PROMS APP TRAINING · PROCEDURAL GUIDE

UNHCR
The UN Refugee Agency

Navigating the PROMS App Overview and search pages

How to sign in, confirm access, review the Overview page and use the Financial Plan, Project Financial Report and Prepayment search pages.

Audience: UNHCR personnel and funded partners

AGENDA

What this training covers

01 Sign in
Routes for UNHCR and partner users

02 Overview page
Blue bar, profile panel, filters and totals

03 Financial Plan search
Filters, table controls, actions, print and export

04 Project Financial Report search
Invoice status, columns, print and export

05 Prepayment search
Invoice details, columns and export

06 Wrap-up
Reminders, support and knowledge check

Colour key UNHCR and common content · Partner-specific content · Cloud ERP information

Learn to navigate before you process

This training is for **UNHCR personnel** and **partner personnel** who need to find records, understand page controls, review status information, and print or export results.

What you can do on any page depends on three things:

Active role

The role selected in the blue bar sets your permissions.

Security context

The operations or business units whose records you can see.

Record status

Where the record is in its workflow right now.

IMPORTANT

Check your Selected Role first.

Always confirm the Selected Role in the blue bar before taking any action. The active role determines the permissions PROMS applies.



01

Sign in to the PROMS App

Two access routes: one for UNHCR personnel, one for funded partners.

SIGN IN

Two ways to sign in

UNHCR USERS

1. Open the PROMS App.
2. Select **Sign in to your account**.
3. Continue with your normal organisational credentials.

Expected result
The Overview page opens under your assigned user profile.

FUNDED PARTNER USERS

1. Enter the email and password registered for your **Aconex account**.
2. When prompted, open **Oracle Authenticator** on your phone.
3. Enter the **six-digit code** it displays.

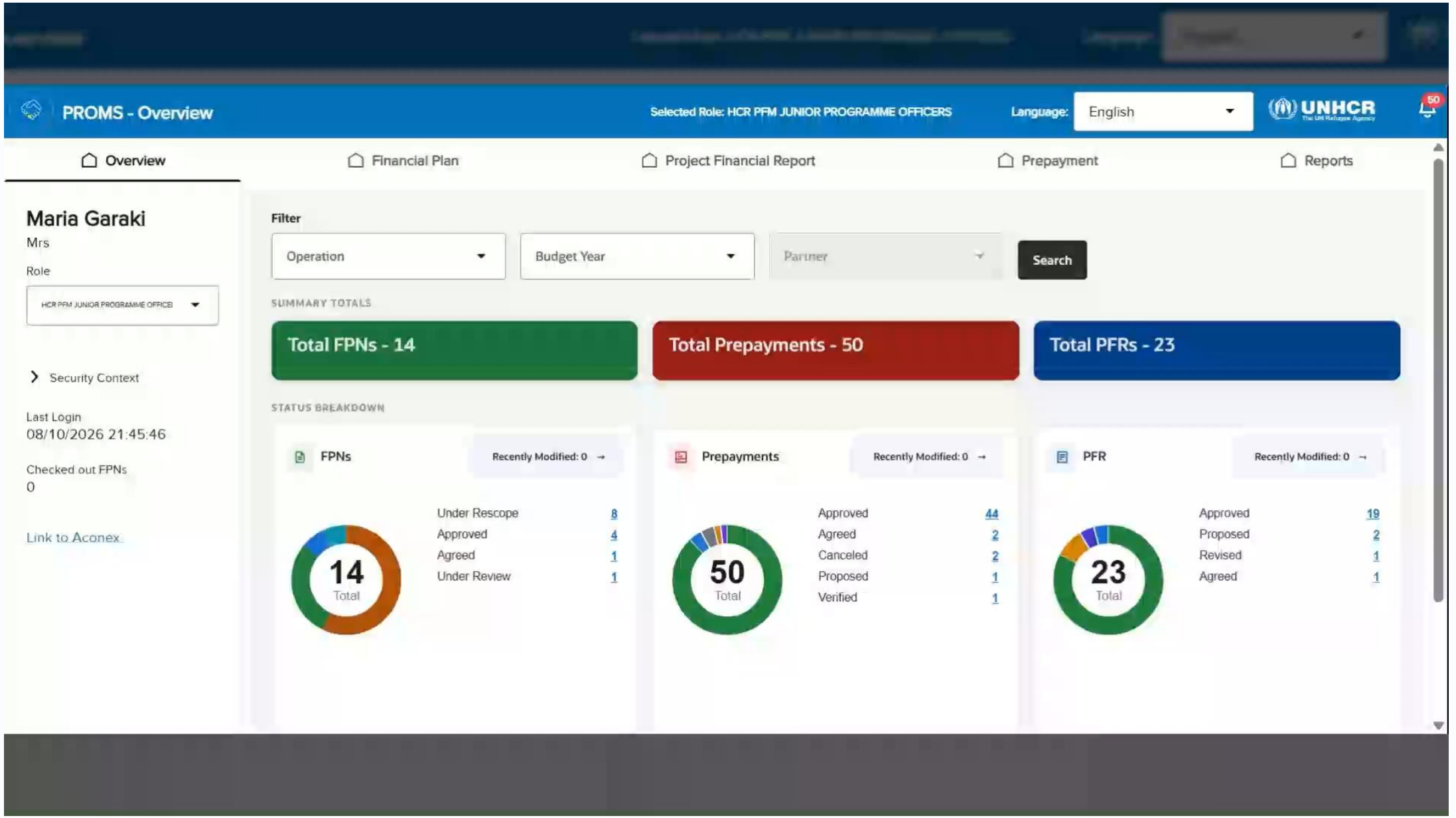
Expected result
You continue into PROMS with the role **HCR PFM PARTNERS**.

