

Project Reporting Oversight and Monitoring Solution

Working **better together**

Train-of-Trainer Workshop: PROMS Navigation

April 2023

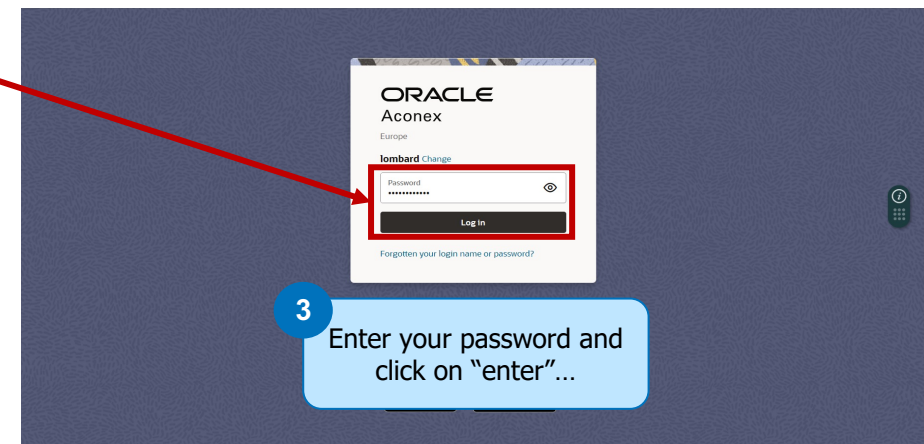
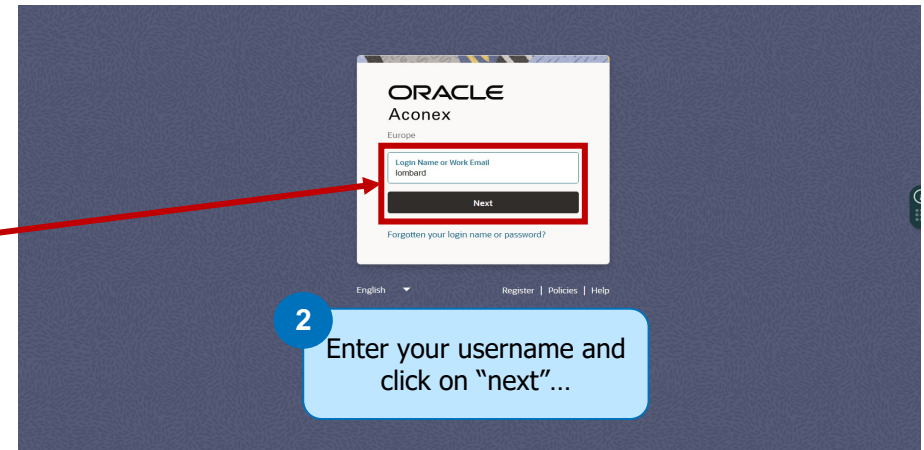
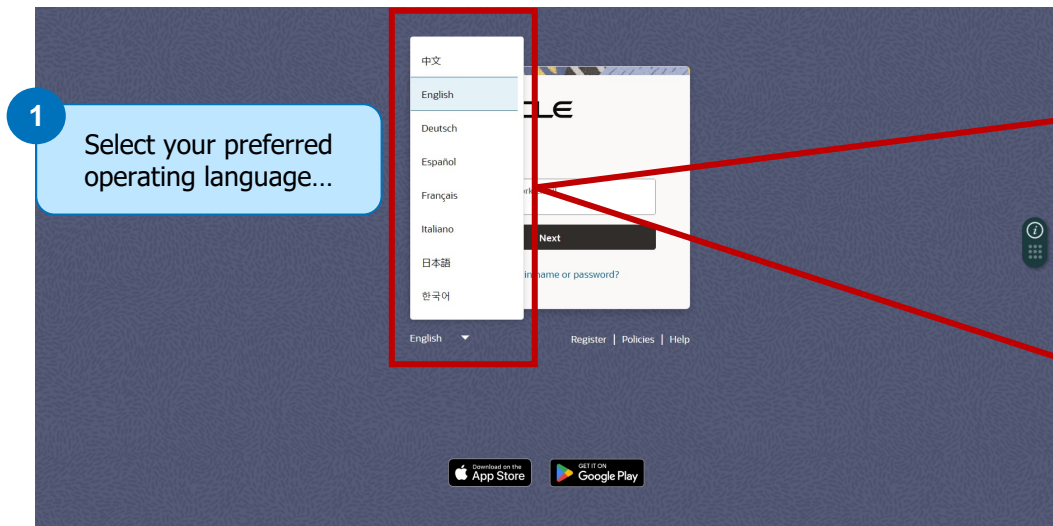
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HOW TO LOG ON TO PROMS

HOW TO LOG ON TO PROMS



Click on link to access video on "How to log on to "Aconex"
[Support Central \(aconex.com\)](https://supportcentral.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

The screenshots illustrate the following steps:

- Clicking the self-help widget (bottom right) in the Oracle Aconex interface.
- Viewing a list of self-help topics in the 'Oracle Guided Learning' panel, including: Lesson Learned- with other features, Search Output Indicators, UNHCR Stage Approval, Partner PFR Input, UNHCR Search for Project Financial Report & Submit Workflow, Search Output Indicators Documents & Submit Workflow, Partner Review & Comments, and Lesson Learned.
- Searching for self-help topics in the search field of the 'Oracle Guided Learning' panel.



PROMS "TASK PAGE"

PROMS TASK PAGE

1 After logging on, you will land on the "My Task" page

The screenshot shows the Oracle Aconex 'My Tasks' page. At the top, there is a navigation bar with 'ORACLE Aconex' and 'ToT Environment' dropdown. A search bar labeled 'Cross Project Search' is on the right, along with the user name 'Mr Basie Lombard' and a notification bell. Below the navigation bar, the 'My Tasks' section is highlighted with a red box. On the left, a sidebar contains a search bar and a list of projects: 'All Projects', 'MENA Field Demo 2022', 'ORCL@UNHCR', 'ToT Environment', and 'UNHCR UAT Afghan.'. The main content area is divided into two sections: 'Mail' and 'Documents'. The 'Mail' section shows a list of email categories: 'Unread To (0)', 'Unread Cc (1) View All', 'Outstanding (0)', 'Overdue (0)', and 'Awaiting your Approval (0)'. A specific email is visible with subject 'Oracle Aconex Project invite for ToT Envir...'. The 'Documents' section shows categories: 'Unread Transmittals To (0)', 'Unread Transmittals Cc (0)', 'Outstanding Transmittals (0)', 'Overdue Transmittals (0)', 'Unread Shares (0)', and 'Awaiting your Review (0)'. On the right, there are two panels: 'Project Details' for 'ToT Environment' and 'Shortcuts' with links for 'New Mail', 'Mail Inbox', 'Sent Mail', 'Draft Mail', 'Document Register', and 'Add/Update Documents'. A mobile app icon is also present.

