Project Reporting Oversight and Monitoring Solution

Working **better together**

Partner On-Boarding Kit (Partner Handout)

September 2023

Content Outline

1. Registration in the UN Partner Portal
2. Registration in Cloud ERP – Supplier Record
3. Getting started in PROMS
    - Registration
    - Set up Admin roles
    - Create new users
    - Invite new users
    - Familiarize yourself with Aconex features

Registration on the UN Partner Portal

The UN Partner Portal

Organizations seeking partnership opportunities with UNHCR register on the UNPP.

Steps for registration in the UNPP:

1. Organization registers on the UNPP and completes the self-declaration.
2. Organization creates and edits organization profile.
3. UNHCR (or a participating UN agency) reviews the information and conducts due diligence.
4. UNHCR grants a ‘verified’ status to the organization.
5. Organization views and applies for partnership opportunities.

Useful Links

1. UN Partner Portal
2. Guide on how to register on the UNPP
3. Self declaration
4. Guide on how to create and edit organization profile

Steps for Registration in the UNPP

Organization registers on the UNPP and complete the self-declaration.

↓

Organization creates and edits organization profile.

↓

UNHCR (or a participating UN agency) reviews the information and conducts due diligence.

↓

UNHCR grants a ‘verified’ status to the organization.

↓

Organization views and applies for partnership opportunities.

Cloud ERP – “Supplier” Record

A partner entering into a PFA must first be registered in UNHCR’s Cloud ERP system.

Steps for registration in the Cloud ERP:

1. UNHCR sends a Cloud ERP Partner Registration Form to the partner.
2. Partner completes the form, with data consistent with the UNPP profile.
3. UNHCR checks the form with the UNPP record.
4. UNHCR creates a “Supplier” record in the Cloud ERP.
5. Partner provides bank details.
6. UNHCR checks bank account and creates a “spend Authorized” record in Cloud ERP.

Registration in Cloud ERP – “Prospective Supplier” Record

START

PARTNER

Partner completes form.
Adds data consistent with the UNPP profile
Master-data needed for a pre-approved supplier record (no bank account)
No bank account details

UNHCR PROGRMME

Checks the form relative to UN Partner Portal record.
Sends verified form to Supply colleague to create a Prospective Supplier record

UNHCR SUPPLY

Creates a **Prospective Supplier** record in the system. Auto-Approved.

COMPASS as an IMPLEMENTER and PROMS

TIME PASSES

LATER

PARTNER

Partner Communicates Bank Account.

UNHCR PROGRMME

Checks the Bank Account

UNHCR SUPPLY

Supply adds the Bank Account details provided by the Programme Officer to the Supplier record and clicks ‘Promote the record to **Spend Authorized**’.

Partner Registration Form

UNHCR PARTNER REGISTRATION FORM

UNHCR
The UN Refugee Agency

ERP Supplier records for Not-for-Profit entities

This form is being submitted to A. ( ) register a partner; or B ( ) update an existing partner record. If B. the registration Number is_________ If B., use the column on the right to mark any changed records.

Fields marked with (*) are mandatory

Section 1: Organization's Details and General Information							
1.1 Organization's name (full legal name)(*):							
1.2 Other names (alias, acronym,etc.):							
1.3. Organization's Website:							
1.4 Parent Organization (If applicable; full legal name of headquarters or umbrella organization):							
1.5 Type of Organization (mark one)(*):	International NGO		National NGO		Government entity		Red Cross/Crescent
	Community Based Organization (CBO)		UN System Organization		Academic Institution		
1.6 TAX Registration No (if applicable):		1.7 Tax Payer ID (if applicable):					
1.8 TAX Organization Type (if applicable):							
1.9 Tax Country (if applicable):		1.10 Indicate availability of VAT No./ Tax ID Certificate/Proof (if applicable):					

Section 2: Address					
2.1 Country Code(*):		2.2 Address Line 1(*):		2.3 Address Line 2:	
2.4 City(*):		2.5 Postal code(*):		2.6 Canton/State:	
2.7 Email (*):		2.8 Website:			

Section 3: Contacts					
3.1 First Name (*):		3.2 Last Name (*):			
3.4 Title (*):		3.5 Email (*):			
3.6 International Country Code (*):		3.7 Telephone (*):		3.8 Tel. Ext.:	

Section 4: Banking Information					
Note: 1: Upon initial registration, this section may remain blank. Banking details will, however, be required before UNHCR can provide funding. 2: If a change to a bank account is being requested, it is important to note that UNHCR may not be able to stop the transfer of funds that are already in the process of being transferred to an old bank account.					
4.1 Country (*):		4.2 Pay to Bank Name(*):			
4.3 Branch Name:					
4.4 Account Type (*):		4.5 Currency Code (*):		4.6 Bank Account No. (*):	
4.7 DFI Qualifier (*):		4.8 Bank Account/IBAN (*):		4.9 DFI ID (*):	
4.10 Address Line 1(*):		4.11 Address Line 2:			
4.12 City (*):					
4.13 Bank account statement available (BAS) "Yes/No" ? (*)		4.14 BAS translation available in English?:			
4.15 Effective date of changes in banking details					

Section 5: UN Partner Portal link for declarations and further information

Part A
If your organization is an NGO, INGO, Academic Institution, CBO, or Red Cross/Cresent, you must successfully register on the UN Partner Portal. If you are registered on the UN Partner Portal, please ensure that the information below is consistent with your Portal registration.

5.1 Is your organization already registered on the United Nations Partner Portal (*)		UN Partner Portal 'Partner ID':	
		HQ Profile 'Partner ID' (if applicable):	

Part B: For all organizations not registered on the UN Partner Portal:
Self-Declaration: I, the undersigned, declare that:

(a)Our organization is not involved in any fraudulent or corrupt activities and has not been in the past, and is not currently under any investigation forany such activities which would render our company unsuitable for business dealing with UNHCR.

