UNHCR · PARTNERSHIP MANAGEMENT · PARTNER WEBINAR

Aconex and the PROMS App: access, roles and support

How funded partners register, obtain access, perform their financial workflow actions and find the right support.

Audience: funded partners

Systems: Aconex · PROMS App

Guidance · October 2026

LEARNING OBJECTIVES

By the end of this session, you will be able to:

1. Recognize what Aconex and the PROMS App are used for, and how they work together.
2. Register and maintain your Aconex organization and individual user accounts.
3. Identify the partner roles in Aconex Core, Field and the PROMS App.
4. Understand your actions in Financial Plans, prepayments and PFRs.
5. Check access readiness and find the right support when something goes wrong.

Who should attend?

ORG ADMINS

Organization Administrators responsible for Aconex registration, accounts and Field users.

PARTNER TEAMS

Programme and finance staff working on Financial Plans, prepayments and Project Financial Reports.

MODULE 1 · UNDERSTANDING THE SYSTEMS

Four systems, two relevant to partners

UNHCR only

COMPASS

Planning and budgeting

UNHCR planning system for partnership scope, budgets and results information.

Partners do not need access.

UNHCR + partners

Aconex

Collaboration and monitoring

Shared documents, Mail, transmittals, workflows and Field Issues / Inspections.

Your Aconex access comes first.

UNHCR + partners

PROMS App

Financial management

Financial Plans, amendments, prepayment requests and PFRs: your assigned actions.

Standard role: HCR PFM Partners

UNHCR only

Cloud ERP

Approval and processing

UNHCR system for contracts, Purchase Orders, invoice approvals and payments.

Partners do not need access.

Colour key used today: UNHCR activity · Partner activity · Cloud ERP processing

Aconex access comes first.

Your organization must be registered in Aconex, your individual account must be active, and the relevant UNHCR project access must be in place before you can use the PROMS App. Aconex also remains essential for documents, Mail and Field monitoring.

First check your Aconex account and project access.

MODULE 2 · ACONEX REGISTRATION · PARTNERS

Getting started: register once, manage your users

Key registration steps and guidance links

1. **Check first: is your organization already registered? Do not create a duplicate.**
2. **If new, follow the official Aconex registration guide, including EU1 and naming instructions.**
3. **Create individual accounts and maintain at least two active Org Admins.**
4. **Inform your UNHCR Operation once the organization and users are ready.**
5. **Step-by-step instructions: [INSERT OFFICIAL REGISTRATION GUIDE LINK]**
6. **Registration or login issue? Contact Oracle Aconex Support.**

Org Admin essentials

- ✓ Maintain at least two active Org Admins
- ✓ One individual account per person; use an official email
- ✓ Never share user accounts
- ✓ Disable accounts when colleagues leave
- ✓ One Lobby account per user linked to Aconex
- ✓ Complete the required 2-Step Verification

MODULE 2 · FIELD MODULE · PARTNERS

Field activation: who does what?

1	PARTNER	Register the organization and users, then inform the UNHCR Operation.
2	UNHCR	UNHCR onboards your organization to the relevant Aconex project.
3	BOTH	Both organizations add each other in Field (reciprocal relationship).
4	UNHCR	UNHCR coordinates technical activation of Field Inspections and Issues.
5	PARTNER	Your Org Admin receives Inspector Administrator and adds relevant partner Inspectors.

⚠ **Key dependency: reciprocal invitations must be completed before technical activation.**

MODULE 2 · ACONEX ROLES · PARTNERS

Aconex: the roles your organization needs

Role	What the role permits	Who assigns or maintains it
Organization Administrator Organization level	Manages organization registration, individual accounts, user maintenance and deactivation.	First registrant is initial Org Admin; existing Org Admins appoint others.
Basic User / Basic Plus User Core Module	Core access to permitted documents, search and Mail. Basic Plus can transmit and supersede.	Assigned under Aconex registration; partner Org Admin maintains accounts.
Inspector Administrator Field administration	Manages Field users and may perform Inspector actions.	PTSS/DEPS or the RB focal point assigns it to the partner Org Admin.
Inspector Field Module	Creates and manages Issues and Inspections within authorized project access.	Partner Org Admin adds users once Field activation is completed.

MODULE 3 · PROMS APP ACCESS · PARTNERS

How partners obtain PROMS App access

Aconex foundation

Complete these steps first

- Register your organization in Aconex.
- Maintain an active individual user account.
- Complete UNHCR project onboarding.
- Ask your Org Admin to help verify access.

