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The UN Refugee Agency

Project Reporting Oversight and Monitoring Solution

Working better together

End-to-End Aconex Registration for Partners

August 2024

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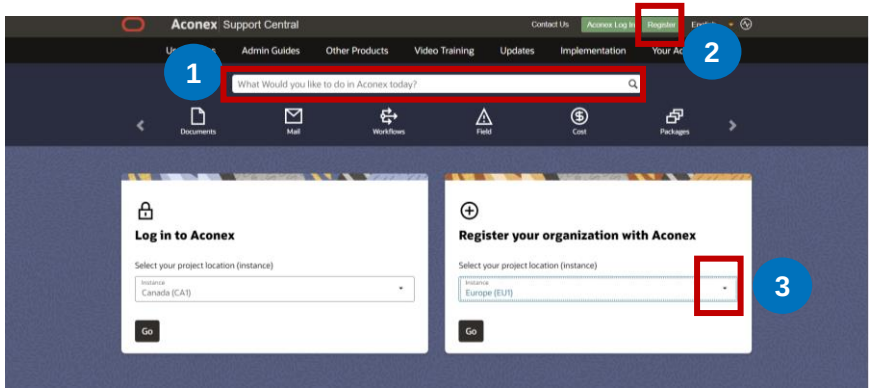
The UN Refugee Agency

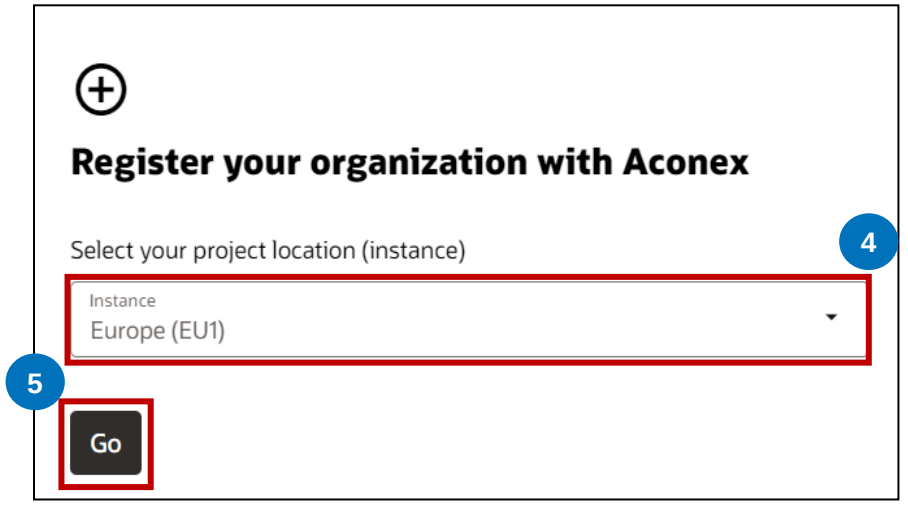
Registering organization in Aconex

Registering organizations in Aconex (1/4)

As an Organization Administrator:

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)

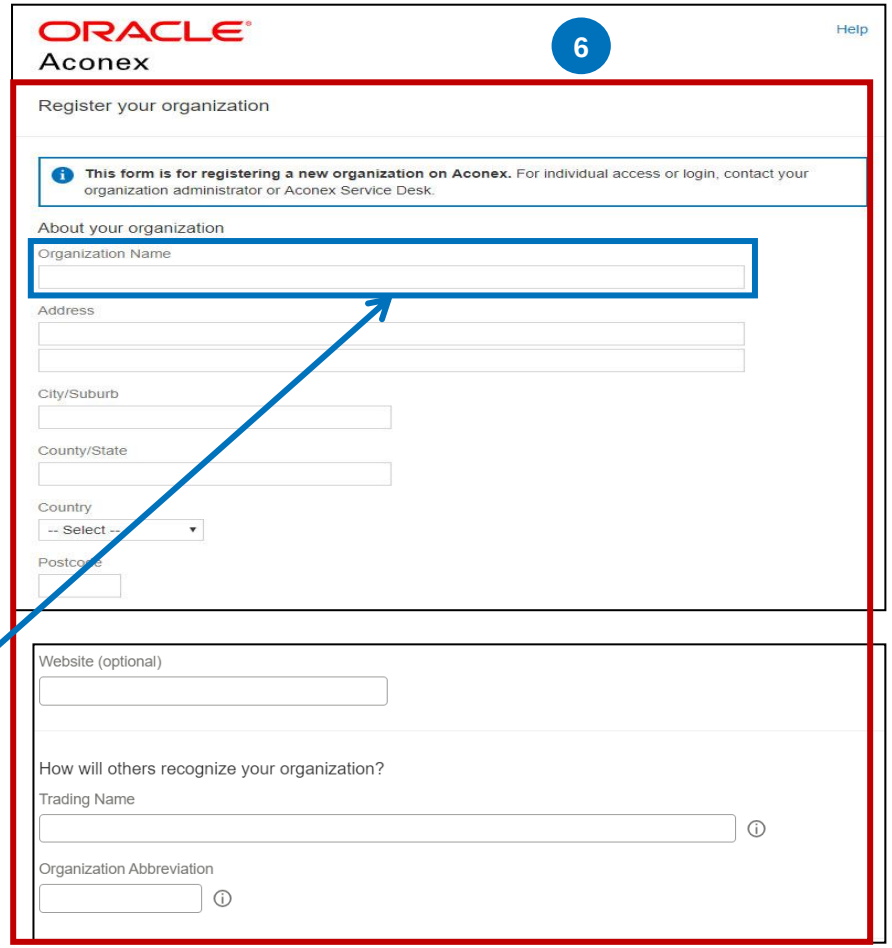
The registration form is divided into two sections.

6. The first asks for information about your organization (local branch for the case of INGOs)

7. The second asks for information about yourself as the first Organization Administrator.

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

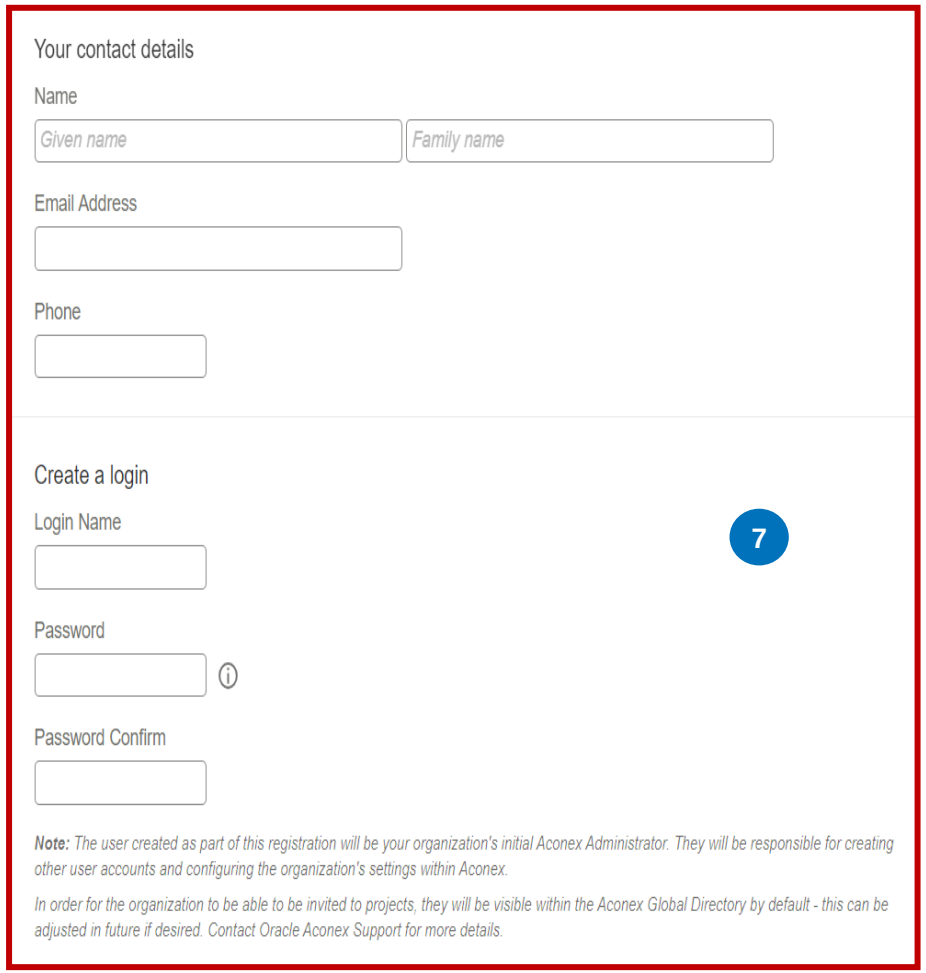
- *INGO HQ: Organization Name-HQ i.e.,* ***Norwegian Refugee Council-HQ***
- *Country Operations: Organization Name-Country i.e.,* ***Norwegian Refugee Council-Afghanistan***



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 second asks for information about yourself.