(b)Our organization is not on, or associated with a company or individual, groups, undertakings and entities that are on the consolidated listestablished and maintained by the committee established by the UN Resolution No. 1267 (www.un.org/sc/committees/1267/consolist.html).

(c)Our organisation is not on, or associated with a company or individual that are subject to the list of Independent Inquiry Committee into UnitedNations Oil-for-food programme (www.iic-offp.org).

(d)Our organization is not currently removed, invalidated or suspended by any other UN Headquarters, or Field Offices or any other UN Agencies(including the World Bank)

Getting Started with Aconex

Familiarise Users with Aconex Essentials

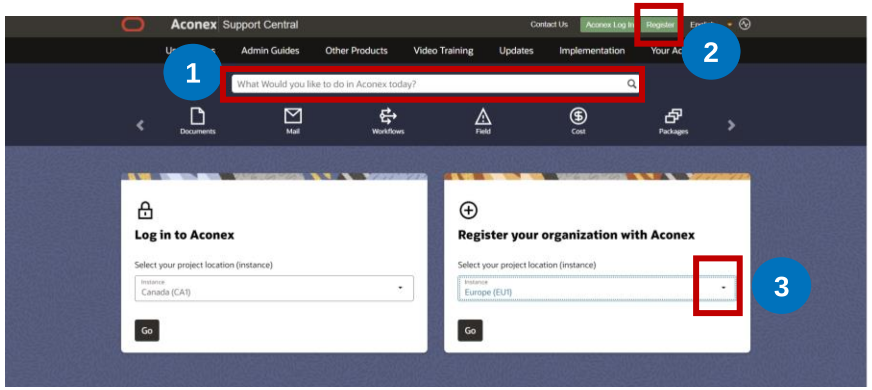
- Has your organization been invited to join a project using Aconex? Here's are the basics – how to get started in Aconex.
- Refer to the video link (Getting Started) for a short overview on basics:
  - Logging in to Aconex
  - Navigating in Aconex
  - Using mail and document management essentials

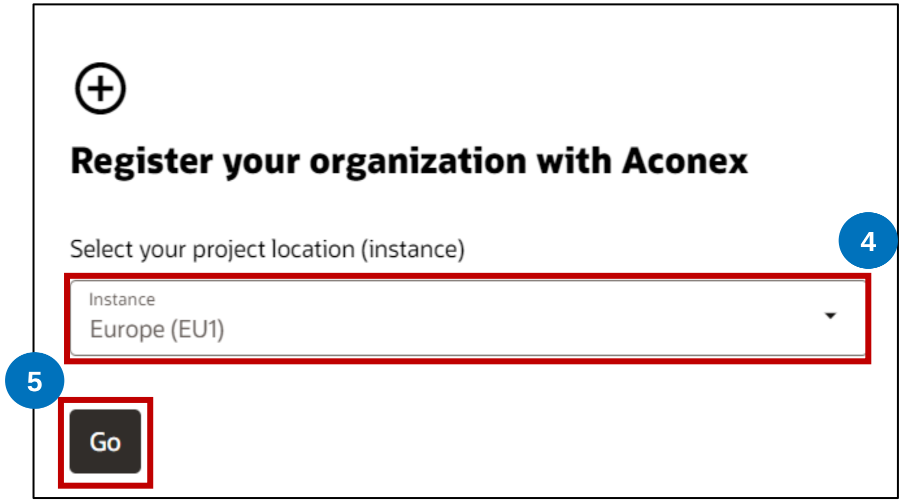
[Getting Started]

Registering organization in Aconex

Registering organizations in Aconex (1/4)

1. Open Support Central via help.aconex.com.
2. In the top right-hand corner, click Register.
3. Click on arrow to select your project location. This is also known as the Aconex 'instance'.
4. Always select Europe (EU1) – this is the UNHCR instance.
5. Click "Go" to start the registration process.





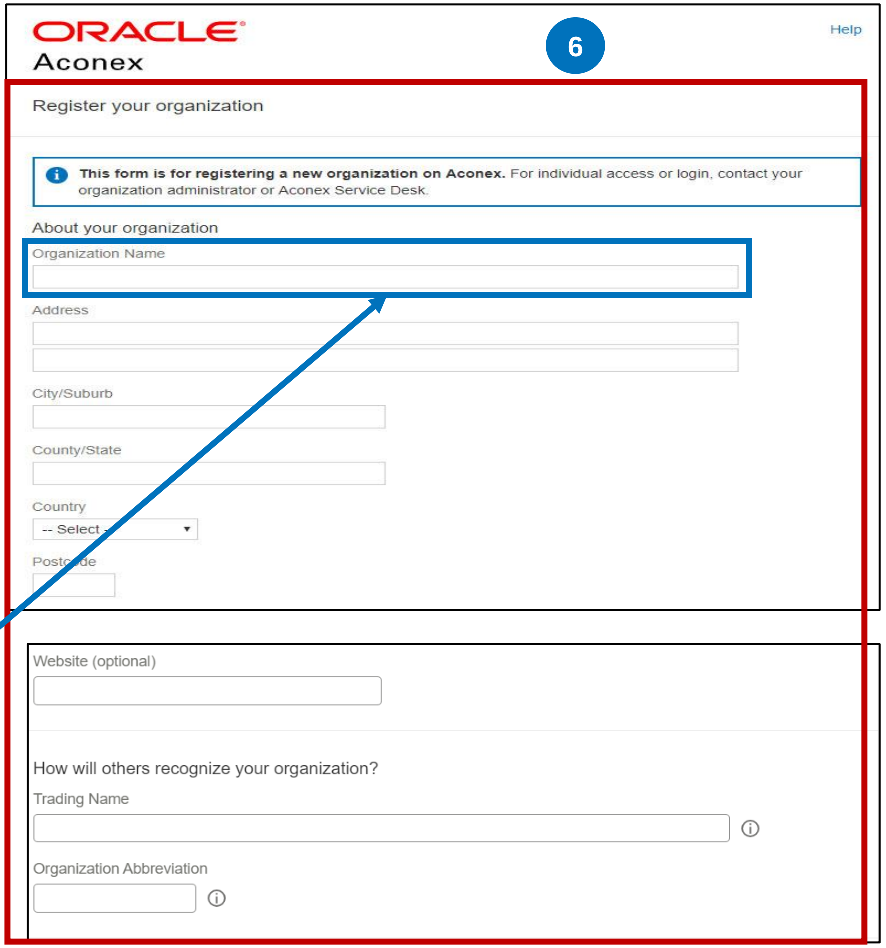
Registering organizations in Aconex (2/4)

