

Project Reporting Oversight and Monitoring Solution

Working **better** together

Field Issues: Appreciations and Recommendations

Updated: July 2026

Aconex Field Issues



A real-time implementation monitoring tool

- While the approach of identifying and raising **recommendations** and **appreciations** between partners and UNHCR **has not changed**.
- **Aconex Field module digitalizes the process** for ease of follow-up and immediately archived for reference.
- **Progress, recommendations and challenges can be recorded and flagged** between organizations and relevant colleagues for action.
- **Automated reminders** in accordance with deadlines set **make it easier to follow-up and record action taken**.

Implementation monitoring

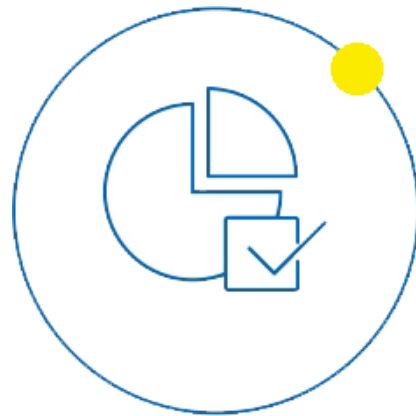


Raising appreciations and recommendations stems from findings during or related to...

**Implementation
Monitoring**



**Performance and
Financial
Verifications**



Assessments



**Risk treatment
plans**



Aconex Field Issue



Both UNHCR and partners can raise an appreciation or recommendation.

Users can select the type of feedback

Appreciation



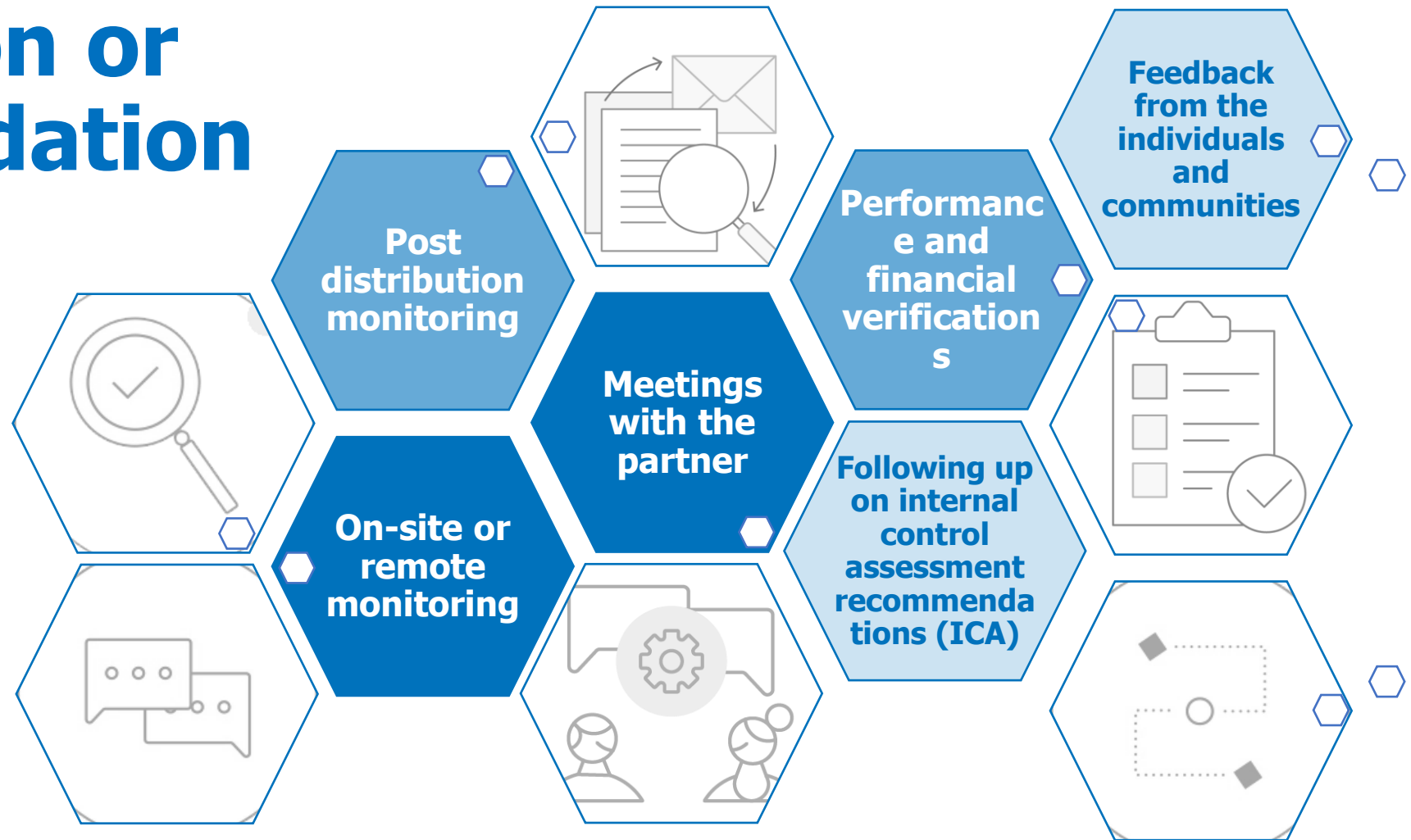
Is used to acknowledge and document good practice

