The various reports to choose from, are as listed:

- **Report Overview**
- **Revision Overview**
- **Monitoring Overview**

**Report Overview**

**Navigation:** Report > Report > Report Overview

**Purpose:** Report Overview generates a report which allows viewing of all the reporting timelines for all projects based on a search criterion. The result would also display projects with all the narrative and financial reporting timeline information for each project.

**Usage:**

- To generate a Report Overview, select one or more filters present on the left corner of the page.

  The filters available are
- **Allocation Type** (drop down box): List of all projects submitted in the GMS system with the allocation type and year for the pooled fund.
- **Organisation Type** (drop down box): List of Organisation Type in the pooled fund (International NGO, National NGO, Other, UN Agency).
- **Cluster** (drop down box): List of clusters defined for the pooled fund.
- **Project Code** (text box): Search a project by Project Code.

Additional filters are available under the **More Filters** button.

Additional filters available are:

- **Organisation** (drop down box): List of organisation names registered for the pooled fund.
- **Project Status** (drop down box): Lists the type of allocation source and the name of the project status.
- **Year created** (drop down box): Lists the years of allocation available in the GMS system for the pooled fund.
- **Admin Location** (drop down box): Lists the regional locations in the country for which the user is registered for.
- **Project Duration** (drop down box): Lists the duration periods set for the projects in the pooled fund. (1 month to 12 months)
- **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 report overview.

Click the **Clear** button to reset the entire filters.

![Report Overview](image)

**Report Overview**

<table>
<thead>
<tr>
<th>#</th>
<th>Primary Cluster</th>
<th>Project Code</th>
<th>Org</th>
<th>Project Title</th>
<th>Progress Narrative Reports</th>
<th>Final Narrative Reports</th>
<th>Interim Financial Reports</th>
<th>Final Financial Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Food Security</td>
<td>TUR-02/0000/SA 0000/0000</td>
<td>NPA</td>
<td>Improving Wheat Seeds Production in Rural Aleppo Province</td>
<td>01/06/2017 - 16/06/2017</td>
<td>Timeline Inactive</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Camp Coordination / Management</td>
<td>TUR-02/0000/SA 0000/0000</td>
<td>ARD</td>
<td>Establishing participatory IDP Committees in IDP Settlements in Idleb</td>
<td>10/04/2017 - 25/04/2017</td>
<td>Timeline Inactive</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Some of the features present in the Report Overview are:

- All the filters mentioned above would be applied on the project data and not on the project timeline data.
- Columns Number (#), Primary Cluster, Project Code and type of Allocation, Organization Acronym and Project title would be locked (frozen) in the result displayed to the user. These columns except Columns Number (#) can be used to sort the data as required. By default the results would be sorted based on the due date in a descending order. In other words, the project with the highest timeline due date would be displayed on top and followed by others.
- Each timeline Active and Due Date for a project is displayed as a link. In case the Report timeline has not been activated, the user will be navigated to the timeline page for the project. In case the report has been activated (i.e. Reporting has started against the report timeline), then the user will be navigated to the narrative or financial report page based on the report type.
- On the Timeline page, only financial report types allowed under financial report timeline section would be displayed. This would be based on a pool fund based configuration in the system.
- Below each report timeline link, the current status of report would be displayed.
- The data displayed to the user can be downloaded in an excel format using the Export to Excel link.

Revision Overview

**Navigation:** Report > Report > Revision Overview

**Purpose:** Revision Overview generates a report which allows viewing of projects sent for revisions.

**Usage:**

- To generate a Revision Overview, select one or more filters from the filters section.

The filters available are:
- **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.
- **Select Cluster** (drop down box): List of clusters defined for the pooled fund.
- **Select Organisation Type** (drop down box): List of Organisation Type in the pooled fund. (International NGO, National NGO, Other, UN Agency)
- **Project Code** (text box): Search a project by Project Code (Last 3 digits of project code need to be mentioned)
- **Select Organization** (drop down box): List of organization names registered for the pooled fund.
- **Select Revision request type** (drop down box): List of revision request types that are available for the filtered projects in a pooled fund. (E.g. Significant change in activities, Change in Location etc)
- **Select Revision Request Status** (drop down box): List of revision request statuses that are available for the filtered projects in a pooled fund.
- **Select Project Revision type** (drop down box): List of project revision types available for the filtered projects in a pooled fund.
- **Select Project Revision Status** (drop down box): List of project revision statuses that are available for the filtered projects in a pooled fund.
- **Select Admin Location 1**: (drop-down list): List of projects' location.
- **Select Revision Request year** (drop-down box): List of years for Revision request activated on the GMS for the Pooled Fund.

**Implementation:** Filter per project's duration. Select in the drop-down list the type of filter wanted, and then enter a value in the side 'from' field.

Then click the **Click to filter** button to generate the revision overview.  
Click the **Reload Filters** button to reset the entire filters (i.e. Allocation Year, Allocation type, Cluster, Organization type).  
Click the **Clear** button to reset the entire filters.

Click on the **Show Filters** button to view the filter screen again which is present on the top right corner of the Revision Overview generated.