02

The Overview page

Profile, role, filters, totals and direct links to the records that need your attention.

OVERVIEW PAGE · Video



OVERVIEW PAGE · TOTALS

Every count is a shortcut to records

Summary Totals

Number of Financial Plans, Prepayments and PFRs for your criteria.

Status Breakdown

Three tables split each document type by status.

Select a count

Each total and status count is a hyperlink.

Filtered results

The search page opens already limited, e.g. all approved FPNs.

RECENTLY MODIFIED

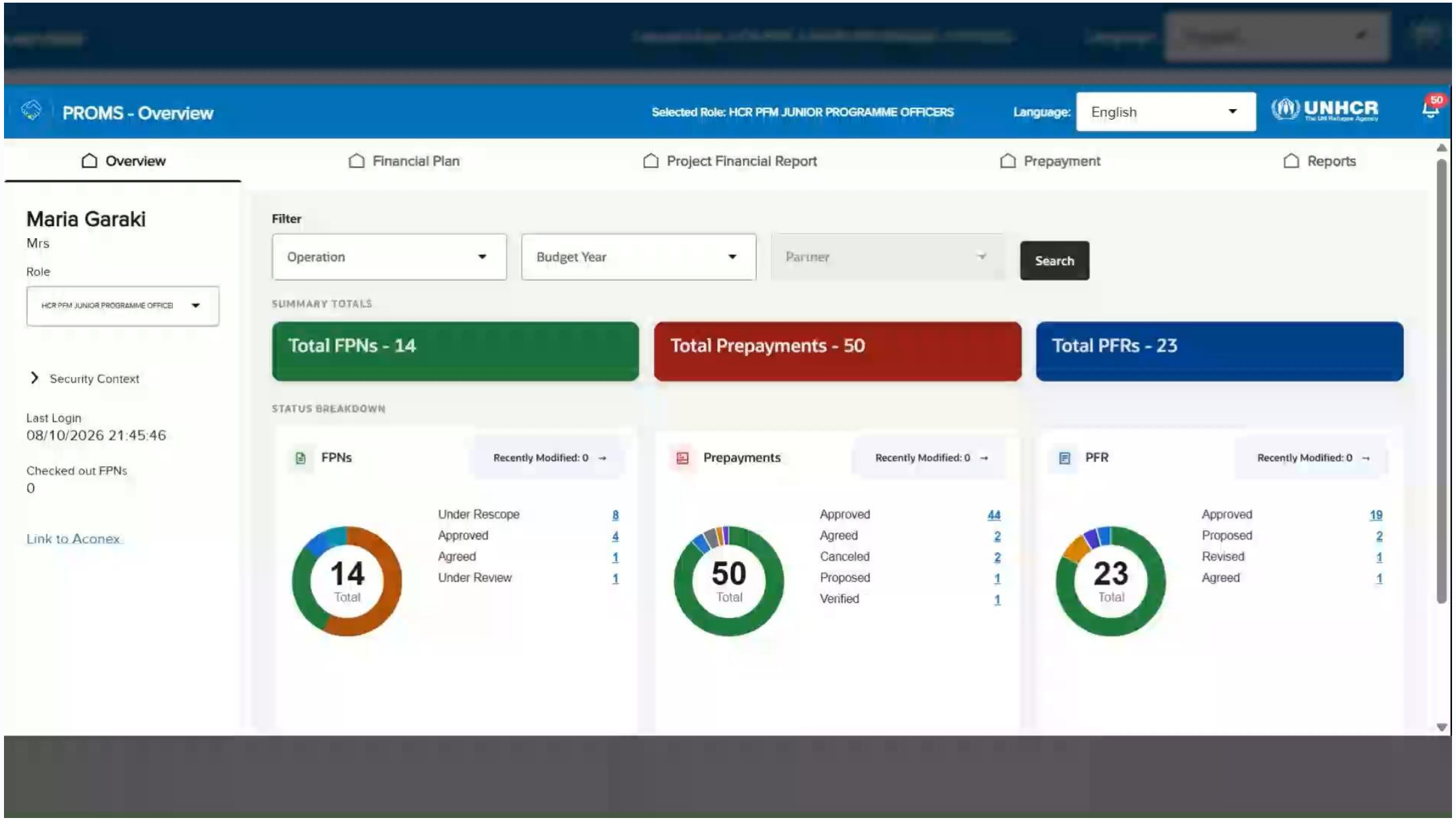
Records changed **by another user since your last login**, for Financial Plans, Prepayments and PFRs. Select the count to check whether follow-up is needed.

Changing the filters and running Search refreshes all these figures.

03

Financial Plan search page

Find, review, print and export Financial Plans (FPNs). The controls you learn here repeat on the other two search pages.


PROMS - Overview
Selected Role: HCR PFM JUNIOR PROGRAMME OFFICERS
Language:
English
UNHCR
Overview