The registration form is divided into two sections.

6. The first asks for information about your organization
7. The second asks for information about yourself.

***Proposed Naming Convention for INGOs in Organisation Name Field*:**

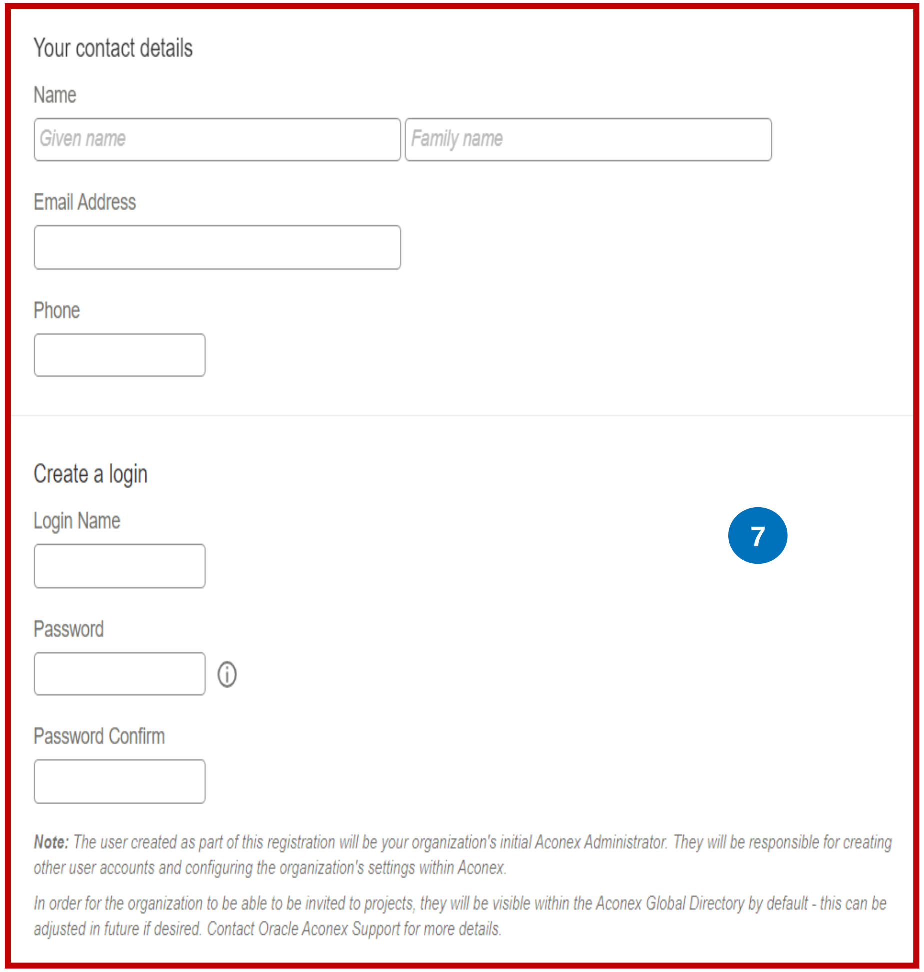
- *INGO HQ: Organization Name-HQ i.e., **Norwegian Refugee Council-HQ***
- *Country Operations: Organization Name-Country i.e., **Norwegian Refugee Council-Afghanistan***



Registering organizations in Aconex (3/4)

The registration form is divided into two sections.

6. The first asks for information about your organization
7. The the second asks for information about yourself.

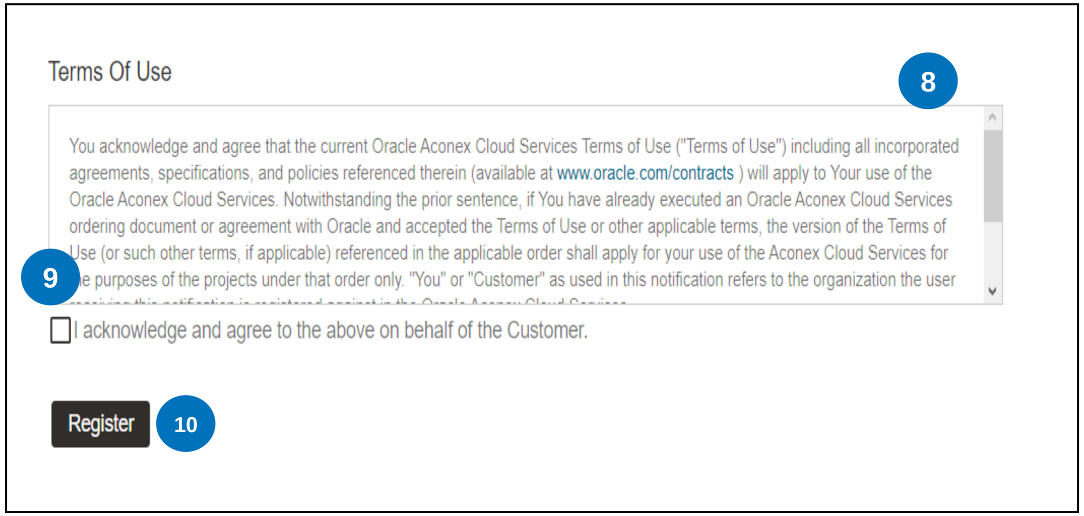


Registering organizations in Aconex (4/4)

