Project Reporting Oversight and Monitoring Solution

Working better together

Train-of-Trainer Workshop: PROMS Navigation

April 2023
1. How to log on to PROMS
2. PROMS “self-help” function
3. PROMS “My Tasks” Page
4. PROMS Document Register
5. PROMS Mail Module
6. PROMS Field Module
7. PROMS Workflow
8. PROMS Connected Cost
9. PROMS Directory
10. PROMS Insights
HOW TO LOG ON TO PROMS
HOW TO LOG ON TO PROMS

1. Select your preferred operating language...

2. Enter your username and click on “next”...

3. Enter your password and click on “enter”...

Click on link to access video on “How to log on to “Aconex” Support Central (aconex.com)
PROMS “SELF-HELP FUNCTION”
PROMS “SELF-HELP FUNCTION”

1. If you need help, click on the self-help widget.
2. From here you can view a list of self-help topics.
3. Or you can search for self-help topics in the search field.
After logging on, you will land on the “My Task” page.

You can view the project details i.e., ToT Environment.

You can view all the projects you were invited too.

You can view all your emails.

You can view all your transmittals.

You can view shortcuts to “Mail Types” and “Document Register”.

Click on link to access video on “How to navigate the MY TASK PAGE”

Tasks (aconex.com)
HOW TO SELECT A PROJECT

Click on the arrow to view the projects that you were invited to

Select the project you want to work in

Another option, is to select a project from the list on the left

Click on link to access video on “How to navigate the MY TASK PAGE”

Tasks (aconex.com)
HOW TO ACCESS DOCUMENT REGISTER

1. You can access the “Document Register” by selecting “Documents”...

2. ...and then select “Document Register”

Click on link to access video on “How to navigate the DOCUMENTS MODULE”
Documents (aconex.com)
SEARCH OPTIONS IN DOCUMENT REGISTER

You can use “Standard” search options if you are looking for documents with specific status i.e., “Approved” status.

Or you can “Customize” your search using the search options fields.

Click on link to access video on “How to navigate the DOCUMENTS MODULE”
Documents (aconex.com)
HOW TO SEARCH FOR DOCUMENT

1. Enter the "Document Type" you are looking for
2. Then click on "Search"
3. You will see all documents that match your search criteria
4. Click on the "Checkbox" to select the document you want to access

Click on link to access video on “How to navigate the DOCUMENTS MODULE”
Documents (aconex.com)
TASK LIST IN DOCUMENT REGISTER

From here you have a series of “tasks” that you can perform (covered in the following slides).

To view task list, click on the three dots next to the document you selected.

Click on link to access video on “How to navigate the DOCUMENTS MODULE”
Documents (aconex.com)
Click on link to access video on “How to navigate the DOCUMENTS”
Documents (aconex.com)

1. Click on “Preview” to preview the document
**How to Download a Document**

1. Click on “Download” to download the document.

2. Pop-up box appears on screen and click on “Open File”.

3. File is downloaded.

Click on link to access video on “How to navigate the DOCUMENTS MODULE”

Documents (aconex.com)
HOW TO VIEW FILE IN “OPEN IN OFFICE ONLINE” MODE

1. Click on “Open in Office Online” to view the document

2. Here you will be able to see the status of document

3. ...as well as the document content

Click on link to access video on “How to navigate the DOCUMENTS MODULE” Documents (aconex.com)
HOW TO “UPDATE” A DOCUMENT

1. Click on "Update" to update document.
2. Click in checkbox to select the file you want to update.
3. Select "Bulk Update".
5. Select "Apply".

Click on link to access video on “How to navigate the DOCUMENTS MODULE”
Documents (aconex.com)
HOW TO VIEW DOCUMENT EVENT LOG

1. Click on "Event Log" to view document history.

2. You can view the history of the document in terms of type of activity (i.e., view), the revision, version, date and time of event, the user, and the users' organisation.

Click on link to access video on “How to navigate the DOCUMENTS MODULE”
Documents (aconex.com)
Click on link to access video on “How to navigate the DOCUMENTS MODULE”
Documents (aconex.com)
HOW TO VIEW THE PROPERTIES OF THE DOCUMENT

1. Click on "Properties" to view properties of document

2. Here you can view the status of the document

3. Here can view the properties of the document

Click on link to access video on “How to navigate the DOCUMENTS MODULE”
Documents (aconex.com)
HOW TO UPLOAD A DOCUMENT IN DOCUMENT REGISTER (1/3)

1. Click on "Add/Update Documents"
2. Click on "+
3. Select document from your computer that you want to upload
4. Drag and drop document into block

Click on link to access video on “How to navigate the DOCUMENTS MODULE”
Documents (aconex.com)
HOW TO UPLOAD A DOCUMENT IN DOCUMENT REGISTER (2/3)

1. Complete mandatory meta data fields

2. Click on “Register”

Click on link to access video on “How to navigate the DOCUMENTS MODULE”
Documents (aconex.com)
Click on link to access video on “How to navigate the DOCUMENTS MODULE”

Documents (aconex.com)
PROMS HAS A MAIL MODULE

You click on "Mail"

You can select an action from i.e., "Search", "Create New", and "Actions"

Or you can select a standard search function

Click on link to access video on “How to navigate the MAIL MODULE”
Mail (aconex.com)
THERE ARE TWO WAYS TO INITIATE AN EMAIL

