



## WHAT IS PROMS AND WHY DO WE NEED IT?

UNHCR introduced the Project, Reporting, Oversight and Monitoring Solution (PROMS) in September 2023 to manage projects that are implemented through partnerships. PROMS helps us to move away from time-consuming, cumbersome, and labour-intensive paper-based processes to improve our collaboration with partners.

Starting from the **2024** agreement cycle, PROMS is used directly by partners. UNHCR country operations engage partner organizations once they are selected to work with us for the following implementation year.

PROMS uses Oracle Aconex as a front-end system, helping to streamline existing processes and provide an end-to-end solution to establish, manage and close projects. Partners will directly access two Aconex modules: Core and Field.

**ACONEX CORE** is the core of the application and is used for document management (including, transmittals and workflow management), mail, and tracking outstanding tasks. **ACONEX FIELD** is a cloud-based mobile and web-based application that streamlines field inspections and prevents lost time due to outdated methods such as paper-based inspections that must be captured afterwards. A third Aconex module, **CONNECTED COST**, is only used by UNHCR, mainly for financial monitoring.

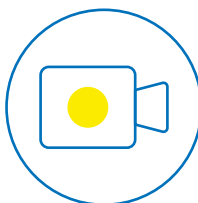


## GET FAMILIAR WITH ORACLE ACONEX

Has your organization been invited to collaborate with UNHCR using Aconex? Here are the basics – how to get started in Aconex.

Refer to the video link (**GETTING STARTED**) for a short overview on the basics of Aconex. You can change the video's language at the top right of your screen.

GETTING STARTED  
WITH ACONEX



LOGGING IN  
TO ACONEX

NAVIGATING  
IN ACONEX

USING MAIL  
AND DOCUMENT  
MANAGEMENT  
ESSENTIALS



SYSTEM ISSUES  
OTHER QUESTIONS



[PROMSHELP@unhcr.org](mailto:PROMSHELP@unhcr.org)

Contact your UNHCR country counterpart first. If additional support is needed: [EPARTNER@unhcr.org](mailto:EPARTNER@unhcr.org)



## SETTING UP YOUR ORGANIZATION TO USE ACONEX



### ACONEX REGISTRATION

- Once you receive an invitation to register from your UNHCR country operation, register your organization in Aconex (visit <https://help.aconex.com> for support).
- Complete all required fields on the registration page.
- INGOs should register their head office and country offices as separate entities in Aconex. This will allow for data neutrality which means that data will be invisible to other country offices unless it is shared with that country office. Country offices, on the other hand, can invite their head office colleagues to every single country office project if required to allow head office visibility on country office projects. The proposed naming convention in such cases will specify the area in which your organization operates, i.e., **ORGANIZATION NAME-HQ** or **ORGANIZATION NAME-COUNTRY**.



### APPOINT YOUR ORGANIZATION ADMINISTRATOR

- The person that registers the organization automatically becomes the Aconex Org Admin.
- It is advisable to assign **MORE THAN ONE PERSON** to this role to serve as back-up.
- The Org Admin is responsible for managing Aconex settings for your organization and configuring and assigning Aconex user roles to people working in your organization.



### CREATE YOUR USER ACCOUNTS

- Create user accounts for users in your organization that will be using Aconex.
- You can only create new users within your own organization.
- Once a user account is created, the person receives an email and is prompted to set-up their Aconex account (visit <https://help.aconex.com> to find out more about creating users for your organization).





### ASSIGN USERS TO A 'USER ROLE' IN CORE MODULE

- By default, your Aconex project will have **FIVE USER ROLES** i.e., 'Project Admin', 'Org Admin', 'Document Administrator', 'Basic +' and 'Basic' (visit <https://help.aconex.com> to find out more about Aconex user roles).
- User roles control what users can and can't do in Aconex.
- When a new user is created, they are automatically assigned to default roles 'Basic' and 'Basic+'.
- This provides a basic level of access including viewing, sending mail, and viewing documents.
- The Org Admin can edit the role assignments.



