



OCHA

United Nations Office  
for the Coordination of  
Humanitarian Affairs

# Agencies / Partners Tooltips and Project Workflow

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(via Webex Recording), 2 February 2018

[www.unocha.org](http://www.unocha.org)



# Tooltips

- Field Description and/or Requirement
- Save Often!
- Print
- Red tabs v. Blue tabs
- Making and viewing comments
- Action Icons
- Project Lifecycle Stages and Project Statuses

# Field Description and/or Requirement

Mandatory fields are marked with an asterisk \*. Always save your information before changing tabs.

|   |   |                             |
|---|---|-----------------------------|
| Project Title *                         | Return to school: supporting access to education for 6,000 children in Kobane town  |                             |
| Planned project duration * ?            | 3 months  |                             |
| Fund Project code                       | Internal<br>(Generated automatically)   | XXX-15/0000/SA2/E/INGO/0000 |
| Planned Start Date *                    | 01/10/2015  |                             |
| Actual Start Date<br>(as per Agreement) | 01/10/2015  |                             |
| Project Summary ? *                     | The project will facilitate the return to formal education for 6,000 girls and boys in Kobane activities will be implemented in collaboration with the Kobane department of education |                             |

Please provide a description of the project.

- The question mark (?) icon will provide you with a field description
- The asterisk (\*) icon will notify you that the field is required.

# Save often!



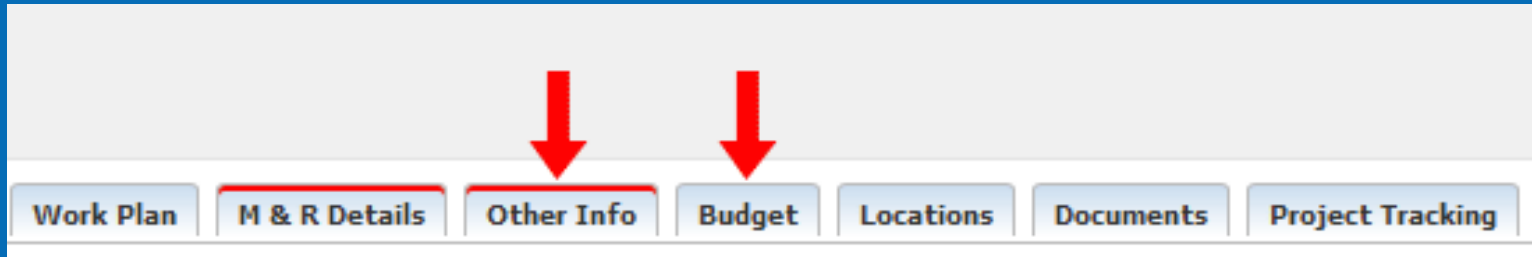
- 'Save & Stay' will save the work and let the user remain on the screen they are working on.
- 'Save & Exit Project' will allow the user to save and exit the project.

# Print



- Users can export the documents that they are drafting, reviewing or viewing on the GMS in PDF, Word or HTML, by clicking on the respective icons at the top right of the screen when they are inside the document (project proposal, reports).

# Red tabs – blue tabs



- Indicate that there is information missing

# Adding comments

[Under final TR review]

Send final TR to HFU Send back to IP

Strategic Review 2 Technical

Save & Stay Save & Exit Project

Comment - By [User] Add Co

Cover Page Background Logical Framework Work Plan H & R Details Other Info Budget Locations Documents Project Tracking

Project Created By: [User] on 30/08/2015 12:38:06 PM Last Updated By: [User]

This section cannot be edited. For any changes, please contact: [User]; Skype: [User]

Requesting Organisation XX (Test Organization)

Allocation Type HPF 2015 Second Standar

Mandatory fields are marked with an asterisk \*. Always save

Project Title \* Return to school: supporting access

Planned project duration 3 months

Fund Project code Internal (Generated automatically) XXX

Planned Start Date \* 01/10/2015

Actual Start Date (as per Agreement) 01/10/2015

Project Summary \* The project will facilitate the return activities will be implemented in col

**Project Comments**

Comments for project in "Under final TR review"

**Status Changed From: TR-3 draft To: Under final TR review**  
By: [User], Agencies/Partners (07/10/2015 01:16 PM)  
Description of cost has been changed i.e. direct to support and BoQ is also uploaded.