Option 1

1. Select “Mail”
2. Select “Blank Mail”
3. Select “New Mail”
4. You will land on Mail Page

Option 2

1. Select “New Mail” from “My Task” Page
2. You will land on Mail Page

Click on link to access video on “How to navigate the MAIL MODULE”
Mail (aconex.com)
HOW TO SELECT A RECIPIENT FOR THE EMAIL

1. Select “Type”

2. Select “General Correspondence”

3. Type the name of person and click on “Search” button

4. The name will be retrieved from the “Directory” and select “To”

5. You have now selected a recipient

6. Select “OK”

Click on link to access video on “How to navigate the MAIL MODULE”
Mail (aconex.com)
HOW TO POPULATE A PROMS MAIL

1. If required, you can request a response timeline.
2. Complete the subject line.
3. Select the agreement number where applicable.
4. Populate text as in outlook.
5. Click on “Send.”
6. Recipient will receive outlook notification about PROMS mail.
7. Mail will be available on recipient’s “My Task” Page.

Click on link to access video on “How to navigate the MAIL MODULE” Mail (aconex.com)
Click on link to access video on “How to navigate the MAIL MODULE”

Mail (aconex.com)

HOW TO SEND CONFIDENTIAL MAIL

1. Select “Options”
2. Select “Send Confidential Mail”
3. Select “Send”
PROMS FIELD
HOW TO CREATE AN ISSUE

1. Click on "Field Tab"
2. Click on "Issues"
3. Click on "Add Issue"
4. Populate the issue fields (see comments)
5. Click on "Save"
6. The issue now appears in the "Issue Register"

Click on link to access video on “How to navigate the FIELD MODULE”
Field - Issues and Inspections (aconex.com)
WAYS TO SEARCH ISSUES REGISTER

1. By issue “Status”
2. By searching to who it was “Assigned to”
3. By date and clicking on “When it was created”
4. By “Issue Type”
5. By searching issues by clicking on “More Filters” tab

Click on link to access video on “How to navigate the FIELD MODULE”
Field - Issues and Inspections (aconex.com)
HOW TO CLOSE AN ISSUE IN ISSUE REGISTER

1. Select issue
2. Click on three dots on the right of the screen
3. You will see dropdown menu
4. Select “Close Issue”
5. Issue status is now updated to “Closed”

Click on link to access video on “How to navigate the FIELD MODULE”
Field - Issues and Inspections (aconex.com)
HOW TO SORT ISSUES

Click on link to access video on “How to navigate the FIELD MODULE”
Field - Issues and Inspections (aconex.com)
HOW TO GROUP ISSUES

Click on link to access video on “How to navigate the FIELD MODULE”
Field - Issues and Inspections (aconex.com)
PROMS WORKFLOW
HOW TO START A WORKFLOW (1/3)

1. Select the document you want to transmit via a "Workflow".
2. Click on "Transmit".
3. Select "Start a Workflow".
4. Select "Workflow Template".
5. Select "Negotiation of Indicators".

Click on link to access video on “How to navigate the WORKFLOW MODULE”
Workflows (aconex.com)
How to Start a Workflow (2/3)

Click on link to access video on “How to navigate the WORKFLOW MODULE”
Workflows (aconex.com)

6. Select “View and Edit Workflow Settings”

7. Go to Partner and UNHCR settings

8. Click on “Arrow” inside Partner Output box

9. Remove Workflow Placeholder by clicking on “Basket”

10. Replace placeholder with Partner name

11. Click “OK”

12. Do the same for UNHCR placeholder and Click “OK”

13. Click “Submit”
Click on link to access video on “How to navigate the WORKFLOW MODULE”
Workflows (aconex.com)
HOW TO START A “SUB-WORKFLOW” (1/3)

1. Select document you want to transmit
2. Click on “Review Outcome” and select “Action Required”
3. Populate “Comments” field
4. Select “Workflow Template”
5. Select “Negotiation of Indicators”
6. Click on “Arrow” inside Partner Output box
7. Remove Workflow Placeholder by clicking on “Basket”

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Workflows (aconex.com)
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Workflows (aconex.com)
HOW TO CREATE A TRANSMITTAL (1/2)

Click on link to access video on “How to navigate the WORKFLOW MODULE”
Workflows (aconex.com)

1. Select document you want to transmit
2. Select “Transmit” and click on “Create Transmittal”
3. Select recipient from directory
4. Select reason for transmittal
5. Select date when recipient must respond
6. Populate Subject Bar
7. You will see document as an attachment
8. Populate message
9. Click “Send”
Click on link to access video on “How to navigate the WORKFLOW MODULE”

Workflows (aconex.com)
PROMS COST
Click on link to access video on “How to navigate the COST MODULE”

Cost (aconex.com)
HOW TO ACCESS YOUR PROJECT DIRECTORY

1. Click on "Directory"

2. Select "Project Directory"

3. You will see a list of names that are in your project
HOW TO CREATE A MAILING GROUP

1. Click on "Create Mailing Group"
2. Click on "Edit Users"
3. Click on box next to users you want to add
4. Click on "To"
5. Confirm users
6. Click on "OK"
7. Click on "Save"
PROMS INSIGHTS – A SERIES OF STANDARD REPORTS
Thank You