Financial Plan
Project Financial Report
Prepayment
Reports
Maria Garaki
Mrs
Role
HCR PFM JUNIOR PROGRAMME OFFICEI
Security Context
Last Login
08/10/2026 21:45:46
Checked out FPNs
0
Link to Aconex
Filter
Operation
Budget Year
Partner
Search
SUMMARY TOTALS
Total FPNs - 14
Total Prepayments - 50
Total PFRs - 23
STATUS BREAKDOWN
FPNs
Recently Modified: 0
14
Total
Under Rescope 8
Approved 4
Agreed 1
Under Review 1
Prepayments
Recently Modified: 0
50
Total
Approved 44
Agreed 2
Canceled 2
Proposed 1
Verified 1
PFR
Recently Modified: 0
23
Total
Approved 19
Proposed 2
Revised 1
Agreed 1

Five actions, and who can use them

Action	Who uses it	What to know
Lock / Unlock	UNHCR personnel only	Whoever locks a document unlocks it; the PROMS App Administrator can unlock if needed.
Edit	Depends on role and status	Opens the Financial Plan for permitted changes.
Make Prepayment	Partner-initiated	Starts a prepayment from the Financial Plan.
Create PFR	Partner-initiated	Starts a Project Financial Report.
View	All roles	Read-only view of the record.