View Previous Comments

Save Cancel

'Add Comments' hyperlink to add comments at Project Level

Pop up box: do not forget to press 'Save' !

# Adding comments

**Comments for Cover Page**

By Date By Status

Leave Comment:

Add Comments here

By hannah@bigheart.org On 5/4/2015 05:30:30 (TR-1 draft)

1) Question - \* BENEFICIARIES: the number of beneficiaries is not clear please specify? Answer - Beneficiaries are broken down above as 965 households / 5,790 direct beneficiaries. T men, 1216 women, 1621 boys and 1737 girls.

By drossi@sy.goal.ie On 23/3/2015 03:01:58 (Under 1st TR review)

\* BENEFICIARIES: the number of beneficiaries is not clear please specify

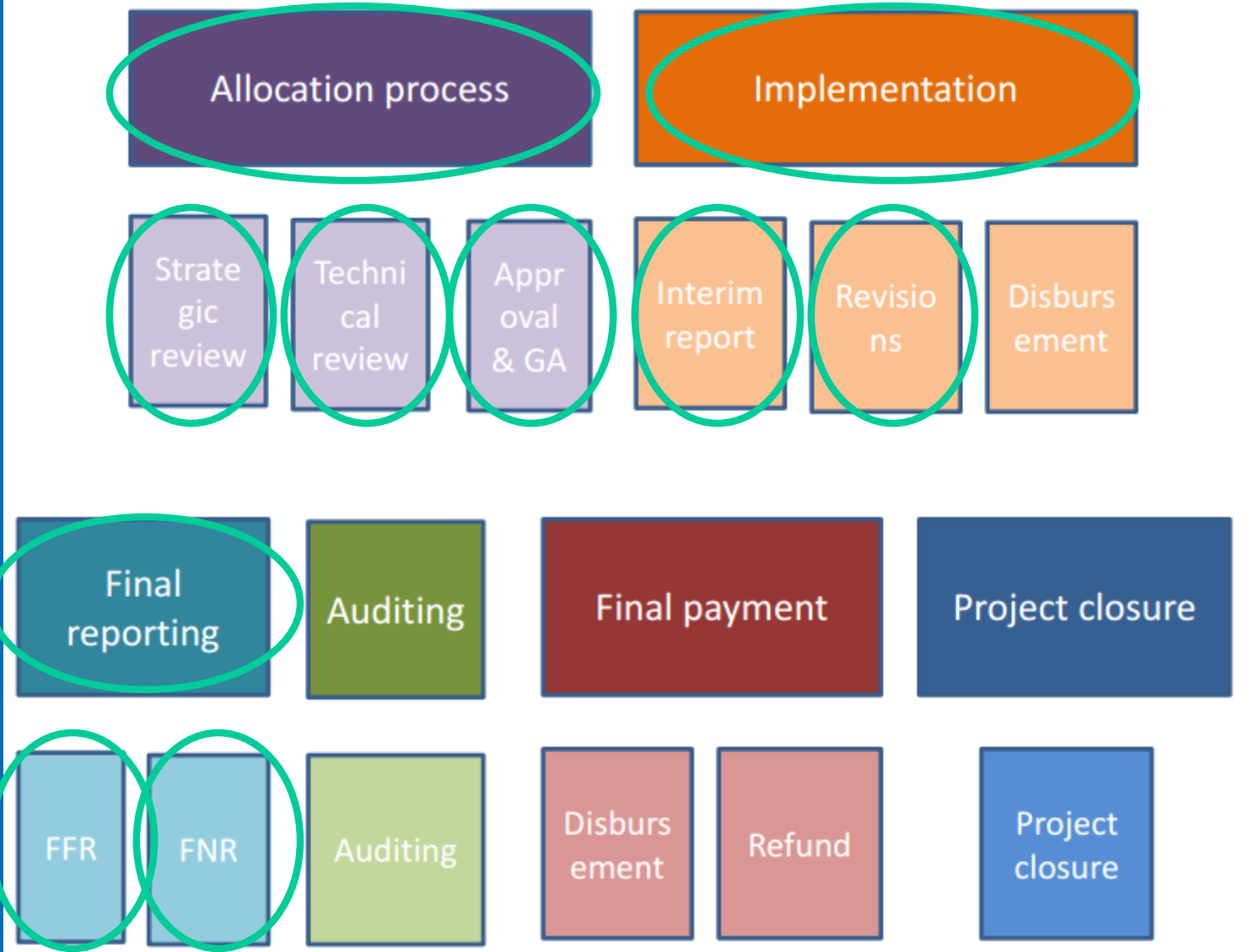


Click here to add a comment  
(lower right margin of the screen)



Do not forget to press 'Save' !



