

Project Reporting Oversight and Monitoring Solution

Working **better together**

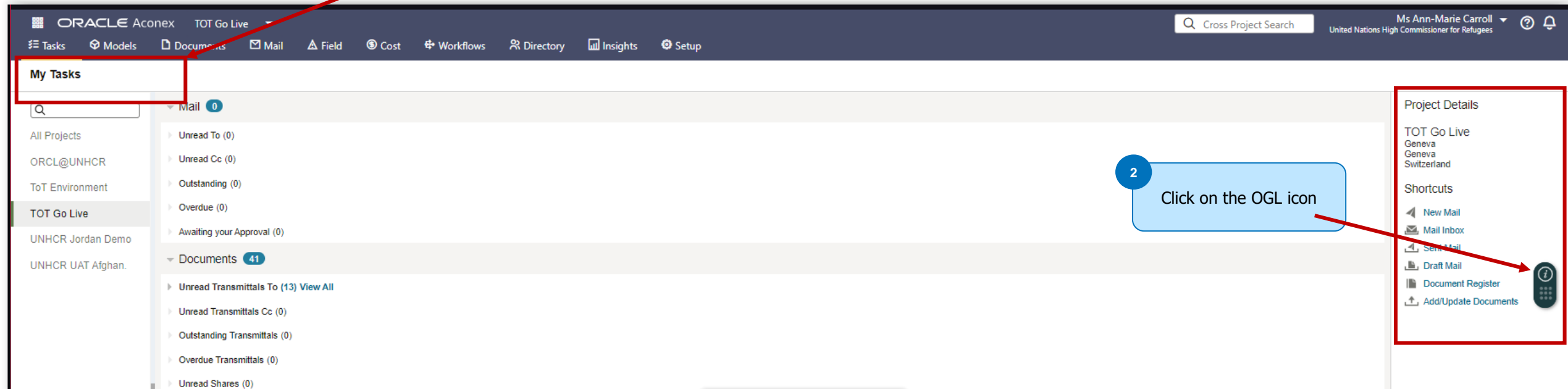
OGL Familiarization

Sept. 2023

HOW TO ACCESS OGL

1

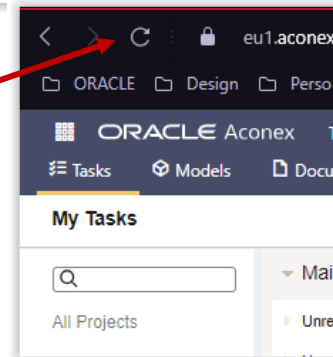
Select Task/"My Tasks" to view the OGL icon



2

Click on the OGL icon

Note: If the OGL icon does not appear refresh your screen.



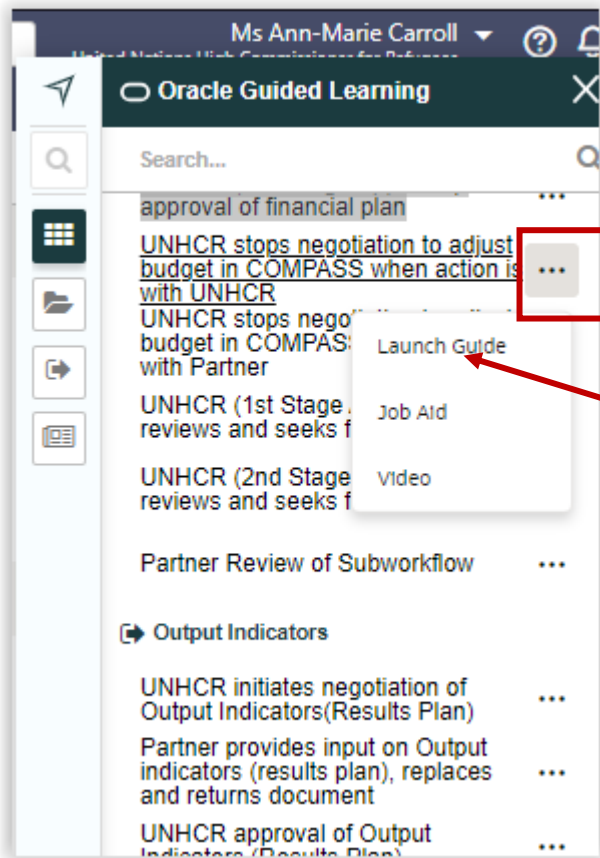
HOW TO SELECT A GUIDE

3 You will see the available guides.

4 Search for a specific guide using the **Search** bar
Or
Select a guide
(see slide 7 for information on the guide themes)