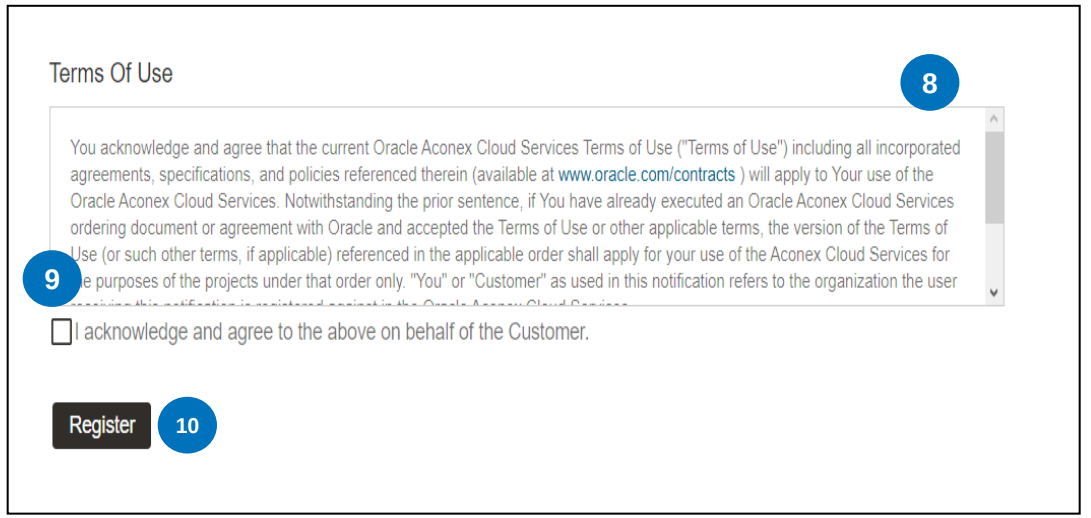


Registering organizations in Aconex (4/4)

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

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

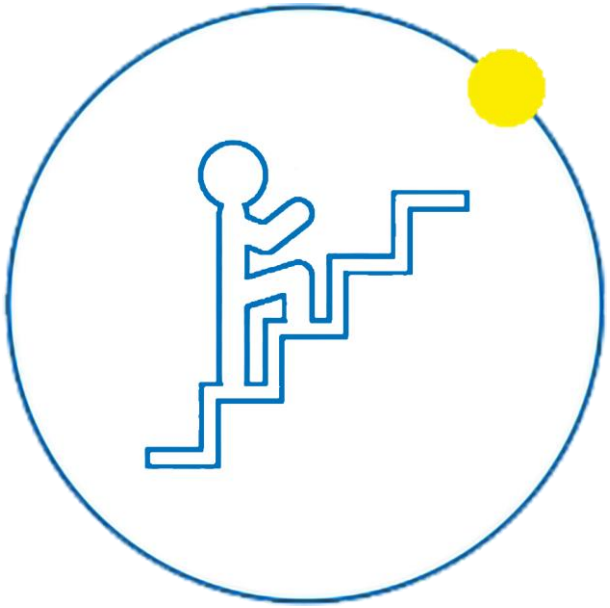
10. Click the Register button. You should then see a message confirming your successful registration.



Next Steps

As Organization Administrator:

- Within the next **72 hours** Oracle (and not UNHCR) will confirm that your registration was completed successfully and that your Aconex Profile is enabled.
- If you face any delays kindly contact Oracle: https://help.aconex.com/contact-us
- **Time to move to Hotspot 2 for the next Steps!**



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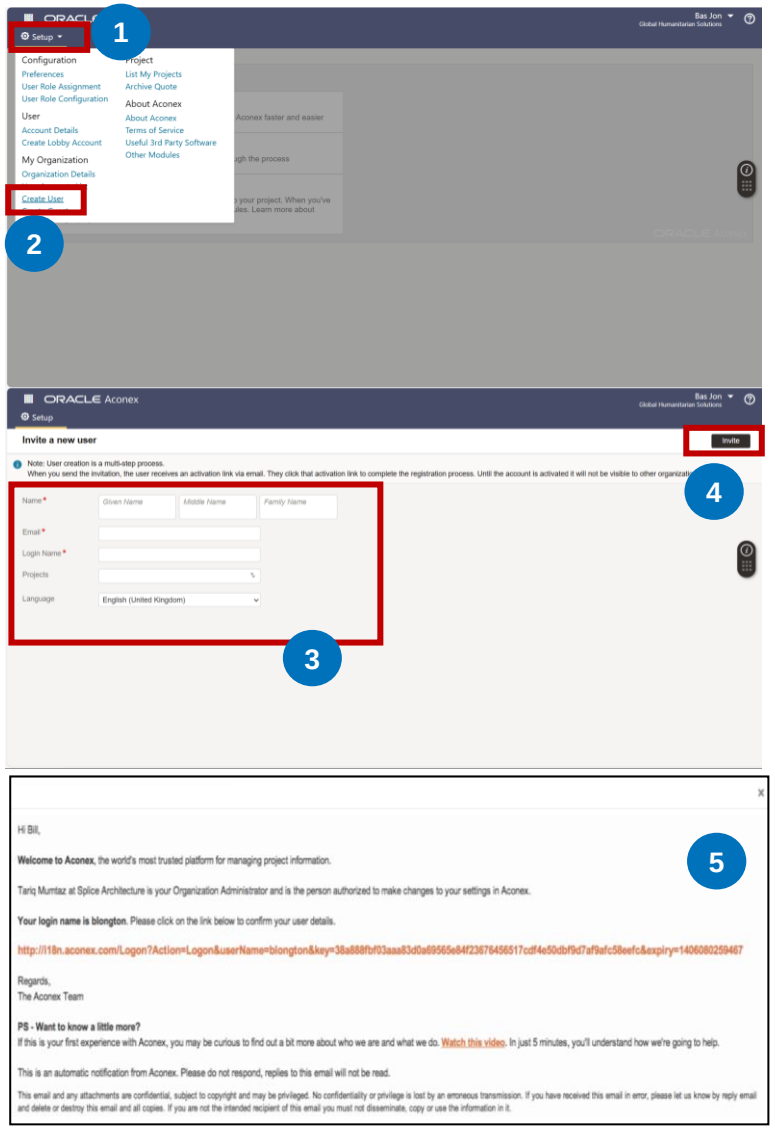
Appoint an Additional Organization Administrator as Back-up (mandatory)

Create the user Account

As the current Organization Administrator, **your role now is to appoint a second Organization Administrator in Aconex**. To do that, you will have to **firstly** create this new user and **secondly** provide them with the Organization Administrator:

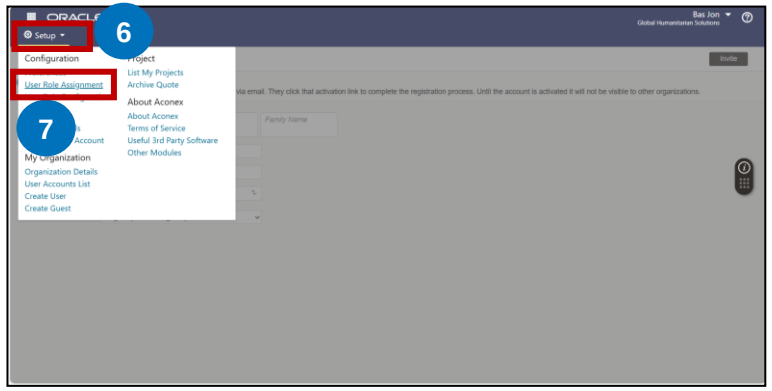
1. Click “Setup” from the top navigation menu.
2. Under My Organization click “Create User”.
3. Complete the mandatory fields — they're marked with a red asterisk i.e., given name; family name; email, login name (note that this is case-sensitive).
4. Click “Invite”.
5. Once you’ve created a user account, Aconex will automatically send the new user an email with their login name and a link to log in.



Assign the Org Admin Role to User

6. Click “Setup” from the top navigation menu.
7. Under Configuration click “User Role Assignment”.
8. Click the tick box under “Org Admin”.
9. Click “Save”.

You have now successfully created an additional Organization Administrator for your organization.