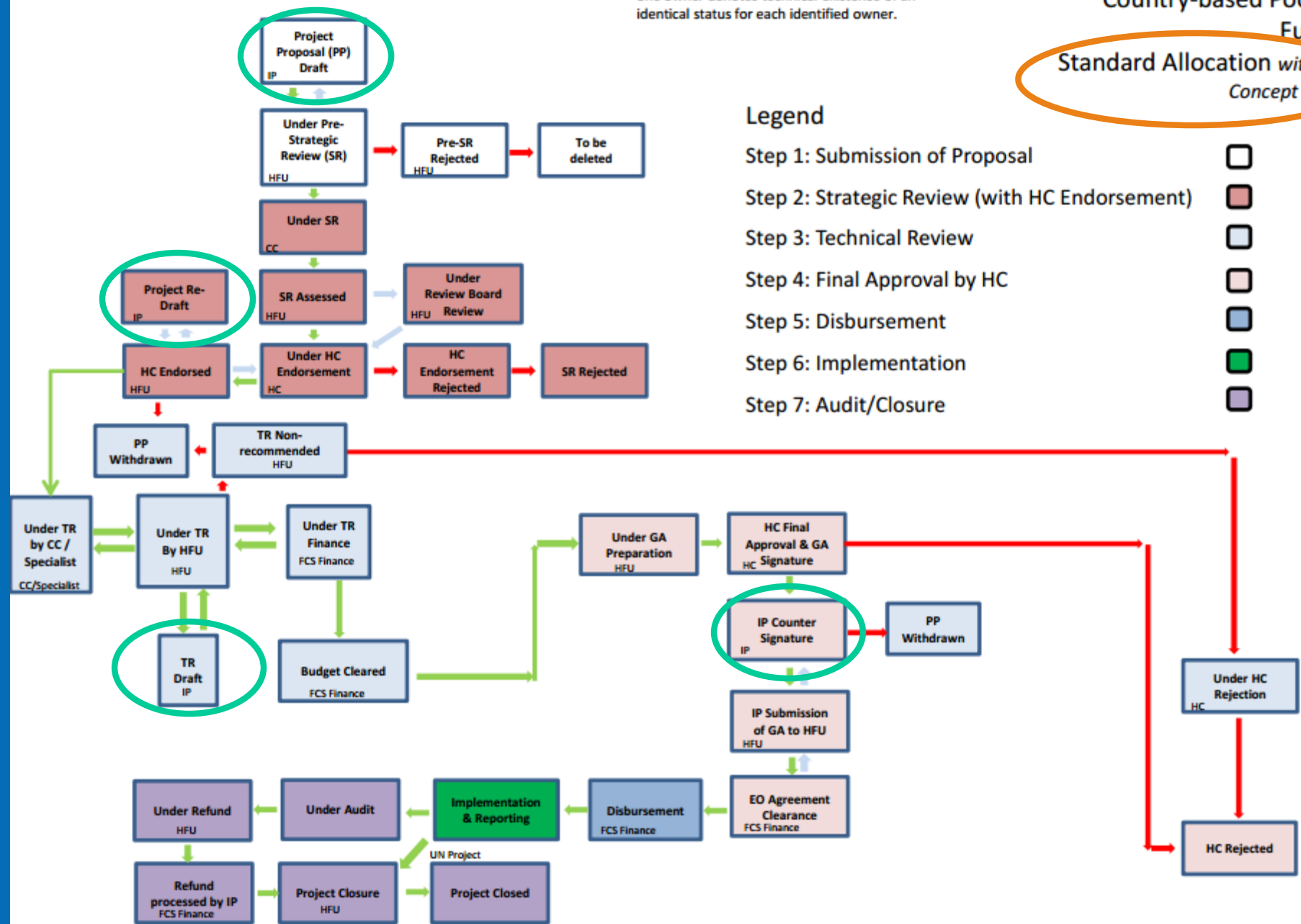


# GMS Workflow

## Country-based Pooled Funds

### Standard Allocation *without* Concept Note

\*Note: Any status box identifying more than one owner denotes technical existence of an identical status for each identified owner.