2 You can view all the projects you were invited too

3 You can view all your emails

4 You can view all your transmittals

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

6 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 \(aconex.com\)](https://aconex.com)

HOW TO SELECT A PROJECT

The image shows two screenshots of the Oracle Aconex interface. The top screenshot shows a dropdown menu for 'ToT Environment' with a red box around it and a callout box labeled '1' that says 'Click on the arrow to view the projects that you were invited to'. The bottom screenshot shows a list of projects on the left side of the interface with a red box around it and a callout box labeled '2' that says 'Select the project you want to work in'. A third callout box labeled '3' points to a 'Mail' notification in the center of the interface, saying 'Another option, is to select a project from the list on the left'.

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

2 Select the project you want to work in

3 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 \(aconex.com\)](https://aconex.com)



PROMS DOCUMENT REGISTER

HOW TO ACCESS DOCUMENT REGISTER

1 You can access the "Document Register" by selecting "Documents"

2 ...and then select "Document Register"

Switched to new Improved Search & Upload
Project fields are used in the project, as a result New Improved Search and Upload are enabled for all the project users by default



Click on link to access video on "How to navigate the DOCUMENTS MODULE"

[Documents \(aconex.com\)](https://www.aconex.com)

SEARCH OPTIONS IN DOCUMENT REGISTER

ORACLE Aconex MENA Field Demo 2022 Cross Project Search Mr Basie Lombard United Nations High Commissioner for Refugees

Tasks Documents Mail Field Cost Workflows Directory Insights Setup

Search - Document Register Document Activity Tell us what you think

Search across all document fields including Document Number Search Save Search As...

Document Register

- Drawings
- Temporary Files
- Standard Searches
 - Approved
 - Issued for approval
 - Drawings modified to...
 - Temporary files uploa...

Search file content Show document history

Document No Title Type

Status Revision Created By

Review Status Agreement Number Cost Centre Code

Implementer Output Code

Date Type Date Range

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

ORACLE Aconex MENA Field Demo 2022 Cross Project Search Mr Basie Lombard United Nations High Commissioner for Refugees

Tasks Documents Mail Field Cost Workflows Directory Insights Setup

Search - Document Register Document Activity Tell us what you think

Search across all document fields including Document Number Search Save Search As...

Document Register

- Drawings
- Temporary Files
- Standard Searches
 - Approved
 - Issued for approval
 - Drawings modified to...
 - Temporary files uploa...

Search file content Show document history

Document No Title Type

Status Revision Created By

Review Status Agreement Number Cost Centre Code

Implementer Output Code

Date Type Date Range

+ Add another date query

MORE FILTERS (0) Reset pinned filters

Add/Update Documents Transmit Tools Reports

36 results (0 selected) Select All Add/Remove Columns

1-36 of 36 Documents (0 selected) Page 1 of 1

2 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 \(aconex.com\)](https://www.aconex.com)

HOW TO SEARCH FOR DOCUMENT

ORACLE Aconex ToT Environment

Mr Basie Lombard
United Nations High Commissioner for Refugees

Cross Project Search

Tasks Documents Mail Field Cost Workflows Directory Insights Setup

Search - Document Register Document Activity Tell us what you think

Document No	Revision	Version	Title	Type	Status
UNHCRTOT-1442023Y23AFG01-FPN-	A	6	Financial Plan - Afghanistan ABC User 1	Financial Plan	Agreed
UNHCRTOT-1442023Y23AFG01-FPN-	A	4	Financial Plan - Afghanistan ABC User 2	Financial Plan	In Negotiation
UNHCRTOT-1442023Y23AFG01-FPN-	0	2	Financial Plan for UVT Test	Financial Plan	In Negotiation
UNHCRTOT-1442023Y23AFG01-FPN-	0	2	test	Financial Plan	In Negotiation
UNHCRTOT-1442023Y23AFG01-FPN-	002	2	Clare - Financial Plan	Financial Plan	Under Review
UNHCRTOT-1442023Y23AFG01-FPN-	1	3	Financial Plan	Financial Plan	Cancelled
UNHCRTOT-1442023Y23AFG01-FPN-	Revised	1	Financial Plan 2023	Financial Plan	Not Started
UNHCRTOT-1442023Y23AFG01-FPN-	1	1	Framework Agreement	Financial Plan	Not Started
UNHCRTOT-1442023Y23AFG01-FPN-	A	6	Financial Plan - Albania ABC User 1	Financial Plan	Agreed

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

Search Save

Type
Financial Plan x

Implementer
Select values...

Assessment Report Type
Select values...

+ Add another date query

Page 1 of 1



Click on link to access video on "How to navigate the DOCUMENTS MODULE"

[Documents \(aconex.com\)](https://www.aconex.com)

TASK LIST IN DOCUMENT REGISTER

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

2 From here you have a series of "tasks" that you can perform (covered in the following slides)

File	Document No	Revision	Version	Title			
<input type="checkbox"/>	UNHCRTOT-1442023Y23AFG01-FPN-	A	6	Financial Plan - Afg			Agreed
<input checked="" type="checkbox"/>	UNHCRTOT-1442023Y23AFG01-FPN-	A	4	Financial Plan - Afg			In Negotiation
<input type="checkbox"/>	UNHCRTOT-1442023Y23AFG01-FPN-	0	2	Financial Plan for UVT Test			In Negotiation
<input type="checkbox"/>	UNHCRTOT-1442023Y23AFG01-FPN-	0	2	test			In Negotiation
<input type="checkbox"/>	UNHCRTOT-1442023Y23AFG01-FPN-	002	2	Clare - Financial Plan			Under Review
<input type="checkbox"/>	UNHCRTOT-1442023Y23AFG01-FPN-	1	3	Financial Plan			Cancelled
<input type="checkbox"/>	UNHCRTOT-1442023Y23AFG01-FPN-	Revised	1	Financial Plan 2023			Not Started
<input type="checkbox"/>	UNHCRTOT-1442023Y23AFG01-FPN-	1	1	Framework Agreement			Not Started
<input type="checkbox"/>	UNHCRTOT-1442023Y23AFG01-FPN-	A	6	Financial Plan - Albania ABC User 1			Agreed

HOW TO PREVIEW A DOCUMENT

1 Click on "Preview" to preview the document

The image shows a document management interface. On the left, a table lists documents with columns for document ID, revision, version, and title. The second row is highlighted in green, and a red box around the 'Preview' button in its context menu has a red arrow pointing to the right. On the right, a preview window is open, displaying a table with columns for Document No, Title, Revision, and Version. The table shows 12 results, with the first row selected. A green 'XLS' icon is visible in the preview window, and a message below it says 'No preview available. Download the file to view in another application.'