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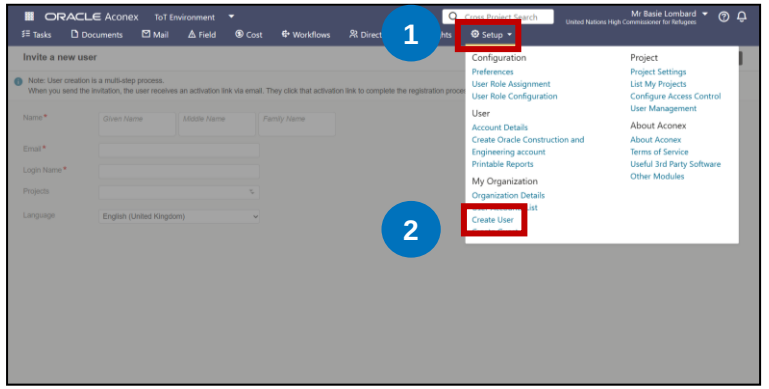
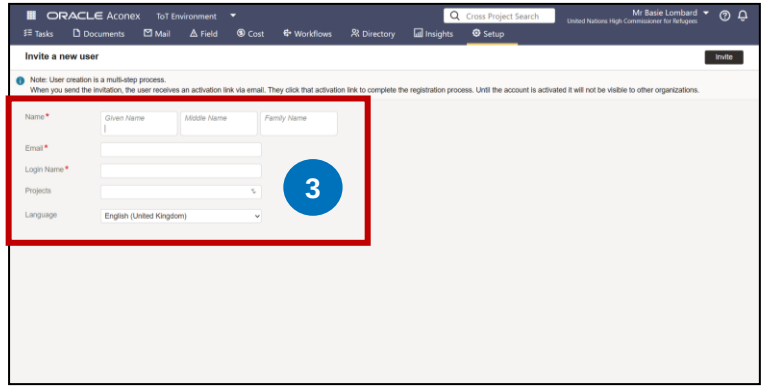
Introduce your colleagues to Aconex
The Organization Administrator creates new Aconex Users

Create Aconex Users (1/3)

As an **Organization Administrator** 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).



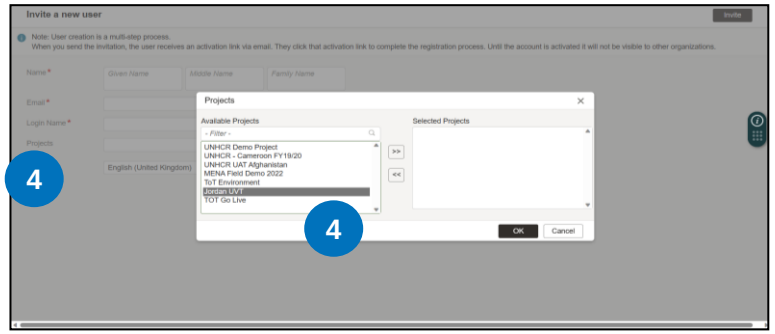


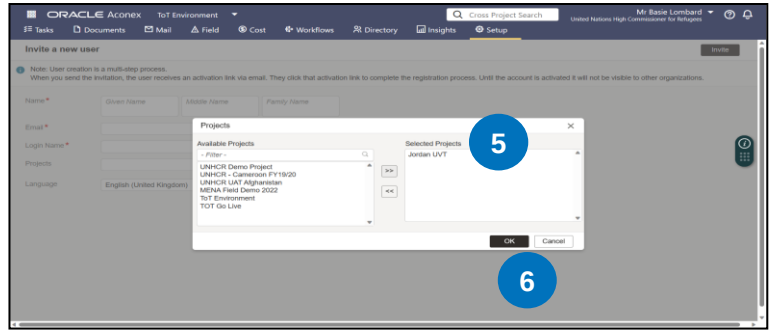
**Note: You can only create one user at a time.

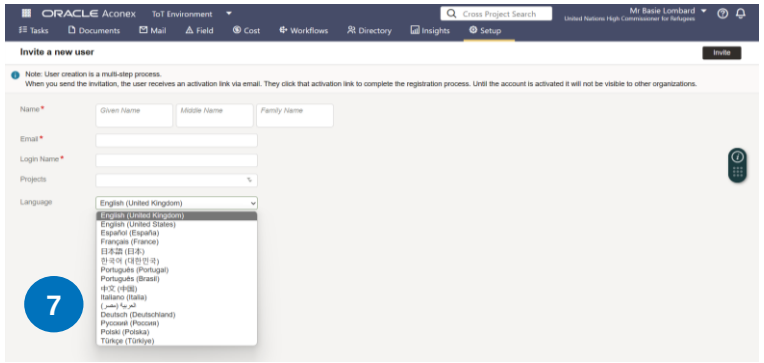
Creating Aconex user

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.





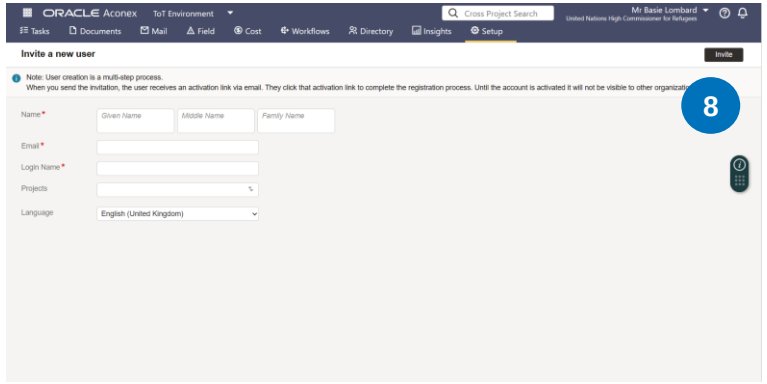


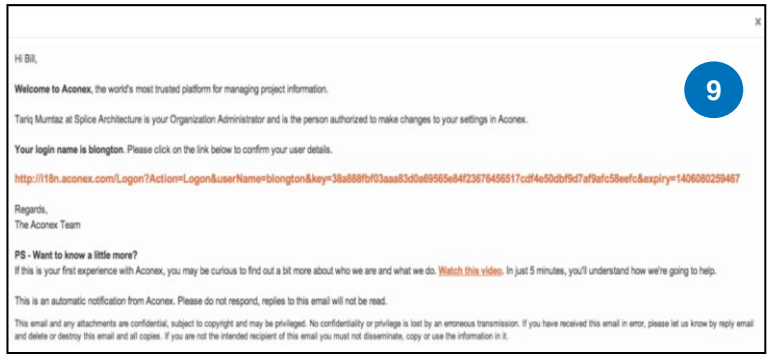
**Note: You can only create one user at a time.

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.**
10. Once received, your colleague **shall immediately** complete their registration, by completing their personal details and the establish the 2-step verification.





Note*: *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.

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

Creating Aconex user

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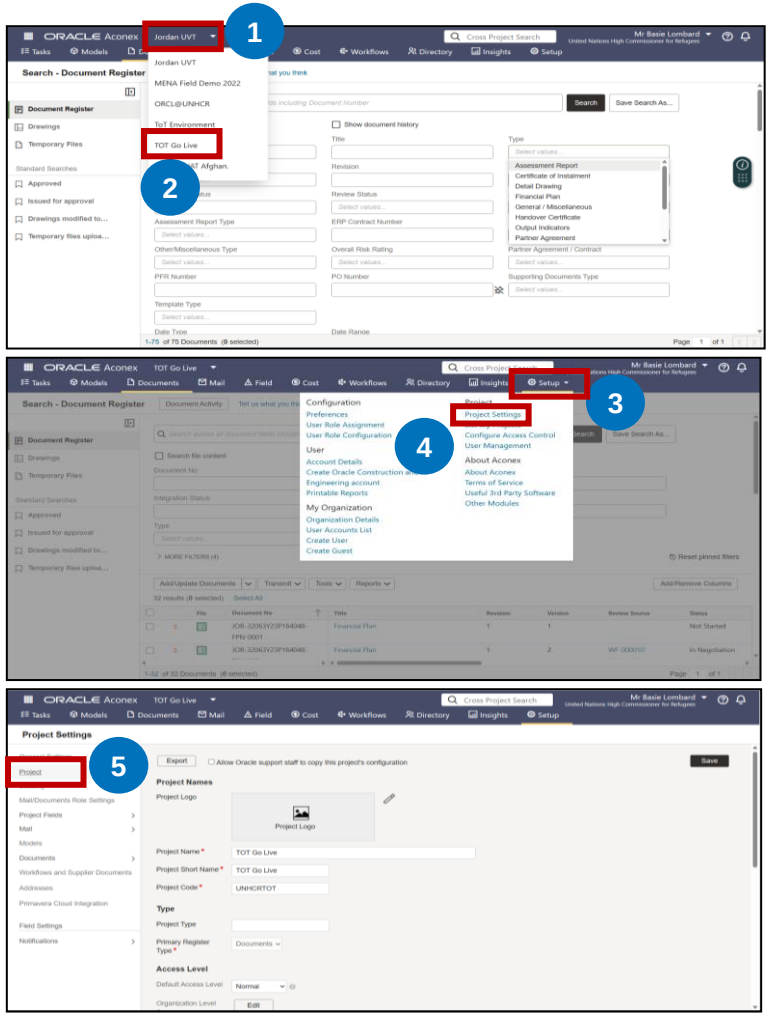
How can you invite your colleagues to our UNHCR Agreement?