Dark icon = available **Grey icon** = not permitted by your role or the record status

What each Financial Plan column shows

Column	What it shows
Action	Row-level action icons for your role and the record status
Financial Plan	The Financial Plan number
Budget	The budget originating from COMPASS
FPN Status	Current stage of the negotiation process
Sub Status	Extra detail when a processing or business issue exists
Organization Name	Partner organisation linked to the agreement

Column	What it shows
Contract Number	Contract number of the partnership agreement
Accumulated Expenses	Expenses accumulated against the Financial Plan
PO Number	The related purchase order number
Negotiated Budget	Final budget after negotiation, not the original COMPASS budget
Modified By	User who last modified the Financial Plan
Modified Date	Date of the last modification

Print one record, or export the table

Print

One Financial Plan · PDF

1. Select one Financial Plan.
2. Select **Print** and wait for the PDF.
3. Open it from your browser's download history.

Once negotiation is complete, the final PDF is **saved automatically in the Aconex Document Register**. UNHCR shares it with the partner by transmittal.

Export

Whole table · Excel

Creates an Excel file with:

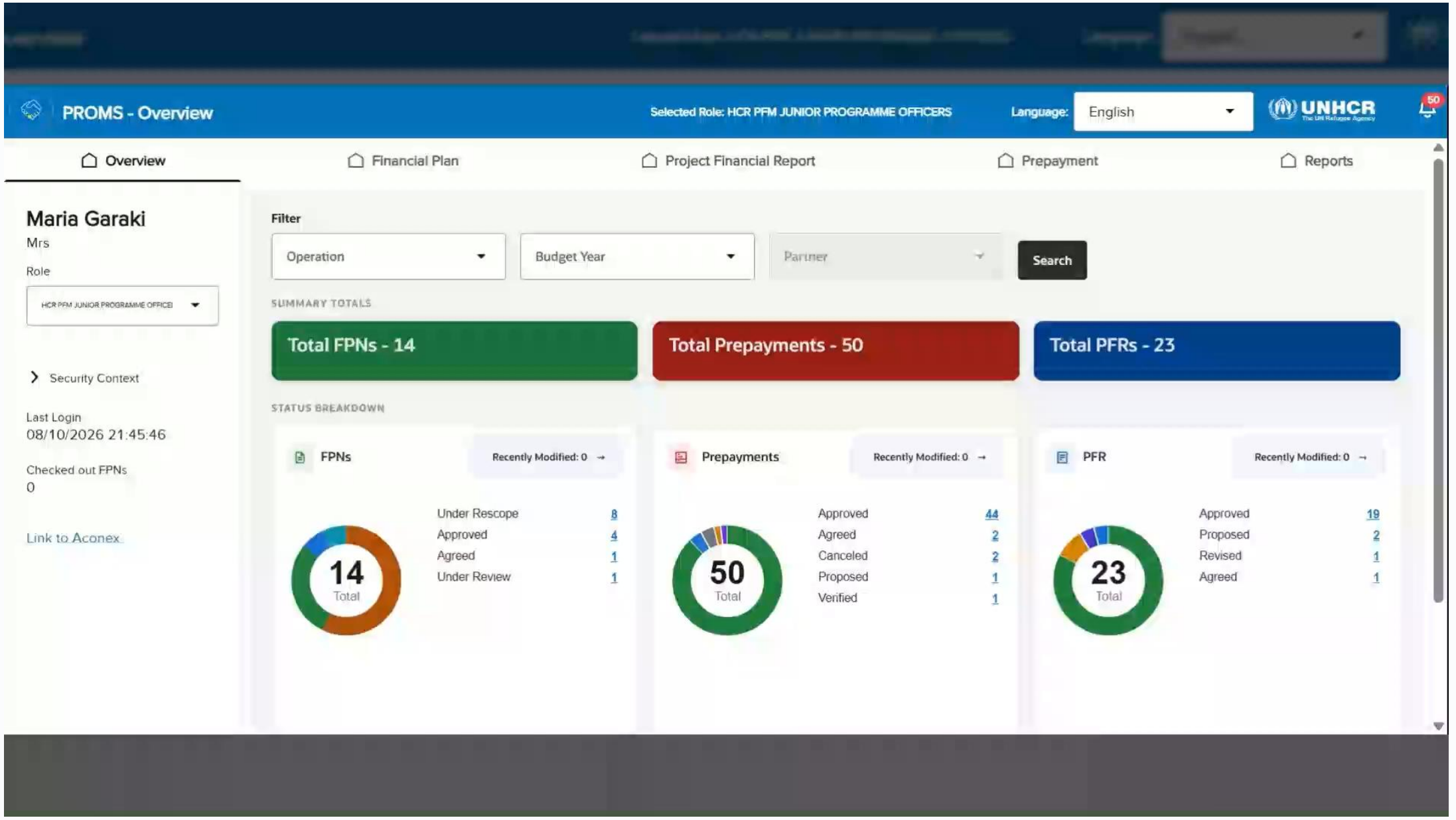
- the records **currently displayed** by your search, and
- the **columns selected through View**.