Document No	Title	Revision	Version
MENA2022-320610001-BUD-0001	JRF - 320610001 - Budget	1	10
MENA2022-320610002-BUD-0001	NRC - 320610002 - Budget	1	14
MENA2022-320610002-BUD-0002	BUD - User 1 - Somy	1	3
MENA2022-888810001-BUD-0001	BUD - User 006 - Manaza Hadi	1	1
MENA2022-888810001-BUD-0002	BUD - 07 Mina Hazou	1	1
MENA2022-888810001-BUD-0003	BUD - User 1 - Josef Lopez	1	1
MENA2022-888810001-PFR-0007	GHS - 888810001 - PFR - User 7	1	1
MENA2022-888810001-BUD-0001	GHS - BUD - User 8 - Rob Jennings	1	1
MENA2022-888810002-BUD-0002	BUD-user-4-Sima	1	3
MENA2022-888810002-BUD-0003	BUD - User 3 - Seven Shalabit	1 (1)	3



Click on link to access video on "How to navigate the DOCUMENTS"

[Documents \(aconex.com\)](https://www.aconex.com)

HOW TO DOWNLOAD A DOCUMENT

1 Click on "Download" to download the document

Unit Cost	Cost	Cost (USD)	Proposed Cost	Revised Cost	Agreed Cost	Request Expenditure	Revised Expenditure	Agreed Expenditure	Partner Comments	UNHCR Comments
38400	38400	38400	50000	40000	40000					
182400	182400	182400	182400	182400	182400					
147466,73	147466,73	147466,73	147466,73		147466,73					
17700	17700	24999,9998	24999,9998	24999,9998	24999,9998					
3540	3540	5000	5000	5000	5000					
40000	40000	56497,1748	56497,1748	56497,1748	56497,1748					
40000	40000	56497,1748	56497,1748	56497,1748	56497,1748					
17700	17700	24999,9998	24999,9998	24999,9998	24999,9998					
1750	21000	29661,0168	29661,0168	29661,0168	29661,0168					
2000	9600	13559,322	13559,322	13559,322	13559,322					
2128	2128	3005,6497	3005,6497	3005,6497	3005,6497					
250	1500	2118,6441	2118,6441	2118,6441	2118,6441					
500	500	706,2147	706,2147	706,2147	706,2147					
2000	4000	5649,7175	5649,7175	5649,7175	5649,7175					
9750	46800	66101,6945	66101,6945	66101,6945	66101,6945					
475	7600	10734,4632	10734,4632	10734,4632	10734,4632					
460	22080	31186,4405	31186,4405	31186,4405	31186,4405					
4000	16000	22598,8699	22598,8699	22598,8699	22598,8699					
285005,07	285005,07	402549,5315	402549,5315	402549,5315	402549,5315					
400	6400	9039,548	9039,548	9039,548	9039,548					
300	2700	3813,5593	3813,5593	3813,5593	3813,5593					
400	7200	10169,4915	10169,4915	10169,4915	10169,4915					
90	3060	4322,0339	4322,0339	4322,0339	4322,0339					

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 \(aconex.com\)](https://www.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

Unit Cost	Cost	Cost (USD)	Proposed Cost	Revised Cost	Agreed Cost	Request Expenditure	Revised Expenditure	Agreed Expenditure	Partner Comments
38400	38400	38400	50000	40000	40000				Agreed
182400	182400	182400	182400		182400				
147466.73	147466.73	147466.73	147466.73		147466.73				
17700	17700	24999.9998	24999.9998		24999.9998				
3540	3540	5000	5000		5000				
40000	40000	56497.1748	56497.1748		56497.1748				
40000	40000	56497.1748	56497.1748		56497.1748				
17700	17700	24999.9998	24999.9998		24999.9998				
1750	21000	29661.0168	29661.0168		29661.0168				
2000	9600	13559.322	13559.322		13559.322				
2128	2128	3005.6497	3005.6497		3005.6497				
750	1500	2118.6441	2118.6441		2118.6441				
		706.2147	706.2147		706.2147				
		5649.7175			5649.7175				



Click on link to access video on "How to navigate the DOCUMENTS MODULE"

[Documents \(aconex.com\)](https://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"

4 Update document

5 Select "Apply"

Document ID	Revision	Version	Title	Type	Status
UNHCRTOT-1442023Y23AFG01-FPN-0001	0	2	test	Financial Plan	In Negotiation
UNHCRTOT-1442023Y23AFG01-FPN-002	002	2	Clare - Financial Plan	Financial Plan	Under Review
UNHCRTOT-1442023Y23AFG01-FPN-001	1	3	Financial Plan	Financial Plan	Cancelled
UNHCRTOT-1442023Y23AFG01-FPN-003	Revised	1	Financial Plan 2023	Financial Plan	Not Started
UNHCRTOT-1442023Y23AFG01-FPN-004	1	1	Framework Agreement	Financial Plan	Not Started
UNHCRTOT-1442023Y23AFG01-FPN-005	A	6	Financial Plan - Albania ABC User 1	Financial Plan	Agreed

Bulk Edit - 1 document

Type * Financial Plan

Revision * A

Title * Financial Plan - Afghanistan ABC User 1

Status * -- Select --

Confidential Limit access to selected individuals

Revision Date * 18/04/2023

Created By * United Nations High Commis

Partner Agreement / Contract * 1442023Y23AFG01

Implementer * Afghanistan's Women Health Foundaion

Additional Notes

Integration Status

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

Type	Event	Revision	Version	Time	User	Organization
View	Viewed	A	4	22/05/23 04:30 PM	Basile Lombard	United Nations High Commissioner for Refugees
View	Viewed	A	4	22/05/23 03:49 PM	Basile Lombard	United Nations High Commissioner for Refugees
View				03:38 PM	Basile Lombard	United Nations High Commissioner for Refugees
View				03:32 PM	Viola Caraccolo	United Nations High Commissioner for Refugees
Send				02:22 PM	Daniela Raiman	United Nations High Commissioner for Refugees
Update	Auto Superseded	A	4	19/04/23 05:22 PM	Daniela Raiman	United Nations High Commissioner for Refugees
Management	Locked by Workflow	A	3	19/04/23 05:22 PM	Daniela Raiman	United Nations High Commissioner for Refugees
View	Downloaded	A	3	19/04/23 05:16 PM	Daniela Raiman	United Nations High Commissioner for Refugees