Invite your colleagues into our Agreements' Project (1/3)

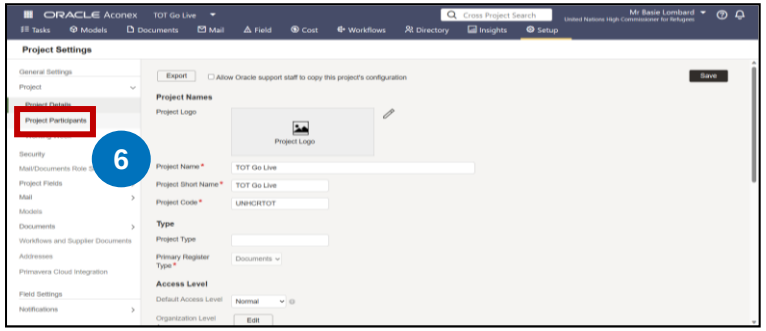
As Organization Administrator, you shall ensure that all the colleagues of your Organization, engaging in the management of the Partnership Agreement activities, are invited in Aconex (after they complete their registration) and the appropriate roles are allocated to them. In order to do that:

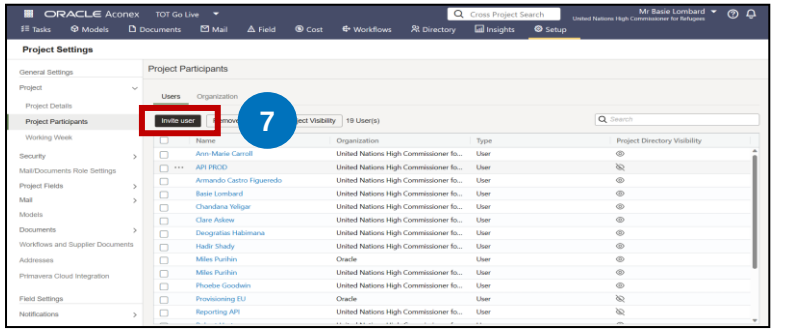
1. Click the "Arrow" from the top navigation menu.
2. Select the "Project" you want to assign to the user from the dropdown menu.
3. Click the "Setup" from the top navigation menu.
4. Under Project menu, select "Project Settings".
5. Under General Settings, select "Project"

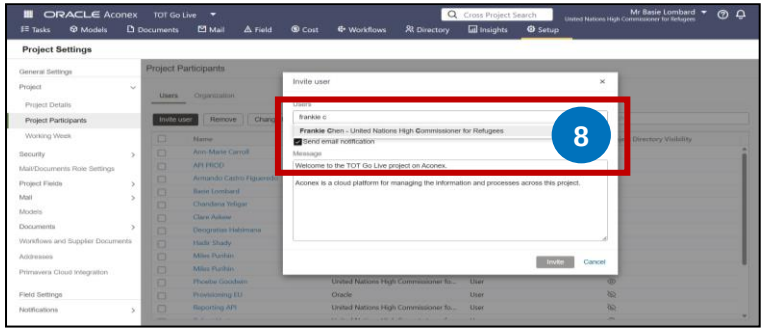


Invite your colleagues into our Agreements' Project (2/3)

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.

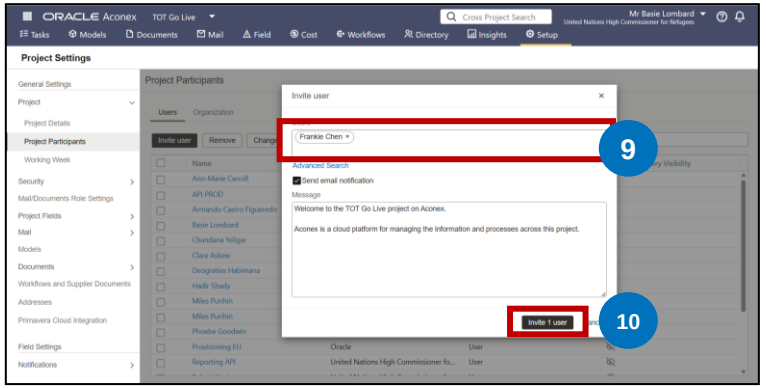


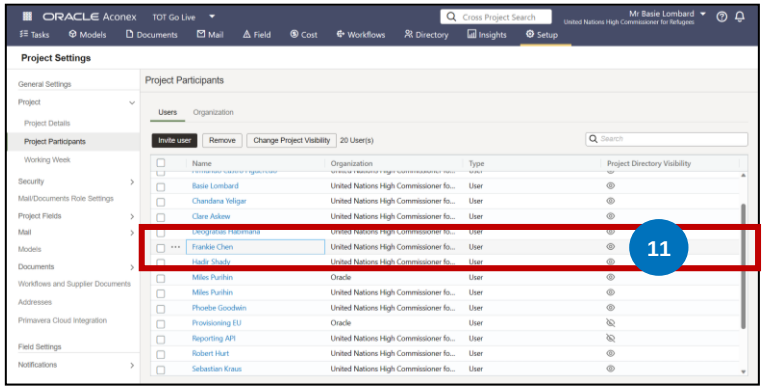




Invite your colleagues into our Agreements' Project (3/3)

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"





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Which are the available roles under the Core Module and how to assign Core Roles to your colleagues?

Which are the available roles under the Core Module?

Which roles can be provided to the staff on an Organization partnering with UNHCR?

CORE Module available roles for your colleagues

Aconex User Roles:

1. **Project Admin**: Manages project settings and administration for all participating organizations.
2. **Org Admin:** Manages Aconex settings and user roles within their own organization.
3. **Document Administrator (Doc Admin):** Manages document control functions for their organization's projects.
4. **Basic Plus User:** Can transmit and supersede documents, in addition to basic user capabilities.
5. **Basic User:** Can create, view, and manage mail, search documents, and view the global directory.

Default Assigned Roles:

- **Basic User**
- **Basic Plus User**

These roles are automatically assigned to new users, providing basic access to Aconex functionalities.

Aconex Library on Core Roles

Who should be in PROMS from your Organization?

Indicative roles and examples of functional roles are provided.

Your Organization is unique, so are your staff' titles!

