

Document management in ProMIS

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1. Introduction

In order to effectively use ProMIS to improve the way we capture, store and access our project, partner and calls for proposals information as an organisation, we must first ensure that consistent filing structures are in place.

This means that anyone working on a particular project, partner or call for proposals, will save their documents in the same folders on the project, partner or funding page regardless of which team or country they sit in.

In this document you will find guidance on the folder structure that can be found under the project, partner and funding entity, as well as a non-exhaustive list of the documents that should be filled under the folders Other documents might be relevant and could be uploaded. The annex provides and overview of mandatory agreements and contracts and where to file them.

2. Project folder structure

The following is standard Project folder structure and documents recommended for each folder. The Project documents in ProMIS integrate Country Office's documents with the Programme Delivery Team documents so as to foster joint work within CBM. Folders at Level 1 are standard and will be created automatically. Folders at Level 2 are recommended but not mandatory.

Level 1 (standard structure)	Level 2 (recommended)	Documents	
01 Project		Project Design Form	
Development		Cost/Finance/Budget Plan	
		Activity Schedule	
		Logframe	
		Project Risk Register (PRR)	

Contracts* Draft approvals for changes (Updated PPA), Partner project Contract/One-off grant contract, Addendum to Project Contract, Project local Government License, MoUs with Stakeholders, Service Agreements/Third Party Agreements/ contracts*, Selection Process Documentation (Audit) and TORs, Selection and Process Documentation / Tender Documents (Evaluation), Selection and Process Documentation / Tender Documents (Third Parties, studies, consultancies), Construction Documentations / Tender and Bids, Sub-Partner Agreement / Subcontracting (if applicable) 03 Implementation & Monitoring 01 Finance Request of Funds, Acknowledgement of Receipt of Funds (AoR), IYAPs and Costplan adjustments, Travel Costs, LCDF Monitoring Tool (Regional Delivery Team), Voucher scans, Project Completion Report (PCR), Semi-annual Narrative Report (SNR), Standard indicators data collection tool, Annual Narrative Report (ANR), Quarterly financial Report 03 Project Visits and Meeting Minutes 03 Project Visits Agendas Kick off Documents O4 Assessment and Meeting TORs of Meetings / Travels Agendas Kick off Documents 04 Publications 05 Correspondence 05 Correspondence 06 Publications Publications From partner on project Jour Fixe between Project stakeholders CBM	02 Approvals and		Draft Project & Programme Approval (PPA),			
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	Meeting Minutes for agreements on project		
	content		

^{*} The partner project contract must be uploaded into ProMIS. However, all other project related contracts such as service, consultancy, funding and procurement contracts, must be uploaded to the contract database. These contracts could be uploaded to ProMIS but this is not mandatory.

3. Partner folder structure

The following is standard Partner folder structure and documents recommended for each folder. Folders at Level 1 are standard and will be created automatically.

Level 1 (standards structure)	Documents		
01. Partner Identification	Partner registration documents		
	List of board members		
02 Partner Assessment and Review	Partner Assessment TOR, Partner Information Letter		
	Partner Assessment reports		
03 Partnership Approval	Partnership Approval Request		
	Partnership Framework Memorandum		
04 Partnership monitoring and reporting	Updated Action Plan from Partner Assessment Tool		
	Partner Financial and Activity reports		
05 Partner Compliance	Risk Assessment Matrix		
06 Partnership Exit	Partnership Exit Request		
	Termination Letter		

4. Funding folder structure

The following is standard Funding folder structure and documents recommended for each folder. Folders at Level 1 and level 2 are standard and will be created automatically.

Level 1	Level 2	Documents		
01	Decision Documents	Checklist Go / No-Go decision		
Identification	Check-in Meeting	Agenda, Minutes		
02 Concept	01 Donor Documents	Guidelines, Templates etc.		
Note Phase	02 Budget	Budget docs		
	03 Technical CN	Technical CN drafts		
	04 Compliance Docs Annual Statement, Teaming Agreements, Registrations etc.			
	05 Correspondence with Stakeholders	Partner, Local Agencies, Consultants		
	06 Schedule	Raci Matrix, detailed Workplan		
	07 Final CN	Submitted CN documents		
03 Full Proposal	01 Donor Documents	Guidelines, Templates etc.		
Phase	02 Budget	Budget docs		
	03 Technical FP	Technical FP drafts, incl add.		
		documents		
	04 Compliance Docs	Annual Statement, Teaming		
		Agreements, Registrations etc.		

	05 Correspondence with	Partner, Local Agencies, Consultants
	Stakeholders	
	06 Studies	FS Study, Baselines,
		Needs Assessments
	07 Schedule	Raci Matrix, detailed Workplan
	08 Final Proposal	Submitted Proposal
04 Negotiation	01 Budget	Budget docs
Phase	02 Technical CN	Technical FP drafts, incl add.
		documents
	03 Donor Communication	Correspondence with donor
	04 FINAL	Final approved Proposal & Budget
		incl. Logframe
05 Contracting*	Contract documents*	Donor contract*
		Service contracts for consultancy*
		Amendments to the donor contract*
06 Reporting		Annual Narrative reports to donor
Implementation		Annual Financial reports to donor
		Project visit reports donor version
	Requests to donor	Payment request
		Change requests
		Donor income bank statements
	Donor Communication	Correspondence with donor
07 Conclusion	Reporting	Final narrative report to donor
of funding	_	Final financial report to donor

^{*} The partner project contract must be uploaded into ProMIS. However, all other project related contracts such as service, consultancy, funding and procurement contracts, must be uploaded to the contract database. These contracts could be uploaded to ProMIS but this is not mandatory



Annex: Overview of contracts and agreements

The following is a summary overview of contracts and agreements related to our programme work and where they can be found.

	SharePoint	ProMIS entitities				
	Contract database	Stakeholder partner	Stakeholder donor	Project entity	Programme entity	Funding entity
	(Bensheim &					
	Initiative teams)					
Mandatory	Funding contract, including amendments, extension, addendums, auxiliar conditions, etc Service, consultancy, procurement, and any other contracts related to a project	MoU or collaboration agreements signed with the partner	MoU or teaming agreements signed with (potential) donors	Partner project contract Amendments to partner project contract	Partner project contract Amendments to partner project contract	
	(except partner project contract)					
Nice to have (could be uploaded but not mandatory						Funding contract