Recommendation



Is used when findings require follow-up action within a given timeframe

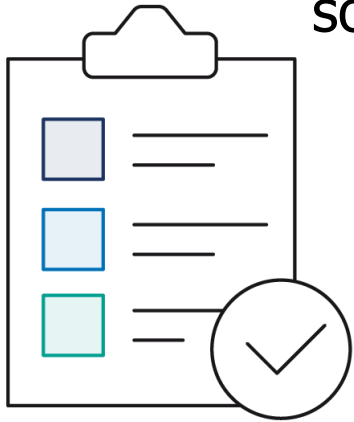
Identifying an appreciation or recommendation



Role assignment for Aconex Field module



The Inspector Administrator: is typically performed by a senior function in the UNHCR operation (i.e. programme) and in the partner organization, and is someone who can:



- *Perform* all actions under the Inspector role.
- *Manage* the organizations their organization works with.
- *Manage* the access to Aconex Field for people in their organization, except Project Administrators.
- *Receives* a summary notification email at the end of the day that includes all Field/Issues assigned to the Inspector Administrator's organization.

The Inspector: is typically performed by somebody in the Multi-Functional Teams, including Project Control, Programme and Results Managers, and is someone who can:

- *Create and assign Field Issues*, within the same organization for a partner organization for further actions, and *close* Field Issues.

Assigning Field Module roles in Aconex by UNHCR Operations and Partners



The Inspector Administrator carries out the following steps to assign Field Module roles:



1. Click on 'Field' and select 'Setting.'
2. Select "Field Directory," and in the dropdown menu find "Your Organization" and "Organizations you work with."
3. Select "Your organization" for all UNHCR Field users and select "Organizations you work with" when reviewing partner current roles.
4. To add a user, click "Add User," type the name in the search field, then select the correct name.
5. Assign the appropriate user role and click 'Save.'

For UNHCR, see [UNHCR Project Creation and Partner Onboarding and Partner Onboarding Handout](#) for more details.

For partners, see [Partner On-Boarding Hand-Out](#), for more details.

Creating a Field Issue (Partnership Monitoring)

ORACLE Aconex UNHCR UAT Afghan. Mr Basie Lombard

Tasks Documents Mail **Field** Cost Workflows Directory Insights Setup

Switch back to the classic Issues

View
Issues
Inspections
Punchlists
Daily Reports
Project
Settings

Click on "Field Tab"

Click on "Issues"

Issues Panama UVT

Tell us what you think **Add Issue**

Search Issues

Status Any Assigned To Any Due Date Any Issue type Any Issue Number Any More Filters

Sort by: Created Date (Newest to Oldest) Group by: None

16 - Partnership Monitoring

Test test
Muhammad Shahzad
Fri, Jul 17, 2026 Open

15 - Implementation Monitoring
xxxxxxxxxxxxxxxxxxxx
Hadir Shady Open

14 - Partnership Monitoring
xxxxxxxxxxxxxx
Hadir Shady Open

16 - Partnership Monitoring

Open

Description
Test test

Assigned To
Muhammad Shahzad

Due
17/7/2026

Source Listed In

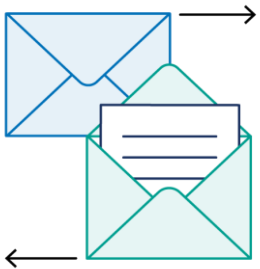


Click on link to access video on "How to navigate the FIELD MODULE"
[Field - Issues and Inspections \(aconex.com\)](https://aconex.com)

Initiates and assigns Field Issues



For each Field Issue, there are two roles:



1. Initiator: an entity or a person within an organization, who:

- *Creates* a Field Issue and fills the 'implementation monitoring' form.
- *Assigns* the Field Issue to an assignee, who could be a partner organization or a colleague within the initiator's same organization.
- *Closes* the Field Issue, once it is addressed by the assignee.