Unlike Print, Export applies to the result set, not to one record.

04

Project Financial Report search page

Find PFRs, check invoice status in Cloud ERP, print one report and export results.


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Prepayment
Reports
Maria Garaki
Mrs
Role
HCR PFM JUNIOR PROGRAMME OFFICEI
Security Context
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0
Link to Aconex
Filter
Operation
Budget Year
Partner
Search
SUMMARY TOTALS
Total FPNs - 14
Total Prepayments - 50
Total PFRs - 23
STATUS BREAKDOWN
FPNs
Recently Modified: 0
14
Total
Under Rescope 8
Approved 4
Agreed 1
Under Review 1
Prepayments
Recently Modified: 0
50
Total
Approved 44
Agreed 2
Canceled 2
Proposed 1
Verified 1
PFR
Recently Modified: 0
23
Total
Approved 19
Proposed 2
Revised 1
Agreed 1

Same logic as the Financial Plan page

Filters

The same four cascading filters: Budget Year activates Contract Number, Operation activates Partner.

Partners: Partner is fixed to your organisation.

View

Add or remove columns for review and export, including **PFR Type** where needed. Print and Export sit above the results.

Actions

- **Lock / Unlock:** UNHCR only
- **Edit:** when role and workflow status permit
- **View:** all users

Dark icons are available; grey icons are not. Pagination and rows-per-page work as on the Financial Plan page.

What each PFR column shows

Column	What it shows
Action	Lock or Unlock, Edit and View icons
Partner	Name of the partner organisation
PFR	The Project Financial Report number
Amount in LCY	Report amount in local currency
PFR Status	Current step of the PFR process
Invoice Number	Invoice number linked to the PFR

Column	What it shows
Inv. Status	Link to the current invoice status in Cloud ERP
Supplier Site Status	Explains a supplier-site or business error, when present
Modified By	User who last modified the PFR
Modified Date	Date of the last modification
PFR Type	Periodic or Final

Print a PFR or export the results

Print

One PFR · PDF

1. Select one PFR, then **Print**.
2. Save the generated PDF.
3. Open it from your browser's download history.

The final approved PFR is **uploaded automatically to the Aconex Document Register**. UNHCR shares it with the partner by transmittal.