### Legend

- Step 1: Submission of Proposal
- Step 2: Strategic Review (with HC Endorsement)
- Step 3: Technical Review
- Step 4: Final Approval by HC
- Step 5: Disbursement
- Step 6: Implementation
- Step 7: Audit/Closure

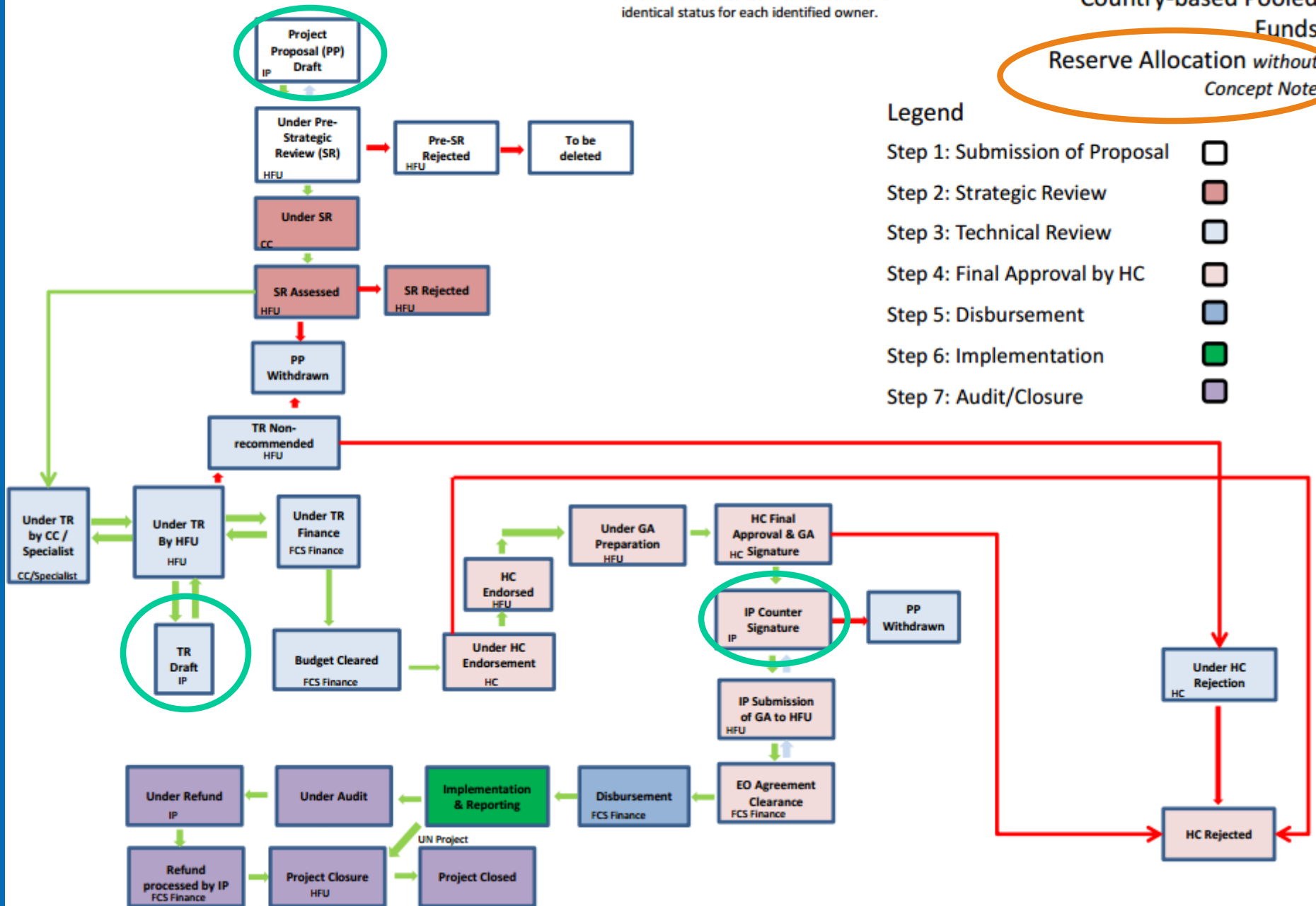
# GMS Workflow Country-based Pooled Funds