For the negotiation of the budget

Project Manager

- To collect the project Description

Finance Manager

- To compile the budgetary requirements

Admin Manager

- To assist the budgetary estimations

Director

- To review and approve

For the negotiation of the Indicators

Project Manager

- To collect the sector's feedback

Field colleague/manager

- To provide inputs on targets

Director

- To review and approve

For the negotiation of the Contracts

Project Manager

- To collect the project Description

PSEA focal point

- To provide inputs to the PSEA Evaluation

Data protection focal point

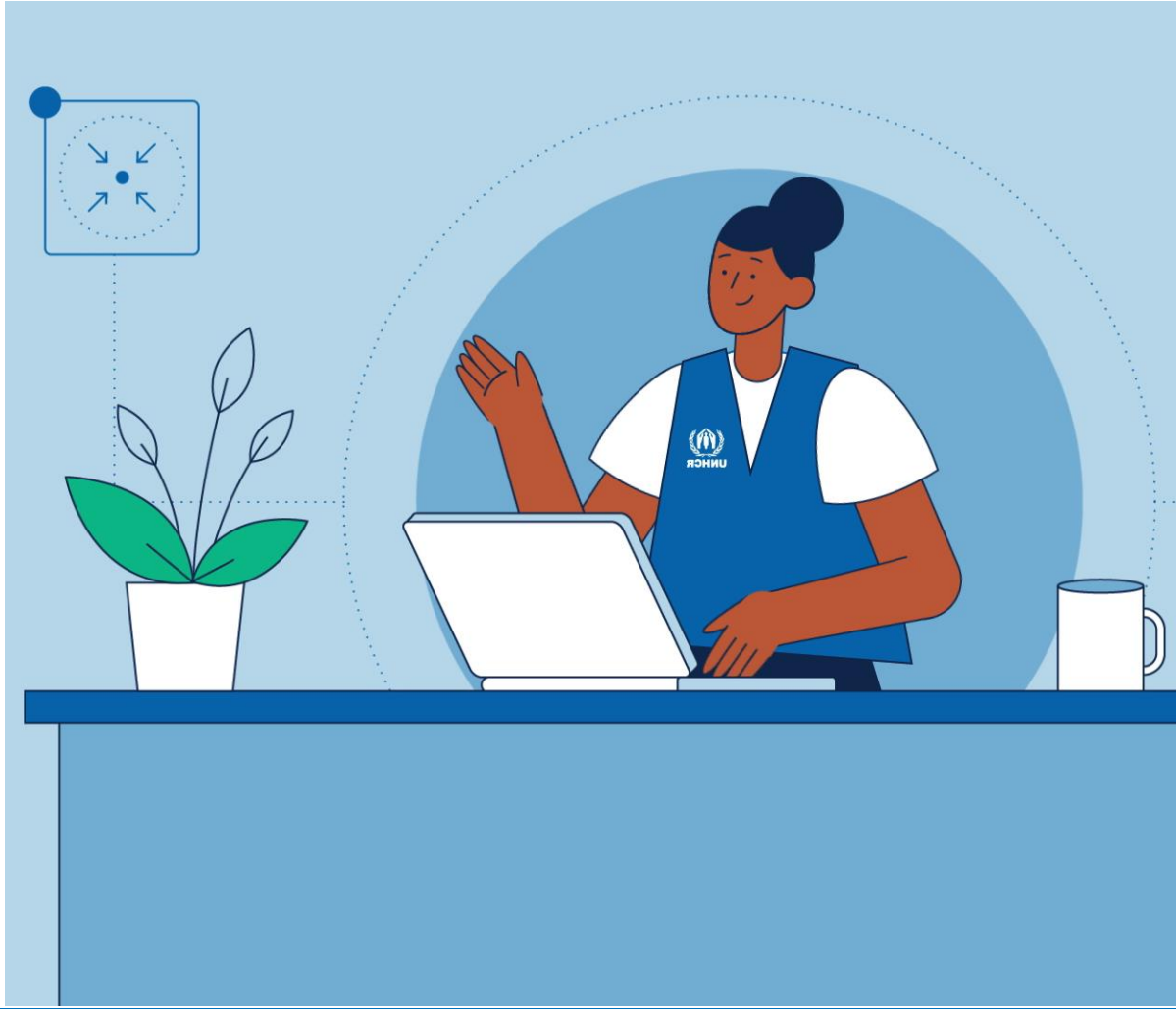
- To provide feedback on internal data protection

Project coordinators per sector

- To provide description per activity Project coordinators per sector

Director

- To approve and sign the contract



For the Reporting and Monitoring

Project Manager

- To collect the project Description

PSEA focal point

- To provide inputs to the PSEA Evaluation

Data protection focal point

- To provide feedback on internal data protection

Project coordinators per sector

- To provide description per activity

Finance Manager

- To compile the budgetary requirements

Admin Manager

- To assist the budgetary estimations

Director

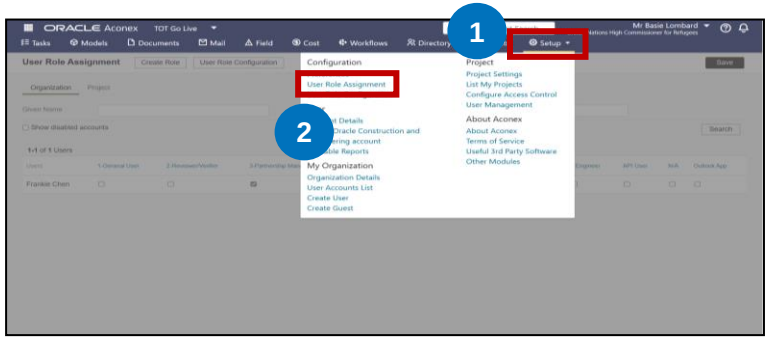
- To review and approve

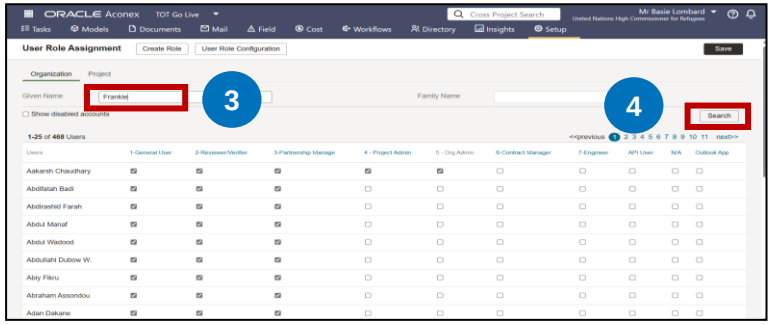
How to assign Roles to your colleagues under the Core Module?

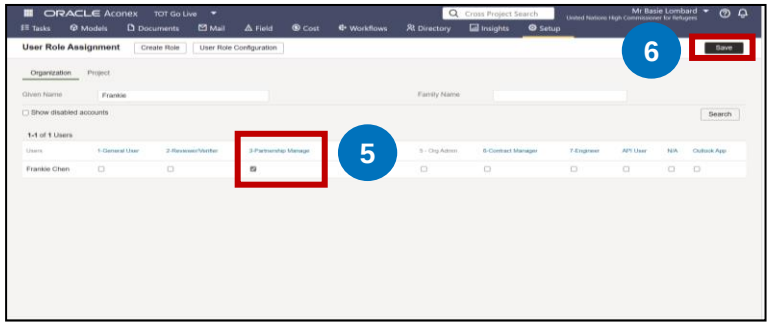
Assign “Core” Role to your colleagues

As an Organization Administrator you need to delegate roles that reflect the tasks of your staff in the actual management of the Partnership Agreement. To do that in Aconex:

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”







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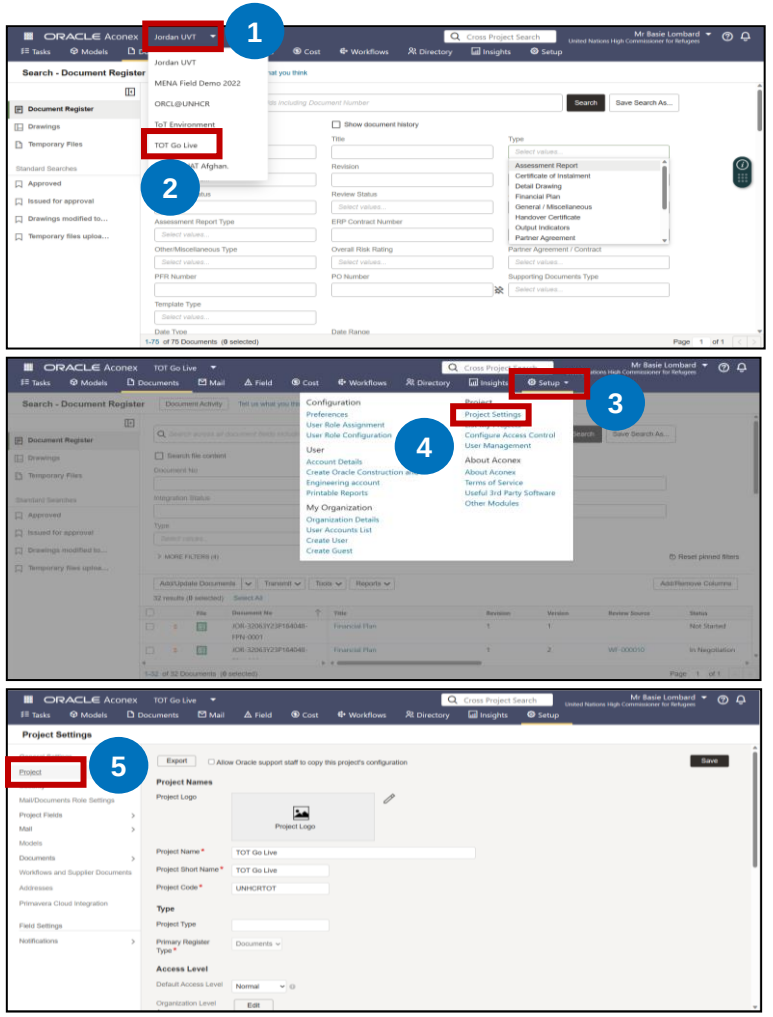
UNHCR Invites Partner Users to the Operation's Environment in Aconex

Invite your Partner into the Core Module (1/3)