8. Read the Terms of Service agreement and Privacy Policy.

9. Select the checkbox at On behalf of my organization.

10. Click the Register button. You should then see a message confirming your successful registration.



Set-up Administration Roles

Organization Admin Explained (1/2)

Create a new user: Create a new user account in your own organization.

Edit all user's information: Edit the login name, email, password, and other details for users in your own organization.

Edit organization information: Edit details of your own organization such as abbreviation and address. Also grants access to the Organization tab in preferences.

Assign user roles: Access User Role Assignment in your own organization. Assign user roles (i.e., Basic, Org Admin) to users in your own organization and at project level.

Configure user roles: Access User Role Configuration in your own organization. Create roles and Grant/Deny permission.

[Kit for Organization Admin]

Organization Admin Explained (2/2)

Useful Links:

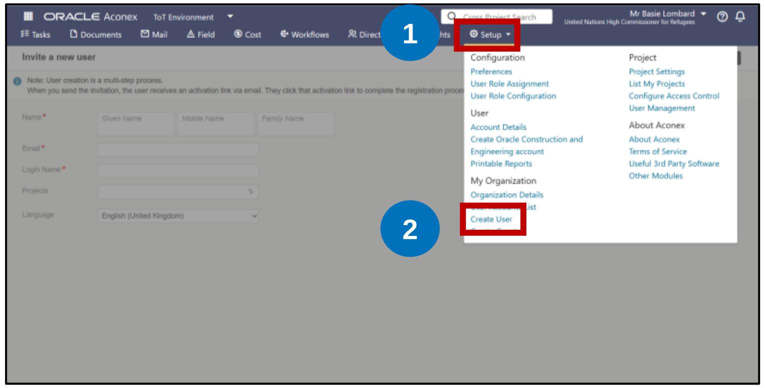
- Manage User Roles and Permissions: As the Org Admin, you can create and modify user roles for people in your organization. There are two types of user roles you'll be managing - organization-level user roles and project-level user roles.
- Standard user roles: Aconex comes preconfigured with a selection of roles based on a best practice.
- User role permissions and definitions: Describes permissions (secured assets) that can be granted to users in your organization.

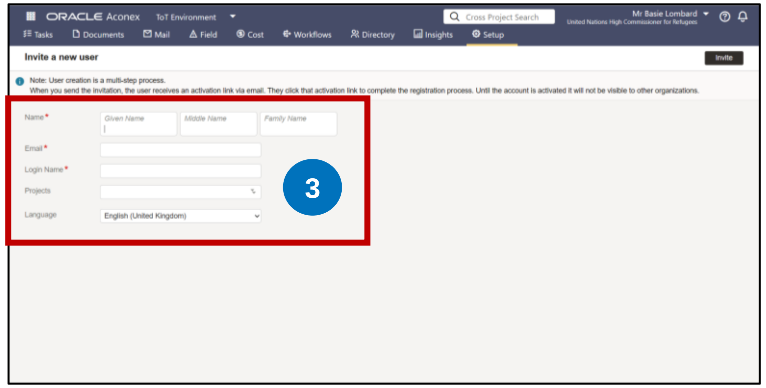
Create new Aconex Users

Create Aconex Users (1/3)

It's easy to create user accounts in Aconex. Each account can span multiple projects, so you need only create one user account for each person in your organization who's working in Aconex. You can only create new users within your own organization.

1. Click “Setup” from the top navigation menu.
2. Under My Organization click “Create User”.
3. Complete the mandatory fields — they're marked with a red asterisk i.e., given name; family name; email, login name (note that this is case-sensitive).



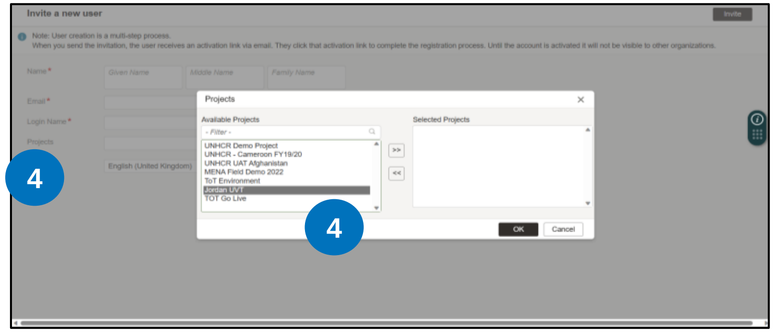


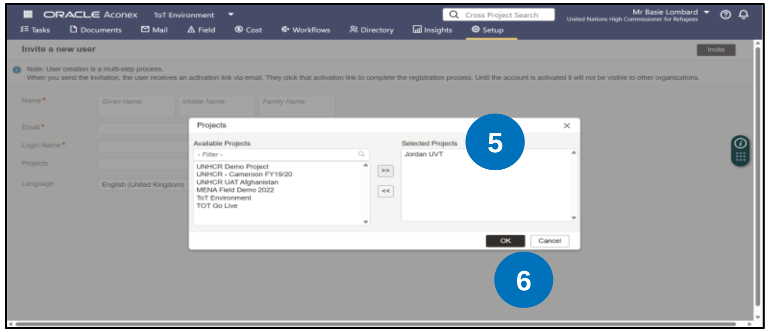
Note: You can only create one user at a time.