PROMS App access

One standard partner role

- Your standard role is HCR PFM Partners.
- Use it for partner-owned financial workflow actions.
- You do not request UNHCR DOARP roles.
- UNHCR handles separate Cloud ERP approvals.

⚠ **Aconex registration and appropriate access are prerequisites for using the PROMS App.**

MODULE 3 · PROMS APP ACCESS · PARTNERS

Can't open the PROMS App? Check in this order

Your first checks

1. Ask your Org Admin whether your individual Aconex account is active and correct.
2. Check that your organization has access to the relevant UNHCR project.
3. If Aconex is fine, contact your UNHCR Operation or epartner@unhcr.org.

Who helps with what?

1. Org Admin: individual accounts and user maintenance.
2. Oracle Aconex Support: registration, login and product issues.
3. UNHCR Operation: project onboarding and PROMS App follow-up.

Start with Aconex. A PROMS App access issue may originate there.

Your PROMS App role: HCR PFM Partners

What you can do

- Review, negotiate and endorse FPNs and amendments
- Initiate, submit and revise prepayment requests
- Complete your organization's actions in PFR workflows
- See records associated with your organization

Your role does not grant access to other partners' records or financial approval authority in Cloud ERP.

Workflow	Partner actions	What to expect
Financial Plans and amendments	Review, negotiate, endorse and respond to revisions.	Several rounds may occur before final agreement.
Prepayment requests	Initiate, submit, and revise or resubmit if returned.	UNHCR reviews, verifies or requests corrections.
Project Financial Reports	Complete partner-owned reporting and correction actions.	UNHCR may request clarification before completion.

MODULE 4 · WHAT HAPPENS NEXT

Agreed in the PROMS App does not mean Approved in Cloud ERP.

PROMS APP

Partner and UNHCR complete the relevant workflow; final Agree means financial certification.



CLOUD ERP

UNHCR validates and approves the resulting transactions before applicable payment processing.

Your actions and what happens next

Financial Plans and amendments

Partner
Reviews and endorses the FPN

→

UNHCR
Final Agree: certification

→

Cloud ERP
PO reviewed and approved

Prepayment requests

Partner
Initiates prepayment

→

UNHCR Programme
Reviews or returns

→

UNHCR Project Control
Final Agree

→

GSS
Validates the invoice

→

Cloud ERP
Prepayment approval

Project Financial Reports

Partner
Completes PFR actions

→

UNHCR Project Control
Reviews / negotiates

→

Senior Project Control
Final Agree

→

DVS
Automated validation

→

Cloud ERP
PFR invoice approval

MODULE 5 · MANAGING ACCESS

Keep your organization and users up to date

Your Organization Administrators

- Review Aconex user accounts regularly.
- Create individual accounts for new colleagues.
- Disable accounts when colleagues leave.
- Maintain two active Org Admins and avoid shared accounts.

Keep UNHCR informed

- Tell the Operation when registration is complete.
- Confirm which staff need access to the partnership.
- Report project or Field Module access issues.
- Notify UNHCR when project access is no longer needed.

Do not wait for a scheduled review: update access whenever responsibilities change.

MODULE 5 · SUPPORT · PARTNERS

Who to contact, and for what

Support need	First point of contact	Follow-up / guidance
Individual Aconex accounts	Your Organization Administrator	Org Admin creates, updates or disables accounts.
Registration / login / verification	Oracle Aconex Support	help.aconex.com/contact-us
UNHCR project / Field access	Your UNHCR Operation	UNHCR coordinates project onboarding and activation.
PROMS App access	Your Org Admin first	Then UNHCR Operation or epartner@unhcr.org.
FPN, prepayment and PFR questions	Your UNHCR Operation	epartner@unhcr.org for partner support.
Payment or approval follow-up	Your UNHCR Operation	UNHCR follows up internally in Cloud ERP.

MODULE 5 · PARTNER READINESS CHECKLIST

Your checklist before working in PROMS App

Aconex organization and users

- Your organization is registered only once, in EU1
- Two Org Admins and individual user accounts are active
- Your organization is on the right UNHCR project

Aconex roles and PROMS App

- Basic User / Basic Plus User access is in place
- Field Inspector Administrator / Inspector roles are assigned
- You can access HCR PFM Partners in the PROMS App

Ongoing readiness

- You understand your FPN, prepayment and PFR actions
- Users are updated or disabled when responsibilities change
- You know your UNHCR focal point and support channels

Thank you!

Questions?