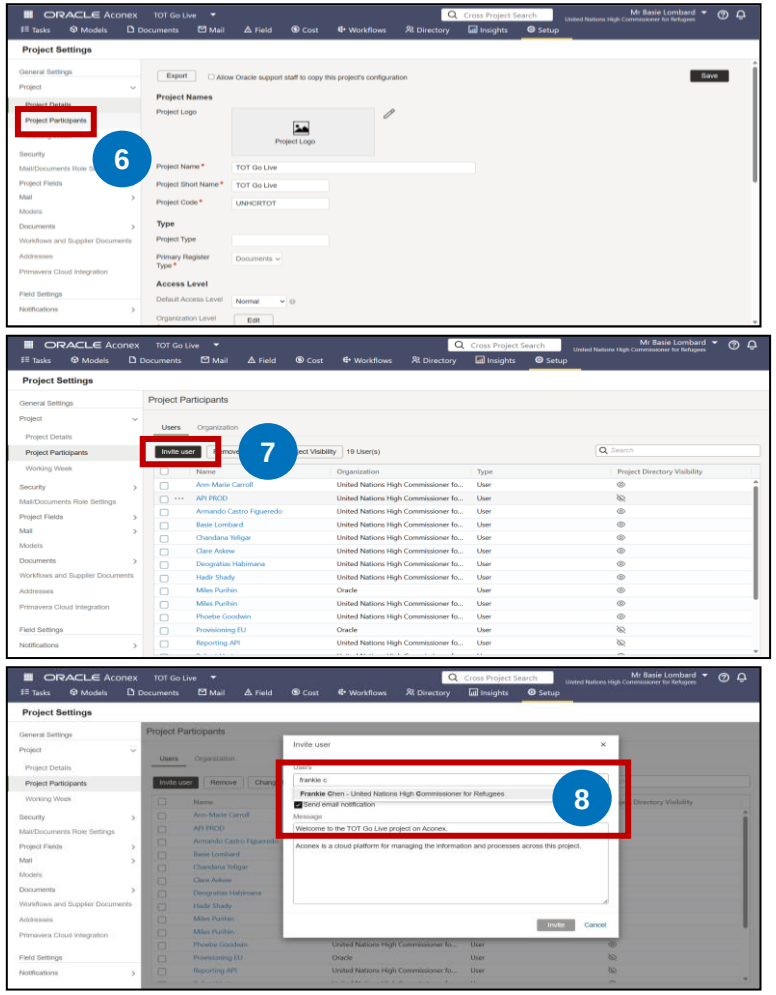
While the partner is completing steps 1, 2 & 3, UNHCR's **Partnership Manager has to** invite all registered partner users in the Core Module by following the steps below:

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"



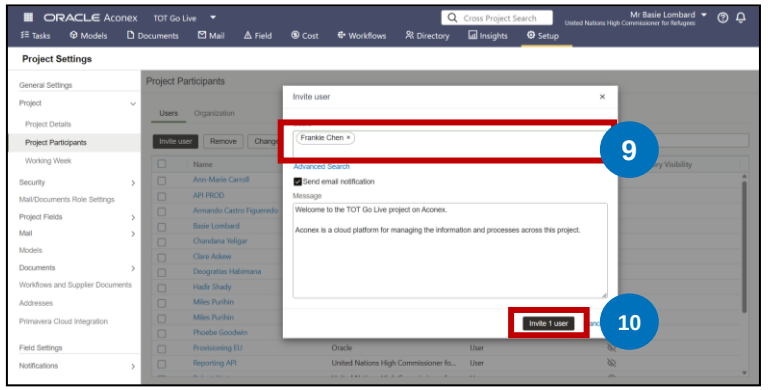
Invite your Partner into the Core Module (2/3)

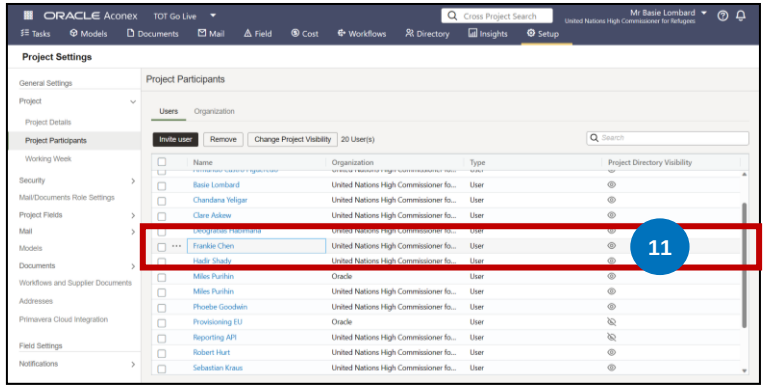
6. Under Project, select “Project Participants”
7. Click on “Invite User”
8. Search for user and select the name of the user you want to add to the project.



Invite your Partner into the Core Module (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”





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What is 2-Step Verification for Partner Staff with Aconex Access?

What is 2-Step Verification?

When a partner user logs into an **UNHCR Project**, they are required to go through a **"2-step Verification"** process also known as 2SV, that provides an extra layer of security within the UNHCR production system, every time they log in Aconex.

- You already sign into your Aconex Lobby Account using a login name and password. That's the first step in 2-Step Verification. The second step links you with a physical device.
- With 2-Step Verification, you use an Authenticator application on your mobile device (iPhone, Android, Windows) to generate a unique code that you enter into the Aconex login page. UNHCR verifies that code to give you access to UNHCR projects.
- 2-Step Verification helps to prevent the situation in which a malicious party guesses your password and gains unauthorized access to your Aconex account.
- It also helps to avoid insecure practices like password sharing between users.

***Note**: The following slides provide an overview on how to set-up and log into Aconex with 2SV.*

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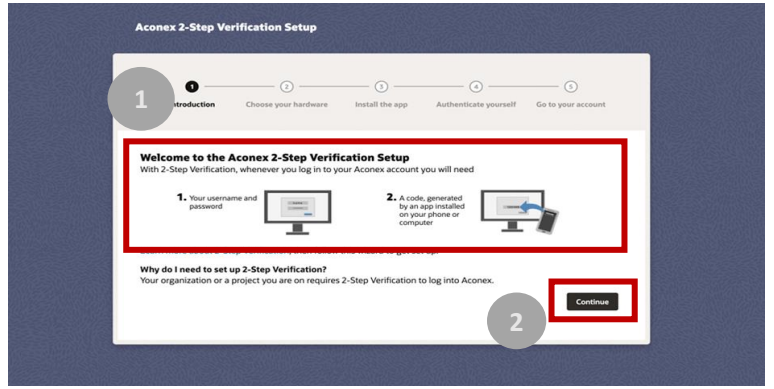
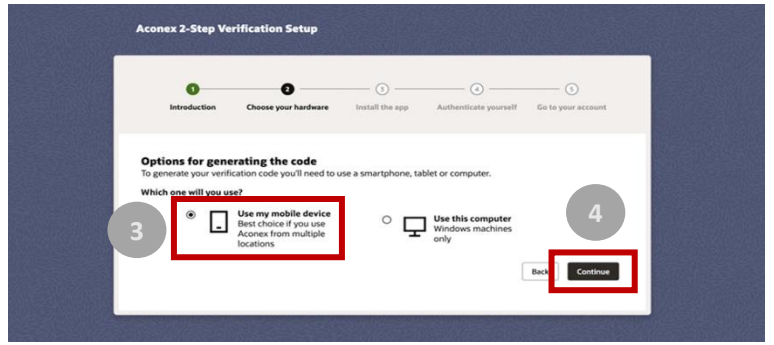
Partner Staff Setting up 2-Step Verification

Setting up 2-Step Verification (1/3)

When you log into UNHCR project for the first time, you will be required to set-up 2-step verification process. You'll need to generate and enter a new 6-digit code from your authenticator app every time you log in.