Click on link to access video on "How to navigate the DOCUMENTS MODULE"

[Documents \(aconex.com\)](https://www.aconex.com)

HOW TO VIEW DOCUMENT TRANSMITTAL HISTORY

1 Click on "Transmittal History" to view document transmittal history

2 You can view the transmittal history of the document in terms of type, the revision, status, and who uploaded the document

The screenshot shows the Oracle Aconex interface with a document list on the left and a 'Transmittal History Report by Document' window on the right. The document list includes columns for document ID, revision, and title. The transmittal history window displays a table with columns for Document, Title, Revision, Status, and Uploaded By. The table shows one document: UNHCRTOT-1442023Y23AFG01-FPN-002, titled 'Financial Plan - Afghanistan ABC User 2', with revision 'A' and status 'In Negotiation'. It was uploaded by 'Document uploaded by D Ralman on 19/04/2023'. Below this, there is a section for 'Recipient Organization' with columns for Recipient, Date Sent, Transmittal Number, and Reason for Issue. The recipient is 'United Nations High Commissioner for Refugees', the date sent is '19/04/2023', the transmittal number is 'UNHCR-WTRAN-000144', and the reason for issue is 'For Negotiation'.

Document	Title	Revision	Status	Uploaded By
UNHCRTOT-1442023Y23AFG01-FPN-002	Financial Plan - Afghanistan ABC User 2	A	In Negotiation	Document uploaded by D Ralman on 19/04/2023

Recipient Organization	Recipient	Date Sent	Transmittal Number	Reason for Issue
United Nations High Commissioner for Refugees	M Cianni	19/04/2023	UNHCR-WTRAN-000144	For Negotiation

 [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

Document ID	Revision	Status	Version
UNHCRTOT-1442023Y23AFG01-FPN-	A	6	
UNHCRTOT-1442023Y23AFG01-FPN-42023Y23AFG01-FPN-	A	4	
UNHCRTOT-1442023Y23AFG01-FPN-	0	2	
UNHCRTOT-1442023Y23AFG01-FPN-	0	2	
UNHCRTOT-1442023Y23AFG01-FPN-	002	2	
UNHCRTOT-1442023Y23AFG01-FPN-	1	3	
UNHCRTOT-1442023Y23AFG01-FPN-	Revised	1	
UNHCRTOT-1442023Y23AFG01-FPN-	1	Revised	1

2 Here you can view the status of the document

3 Here can view the properties of the document

Document Properties | Event Log | Tell us what you think | Update Document

History: Rev: A In Negotiation 19/04/2023 #4

UNHCRTOT-1442023Y23AFG01-FPN-002
Financial Plan - Afghanistan ABC User 2

Office Online Viewer | Properties | Related Items | Sent | Downloaded

XLS

1442023Y23TOT01-FPN-0001 partner.xls (641.0kB)

Download File | Confidentiality

Type: Financial Plan	Revision: A
Status: In Negotiation	Confidential: No
Revision Date: 18/04/2023	Created By: United Nations High Commissioner for Refugees
Partner Agreement / Contract: 1442023Y23AFG01	Implementer: Afghanistan's Women Health Foundaion
Additional Notes:	Integration Status:
Review Status: Pending	Version: 4
Review Source: WF-00071	



Click on link to access video on "How to navigate the DOCUMENTS MODULE"

[Documents \(aconex.com\)](https://aconex.com)

HOW TO UPLOAD A DOCUMENT IN DOCUMENT REGISTER (1/3)

The screenshot shows the Oracle Aconex Document Register interface. The main navigation bar includes 'Tasks', 'Documents', 'Mail', 'Field', 'Cost', 'Workflows', 'Directory', 'Insights', and 'Setup'. The 'Documents' tab is active. The 'Document Register' section is visible, with a search bar and various filters. A callout '1' points to the 'Add/Update Documents' button. A callout '2' points to a '+' button in the 'Upload Documents' dialog. A callout '3' points to a file selection window showing a list of files, with one file highlighted. A callout '4' points to a 'Drag and Drop' area in the dialog.

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

Name	Status	Date modified	Type
MEN2023-320610001-BUD-REV1	⊙	2023/04/13 12:12	Adobe Acrobat
MEN2023-320610001-BUD-REV1	⊙	2023/04/13 12:12	Microsoft Word
PS17258(10479)	⊙	2023/03/31 11:18	Adobe Acrobat
Terms and conditions(10480)	⊙	2023/03/31 11:17	Adobe Acrobat
User List_Consolidated	⊙	2023/03/16 10:27	OpenDocument
Pecanwood Estate Leisure Rental Notifica...	⊙	2023/03/08 10:09	Adobe Acrobat
Book1	⊙	2023/03/01 14:29	OpenDocument



Click on link to access video on "How to navigate the DOCUMENTS MODULE"

[Documents \(aconex.com\)](https://www.aconex.com)

HOW TO UPLOAD A DOCUMENT IN DOCUMENT REGISTER (2/3)

ORACLE Aconex ToT Environment

Mr Basie Lombard
United Nations High Commissioner for Refugees

Tasks Documents Mail Field Cost Workflows Directory Insights Setup

Upload Documents Tell us what you think

Cancel Save in Temporary Files Register

Add more Bulk Edit... Import metadata Remove

Files: 1 (1 selected)

1442023Y23TOT01-FPN-0001 partner bl.xls
Size: 641.5kB Ready to register

1 Complete mandatory meta data fields

2 Click on "Register"

Document No * -- Auto assigned --

Revision * 1

Title * CBO

Status * Not Started

Confidential Limit access to selected individuals

Revision Date * 24/05/2023

Created By * United Nations High Commissioner for Refugees

Partner Agreement / Contract * 1442023Y23BOS01

Implementer * Norwegian Refugee Council

Additional Notes

Integration Status



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

[Documents \(aconex.com\)](https://aconex.com)

HOW TO UPLOAD A DOCUMENT IN DOCUMENT REGISTER (3/3)

The screenshot displays the Oracle Aconex interface for the Document Register. On the left, a 'Document Upload' notification window is open, indicating that one document has been successfully moved to the organization's register. A red box highlights this notification, with a callout bubble labeled '1' stating: 'Notification that registration was successful'. On the right, the 'Document Register' search results are shown. A table lists 23 documents. A red box highlights a specific document entry, with a callout bubble labeled '2' stating: 'The document is now visible in the document register.' Below this, a note says: 'Note: you can search for document using the same steps as in slide 11'. The table has the following columns: Document No, Revision, Version, Title, Type, and Status. The highlighted document is 'AFA2022-111110001-BUD-' with Revision 1, Version 1, Title 'CBO', Type 'Budget', and Status 'In Negotiation'.