Export

Whole table · Excel

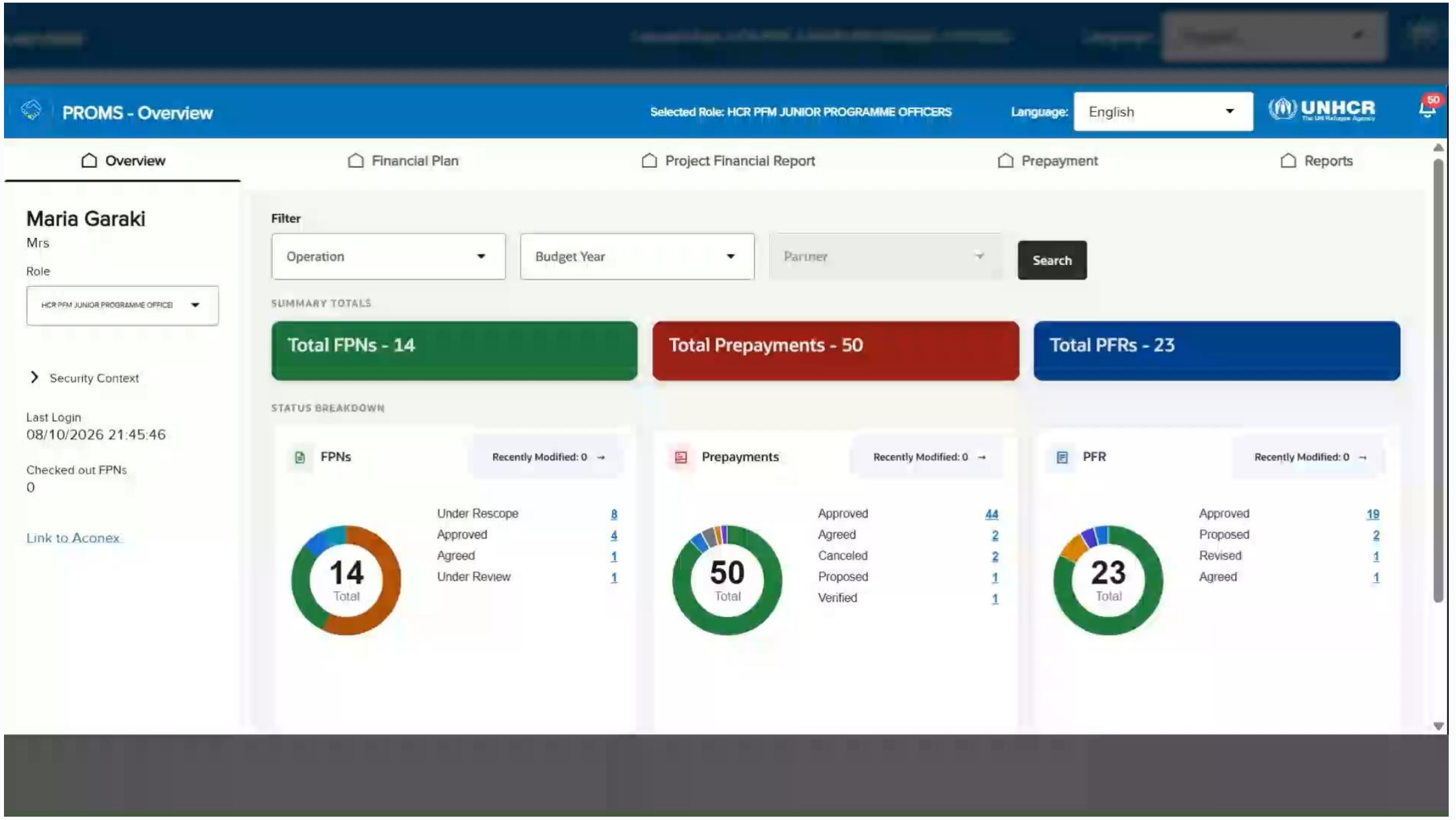
Creates an Excel file with the **filtered PFR results** and the **columns selected through View**.

A PFR PDF can also be downloaded during submission and review.

05

Prepayment search page

Find prepayments, review invoice details and export results, then compare all three search pages.


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Prepayment
Reports
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Prepayments
Recently Modified: 0
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Total
Approved 44
Agreed 2
Canceled 2
Proposed 1
Verified 1
PFR
Recently Modified: 0
23
Total
Approved 19
Proposed 2
Revised 1
Agreed 1

Prepayments: three actions, no Print

Edit

Active only when your role and the record status permit changes.

View

Read-only access to the prepayment record.

Invoice Details

Opens a **panel on the right** with the prepayment information, including available **Cloud ERP** details. Review, then close.

Same as before: four cascading filters, View for columns, Export, pagination and rows per page.

Different: no single-record Print on this page. Use Export.

What each Prepayment column shows

Column	What it shows
Action	Edit, View and Invoice Details controls
Invoice Number	Invoice number of the prepayment
Creation Date	Date the prepayment record was created
Prepayment Amount	Value of the prepayment
Prepayment Status	Current processing status
Financial Plan Number	The linked Financial Plan

Column	What it shows
Sub Status	Extra detail when a processing or business issue exists
Contract Number	Contract number of the partnership agreement
Modified By	User who last modified the prepayment
Modified Date	Date of the last modification
Accumulated Expenses	Accumulated expenses of the related Financial Plan

Questions?

FIRST CHECK

Your Selected Role

NEED HELP

PROMS focal point

LOCKED DOCUMENT

PROMS App Administrator