1. After you entered your login name and password, you'll see the **"Aconex 2-Step Verification Setup Wizard"**.
2. Click "**Continue"** when you're ready to begin.
3. **"Choose the device"** on which you want to install the authenticator app (ALWAYS choose "Mobile Device").
4. Click **"Continue".**

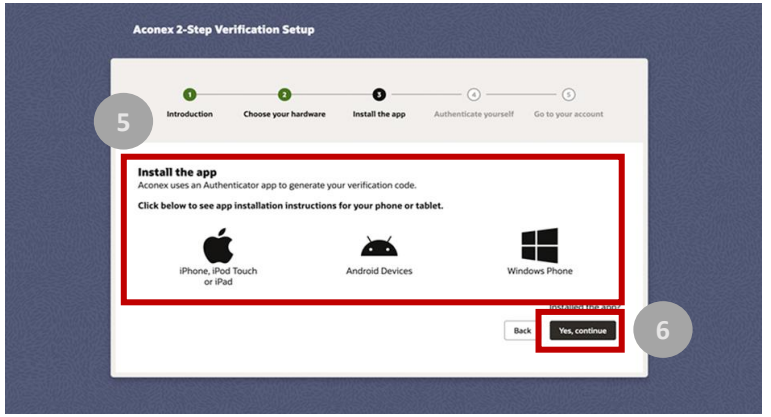


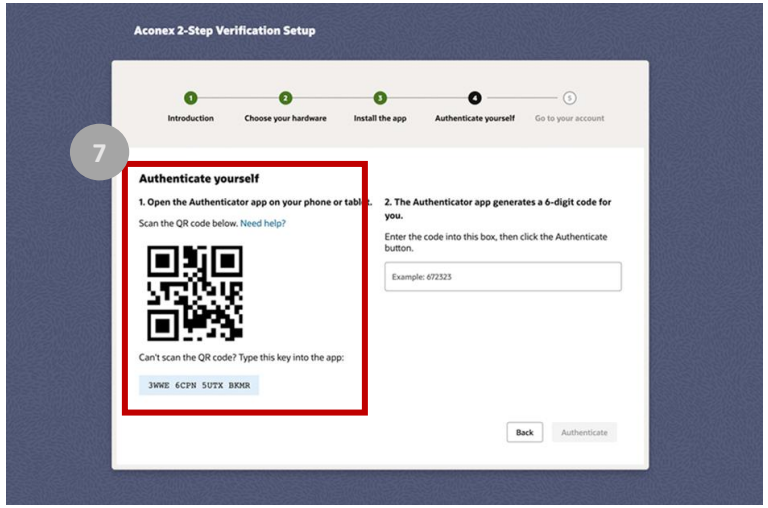


Setting up 2-Step Verification (2/3)

5. “**Choose your device’s operating system**”. A new tab will open in your browser. This contains instructions to (1) download the app; (2) set the time on your device.
6. When you’re finished, close the instructions, and click **“Yes, continue”** in the Setup Wizard.
7. The next page of the Setup Wizard asks you to open the authenticator app you just downloaded, and either **“Scan the QR code”** or enter the **“Highlighted key”** into your authenticator app.

   Tip!: If you’re using the authenticator app on your computer, you won’t see the QR code. You can just enter the highlighted key into your app.





Setting up 2-Step Verification (3/3)

8. Your app will generate a 6-digit verification code.
9. **“Enter code”** into the empty field at Step 2 on the Wizard page.
10. Click “**Authenticate**”.

    Tip!: Once you’ve successfully authenticated yourself, you’ll see the confirmation page. Click Go to your account to close the Wizard and start work.

11. Click “**Go to Account**” to access you Aconex Account.

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Downloading the Authenticator App

Downloading the Authenticator App

Downloading the Authenticator app to your iOS device

1. Open the App Store on your iOS device.
2. Search for Google Authenticator.
3. Download Google Authenticator to your device.

Downloading the Authenticator app to your Android device

1. Open the Google Play store on your Android device.
2. Search for Google Authenticator.
3. Download Google Authenticator to your device following their instructions. **Note** you may need to log into Google to do this.

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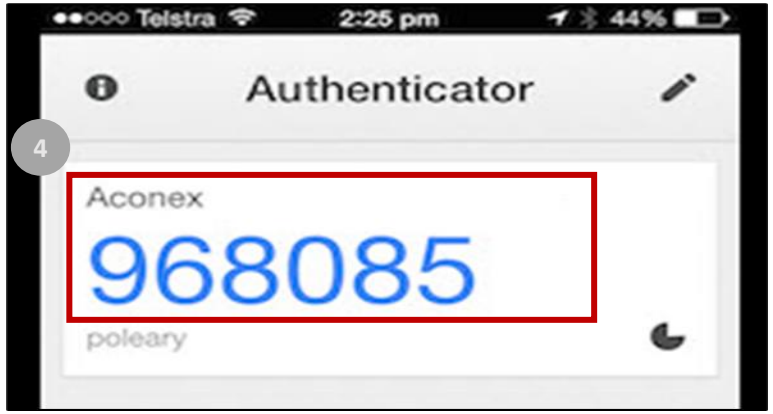
Generate your 6-digit code

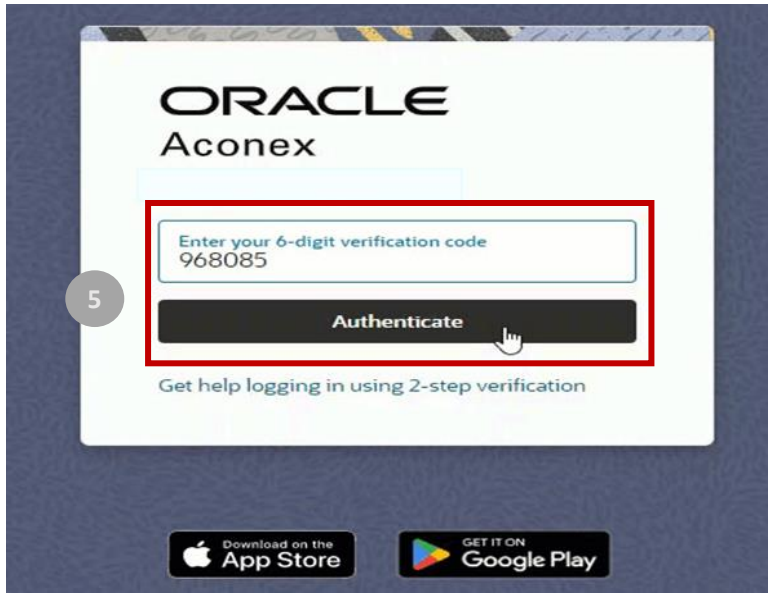
Generate your 6-digit code

1. Log into Aconex with your username and password. You'll be asked to enter your verification code.
2. Find the device you downloaded the authenticator app to.
3. Open the authenticator app.
4. Find the Aconex verification code.

   Tip!: The app generates a new 6-digit code every 30 seconds.

5. Enter your 6-digit code into the box on the login page and click Authenticate.
6. You'll be taken to your project.





Partner: How to gain access to the Field Module

Partner: Activate Field Module for your Organization

When setting up users in Aconex Field Module, the partner's Organization Administrator needs to follow the steps below:

1. REQUEST UNHCR TO ADD YOUR PARTNER ORGANIZATION IN THE FIELD MODULE: In the Field Module, UNHCR search for the partner organization and adds the partner Organization and their Users as "Organization you work with" and assign the appropriate field role to the partner user/s. The request to UNHCR can be submitted via an email. Once UNHCR has added your Organization:

2. THE PARTNER ALSO ADDS UNHCR IN THE FIELD MODULE: In the Field Module, the Organization Administrator has search for UNHCR and add the UNHCR as "Organization you work with" and assign the appropriate field role to UNHCR user/s.

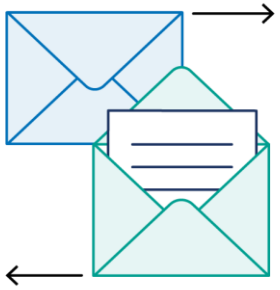
3. UNHCR RAISES A TICKET TO ENABLE THE PARTNER IN "FIELD INSPECTIONS": Once both organizations have completed steps 1 & 2 in the Field Module, UNHCR has to ENABLE the features of the Field Module for the partners. In order to do that, UNHCR has to raise a ticket in ServiceNow requesting so that Oracle enables the partner in "Field Inspections & Issues".

Let's explore each step individually!

