

## Software tip: Aconex – Negotiation of Contracts

The partnership agreement contract templates are downloaded from the Cloud ERP contracts module. The content of all types of partnership agreement contracts can be negotiated and finalized with partners in Aconex utilizing the “Document” and “Workflow” modules. The final signed contracts are then uploaded to the Aconex Document Register, as outlined below.

**Step 1:** UNHCR uploads the draft contract (as a word document with the same file name, author and type that was downloaded from Cloud ERP) in the Document Register, as follows:

- i. For a PFA, select the document Type “Agreement” and the Agreement Type “Partnership Framework Agreement”.
- ii. For a DPA, select the document Type “Agreement” and the Agreement Type “Other/miscellaneous”.
- iii. For a project workplan, select the document Type “Partner Agreement”.
- iv. For all contract types, set the revision number to zero (“0”) and select the status of “Not started”.
- v. Click “Register” and the document is immediately stored in the Document Register.

**Step 2:** UNHCR sends the draft contract to the partner, as follows:

- i. Select the draft contract from the Document Register and transmit it on a workflow using the “Formal Partner Review” workflow template.
- ii. In the workflow wizard, edit the workflow name to include the partnership agreement contract number, assign participants to the workflow steps and enter the step deadlines.
- iii. Click “Submit” to initiate the workflow.

**Step 3:** The partner populates the contract and sends it back to UNHCR, as follows:

- i. Receive the workflow transmittal, open the “Partner Review” workflow step and download the draft contract.
- ii. Insert new content/edits/feedback as required and upload the modified file in the workflow step as the replacement file.
- iii. Complete the workflow step by selecting either “Draft” or “Final” for the review outcome.

**NB:** It does not matter which review outcome the partner selects because the workflow will always proceed to the second step.

**Step 4:** UNHCR opens the “UNHCR Finalization” workflow step, downloads the draft contract and incorporates the partner’s inputs.

- a) If no further consultation is required with the partner, UNHCR uploads the final agreed contract, selects the review outcome of “Final” and completes the

workflow step. The partner receives the final word version of the contract and the workflow ends.

**OR:**

**b)** If not in agreement with the partner's feedback (major concerns) and the entire workflow review period needs to be reset, UNHCR enters concerns in the downloaded file, uploads the modified contract in the workflow step and selects the review outcome of "Draft". The workflow ends and UNHCR returns to **step 2**.

**OR:**

**c)** If consultations are required with the partner that can be achieved within the deadline of the "UNHCR Finalization" workflow step, UNHCR enters concerns in the downloaded file, uploads the modified contract in the workflow step and transmits it on a "Partner Sub Workflow" to reach agreement with the partner, as follows:

- i. Within the sub workflow, the partner selects either "Proceed", if in agreement with UNHCR's changes/requests, or "Revise & resubmit" if the partner does not agree with the proposal from UNHCR.
- ii. If the partner selects "Revise & resubmit", UNHCR can initiate another new "Partner Sub Workflow" until there is mutual agreement on the content of the contract.
- iii. Once agreement is met with the partner, the sub workflow(s) end and the final version of the file is automatically sent to the parent "UNHCR Finalization" workflow step that still needs to be completed [return to **step 4a**].

**NB:** The sub workflow timing does not extend the review of the parent workflow step ("UNHCR Finalization") and falls within the deadline of this parent workflow step.

**Step 5:** Once the final word version of the contract is converted to PDF and signed by the agreement signatories, UNHCR uploads this PDF copy to the Document Register as a replacement file for the workflow-approved word document version. UNHCR leaves the revision number as zero and selects the status of "Final".

**NB:** Do not upload a new separate document to the Document Register for storing the signed PDF of the final approved contract. Please only 'update' the existing word document version. It is possible to refer back to the word document version in the document 'history' and download it (if required).

**Note:** The revision number for the first amendment to a contract would be one ("1") and it would be two ("2") for the second amendment (and so on).