Document No	Revision	Version	Title	Type	Status
AFA2022-111110001	0	2	Project Description Template	Partner Agreement	In Negotiation
AFA2022-111110001-BUD-	A	3	RG BUD 29/03/2022	Budget	In Negotiation
AFA2022-111110001-BUD-	A	2	Test	Budget	In Negotiation
AFA2022-111110001-BUD-	A	2	Test	Budget	In Negotiation
AFA2022-111110001-BUD-	A	2	Budget CBO 18 11	Budget	In Negotiation
AFA2022-111110001-BUD-	A	2	CBO Budget 1811	Budget	In Negotiation
AFA2022-111110001-BUD-	1	1	CBO	Budget	In Negotiation
AFA2022-213010001-AX-	A	2	PMC02	Annex	In Negotiation
AFA2022-213010001-AX-	A	3	PMC03	Annex	In Negotiation
AFA2022-213010001-AX-	A	3	PMC03	Annex	In Negotiation
AFA2022-213010001-AX-	A	3	PMC03	Annex	In Negotiation
AFA2022-213010001-AX-	A	3	PMC03	Annex	In Negotiation
AFA2022-222222001-AX-	A	3	PMC03	Annex	In Negotiation
AFA2022-222222001-AX-	A	3	PMC03	Annex	In Negotiation
AFA2022-230301001-AX-	A	3	PMC03	Annex	In Negotiation
AFA2022-230301001-AX-	A	3	PMC03	Annex	In Negotiation



PROMS MAIL

PROMS HAS A MAIL MODULE

1 You click on "Mail"

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

3 Or you can select a standard search function

The screenshots illustrate the following steps:

- Click on the "Mail" icon in the top navigation bar.
- Select an action from the dropdown menu, such as "Search", "Create New", or "Actions".
- Select a standard search function from the "Search" dropdown menu.



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

Option 1 illustrates the process of initiating an email through the 'Mail' menu. The steps are as follows:

1. Select "Mail" from the top navigation bar.
2. Select "Blank Mail" from the dropdown menu.
3. Select "New Mail" from the search results.
4. You will land on Mail Page.

Option 2

Option 2 illustrates the process of initiating an email through the 'My Tasks' page. The steps are as follows:

1. Select "New Mail" from the "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"

The screenshot shows the 'New Mail - DRAFT-000197' form in the Oracle Aconex interface. The 'Cc' field is populated with 'Ms Ann-Marie Carroll - United Nations High Commissioner for Refugees'. The 'Response Required' section has 'Respond by' set to '31/05/2023'. The 'Subject' field contains 'Issue'. The 'Details' section has 'Partner Agreement / Contract' set to '1442023Y23BEL01'. The 'Message' field contains the text: 'I detected a burst pipe that can must be repaired. Best regards Basiel'. A red box highlights the 'Send' button in the top right corner.

6 Recipient will receive outlook notification about PROMS mail

The screenshot shows an Outlook email notification for 'UNHCR-GC-000001: Budget'. The email is from 'Aconex Notification (ToT Environment) <noreply@aconex.com>' to 'Basie Lombard'. The subject is 'Budget'. The email body includes a warning: 'Attention: This email is from an external sender. Please be careful with...' and details about the project and correspondence. A blue callout box with the number 6 points to the email content.

7 Mail will be available on recipient's "My Task" Page"

The screenshot shows the 'My Tasks' page in the Oracle Aconex interface. The 'Mail' section is expanded, showing a list of tasks. One task is highlighted with a red box: 'UNHCR-GC-000001 Budget'. A blue callout box with the number 7 points to this task.

 [Click on link to access video on "How to navigate the MAIL MODULE"](#)
[Mail \(aconex.com\)](mailto:aconex.com)

HOW TO SEND CONFIDENTIAL MAIL

The image shows two overlapping screenshots of the Oracle Aconex 'New Mail' interface. The top screenshot shows the 'Options' button highlighted with a red box and a callout bubble labeled '1 Select "Options"'. The bottom screenshot shows the 'Mail Options' dialog box with the 'Send as confidential mail' checkbox checked and highlighted with a red box, and a callout bubble labeled '2 Select "Send Confidential Mail"'. The 'Send' button in the bottom right corner of the dialog is also highlighted with a red box and a callout bubble labeled '3 Select "Send"'. The interface includes a top navigation bar with 'ORACLE Aconex ToT Environment' and a search bar, and a main toolbar with 'New Mail', 'Attach', 'Options', 'Preview', 'Save To Draft', and 'Send' buttons.



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

[Mail \(aconex.com\)](https://aconex.com)



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 \(aconex.com\)](https://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 \(aconex.com\)](https://aconex.com)

HOW TO SORT ISSUES

The screenshot displays the Oracle Aconex 'Issues' module interface. At the top, the navigation bar includes 'ORACLE Aconex', 'ToT Environment', a search bar for 'Cross Project Search', and the user profile 'Mr Basie Lombard'. Below the navigation bar, the 'Issues' section is visible, with a search bar and filter buttons for 'Status Any', 'Assigned To Any', 'Due Date Any', and 'Issue type Any'. A list of issues is shown, with the first issue selected. A dropdown menu for 'Sort by' is open, showing options: 'Location', 'Assigned To', 'Created on', and 'Issue type'. The 'Created on' option is highlighted. Two callout boxes provide instructions: '1 Click on "Sort by"' and '2 Select any of the options in the dropdown menu'.

Issues

ToT Environment > Sub Areas

Search Issues

Status Any Assigned To Any Due Date Any Issue type Any More Filters

Edit Assignees Send Export

Sort by: Created on Group by: None

33 - Implementation Monitoring
Please review budget - to much spend on salaries.
Basie Lombard Thu, May 25, 2023 Closed

32 - Implementation Monitoring
Review of the Implementation
Brian Kombo Wed, May 03, 2023 Closed

31 - Implementation Monitoring
Financial Plan
Brian Kombo Mon, May 01, 2023 Open

30 - Implementation Monitoring
cccc Open

Page 1 of 1 (1-33 of 33 issues)

Please review budget - to much spend on salaries.
33 -Implementation Monitoring

Location sal...
Assigned To
Created on
Issue type

1 Click on "Sort by"

2 Select any of the options in the dropdown menu



Click on link to access video on "How to navigate the FIELD MODULE"

[Field - Issues and Inspections \(aconex.com\)](https://aconex.com)

HOW TO GROUP ISSUES

The screenshot shows the Oracle Aconex interface for the 'Issues' module. The top navigation bar includes 'ORACLE Aconex', 'ToT Environment', a search bar, and user information for 'Mr Basie Lombard'. Below the navigation bar, the 'Issues' section is displayed with a search bar and filter buttons for 'Status Any', 'Assigned To Any', 'Due Date Any', 'Issue type Any', and 'More Filters'. A list of issues is shown, with the first issue selected. A dropdown menu is open, showing options for 'Group by: None', 'Location', 'Assigned To', 'Issue type', and 'None'. Two callout boxes provide instructions: '1 Click on "Group by"' and '2 Select any of the options in the dropdown menu'.

