Cluster Coordinator Home Page

- Homepage Overview
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Home Page Overview

The Cluster Coordinators' (CC) home page automatically displays all the tasks pertaining to projects that currently require the CC’s action or attention.

The CC Home Page also includes several features that will allow you to navigate through the GMS and access the wanted content:
1- The **Fund** you are registered in;
2- Your GMS **user role**;
3- The **log out button**: click on this button to log out;
4- The **Fund Home button**, click on this button to access your Fund’s home.
5- **Menu options** at the top, *which are accessible in every page of the GMS*;
6- **Quick Access tooltip**, *which is accessible in every page of the GMS*;
7- A **FAQ button** which redirects to the according guidance in the Help portal, *this feature is accessible in every page of the GMS*.
8- The **Tasks Overview Dashboard**; which allows an easy access to all pending tasks, sorted thematically.
9- A **[Customize Task list] button**; which allows to customize your Tasks Overview dashboard, namely to show/hide your task lists.
10- A **[Search] button**; which shows the Advance Switchboard section.

A detailed explanation of the sections is given below under sections titled "Fund Home", "Tasks Overview", "Quick Access", "Advance Switchboard" and "FAQ tooltip".

How to navigate through the Tasks Overview Dashboard? 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
- Report (financial and narrative) Task List
- Revision Task List

Each task list has been provided with certain common functionalities which are mentioned below:
1. The **Date Assigned** column in every task list provides you with a link to open individual task items. The information in this column can be sorted chronologically. An upward arrow indicates that the information is in ascending order and downward arrow indicates descending order.

2. The **Code column** provides you with a link opening the project proposal.

3. The ‘**Exclude configured [instance] statuses**’ option. Cluster Coordinators can request GMS Support by email to exclude specific statuses from their task lists. Hence, the requested statuses are hidden by default from the task list. However, you can still view the excluded ones and access the full list of pending tasks by un-ticking this box.

4. A ‘**Refresh**’ option, allowing users to update the task list.

5. 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 provide you with a status count of the tasks.

6. An ‘**Export to Excel**’ option, which enables the user to extract the filtered information into an excel sheet.

**CUSTOMIZING THE TASK OVERVIEW DASHBOARD**

You can choose to hide, show or set as default view the task lists by clicking on [Customize Task List].
### Tasks Overview

#### Projects Task List
- **Date Assigned**: 30/09/2020 02:04 PM
- **Code**: TUR-20/3559/DSTD/E/NGO/14987
- **Cluster**: Education
- **Organization**: ABC DEMO
- **Budget**: €91,705.90
- **Status**: Budget Cleared

#### Financial Report Task List
- **Date Assigned**: 11/05/2020 07:25 PM
- **Code**: TUR-18/3559/RA2/CCN/NGO/14963
- **Report Type**: Interim
- **Report Name**: Interim Financial report
- **Organization**: Non-industrial Peace Monitoring
- **Status**: Interim report under review

#### Narrative Report Task List
- **Date Assigned**: 21/01/2020 05:30 PM
- **Code**: TUR-10/2559/SA1/P-E/NGO/3446
- **Report Type**: Final
- **Report Name**: Final Narrative Report
- **Organization**: Mercy without Limits
- **Status**: Final Narrative Report Under Review

#### Revision Task List
- **Date Assigned**: 04/06/2020 05:54 PM
- **Code**: UR-19/3559/SA1/E/NGO/12883
- **Revision Name**: Revision 1
- **Revision Type**: Project Revision
- **Organization**: Ahmene for Humanitarian Support
- **Status**: Project Revision Approved
In the pop-up window, tick the boxes of the task lists’ names to select them. Then click on one of the three different options:

- **Set as default**: this will configure the selected task lists as appearing by default on your GMS homepage,
- **Refresh**: This will temporarily configure your dashboard as per your selection. However, to set this configuration as permanent, you will need to click on [set as default].
- **Cancel**: click on this button to close the pop-up window, this will have no impact on the dashboard.
Quick Access

The Quick Access tool, accessible on all pages of the GMS, enables users to quickly access sections in the GMS.
To access the Quick Access tool, click on this icon on the right-hand side of the menu bar:

The tools displayed in the Quick Access panel depend on the system functions made available for your user role by the GMS Admin team.