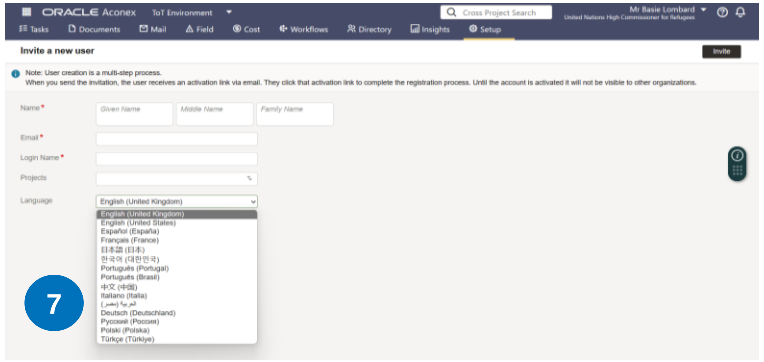
[Creating Aconex user]

Create Aconex Users (2/3)

4. In the Projects field, add the projects this user will be working on.
5. If you double-click a project in the Available Projects list, it'll be added to the Selected Projects list.
6. Click OK
7. If the user speaks a language other than English, you can also change the default language.



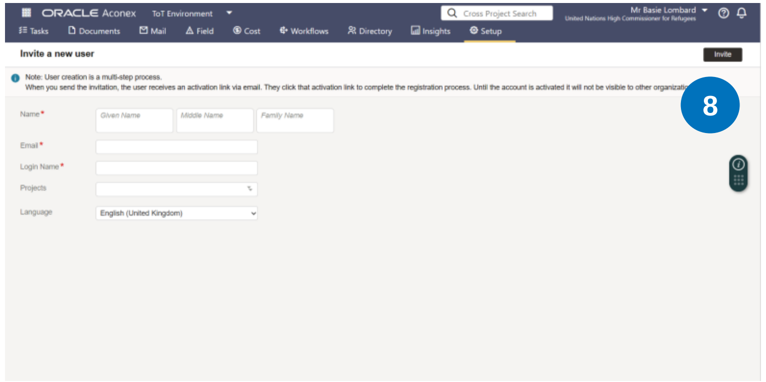


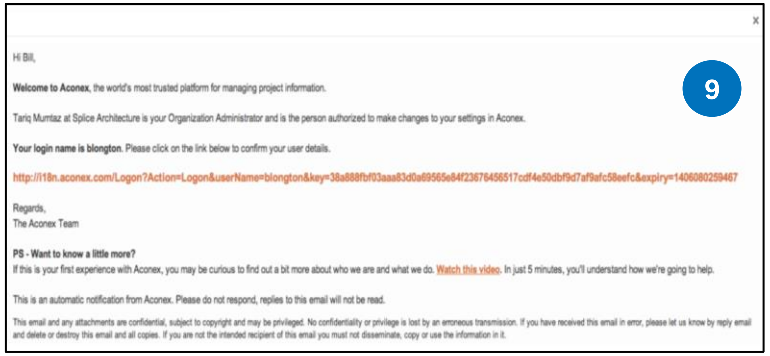


[Creating Aconex user]

Create Aconex Users (3/3)

8. Once completed all required fields, click “Invite”
9. Once you’ve created a user account, Aconex will automatically send the new user an email with their login name and a link to log in.





***<u>Note</u>**: This link will expire in 7 days. You can provide the user with a temporary password if they can't access the link. If you double-click a project in the Available Projects list, it'll be added to the Selected Projects list.*

[Creating Aconex user]

UNHCR
The UN Refugee Agency

Invite Users

Setting up users on your Project

When setting up users in PROMS, they are assigned to roles in the Core, and Field modules:

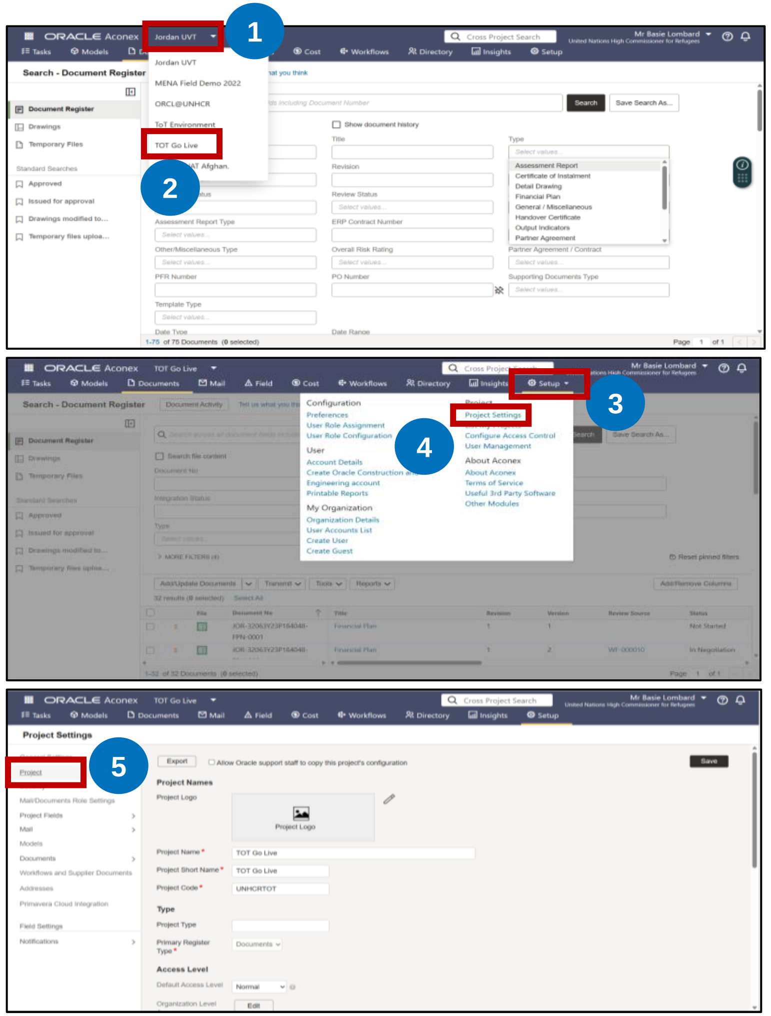
- **INVITE AND ASSIGN USERS TO CORE ROLE**: From the project directory, you can invite users into your project and assign the appropriate user role i.e., “Basic”, “Basic +”, and “Document Admin”.