Issues

ToT Environment > Sub Areas

Search Issues

Status Any Assigned To Any Due Date Any Issue type Any More Filters

Sort by: Created on

Group by: None

Location

Assigned To

Issue type

None

1 Click on "Group by"

2 Select any of the options in the dropdown menu



Click on link to access video on "How to navigate the FIELD MODULE"

[Field - Issues and Inspections \(aconex.com\)](https://aconex.com)



PROMS WORKFLOW

HOW TO START A WORKFLOW (1/3)

1 Select the document you want to transmit via a "Workflow"

File	Document No	Revision	Version	Title	Type	Status
	UNHCRTOT-1442023-PFA-	0	1	Framework	Framework Agree...	Not Started
	UNHCRTOT-1442023-PFA-	1	1	PROFESSIONAL SUMMARY	Framework Agree...	Not Started
	UNHCRTOT-1442023-PFA-	1	1	Framework agreement	Framework Agree...	Not Started
	UNHCRTOT-1442023-PFA-	1	1	Framework agreement	Framework Agree...	Not Started
	UNHCRTOT-1442023-PFA-	1	1	ToT	Framework Agree...	Not Started
	UNHCRTOT-1442023-PFA-	1	1	Maxine Agreement	Framework Agree...	Not Started
	UNHCRTOT-1442023-PFA-	0	1	o	Framework Agree...	Not Started
	UNHCRTOT-1442023-PFA-	1	1	Framework mail	Framework Agree...	Not Started
	UNHCRTOT-1442023Y23AFG01-IND-1442023Y23AFG01-IND-	A	1	Indicators - Afghanistan ABC User 2	Output Indicators	Not Started
	1442023Y23AFG01-NAR-	1	1			
	UNHCRTOT-1442023Y23AFG01-NAR-	pa amendme...	1	Partnership agreement Zuzana	Partner Agreement	Not Started
	UNHCRTOT-1442023Y23AFG01-PPA-	0	1	Agreement	Partner Agreement	Not Started
	UNHCRTOT-1442023Y23AFG01-PPA-	1	1			
	UNHCRTOT-1442023Y23AFG01-PPA-	procurement	1	23 ALB01 UP Partner Procurement Capacity	Annex	Not Started

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 \(aconex.com\)](https://www.aconex.com)

HOW TO START A WORKFLOW (2/3)

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 WORKFLOW (3/3)

The screenshot displays the Oracle Aconex interface for a partner user, Mr. Basie Lombard. It is divided into two main sections: an email notification on the left and a 'My Tasks' dashboard on the right.

Section 14: An email notification titled '(WF-000114) Negotiation of Indicators ToT' is shown. A callout bubble with the number 14 states: "You will receive pop-up message that workflow was successful". The email content includes a subject line, a 'Workflow Transmittal' type, and a subject '(WF-000114) Negotiation of Indicators ToT'. It also lists document attachments, including a 'Financial Plan 2022'.

Section 15: A callout bubble with the number 15 states: "Partner receives an email notification". This points to the email notification itself.

Section 16: The 'My Tasks' dashboard on the right shows a list of tasks. A callout bubble with the number 16 states: "It appears in the Partner 'My Page' as outstanding workflow". A red box highlights a specific task entry in the list:

Workflow ID	Task Name	Status	Due Date
WF-000114 (1)	Negotiation of Indicators ToT	Partner Output In...	15/06/23

 [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

Document Review (List Mode) - WF-000085 : Partner Output Indicator Proposal

File	Document No	Title	Revision	Subworkflow Outcome	Review Outcome	Comments	Date Due	Markups
<input checked="" type="checkbox"/>	UNHCRTOT-1442023Y23AFG01-IND-0003	Basile	1				16/05/2023	None

2 Select Workflow Template

4 Select "Workflow Template"

5 Select "Negotiation of Indicators"

Start Workflow Wizard

Template Name	Organization	Duration
Financial Plan	United Nations High Commissioner for Refugees	4
<input checked="" type="radio"/> Negotiation of Financial Plan		30
<input checked="" type="radio"/> Negotiation of Indicators ToT		30
<input type="radio"/> Negotiation of Indicators. dml		30
<input type="radio"/> Partner Sub Workflow		5

2 Click on "Review Outcome" and select "Action Required"

3 Populate "Comments" field

Document Review (List Mode) - WF-000085 : Partner Output Indicator Proposal

File	Document No	Title	Revision	Subworkflow Outcome	Review Outcome	Comments	Date Due	Markups
<input checked="" type="checkbox"/>	UNHCR				Action required	Review Targets	16/05/2023	None

6 Click on "Arrow" inside Partner Output box

7 Remove Workflow Placeholder by clicking on "Basket"

Start Workflow Wizard

Partner Output

Workflow Placeholder (Do Not Add Users)

HOW TO START A "SUB-WORKFLOW" (2/3)

8 Replace placeholder with Partner name

9 Click "OK"

10 Do the same for UNHCR placeholder and Click "OK"

11 Click "OK"

12 Click "Submit"

 [Click on link to access video on "How to navigate the WORKFLOW MODULE"](#)
[Workflows \(aconex.com\)](#)

HOW TO START A "SUB-WORKFLOW" (3/3)

The screenshot displays the Oracle Aconex interface for a partner user, Mr. Basie Lombard. It is divided into three main sections illustrating the workflow process:

- Step 13:** A callout box states, "You will receive pop-up message that workflow was successful". This points to a notification in the top left corner of the interface.
- Step 14:** A callout box states, "Partner receives an email notification". This points to an email notification from the system regarding a new workflow transmittal.
- Step 15:** A callout box states, "It appears in the Partner 'My Page' as outstanding workflow". This points to a table in the "My Tasks" section of the interface.