2. Assignee: an entity/person within an organization, who:

1. *Receives* the Field Issue and acts on it, as necessary.
2. *Address* the Field Issue by taking the necessary actions/recommendations within the indicated deadline.
3. *Marks* the Field Issue as "Ready to Inspect" after addressing the issue, or "Dispute Issue" if not in agreement.

Keep in mind: the initiator of an issue should be the one to close it once it is addressed by the assignee.



Creating a Field Issue

Creating an Issue

Make sure to fill all fields, especially those marked as 'Required.'

1

Issue type "**Partnership Monitoring**".

3

From the drop-down list, select the partner organization or a colleague within your organization to whom you want to assign the issue.

5

Attach any relevant supporting, such as a document or a photo.

The screenshot shows a 'New Issue' form with the following fields and callouts:

- Callout 1:** Points to the 'Issue type' dropdown menu, which currently shows 'Partnership Monitoring'.
- Callout 2:** Points to the 'Description' text area, which is marked as 'Required'.
- Callout 3:** Points to the 'Assigned To' dropdown menu in the 'Assignment' section.
- Callout 4:** Points to the 'Due' date field in the 'Assignment' section, which includes a calendar icon.
- Callout 5:** Points to the 'Attach' button, which has a paperclip icon.
- Callout 6:** Points to the 'Location details' dropdown menu at the bottom of the form.

Other visible text in the form includes 'New Issue', 'Issue type', 'Partnership Monitoring', 'Description', 'Required', 'Assignment', 'Assigned To', 'Due', 'Attach', 'Located', 'Panama UVT', and 'Location details'.

2

Write a brief **description** of the issue.

4

Indicate the due date you need this issue to be addressed.

6

Indicate the exact location of the issue, as applicable.

Creating an Issue

1 Write a detailed **description** of the issue.

2 From the dropdown list, select the **partner contract number**.

3 From the dropdown list, select the **implementer/partner**.

4 From the drop-down list, select the **type of feedback**:

- **Appreciation** to acknowledge good work, or
- **Recommendation** to request an action.

5 From the drop-down list, select the **severity level (High, Medium, or Low)**

6 Indicate the exact required **actions** to address this issue.

7 Check this box, to create a new issue after saving the current one.

8 Click 'Save' if you want to proceed or 'Cancel' if you want to cancel.

Additional Details (6)

Description of Request Required

Partner Agreement / Contract Required

Type of Feedback Required

Implementer Required

Severity Level Required

Recommendation / Follow Up Action Required

☐ Add another issue after saving.

Cancel Save



Addressing a Field Issue

Addressing a Field Issue

The **assignee** of an issue reviews the issue details, any supporting documents, and the recommendations for follow-up actions.

There are three options for feedback on the issue and actions taken.

Option 1:

Click "New Comment" to add any relevant comments.

2

Click 'Post' to save the note.

The screenshot shows the 'Partnership Monitoring' issue form. At the top right, a pencil icon and a three-dot menu icon are highlighted with red boxes. Below the form fields, a 'New Comment' button is highlighted with a red box. At the bottom of the comment section, 'Post' and 'Cancel' buttons are highlighted with red boxes. The form fields include: 'If other, please specify', 'Type of Monitoring / Verification' (Implementation monitoring), 'If remote, please justify', 'Severity Level' (Low), 'Recommendation / Follow Up Action' (Follow up from last recommendation), 'Is risk mitigation follow-up required?' (No), and 'If "Yes" reference risk and treatments'. The comment section is titled 'Comments' and includes a 'With:' field set to 'United Nations High Commissioner for Refugees'.

3

Option 2:

Click the pencil sign to open the issue form and make any necessary edits or reassign it to a colleague within your organization for further action.

4

Option 3:

If not in agreement with the issue, select "Dispute Issue" from the three dots.

5

Once the issue is addressed, the assignee selects "Mark Ready to Inspect" option from the three dots, notifying the issue initiator that the recommendations and necessary actions have been carried out and the issue is addressed.

This screenshot shows a dropdown menu with three options: 'Close Issue', 'Dispute Issue', and 'Mark Ready To Inspect'. The 'Dispute Issue' option is highlighted with a red box.

This screenshot shows the same dropdown menu as above, but with the 'Mark Ready To Inspect' option highlighted with a red box.