- **ASSIGN FIELD ROLE**: From within the Field module, add user to the Field module and assign the appropriate Field role i.e., “Inspector” or “Assignee”.

*****Note***: *The following slides provide an overview on how to perform the activities described above.*

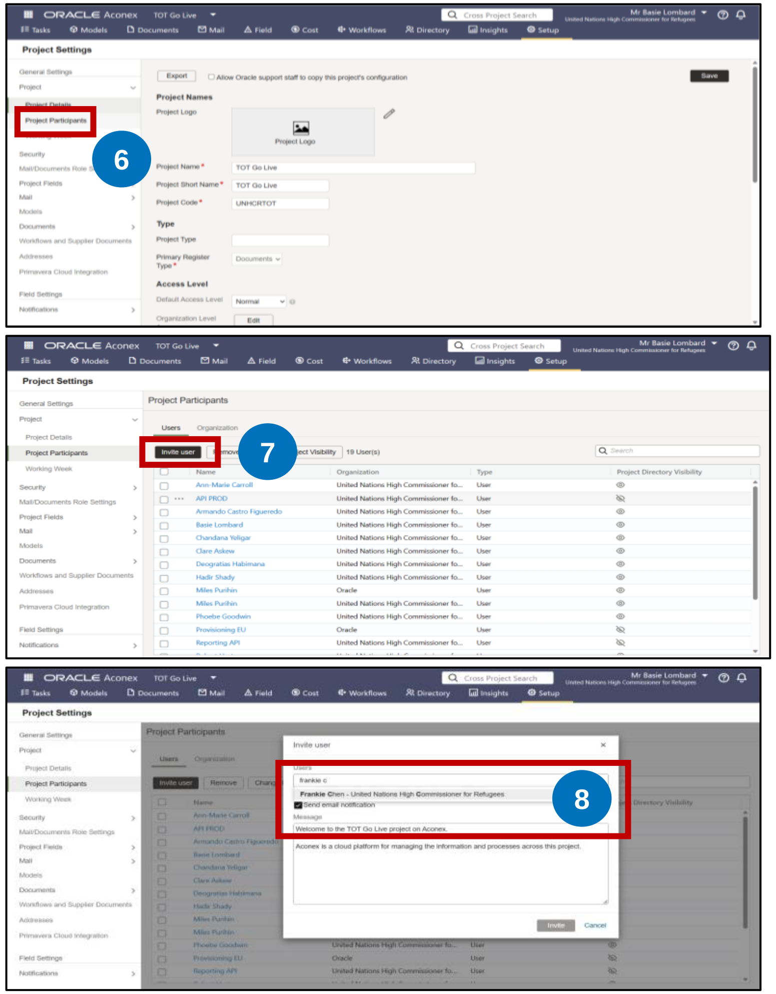
Invite your users into Project (1/3)

1. Click the “Arrow” from the top navigation menu.
2. Select the “Project” you want to assign to the user from the dropdown menu.
3. Click the “Setup” from the top navigation menu.
4. Under Project menu, select “Project Settings”.
5. Under General Settings, select “Project”



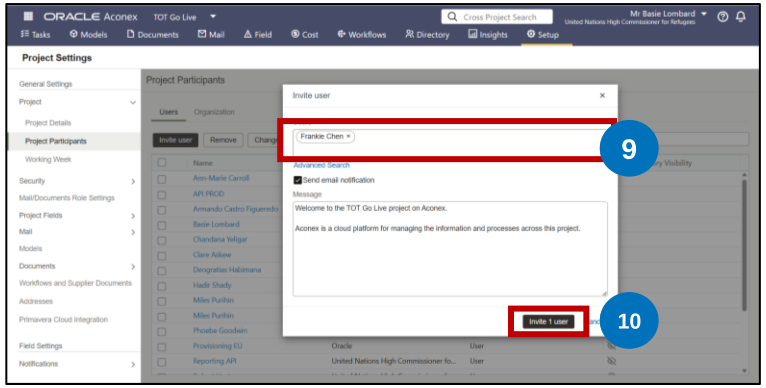
Invite your users into Project (2/3)

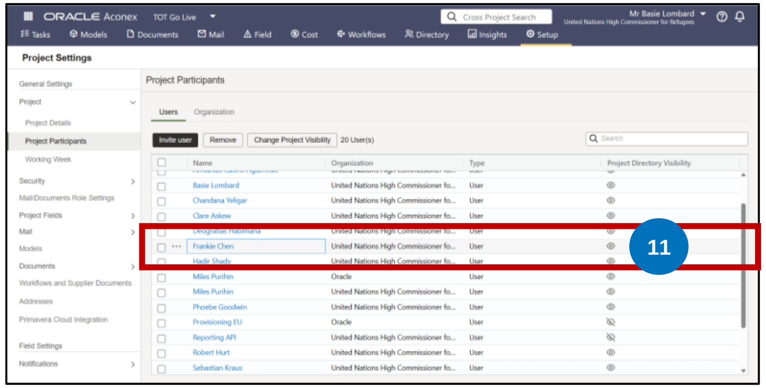
6. Under Project, select “Project Participants”
7. Click on “Invite User”
8. Search for user and select the name of the user you want to add to the project.