The screenshot displays the Oracle Aconex user interface. At the top, the navigation bar includes 'ORACLE Aconex' and 'TOT Go Live'. Below this, a menu contains 'Tasks', 'Models', 'Documents', 'Mail', 'Field', 'Cost', 'Workflows', 'Directory', 'Insights', and 'Setup'. The main content area is titled 'My Tasks' and features a search bar and a list of task categories: 'All Projects', 'ORCL@UNHCR', 'ToT Environment', 'TOT Go Live' (highlighted), 'UNHCR Jordan Demo', and 'UNHCR UAT Afghan.'. On the right side, there are task counts for 'Mail' (0) and 'Documents' (41). A 'Cross Project Search' bar is visible at the top right. An 'Oracle Guided Learning' search overlay is open on the right, showing a search bar and a list of guides. The first guide is 'Negotiation of Financial Plan', with several sub-topics listed below it, including 'UNHCR initiates negotiation of financial plan', 'Partner provides input into financial plan, replaces and returns document', 'UNHCR (1st Stage Approver) approval of financial plan', 'UNHCR (2nd Stage Approver) approval of financial plan', and 'UNHCR stops negotiation to adjust budget in COMPASS when action is with UNHCR'. Red arrows point from the callout boxes to the search bar and the list of guides in the overlay.