The "My Tasks" table shows the following workflow items:

Workflow ID	Workflow Name	Status	Due Date
UNHCR-WTRAN-000192	Final (WF-000091) Partner Sub Workflow	Outstanding	25/04/23
UNHCR-WTRAN-000187	Final (WF-000088) Partner Sub Workflow	Outstanding	25/04/23
UNHCR-WTRAN-000055	Transmittal Rob G Demo	Outstanding	25/04/23
WF-000085 (1)	Negotiation of Indicators ToT	Outstanding	16/05/23
WF-000114 (1)	Negotiation of Indicators ToT	Outstanding	15/06/23

 [Click on link to access video on "How to navigate the WORKFLOW MODULE"](#)
[Workflows \(aconex.com\)](#)

HOW TO CREATE A TRANSMITTAL (1/2)

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"

The screenshots show the Oracle Aconex interface with various components highlighted:

- Screenshot 1:** A table of documents with columns for File, Document No, Revision, Version, Title, and Type. A document is selected.
- Screenshot 2:** The "Transmit" button in the top right corner of the document list is highlighted, along with the "Create Transmittal" option in the dropdown menu.
- Screenshot 3:** The "Transmittal" form is shown with the "Recipient" field populated with "Mr Basile Lombard - United Nations High Commissioner for Refugees".
- Screenshot 4:** The "Reason for Issue" dropdown menu is open, showing options like "For Negotiation" and "Issued for Information".
- Screenshot 5:** The "Response Required" date field is set to "31/05/2023".
- Screenshot 6:** The "Subject" field is populated with "Review Financial Plan".
- Screenshot 7:** The "Attachments" section shows the selected document as an attachment.
- Screenshot 8:** The "Message" field is populated with "Please review attached plan. Best regards Basile".
- Screenshot 9:** The "Send" button is highlighted in the top right corner of the transmittal form.



Click on link to access video on "How to navigate the WORKFLOW MODULE"

[Workflows \(aconex.com\)](https://www.aconex.com)

HOW TO CREATE A TRANSMITTAL (2/2)

10 You will receive pop-up message that transmittal was successful

Review Financial Plan
TRANSMITTAL

Basile Lombard
UNITED NATIONS HIGH COMMISSIONER FOR REFUGEES
Geneve 1211 Switzerland

To: Environment
Case postale 2500
Geneve
1211 Switzerland

United Nations High Commissioner for Refugees
Case postale 2500
Geneve
1211 Switzerland

MAIL TYPE: Transmittal
MAIL NUMBER: UNHCR-TRANSMIT-000078
REFERENCE NUMBER: UNHCR-TRANSMIT-000078

Review Financial Plan

From: Mr Basile Lombard - United Nations High Commissioner for Refugees
To: Mr Basile Lombard - United Nations High Commissioner for Refugees
Sent: Thursday, 25 May 2023 5:46:09 PM GST (+04:00)
Reason: Issued for Review
Respond by: 31/05/2023
Status: Outstanding

DOCUMENT ATTACHMENTS (1)

File	Document No	Revision	Revision Date	Title	Status

Outstanding Transmittals (1) View All

Document No	Revision	Title	Status
UNHCR-TRANSMIT-000078		Review Financial Plan	Outstanding

11 Partner receives an email notification

UNHCR-TRANSMIT-000078: Review Financial Plan

Aconex Notification (ToT Environment) <noreply@aconex.com>
To: Basile Lombard

Attention: This email is from an external sender. Please be careful with any links or attachments.

Dear Basile,

You have received a new [Transmittal: UNHCR-TRANSMIT-000078](#)

Project: ToT Environment
Type: Transmittal
Mail Number: UNHCR-TRANSMIT-000078
Reference Number: UNHCR-TRANSMIT-000078
To: Mr Basile Lombard, United Nations High Commissioner for Refugees
From: B Lombard, United Nations High Commissioner for Refugees
Sent: 25/05/2023 5:46:11 PM GST (GMT +04:00)
Reason: Issued for Review
Status: Outstanding
Response: Respond by Wednesday, 31 May 2023
Subject: Review Financial Plan

Uploaded Document

Document No.	Revision	Title	Status
UNHCR-TOT-1442023Y23ARG01-FPN-0001	A	Financial Plan - Argentina MCO ABC user 1	Not Started

Your document register has been automatically updated with these revisions.

This is an automatic notification from **Aconex**.

12 It appears in the Partner "My Page" as outstanding transmittal



PROMS COST

PROMS COST

ORACLE Aconex UNHCR UAT Afghan. Mr Basie Lombard
Tasks Documents Mail Field Cost Workflows Directory Insights Setup

My Tasks

View
Cost Management
Cost Reports

Project Details
UNHCR UAT Afghan.
TBA
United Kingdom

Shortcuts
New Mail
Mail Inbox
Sent Mail
Draft Mail
Document Register
Add/Update Documents

ORACLE Aconex UNHCR UAT Afghan. Mr Basie Lombard
Tasks Documents Mail Field Cost Workflows Directory Insights Setup

Cost Management

Cost Worksheet

View: UNHCR Cost Worksheet

Level	Name	Code	Approved Downstream Contracts	Approved Downstream
1	Afghanistan ABC	AFA2022	46,732,050.20	100,000.00
1.1	350220001 - Validation Demo	AFA2022/350220001	286,689.65	0.00
1.1.1	Installments	AFA2022/350220001/PA	0.00	0.00
1.2	35022 - Afghanistan, Mazar I-Sharif	AFA2022/350220001/35022	286,689.65	0.00
1.2.1	EA17 - Systems	AFA2022/350220001/35022/EA17	11,026.02	0.00
1.2.1.1	107 - General project management services pro...	AFA2022/350220001/35022/EA17/107	11,026.02	0.00
1.2.2	OA4 - GBV	AFA2022/350220001/35022/OA4	60,251.79	0.00
1.2.2.1	10G - GBV is anticipated and risks identified acro...	AFA2022/350220001/35022/OA4/10G	17,255.51	0.00
1.2.2.2	11L - PoCs received Mental Health Psychosocial ...	AFA2022/350220001/35022/OA4/11L	42,996.28	0.00
1.2.5	OA7 - Community	AFA2022/350220001/35022/OA7	215,278.27	0.00

ORACLE Aconex ToT Environment Mr Basie Lombard
Tasks Documents Mail Field Cost Workflows Directory Insights Setup

