the partner, including both direct funding and indirect funding.

Fields Description (second section: Projects Details)

- Partners’ name and acronym
- Project code
- Table on the left: the number of tranches required for the project, the tranches amount, the disbursed amount for each of the tranches and the disbursement date if relevant
- Table on the right: the status of the project, the budget, disbursement paid and pending to date, and the refund paid and pending

*Please note,* you can access the project page on GMS by clicking on the project’s code (framed in red in the picture).

**REPORTING**

The Reporting tab provides information on reporting history of funded projects. It follows the same structure than the Financial Information and Projects tabs, with both a Partner Information and a Projects Details sections.

*Fields description:*

- Partner’s name and acronym
- Humanitarian Fund
- Total financial reports reports due (to be submitted but for which the due date has not yet been passed), reports on time (submitted on time), reports delayed (submitted but late), reports overdue (not yet submitted but for which the due date has passed)
- Total narrative reports, reports due (to be submitted but for which the due date has not yet been passed), reports on time (submitted on time), reports delayed (submitted but late), reports overdue (not yet submitted but for which the due date has passed)
**Fields description:**

- Partner’s name and acronym
- Project code, status and budget
- Financial reports: report's code, audit triggered, due date, submission date, active date
- Narrative reports: report's code, audit triggered, due date, submission date, active date

*Please note,* you can access the project page on GMS by clicking on the project’s code (framed in red in the picture). In addition, users can access and download the reports by clicking on their title (underlined in red in the picture).

**ASSURANCES**

The Assurances tab focuses on monitoring. Also structured with a Partner Information and a Projects Details, it provides data on field visits, financial spot-checks and audits of the funded projects.
### Fields Description (first section: partner information)

- Partner’s name and acronym
- Humanitarian Fund
- Number of Field visits
- Number of Financial spot check

### Fields Description (second section: Projects Details)

- Partner’s name and acronym
- Project code, status and budget
- Field Visits information: field site monitoring reports, monitoring status and dates, adverse findings
- Audit information: audit status and critical findings
*Please note,* you can access the project’s page on the GMS by clicking on the project’s code (framed in red in the picture). In addition, users can access and download the field visit and audit reports by clicking on their titles (underlined in red in the picture).

**SUB-IMPLEMENTING PARTNERS FUNDING**

This tab provides information on sub-implementing partners who carried out activities of the partners projects.

To access the breakdown of projects in association with the sub-implementing partner, click on the cross on the left-hand side on the sub-implementing partner’s name.

**Field Description**

- Project Code
- Project summary
- Project Organization (implementing partner)
<table>
<thead>
<tr>
<th>Allocation</th>
<th>Status</th>
<th>Project dates</th>
<th>Partner Budget</th>
<th>Cluster</th>
</tr>
</thead>
</table>

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