Closing a Field Issue

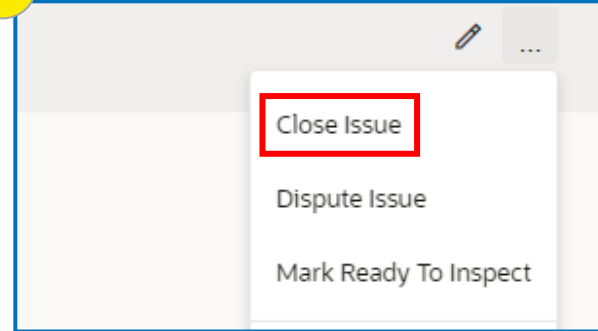
Closing a Field Issue

1

To close an issue, the **initiator** carries out the following actions according to the status:

- If the **assignee** has marked the issue as "**Dispute Issue**," then the initiator to communicate with the assignee to reach an understanding and a consensus about the issue. Depending on the agreement, previous steps carried out by the initiator could be revisited, as appropriate, or go to step 2 if it will be agreed to close the issue.
- If the **assignee** has addressed the issue and marked it as "Mark Ready to Inspect," the initiator reviews issue notes (if any), any edits/updates to the issue form done by the assignee and checks through other verification modalities as well to make sure that the issue is addressed as per the recommendations and within the deadline. If this is the case, go to step 2.

2



To close the issue, click the three dots and select "Close Issue."



Monitoring the Status of Field Issues and Generating Field Issue Reports

Monitoring the Status of Field Issues



- The status of all Field Issues can be monitored through generating a **report**.



- UNHCR and partner organizations should monitor the status of all Field Issues initiated by them or assigned to them.



- All Field Issues are **addressed** as per the **recommendations** and within the **indicated deadlines**.

Generating Field Issues Reports



- Two options for generating field issues reports.

Option 1

1 Use the filter options to narrow down the search, as required, then click 'Search.'

2 If no filters are selected, then check the first box to select all available issues.

3 Select the required report format from 'Export.'

An Excel format will enable filtering options.

4 Click 'Export' in the pop-up window that opens.

5 "Click 'Temporary Files' to access the downloaded report that is saved in the 'Document Register.'"

6 Download the file.

Issues
TOT Go Live

Search Issues

Status Any Assigned To Any Due Date Any Issue type Any More Filters

(100 Selected) Select All Edit Assignees Send Move Remove Export

658 - Implementation Monitoring
Preparation of Leaflets
Global Humanitarian Solutions

657 - Implementation Monitoring
xxxx

656 - Implementation Monitoring
Test
NGO Sigma Plus

655 - Implementation Monitoring
prueba
Edith Catania ESTRADA

Export Options

File name*
Issues Export

Include in Excel export

☐ Comments

☐ All threads

☐ Current thread

Cancel Export

Export in progress

The file export is currently in progress. If you have notifications enabled, you will receive an email notification when it is ready.

Exports can be found in Temporary Files

Ok

Document Register

1 results (0 selected) Select All

	File	Candidate Doc No	Title	Revision	Status
☐			Issues Export_20240607_13:06:55.xls		

Generating Field Issue Reports



Option 2

1 From 'Insights,' select 'Reports.'

2 Narrow your search by selecting 'Field Issues' from the "Main Subject Area" filter, then click 'Search.'

Reports

Standard Custom Organization

Search across name and description

Report Information | Any Main Subject Area(s) | Field Issue X

1 Selected

Document

Field Inspections

General

Field Issue

Workflow

Field Insights

Field Daily Reports

Contracts

Contract Changes

Clear All

Name	Description	Report Information	Main Subject Area(s)
Project Overview	Your organization's project adoption and performance	Aconex, Field, General	User, Mail, Workflow
Overdue Mails and Workflows, open Issues by users.		Aconex, Field, General	Mail, Workflow Step
Field Usage by Month		General, Field	General, Field Issue
Field Insights		General, Field	General, Field Issue
Field Issues		Field, General	Field Issue, General
Field Issues by Type		General, Field	General, Field Issue
Field Issues by assigned and captured organizations		Field, General	Field Issue, General

3 Select the required report format from 'Export.'

- Select the required report format from 'Export.'
- An Excel format will enable filtering options.

Layout Standard Save As Export As

As PDF
As HTML
As XLSX
As CSV

4 Notice the notification sign (marked by a number in red), which means that the report is being generated.

Cross Project Search Ms Hadir Shady United Nations High Commissioner for Refugees

Save As Export As

5 Find the downloaded report and click on it to open it.

Field Issues report executed. Download the EXCEL file. ToT Go Live

Now Dismiss



THANK YOU!