### Revision Overview

<table>
<thead>
<tr>
<th>#</th>
<th>Primary Cluster</th>
<th>Project Code (Allocation)</th>
<th>Day</th>
<th>Project Title</th>
<th>Revision Request Types</th>
<th>Revision Request Status</th>
<th>Project Revision Status</th>
<th>Project Revision Type</th>
<th>Project Revision Overwritten</th>
<th>Previous Revision</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Camp Coordination / Management</td>
<td>TUR-00/0000 /SA2/COM /NGO/00000</td>
<td>VO</td>
<td>Safer camps</td>
<td>Change in project duration/NCE</td>
<td>Revision request approved</td>
<td></td>
<td>Project Duration Extension (NCE)</td>
<td>Project Revision Overwritten</td>
<td>View</td>
</tr>
<tr>
<td>2.</td>
<td>Camp Coordination / Management</td>
<td>TUR-00/0000 /SA2/COM /NGO/00000</td>
<td>MF</td>
<td>Camp Committee Establishment and Management Training, Rehabilitation and Waterisation for 12 IDP Camps</td>
<td>Revision Request in draft</td>
<td></td>
<td></td>
<td></td>
<td>View</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>Camp Coordination / Management</td>
<td>TUR-00/0000 /SA2/COM /NGO/00000</td>
<td>WU2</td>
<td>Getting ahead of the winter: WASH, winterisation and self-protection mechanism for IDPs in Sijo and Al Hasaem campaigns</td>
<td>Significant change in activities</td>
<td></td>
<td></td>
<td></td>
<td>View</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>Camp Coordination / Management</td>
<td>TUR-00/0000 /SA2/COM /NGO/00000</td>
<td>ACTED</td>
<td>Improving the living conditions of IDPs in Idlib governorate through site improvement and winterization support while strengthening community mobilization and promoting good governance</td>
<td>Change in Budget, Change in project duration/NCE</td>
<td>Revision request approved</td>
<td></td>
<td>Project Duration Extension (NCE)</td>
<td>Project Revision Overwritten</td>
<td>View</td>
</tr>
<tr>
<td>5.</td>
<td>Camp</td>
<td>TUR-00/0000</td>
<td>TCM</td>
<td>Procurement, transportation and</td>
<td>Change in Budget, Change in project</td>
<td>Revision</td>
<td></td>
<td></td>
<td></td>
<td>View</td>
</tr>
</tbody>
</table>
Some of the features present in the Revision Overview are:

- Clicking on the Revision Request icon present in the Revision Request column will navigate the user to the active revision request for the project.
- Clicking on the Revise this project icon present in the Project Revision column will navigate the user to the ongoing Project revision. If the button is not present, it means that the revision has not been activated yet by the HFU.
- The Previous Revisions column displays the number of times this project was sent for revision. Clicking on the View icon will display a popup showing the revision history for the project.

<table>
<thead>
<tr>
<th>Revision Type</th>
<th>Revision Section</th>
<th>Revision Request Date</th>
<th>Revision</th>
<th>Revision Request</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bank Info change</td>
<td>Bank Info</td>
<td>7/21/2016</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bank Info change</td>
<td>Bank Info</td>
<td>7/1/2016</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Duration Extension (NCE), Budget Revision, Bank Info change, Other</td>
<td>Cover Page--&gt;Project Duration Budget Bank Info</td>
<td>7/1/2016</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Clicking on the Revision icon present in Revision column will navigate the user to the corresponding project revision instance of the project.
- Clicking on the Revision Request icon present in Revision Request column will navigate the user to the corresponding revision request for the project.
- The data displayed to the user can be downloaded in an excel format using the Export to Excel link.

Navigation: Report > Report > Monitor Overview

Purpose: Monitor overview enables a user to view all the monitoring information of a project. User can search the projects and monitoring information using different search criteria.

Usage:
- To generate a Monitor Overview, select one or more filters from the filters section.

The filters available are
### Filters

- **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.
- **Select Cluster** (drop down box): List of clusters defined for the pooled fund.
- **Select Organisation Type** (drop down box): List of Organisation Type in the pooled fund (International NGO, National NGO, Other, UN Agency).

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

- **Project Code** (text box): Search a project by Project Code (Last 3 digits of project code need to be mentioned)
- **Select Organisation** (drop down box): List of organisation names registered for 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 Monitor Type** (drop down box): Lists the Monitor types available based on the criteria set above.
- **Select Monitor Status** (drop down box): Lists the Monitor statuses available based on the criteria set above.

Then click the **Click to filter** button to generate the **Tasks Overview**. To reset the filters, click the **Reload Filters** button (i.e. Select Allocation Year, Select Allocation Type, Select Cluster, Select Organisation type).

Click the **Clear** button to reset the entire set of filters. Click on the **Back to Results** icon to return back to the previously generated Tasks Overview page.
Some of the features present in the Monitor Overview are:

- The project Monitor column displays each Monitor activity for a project as a link. Monitoring activities which are currently active will be displayed in pink colour. On clicking the link, the user will be navigated to the Monitoring section of the project.
- Project locations are also displayed in the Monitoring overview.
- Below each Monitor activity link, the current status of the activity would be displayed.
- The data displayed to the user can be downloaded in an excel format using the Export to Excel link.

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