Cost Reports

UNHCR Cost Worksheet

Report Type: Project

Name: UNHCR Cost Worksheet

Title: UNHCR Cost Worksheet

Subtitle: UNHCR Cost Worksheet - Exp Type Detail

Code	Name	Approved Downstream Contracts	Approved Downstream Contract Changes	Current Downstream Contracts	Approved Downstream Contract Actuals	Remaining to Spend	Invoiced PAID Amount	Remaining Invoiced
UNHCRTOT	ToT Environment	15,454,191	125,000	15,579,191	949,106	14,630,085	2,000,000	1,630,085
2022	2022	15,454,191	125,000	15,579,191	949,106	14,630,085	2,000,000	1,630,085
32061Y22P12B17A	32061Y22P12B17A	15,454,191	125,000	15,579,191	949,106	14,630,085	2,000,000	1,630,085
32061Y22P12B17A	32061Y22P12B17A	0	0	0	0	0	0	0
32061Y22P12B17A	32061Y22P12B17A	5,655,514	1,125,000	6,780,514	605,337	6,175,177	0	605,337
32061Y22P12B17A	32061Y22P12B17A	5,655,514	1,125,000	6,780,514	605,337	6,175,177	0	605,337
32061Y22P12B17A	32061Y22P12B17A	7,800,150	-1,000,000	6,800,150	343,770	6,456,380	0	343,770
32061Y22P12B17A	32061Y22P12B17A	7,800,150	-1,000,000	6,800,150	343,770	6,456,380	0	343,770
32061Y22P12B17A	32061Y22P12B17A	1,873,564	0	1,873,564	33,692	1,839,872	0	33,692
32061Y22P12B17A	32061Y22P12B17A	1,873,564	0	1,873,564	33,692	1,839,872	0	33,692
32061Y22P12B17A	32061Y22P12B17A	100,000	0	100,000	39,893	60,107	0	39,893
32061Y22P12B17A	32061Y22P12B17A	1,341,432	0	1,341,432	0	1,341,432	0	1,341,432
32061Y22P12B17A	32061Y22P12B17A	0	0	0	0	0	0	0
32061Y22P12B17A	32061Y22P12B17A	0	0	0	0	0	0	0
TOTAL	New Output	15,454,191	125,000	15,579,191	949,106	14,630,085	2,000,000	1,630,085



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

[Cost \(aconex.com\)](https://aconex.com)



PROMS DIRECTORY

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

ORACLE Aconex UNHCR UAT Afghan. Mr Basie Lombard Commissioner for Refugees

Tasks Documents Mail Field Cost Workflows Directory Insights

My Tasks

View

Project Directory

Global Directory

Project Details

UNHCR UAT Afghan. TBA

ORACLE Aconex ToT Environment Cross Project Search Mr Basie Lombard United Nations High Commissioner for Refugees

Tasks Documents Mail Field Cost Workflows Directory Insights Setup

Search - Directory Create Mailing Group Create Guest Invite user Search

1-25 of 71 search results <<previous 1 2 3 next>>

User / Group	Organization	Project Address	Project Phone	Project Fax
Workflow				
X BOB Gennings Project Manager	Humanitarian Solutions	Australia, Brisbane Queensland Australia 4558		
X Alan Collins Industry Consultant	Client Operations	Office 125, Level 1, Emarat Atrium Building, Sheikh Zayed Road, Dubai Dubai United Arab Emirates 346023		
X David Collins Administration	T Walsh Associates	Lenton Lane, Nottingham Nottingham United Kingdom NG72RR		
X Clare Askew Programme Support	United Nations High Commissioner for Refugees	Case postale 2500, Geneve Geneve Switzerland 1211		
X Yin Aye Snr Programme Monitoring Associate	United Nations High Commissioner for Refugees	Case postale 2500, Geneve Geneve Switzerland 1211		
X Joelle Ayoub Programme Officer	United Nations High Commissioner for Refugees	Case postale 2500, Geneve Geneve Switzerland 1211		
X Maria Ellana Barona Snr Programme Officer	United Nations High Commissioner for Refugees	Case postale 2500, Geneve Geneve Switzerland 1211		
X Diana Beltran Senior Project Control Officer	United Nations High Commissioner for Refugees	Case postale 2500, Geneve Geneve Switzerland 1211		

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"

The screenshots show the following steps in detail:

- Step 1:** The "Create Mailing Group" button in the top navigation bar is highlighted.
- Step 2:** The "Edit Users" button in the "New Group" dialog is highlighted.
- Step 3:** In the "Select Recipients" dialog, checkboxes next to "Alan Collins" and "David Collins" are highlighted.
- Step 4:** The "To" button in the "Select Recipients" dialog is highlighted.
- Step 5:** The "Target List" table in the "Select Recipients" dialog is highlighted, showing the selected users.
- Step 6:** The "OK" button in the "Select Recipients" dialog is highlighted.
- Step 7:** The "Save" button in the "New Group" dialog is highlighted.

To:	Organization
Alan Collins	Oracle
David Collins	T Walsh Associates

User	Organization
Alan Collins	Oracle
David Collins	T Walsh Associates



PROMS INSIGHTS

PROMS INSIGHTS – A SERIES OF STANDARD REPORTS

The screenshot displays the Oracle Aconex interface. The top navigation bar includes 'ORACLE Aconex', 'UNHCR UAT Afghan.', a search bar, and user information 'Mr Basie Lombard'. The main menu contains 'Tasks', 'Documents', 'Mail', 'Field', 'Cost', 'Workflows', 'Directory', 'Insights', and 'Setup'. The 'Insights' menu is expanded, showing 'View Reports Dashboards' highlighted with a red box and a red arrow pointing to the 'Reports' section.

The 'Reports' section is shown in a separate window, featuring a search bar and a table of reports. The table has columns for Name, Description, Report Information, Main Subject Area(s), and Supporting Subject Area(s).

Name	Description	Report Information	Main Subject Area(s)	Supporting Subject Area(s)
Project Overview	Your organization's project adoption and ...	Aconex, General, Field	Workflow, User, Mail, General, Field Insp...	
Overdue and Open Tasks by Users	Overdue Mails and Workflows, open issu...	Aconex, Field, General	Workflow Steps, Field Issue, General, Mail	
Document Status	Types of documents and their latest revisi...	General, Aconex	General, Document	
Document History	History of document revisions and versio...	Aconex, General	Document, General	Document Workflow Steps
Transmittal History By Document	History of transmittals in and out for docu...	General, Aconex	General, Document	Mail Transmitted, Mail Transmittal In
Transmittal History By Organization	History of transmittals in and out for docu...	General, Aconex	General, Document	Mail Transmitted
RFI Sent	RFIs sent by your organization.	General, Aconex	General, Mail	
RFI Received	Incoming RFIs where your organization is...	Aconex, General	Mail, General	
Mail Status	All your inbox & sent mails including thos...	General, Aconex	General, Mail	
Mail Response	Mail Responses sent and received by yo...	General, Aconex	General, Mail	Response Mail
Mail Thread	Mail threads your organization is involved	Aconex, General	Mail, General	Response Mail



Thank You