Invite your users into Project (3/3)

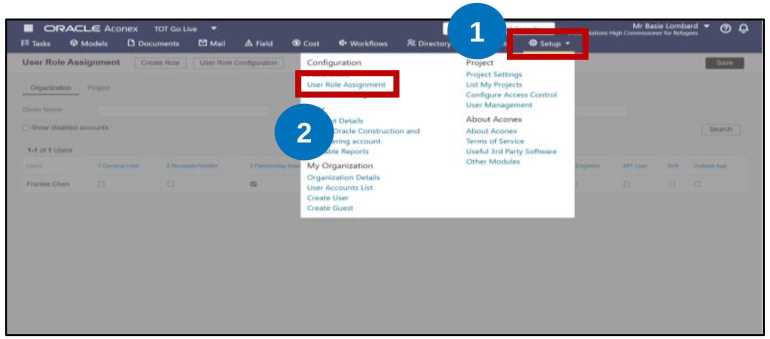
9. Select the user (you can add multiple users in this step).
10. Click on “Invite User”
11. You will see the username in the “Project Directory”

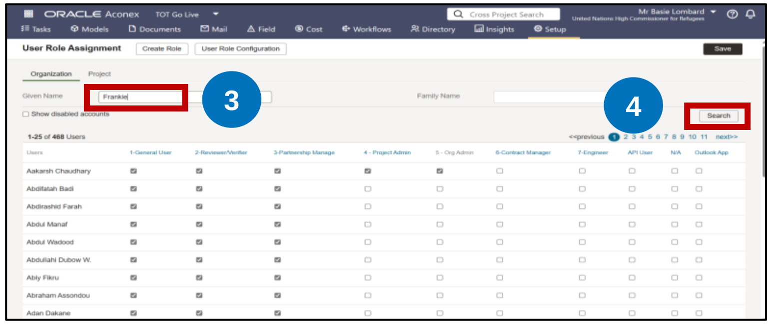


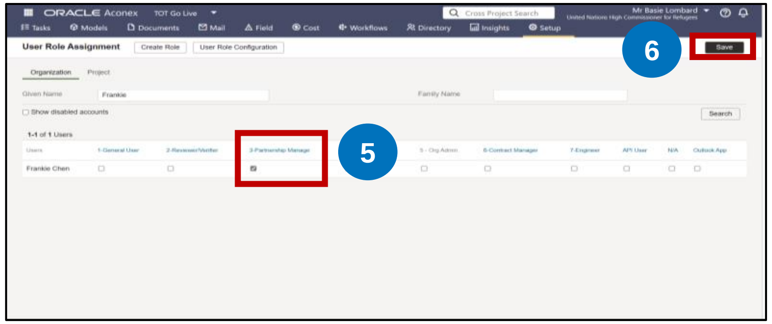


Assign “Core” Role to User

1. Click the “Setup” from the top navigation menu.
2. Under Configuration menu, select “User Role Assignment”.
3. Type the username in the “Given Name” tab.
4. Select “Search”.
5. Click on the tick box under the role you want to assign to the user.
6. Click “Save”