The tools displayed in the Quick Access panel for CC Home Page are:

<table>
<thead>
<tr>
<th>Tool Name</th>
<th>Description</th>
<th>Navigation</th>
<th>Additional Information</th>
</tr>
</thead>
</table>

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<table>
<thead>
<tr>
<th>Tool Name</th>
<th>Description</th>
<th>Navigation</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Overview</td>
<td>This option redirects the user to the Report Overview Tab which focuses on providing the user with reports regarding a project.</td>
<td>Report &gt; Report &gt; Report Overview</td>
<td>Please access more information on this tool by clicking <a href="#">here</a>.</td>
</tr>
<tr>
<td>Revision Overview</td>
<td>This option redirects the user to the Revision Overview Tab which displays all revision requests and revision associated with a project.</td>
<td>Navigation: Report &gt; Revision Overview</td>
<td>Please access more information on this tool by clicking <a href="#">here</a>.</td>
</tr>
<tr>
<td>Monitoring Overview</td>
<td>This option redirects 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.</td>
<td>Report &gt; Report &gt; Monitoring Overview</td>
<td>Please access more information on this tool by clicking <a href="#">here</a>.</td>
</tr>
</tbody>
</table>

**Advance Switchboard**

The Advance Switchboard is by default not shown in the homepage, unless it has been ticked from the [Customize Task List] pop-up window. In this case, it is accessible on prompt of the button [search].
The 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.
Following are the filter options available:

*Please note,* you can hover over the question mark icon near the filter’s title to access more information.

**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 allocations related to the pooled fund. (Standard or Reserve Allocation).
- **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.
- **Select Organization** *(drop down box):* List of organization names for organizations that have created a project in the pooled fund.
- **Select Admin Location 1** *(drop down box):* Lists the regional locations in the country.
- **Select Project Status** *(drop down box):* Lists the project statuses currently available in the pooled fund. 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 narrative and financial reports available for the pooled fund on which basis projects can be filtered.

**Under the Implementation section:**

- **Date** *(drop down box)*: Select the start and end dates to filter the relevant projects,
- **Duration** *(drop down box and text box)*: choose the duration characteristic from the drop-down list, and insert the duration in the text box, to filter the relevant projects.

To reset the bottom filters, click the [Reload Filters] button

Click the [Clear] button to reset the entire Advance Switchboard filters.
Example: A list of projects that meets a set of filter criteria.

A brief description of the columns and buttons 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 on GMS.

  - Edit ✏️: Clicking on this icon will allow editing the project on GMS. This icon will be displayed only if the user can edit in the current project status.
CBPF GRANT MANAGEMENT SYSTEM (GMS)

- **Primary Cluster:** Displays the primary cluster group(s) to which the project proposal belongs to.
- **Project Code [Allocation]:** Displays the system generated project code and allocation 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):** Displays if project revisions have been made.
- **Partner Project Risk:** Is determined at budget clearance stage of the project. At budget clearance, the partner’s risk becomes the partner project’s risk. The partner project risk is used to define the operational modalities applicable to this project. The partner project risk never changes, even if the partner’s risk is re-calculated through the Partner Performance Index.

- **Partner Risk:** Displays the current risk of the partner. It can be different from the Partner’s project risk, as it can be re-calculated any time through the Partner Performance Index.

Click the [Show Filters] button to revert to the Advance Switchboard present on the GMS 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.

**How to use the FAQ Tooltip?**

The FAQ tooltip is accessible on all pages of the GMS. It redirects to a guidance note dedicated to the page.

In the example below, upon clicking on the FAQ tooltip of the Strategic Review’ page, a new tab will open on your browser, opening the specific related section in the ‘Strategic Review’ article of the Help portal.
What is the Fund Home Page? Top
In the Fund Home page, users can view the following features:
1- A Login button, to login to GMS
2- A year tab, allowing users to filter this page's information per year,
3- A list of all CBPFs, enabling users to filter this page's information per CBPF,
4- A contributions/allocations section, providing users with funding information on the pooled funds as follows:
   a. Contributions:
      - The Fund Name,
      - Commitments in US$ per Donor, and
      - Paid Contributions in US$ per Donor.
   b. Allocations:
      - the Fund Name
      - The implementing partners (UN Agencies, International NGOs, national NGOs, Red Cross/Red Crescent Societies),
      - The clusters, and
      - The budget allocated to the according cluster and partner.
5- The map provides a broad overview of the CBPFs worldwide,
6- The legend completes the map, indicating the amounts allocated in US$ per CBPF.