## Reserve Allocation *without* Concept Note

\*Note: Any status box identifying more than one owner denotes technical existence of an identical status for each identified owner.

### Legend

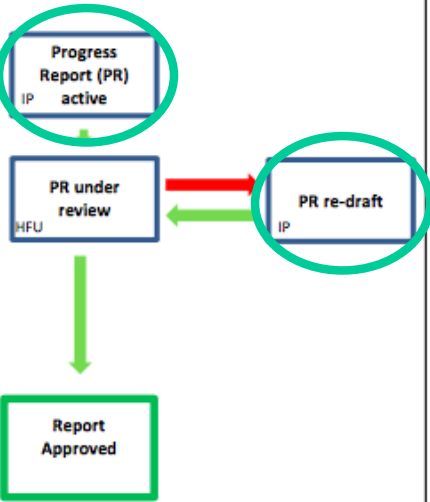
- Step 1: Submission of Proposal
- Step 2: Strategic Review
- Step 3: Technical Review
- Step 4: Final Approval by HC
- Step 5: Disbursement
- Step 6: Implementation
- Step 7: Audit/Closure



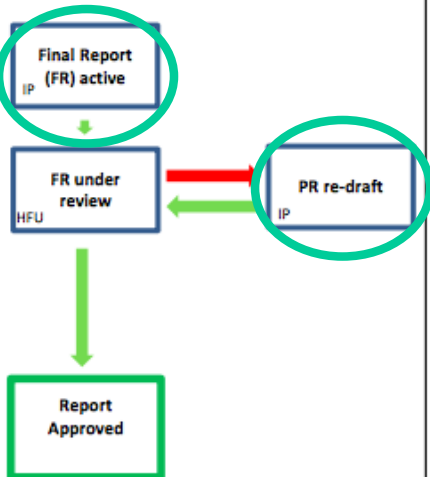
