

CBM Connect and ProMIS

‘CBM Connect’ is an information sharing platform that hosts contents of general relevance for all CBM entities. It enables staff members to connect with each other, to engage with the global activities of CBM, and the overall cause of CBM.

ProMIS (project management information system) is a cloud-based project, partner information and document management system which is used by CBM for its programme work.

Which documents should be saved where?

CBM Connect	ProMIS	
Document Centre	Documents tab library	Resource library
<p>What’s this? The document centre on CBM Connect houses fundamental documents of overarching organisational relevance, incl. “Organisation-wide documents” (see point 1 below), and further “Intranet documents” (points 2-8) which provide high-level information of strategic relevance from all divisions (non-operational).</p>	<p>What’s this? The documents tab library is available for each project and partner. Project/programme officers/managers need to file all project and partner documentation here. The ProMIS document tab library replaces project /programme portal library in old SharePoint site.</p>	<p>What’s this? One-stop source for CBM standard process documents that project/programme officers/managers or finance officers/managers at CO, RO or Initiative need to work with during the entire iPCM cycle including Partnership. The ProMIS resource library replaces the SharePoint Programme management resource site.</p>
<p>Key considerations: The CBM Connect document centre is the central place on the intranet where qualified documents are stored. Documents can be linked up to different pages on CBM Connect, or Sharepoint Online.</p>	<p>Key considerations: The document tab library for partner and projects has the same first level folder structure. Documents are tagged from a list of document types.</p>	<p>Key considerations: The resource library structure combines ProMIS Entities and Project cycle phases. All files tagged from a list of 6 main document types (QPRGs, Tools/Templates, Guidance Note, Good Practice, Policy/Principle and Training Material/Presentation)</p>

Files are tagged from pre-defined lists for ‘document types’, ‘topics’ and ‘locations’.		and various specific topics as shared by the document owners.
1. Organisation-wide documents: <ul style="list-style-type: none"> • Vision, Mission, Values • Governance and Strategy • Policy documents from all areas of work 	Stakeholder Partner <ul style="list-style-type: none"> • Partner identification • Partner assessment & review • Partnership approval • Partnership monitoring & reporting • Partner compliance • Partnership exit Stakeholder Donors <ul style="list-style-type: none"> • To be defined by resource mobilisation teams 	01 Partner <ul style="list-style-type: none"> • Partner Assessment and Approval • Support Monitoring and Review • Partnership Exit • QPRG and General Documents
2. Corporate reports <ul style="list-style-type: none"> • CBM Annual Report • CBM Report of Activities 	Project <ul style="list-style-type: none"> • Project development • Approvals & contracts • Implementation & monitoring • Assessments & reviews Programme <ul style="list-style-type: none"> • Approvals (if applicable) 	02 Projects and Programmes <ul style="list-style-type: none"> • Development and Approval • Implementation and Monitoring • Assessment and Review • Closure
3. Entity plans <ul style="list-style-type: none"> • Initiative plans • Country plans and Regional plans • Division plans • International integrated communication strategy 	Stakeholder Donors <ul style="list-style-type: none"> • To be defined by resource mobilisation teams Funding <ul style="list-style-type: none"> • Identification • Proposal development • Contracting • Implementation • Conclusion of funding 	03 Donor & Funding <ul style="list-style-type: none"> • BMZ • Other Donors • Fundraising Requirements
4. Entity report <ul style="list-style-type: none"> • CBID Annual Report • IEH Annual Report • AFES Annual Report 	Geography <ul style="list-style-type: none"> • To be defined by COs 	04 Geography <ul style="list-style-type: none"> • Country Planning • Country Office Capacity Assessment

5. CBM resource papers <ul style="list-style-type: none"> • Global facts & figures • PowerPoint about CBM 	CBM Teams <ul style="list-style-type: none"> • Each team to agree on folder structure Documents not relevant to all projects but relevant to teams that work with partners/projects 	General <ul style="list-style-type: none"> • Only one “General” folder with no sub-folders for cross-cutting resources
6. Background information e.g. <ul style="list-style-type: none"> • CBM’s response to the crisis in Ukraine 		
7. Team presentation e.g. <ul style="list-style-type: none"> • CBM Initiative presentation • ‘IEH Initiative explained’ • Introduction to ‘Brand management’ 		
8. Webinar materials <ul style="list-style-type: none"> • Documentation of the ‘CBM webinar’ series 		