HOW TO LAUNCH THE GUIDE

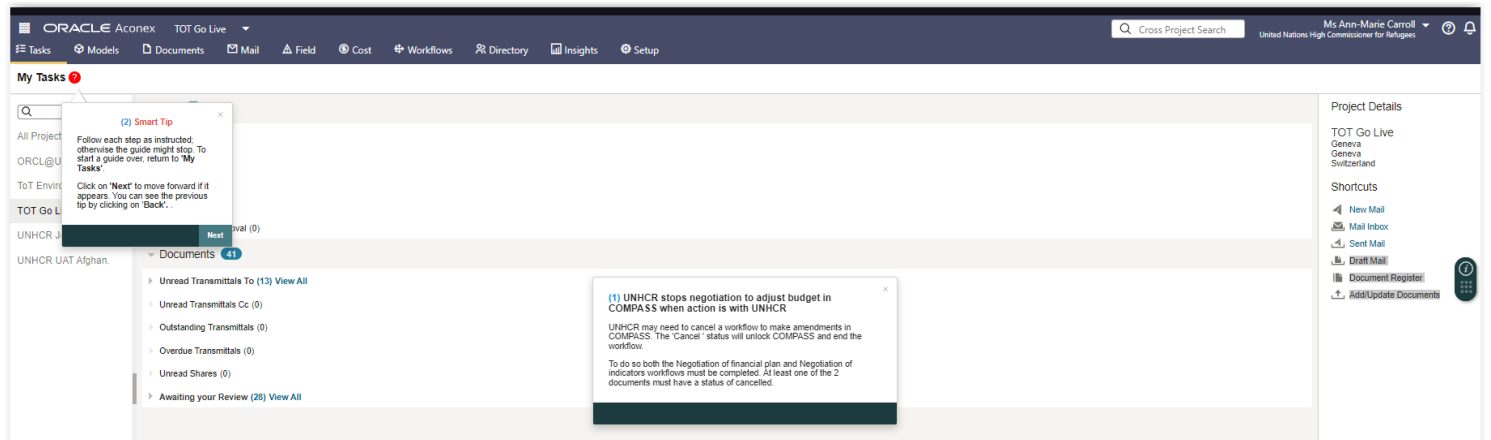


5
Click on the 3 dots.

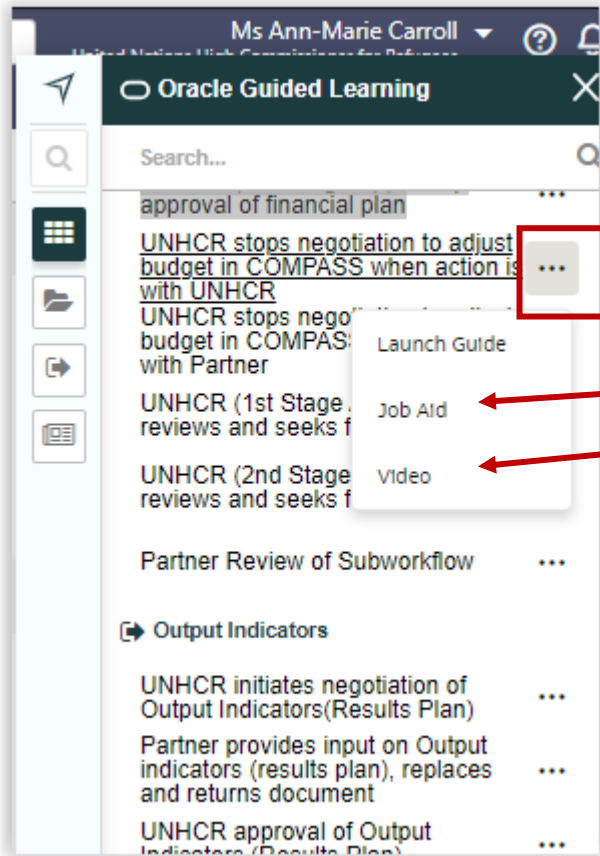
6
Select "Launch Guide " to activate OGL in Aconex.

Note: if the guide disappears select 'Back' if it is available on a text box or restart the guide. Remember [all guides are available on PDF and Video](#) as an alternative to the interactive guide.