Reports - CC

To access Reports, go to Report > Report
The various reports to choose from, are as listed:

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

**Report Overview**  [TOP]

**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 1** (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.
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>Org</th>
<th>Project Title</th>
<th>Revision Request Types</th>
<th>Revision Request Status</th>
<th>Project Revision Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Camp Coordination / Management</td>
<td>TRP-001381 / 8401/COM / H601/1000 / H6P 2013 Secretariat Allocation</td>
<td>VO</td>
<td>Safer camps</td>
<td>Change in project duration (KEC)</td>
<td>Revision was not approved</td>
<td>Project Duration Extension (KEC)</td>
</tr>
<tr>
<td>2</td>
<td>Camp Coordination / Management</td>
<td>TRP-001381 / 8401/COM / H601/1000 / H6P 2015 Secretariat Allocation</td>
<td>PF</td>
<td>Camp Committee Establishment and Management Training, Rehabilitation and Water Conservation for 12 IDP Camps</td>
<td>Revision Request in draft</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Camp Coordination / Management</td>
<td>TRP-001381 / 8401/COM / H601/1000 / H6P 2015 Secretariat Allocation</td>
<td>MIF</td>
<td>Getting ahead of the winter: WASH, sanitation and self-protection mechanism for IDPs in Elgo and Al Harraim camps</td>
<td>Significant change in activities</td>
<td>Revision was not approved</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Camp Coordination / Management</td>
<td>TRP-001381 / 8401/COM / H601/1000 / H6P 2015 Secretariat Allocation</td>
<td>ACTED</td>
<td>Improving the living conditions of IDPs in Darfur governorates through site enhancement and water supervision support while strengthening community mobilization and promoting good governance</td>
<td>Change in budget, Change in project duration (KEC)</td>
<td>Revision was not approved</td>
<td>Project Duration Extension (KEC)</td>
</tr>
<tr>
<td>5</td>
<td>Camp Coordination / Management</td>
<td>TRP-001381 / 8401/COM / H601/1000 / H6P 2015 Secretariat Allocation</td>
<td>DFO</td>
<td>Improvement, transportation and</td>
<td>Change in budget, Change in project duration</td>
<td>Revision was not approved</td>
<td>Project Duration Extension (KEC)</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>Previous project revision(s) for TUR-90/0008/RBZ/CM/UN/0008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revision Type</td>
</tr>
<tr>
<td>----------------</td>
</tr>
<tr>
<td>Bank Info change</td>
</tr>
<tr>
<td>Bank Info change</td>
</tr>
<tr>
<td>Project Duration Extension (NCE), Budget Revision, Bank Info change</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.

Monitoring Overview **TOP**
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
CBPF GRANT MANAGEMENT SYSTEM (GMS)

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.

### Projects Monitoring

<table>
<thead>
<tr>
<th>#</th>
<th>Primary Cluster</th>
<th>Project Code</th>
<th>Org</th>
<th>Project Title</th>
<th>Location</th>
<th>Budget</th>
<th>Project Status</th>
<th>Project Monitoring</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Health (95%), Water, Sanitation and Hygiene (15%)</td>
<td>ENO-CO/00310/RQ2/4</td>
<td>BFD WASH/EN001000 [2nd Khreu</td>
<td>Emergency health support to IDPs and host community population through provision of primary and basic secondary health services with a focus on maternal, neonatal and child health care for conflict affected and vulnerable populations in (Kemii) district of South Governorates</td>
<td>Amran → Amran</td>
<td>130,835.60</td>
<td>Implementation &amp; Reporting</td>
<td>15/07/2016 Financial Spot Check - Completed</td>
</tr>
</tbody>
</table>

Total: $130,835.60

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.