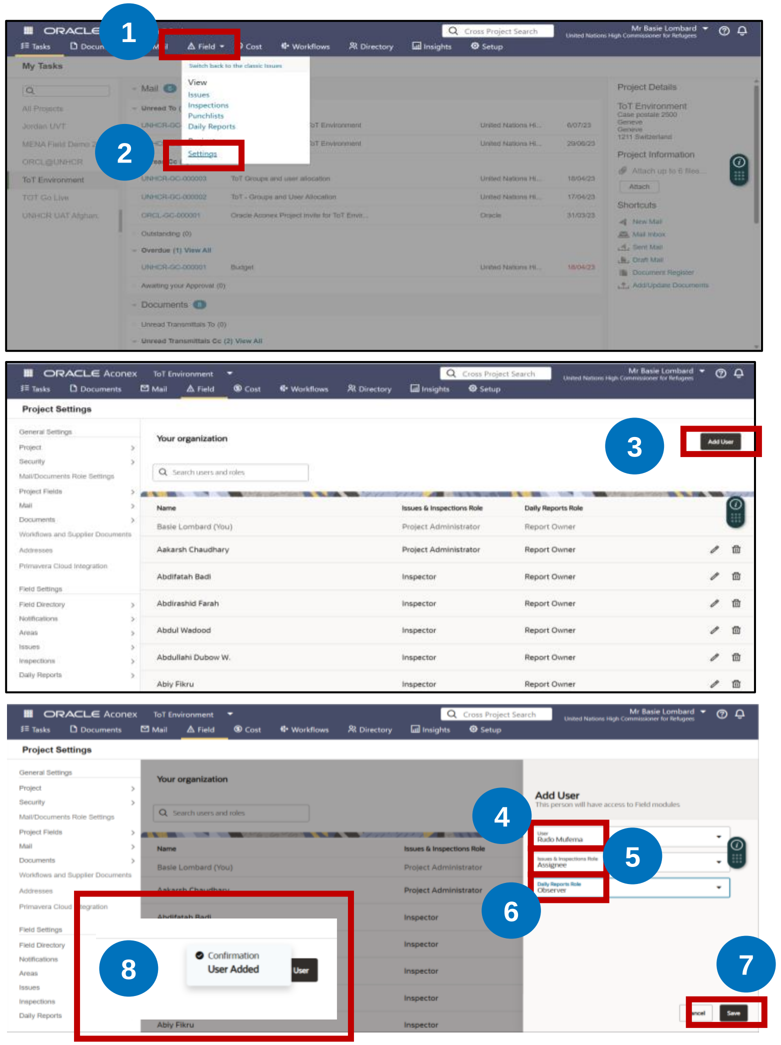






Assign “Field Role” to User

1. Click the “Field” tab from the top navigation menu.
2. Under Project menu, select “Settings”.
3. Select “Add User”.
4. Select username from the “User” dropdown menu.
5. Select the role of “Assignee” / Inspector from the “Issues and Inspection” dropdown menu.
6. Select the appropriate role under the “Daily Reports” dropdown menu.
7. Click “Save”.
8. You will receive notification that “User is Added”.



[Assign “Field Role” to user]

Familiarise Users with Aconex Essentials

Other Useful Links

Tasks in Aconex - Use the Tasks page to manage your 'to do' list in Aconex.

Documents Essentials - These are the every-day tasks you'll carry out on a regular basis within Documents.

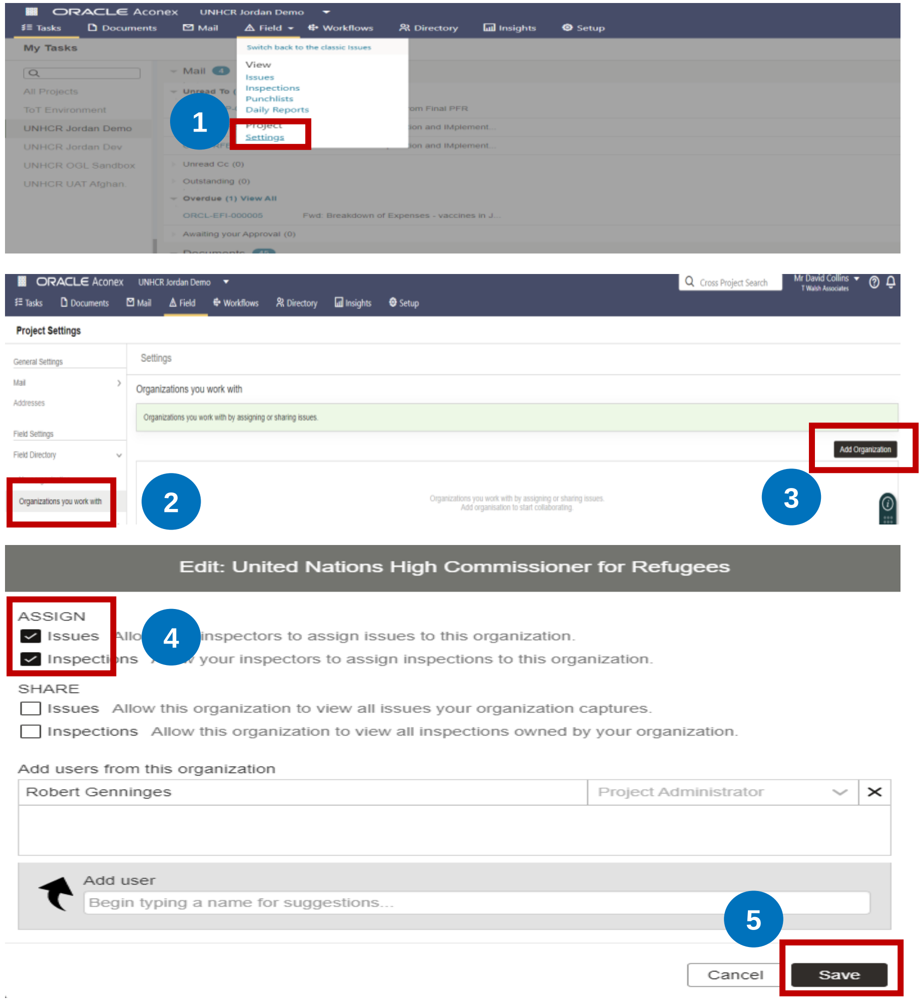
Mail Essentials - Create, reply to, send, and manage mail in Aconex.

Workflows Essentials - Everything you need to start using workflows

Setting Up Field Settings (Partner)

Partner: Setting Up Field Settings

1. Navigate to Field and select “Settings”.
2. Click “Organizations you work” with in the left-hand menu to see a list of the external organizations (You need to be an Inspector Administrator or Project Administrator to see this option).
3. Click the Add Organization button on the right. You'll see the “Add an organization” window – click the arrow to display the dropdown menu and select UNHCR.
4. Select “Assign”
   - Click “Issues” to allow your inspectors to assign Issues to UNHCR.
   - Click “Inspections” to assign inspections to this UNHCR.
5. Click “Save”



Partner On-Boarding Criteria & Plan

9-Point Partner On-Boarding Plan (1/2)

1	**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**
2	**Appoint your Org Admin**	• 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.
3	**Create your Users 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).
4	**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.

9-Point Partner On-Boarding Plan (2/2)

5	**Get invited to UNHCR Project**	• Contact your UNHCR focal point and request him / her to invite your colleagues into the UNHCR Aconex Project.
6	**Configure 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.
7	**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.
8	**Familiarise Users on "Aconex Essentials"**	• Provide training to users on Aconex essentials i.e., Tasks, Mail, Documents, Field, etc. • Please visit https://help.aconex.com/ for more information on the Aconex Essentials / Navigation Features.
9	**Collaborate with UNHCR on Agreements**	• Start to collaborate with UNHCR on agreements / projects.

Timelines

PROMS On-Boarding Timelines