# REPORTING

## Narrative reporting

### Progress

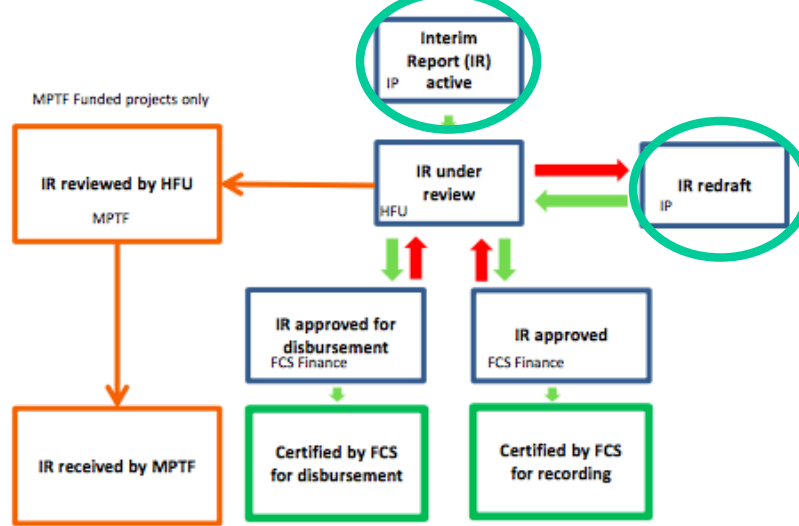


### Final

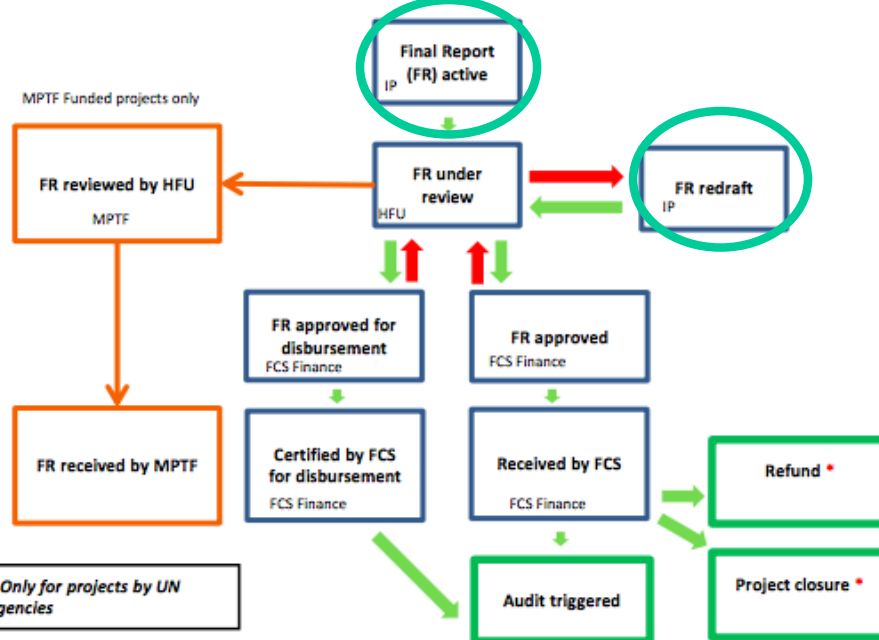


## Financial reporting

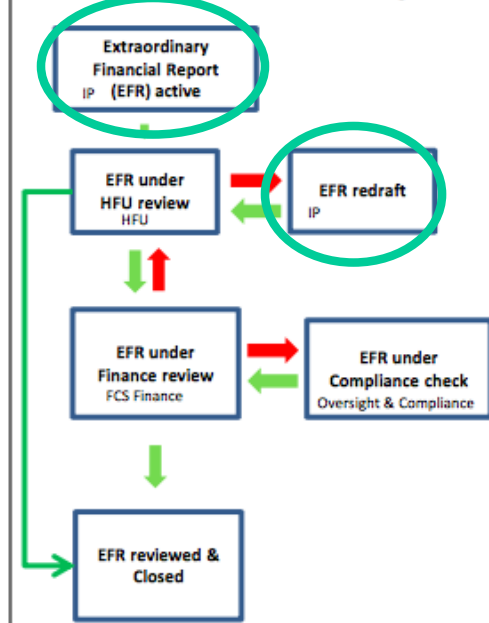
### Interim



### Final



### Extraordinary





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United Nations Office  
for the Coordination of  
Humanitarian Affairs

Coordination Saves Lives

La coordination sauve des vies

La coordinación salva vidas

Координация спасает жизни

بالتنسيق ننقذ الأرواح

致力协调，挽救生命