7
You will see the interactive guide. Follow each step as instructed or the guide will stop.



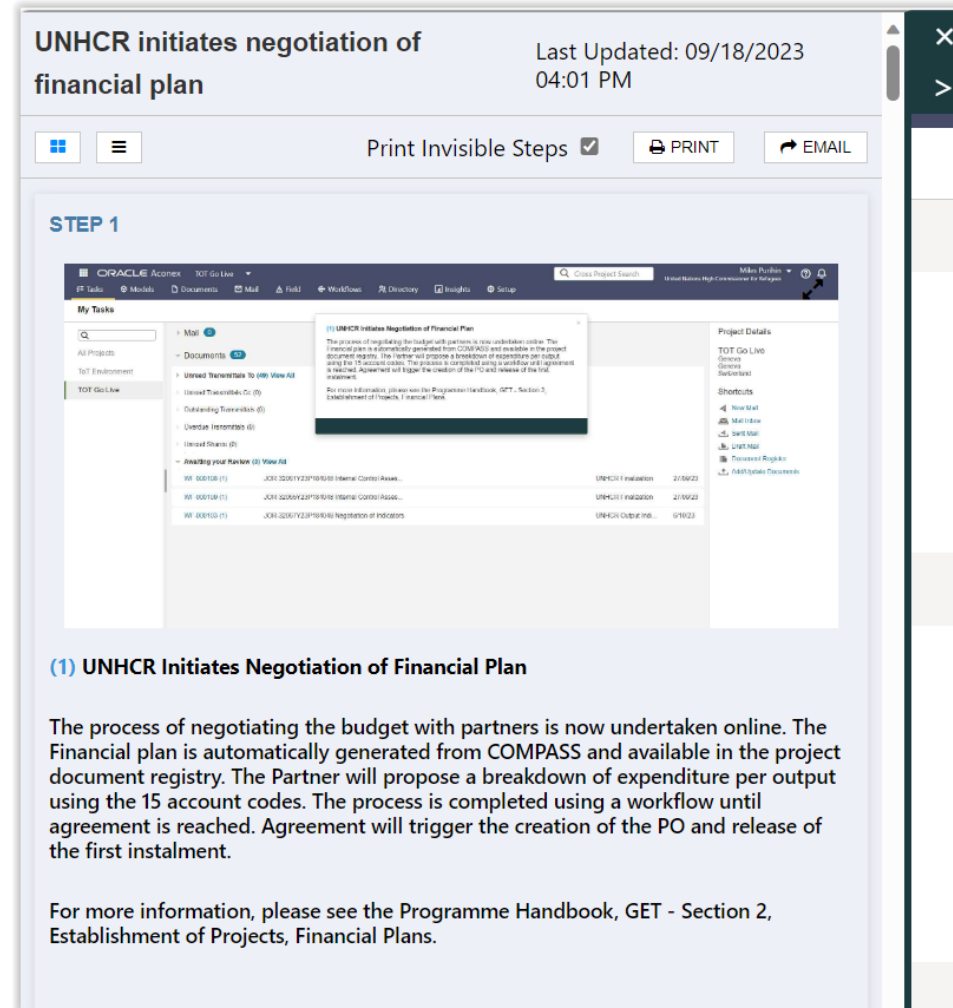
HOW TO VIEW THE PDF and VIDEO



1 Click on the 3 dots to access the PDF and Video

2 Select "Job Aid" for the PDF and Video

3 The guide will appear as below



4 Click on the arrow to expand the guide

5 You also have the option to print or email the guide.

(1) UNHCR Initiates Negotiation of Financial Plan

The process of negotiating the budget with partners is now undertaken online. The Financial plan is automatically generated from COMPASS and available in the project document registry. The Partner will propose a breakdown of expenditure per output using the 15 account codes. The process is completed using a workflow until agreement is reached. Agreement will trigger the creation of the PO and release of the first instalment.

For more information, please see the Programme Handbook, GET - Section 2, Establishment of Projects, Financial Plans.

HOW TO CREATE AN OFFLINE GUIDE

1 Select **Job Aid**

2 Select **Print**

3 In **Destination**, select **Save as PDF**, then copy to your computer.

Ms Ann-Marie Carroll
Oracle Guided Learning

Search...

approval of financial plan

UNHCR stops negotiation to adjust budget in COMPASS when action is with UNHCR

UNHCR stops nego budget in COMPAS with Partner

UNHCR (1st Stage reviews and seeks f

UNHCR (2nd Stage reviews and seeks f

Partner Review of Subworkflow

Output Indicators

UNHCR initiates negotiation of Output Indicators(Results Plan)

Partner provides input on Output indicators (results plan), replaces and returns document

UNHCR approval of Output Indicators (Results Plan)

Launch Guide

Job Aid

Video

UNHCR initiates negotiation of financial plan
Last Updated: 09/18/2023 04:01 PM

Print Invisible Steps **PRINT** EMAIL

STEP 1

CRACLE Report - TOT Col Line

My Tasks

Documents

Project Details

UNHCR Initiates Negotiation of Financial Plan

The process of negotiating the budget with partners is now undertaken online. The Financial plan is automatically generated from COMPASS and available in the project document registry. The Partner will propose a breakdown of expenditure per output using the 15 account codes. The process is completed using a workflow until agreement is reached. Agreement will trigger the creation of the PO and release of the first instalment.

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For more information, please see the Programme Handbook, GET - Section 2, Establishment of Projects, Financial Plans.

10/06/23, 12:02 PM Register Internal Control Assessment (ICA) Report and send through Workflow for review (2/5/3r)

Register Internal Control Assessment (ICA) Report and send through Workflow for review
Last Updated: 10/06/2023 11:09 AM

STEP 1

CRACLE Report - TOT Col Line

My Tasks

Documents

Project Details

UNHCR Initiates Negotiation of Financial Plan

The process of negotiating the budget with partners is now undertaken online. The Financial plan is automatically generated from COMPASS and available in the project document registry. The Partner will propose a breakdown of expenditure per output using the 15 account codes. The process is completed using a workflow until agreement is reached. Agreement will trigger the creation of the PO and release of the first instalment.