Partner: Activate Field Module for your Organization(1/3)

1. REQUEST UNHCR TO ADD YOUR PARTNER ORGANIZATION IN THE FIELD MODULE: In the Field Module, UNHCR search for the partner organization and adds the partner organization and their Users as “Organization you work with” and assign the appropriate field role to the partner user/s. The request to UNHCR can be submitted via an email. Once UNHCR has added your Organization:

Organization Administrator

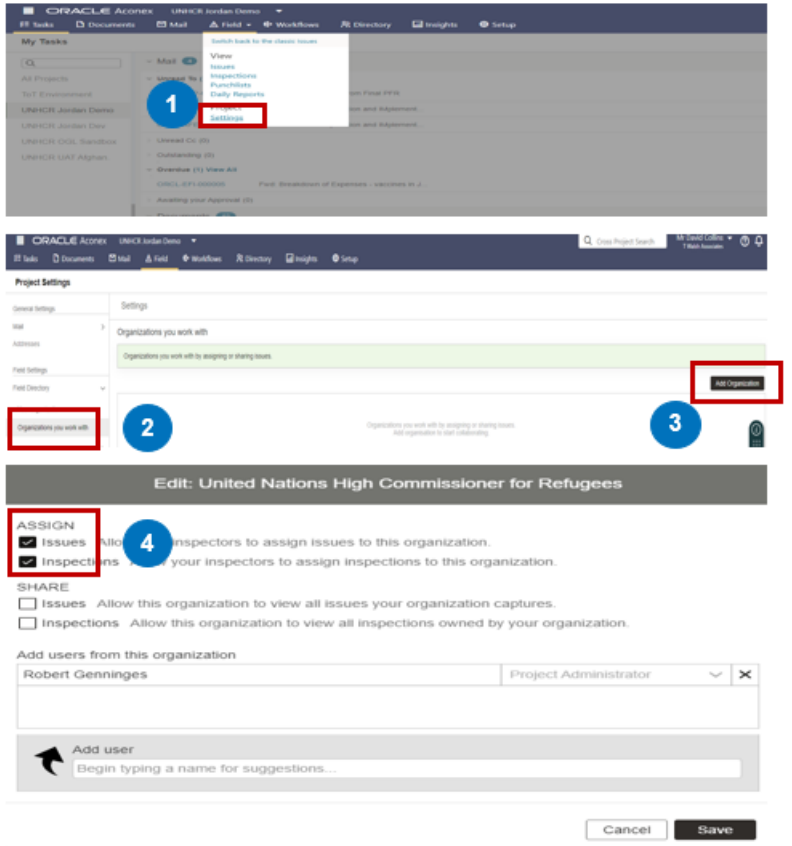


“Hello UNHCR colleague, I am the Organization Administrator of Organization X and I kindly request you to add our Organization in the Field Module.”

Partner: Activate Field Module for your Organization (2/3)

2. THE PARTNER ALSO ADDS UNHCR IN THE FIELD MODULE: In the Field Module, the Organization Administrator has search for UNHCR and add the UNHCR as "Organization you work with" and assign the appropriate field role to UNHCR user/s.

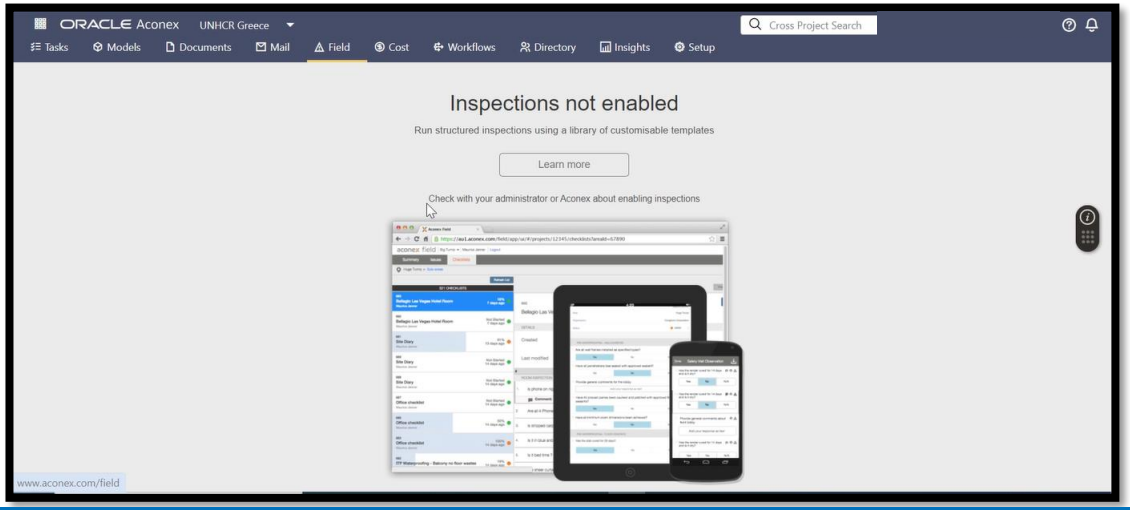
1. Navigate to Field and select **"Settings".** On your right, go to **"Field Directory".**
2. Click "**Organizations you work with"** with in the left-hand menu to see a list of the external organizations (as an Organization Administrator you are also an **Inspector Administrator** so you can perform this task).
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"
5. **Click ONLY "Issues" & "Inspections".** If not selected properly UNHCR might be able to see all needed Field features for our partnership agreement.
6. **No need** to select specific UNHCR staff, all UNHCR staff are already automatically there with their respective roles.
7. Click **"Save".**



Partner: Activate Field Module for your Organization(3/3)

3. UNHCR RAISES A TICKET TO ENABLE THE PARTNER IN "FIELD INSPECTIONS": Once both organizations have completed steps 1 & 2 in the Field Module, UNHCR has to **ENABLE** the features of the Field Module for the partners. In order to do that, UNHCR has to raise a ticket in ServiceNow requesting so that Oracle enables the partner in "Field Inspections & Issues".

As a partner staff, despite the fact the steps 1 & 2 are completed, when entering the Field Module, you see this message:



It is **UNHCR**'s turn **to Enable all Features of the Field Module for the partner**, ensuring that the use of the Module throughout the project implementation will be smooth and all colleagues that hold the right credentials can gain the most out of their user experience. UNHCR does that by raising an internal ticket through ***Service Now for PROMS.***

UNHCR Project Administrator

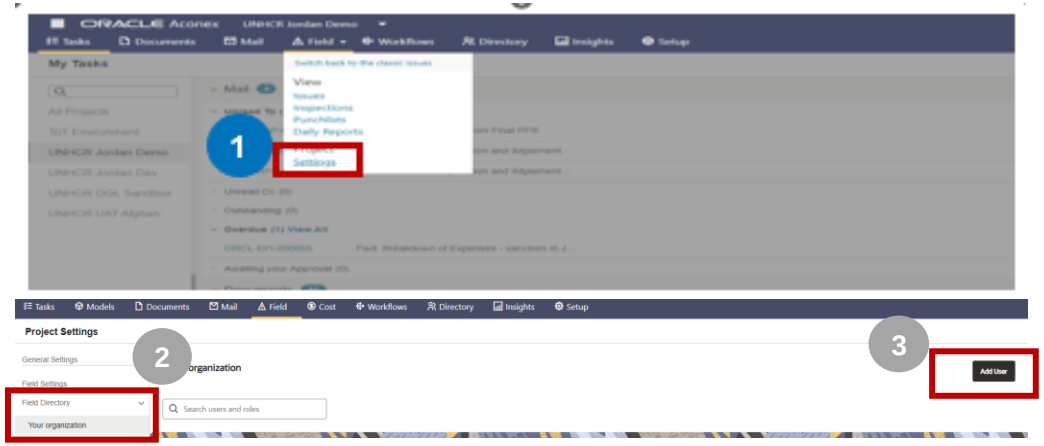
"Hello dear colleagues, UNHCR and partner X have completed the configuration of users and organizations under the Aconex Field Module. Please request Oracle to enable the Field Module features for the partner. Thank you."

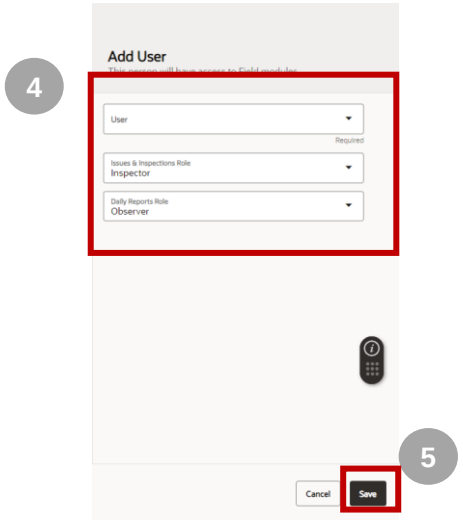
Partner: How to add colleagues and assign them roles of your colleagues under the Field Module

Partner: How to add colleagues and assign them roles of your colleagues under the Field Module

When setting up users in Aconex Field Module, the partner's Organization Administrator needs to follow the steps below:

1. Navigate to Field and select **"Settings".** On your right, go to **"Field Directory".**
2. Click "**Your Organization".**
3. Click the "**Add User" button** to add all the colleagues that are already configured under the Core Module. Once you press "Add User" a pop-up window on the right of your screen will ask you to provide:
    a. **Username**
    b. **Assign them with an "Issues and Inspections Role"**
    c. **Assign them with a role under "Daily Reports"**
4. Click "Save"





UNHCR
The UN Refugee Agency

Thank You!