### GET INVITED TO UNHCR PROJECT

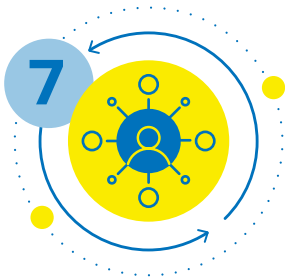
- Contact your **UNHCR FOCAL POINT** and request him / her to invite your colleagues into the UNHCR Aconex Project.
- You need to provide a list of names as the UNHCR colleague with the role of Partnership Manager is the only person that can invite people into a UNHCR project in Aconex.
- After your Org Admin has created your user account in Aconex, you will receive an email from Oracle Construction/Aconex prompting you to confirm your user details. This is not a spam email! Simply click on the provided link and follow the instructions to update your user details.
- If you make use of sub-contractors or third parties, these names need to be submitted to UNHCR for verification and approval before they can be invited into the UNHCR project.



### CONFIGURE YOUR FIELD SETTINGS

- Your Org Admin needs to set permissions in the **FIELD MODULE** to allow you to collaborate with UNHCR.
- Firstly, set permissions to assign Issues – if you want to allow staff to assign Issues.
- Secondly, set permissions to assign Inspections - if you want to allow staff to assign inspections.
- To find out more about configuring Field Settings, please visit <https://help.aconex.com>.





**ASSIGN USERS TO A 'USER ROLE' IN FIELD MODULE**

- Project roles in the Aconex Field module allow organizations to easily control and manage what users can do in Aconex Field.
- There are two types of roles in Aconex Field – access roles and administrator roles.
- If you are an Administrator for a project in Field, you can assign user roles in Field i.e., '**INSPECTOR**' or '**ASSIGNEE**'.
- You can find out more about assigning Field roles by visiting <https://help.aconex.com/>.



**THE ROLE OF YOUR 'ORGANIZATION ADMINISTRATOR'**



**CREATE A  
NEW USER**

Org Admins can create new user accounts in your organization.



**EDIT ALL  
USER'S  
INFORMATION**

Org Admins can edit login name, email, password, and other user details in your organization.



**EDIT  
ORGANIZATION  
INFORMATION**

Org Admins can edit organization details such as abbreviation and address.



**ASSIGN  
USER ROLES**

Org Admins will access User Role Assignment in your organization to assign user roles to different people in your organization.



**CONFIGURE  
USER ROLES**

Org Admins can configure your organization's User Roles (i.e. grant or deny user permissions).





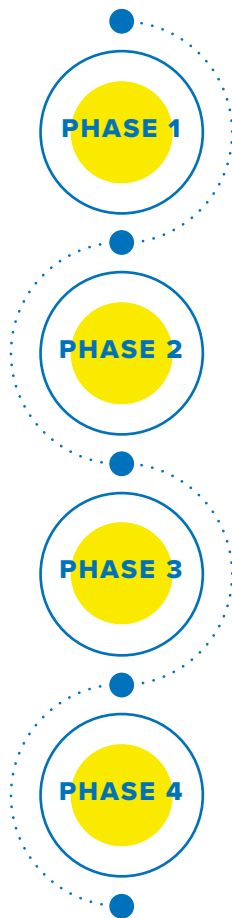
## WHAT TRAINING IS AVAILABLE FOR PARTNERS ON PROMS?



### PROMS TRAINING APPROACH

PROMS training follows the Partnership Agreement implementation life cycle. It will be scheduled as and when the functionality will be needed. UNHCR has established a network of trainers in every country operation to train both UNHCR and partner users on PROMS. Once you have set up your users in Aconex, contact your local UNHCR focal point to enrol them for training.

To get started, browse through the videos available on Aconex Central (<https://help.aconex.com>) to familiarize yourself with Aconex navigation and essentials i.e., how to use Aconex features such as Tasks, Mail, Documents, Field, etc. You can change the language at the top right of your screen to access guidance content in the language you feel most comfortable in.



#### NEGOTIATE AND SIGN PARTNER AGREEMENTS

Training is designed around the establishment of a partnership agreement, such as negotiation of financial and results plans and the finalization of the project workplan.

#### MONITORING AND PERIODIC FINANCIAL REPORTING

Training revolves around key processes for monitoring and reporting on partnership agreements. Processes covered include Field monitoring (Assigning issues, tasks and risks); and Financial Reporting.

#### AMENDMENTS

Training revolves around key steps for amending an agreement. This includes Amendment Processes (Multiple Outputs, Adding / Deleting Outputs); Financial Plan Revisions; and Contract Amendments.

#### PROJECT CLOSURE AND AUDITS

Training revolves around key processes for closing an agreement, including auditing.