(1) Register Internal Control Assessment (ICA) Report and send through Workflow for review

The ICA is conducted by the MFT, led by project control, and the results are shared with the partner in draft, ahead of finalization.

The ICA review process utilizes the "Document" and "Workflow" modules in Aconex, to reach agreement on the contents of the ICA report.

For more information, please see the Programme Handbook, PLAN - Section 9 Partnership Engagement.

Print 21 pages

Destination Save as PDF

Pages All

Layout Portrait

More options

Save Cancel

HOW TO ACCESS A LINK TO SHARE

UNHCR initiates negotiation of financial plan

STEP 1

ORACLE Aconex TOT Go Live

Tasks Models Documents Mail Field Workflows Directory Insights Setup

My Tasks

Search

All Projects

ToT Environment

TOT Go Live

Mail 0

Documents 52

Unread Transmittals To (49) View All

Unread Transmittals Cc (0)

Outstanding Transmittals (0)

Overdue Transmittals (0)

Unread Shares (0)

Awaiting your Review (3) View All

WF-000108 (1)	JOR-32061Y23P184048 Internal Control Asses...	UNHCR Finalization	27/09/23
WF-000109 (1)	JOR-32065Y23P184048 Internal Control Asses...	UNHCR Finalization	27/09/23
WF-000103 (1)	JOR-32067Y23P184048 Negotiation of Indicators	UNHCR Output Indi...	6/10/23

Project Details

TOT Go Live

Geneva

Geneva

Switzerland

Shortcuts

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

UNHCR initiates negotiation of financial plan

Last Updated: 09/18/2023 04:01 PM

Print Invisible Steps [x] [PRINT] [EMAIL]

6

Once you have expanded the guide you will see the link to share.

Note: the guides work better on Edge or Chrome.

WHAT GUIDES ARE AVAILABLE?

Negotiation of Financial Plan

- UNHCR initiates negotiation of financial plan
- Partner provides input into financial plan, replaces and returns document
- UNHCR (1st Stage Approver) approval of financial plan
- UNHCR (2nd Stage Approver)
- UNHCR stops negotiation to adjust budget in COMPASS when action is with UNHCR
- UNHCR stops negotiation to adjust budget in COMPASS when action is with Partner
- UNHCR (1st Stage Approver) reviews and seeks further info
- UNHCR (2nd Stage Approver) reviews and seeks further info
- Partner Review of Subworkflow

Output Indicators

- UNHCR initiates negotiation of Output Indicators (Results Plan)
- Partner provides input on Output indicators (results plan), replaces and returns document
- UNHCR approval of Output Indicators (Results Plan)
- UNHCR stops negotiation to adjust indicators in COMPASS when action is with UNHCR
- UNHCR stops negotiation to adjust indicators in COMPASS when action is with Partner
- UNHCR user requires further input from the Partner
- Partner Review of Subworkflow

Internal Control Assessment

- Register Internal Control Assessment (ICA) Report and send through Workflow for review
- Partner Reviews the Draft Internal Control Assessment Report
- UNHCR Finalization of the ICA Report
- UNHCR initiates a sub workflow
- Partner Review of Subworkflow

The 1st 4 guides refer to a happy path where UNHCR is satisfied with the partner proposal without requiring further information.

The 5th nd 6th guides will be used to cancel the workflow when the step is either with UNHCR or the Partner

The 7th to 9th guides: sub workflow to request further information.

The 1st 3 guides refer to a happy path where UNHCR is satisfied with the partner proposal without requiring further information.

The 4th and 5th guides will be used to cancel the workflow when the step is either with UNHCR or the Partner.

The 6th to 7th guides: will be used when UNHCR requires further information through sub workflows.

Internal Control Assessment

- Register Internal Control Assessment (ICA) Report and send through Workflow for review
- Partner Reviews the Draft Internal Control Assessment Report
- UNHCR Finalization of the ICA Report
- UNHCR initiates a sub workflow
- Partner Review of Subworkflow

The 1st 3 guides refer to a happy path where UNHCR is satisfied with the partner proposal without requiring further information.

The 4th to 5th guides: are used for sub workflows to request further information.