eTools Access Management Portal – AMP

User Guide

September 2023

Access Management Portal (AMP)

Purpose: To give access to non-UNICEF users (CSO Partners, Third Party Monitors, Financial Assurance Firms)
System: It is recommended that all users use google chrome when accessing the module https://etools.unicef.org/amp

Who: All users

When: To add, remove, change role of users for ePD, PRP, FAM, FM/TPM

Why: To ensure that external users have adequate access of different modules in eTools.

Introduction: The Access Management is eTools module for the configuration and settings of all users who are not affiliated with UNICEF. This module is integrated with Partnership Management, Financial Assurance, Field Monitoring, and the Partner Reporting Portal.

- AMP offers a dynamic approach to handling each user, allowing for the creation of user groups within the specific countries and related organizations.
- Furthermore, this module permits the same user to access multiple partners across various workspaces, which is particularly useful for INGOs with headquarters staff. Additionally, it accommodates scenarios where a user may need to be added to other partners, especially when a partner staff member joins a new organization with the same email address.
- The Access Management Portal brings significant enhancements to organizations that have multiple users assigned to different countries within the same entity.

UNICEF Users Information:

- **UNICEF User** is a staff member or individual consultant with UNICEF issued valid email ID who can only view capability to the AMP Module; cannot add or edit users to the organization
- **Partnership Manager** is a UNICEF staff member who has the ability to add agreements and PDs/SPDs, add amendments, import partners: can add users for Partners (CSO) only and can also update the Partner user roles.
- **PME** is a UNICEF staff member or individual consultant who has all the functionalities of a FM and also manages "sites" in FM. This role can also add standard disaggregation points for reporting. The role can Add new Third-Party Monitoring vendors, the related TPM new users and update user roles.
- **UNICEF Audit Focal Point** is a UNICEF staff member or individual consultant who can create and finalize an engagement with the Financial Assurance Module. The user can also assign UNICEF staff spot check engagements in the Financial Assurance Module; are the only ones who can add users to Audit Firms in AMP, and update user roles.
- **PRC Secretary** is UNICEF staff member who receives the partnership for reviews, assign PRC members and PRC chair for partnership. This individual can also update the partnership start and end dates when PD is in signature stage to reflect the accurate information.

- **UNICEF Reviewer** role preferably assigned to UNICEF user who has no other role (partnership management, Audit, PME, etc.). In AMP the reviewer does not add users however reviewer can approve or decline the non-UNICEF user into eTools. The reviewer, checks the provided information is accurate e.g. organization, country, email address and title. The reviewer's role is very important to avoid any junk, wrong or inaccurate information and control the unauthorized access to the system. Any new user added by UNICEF or Partner staff in AMP must require reviewer approval. These approvals are not requiredf for the email already approved any other country or partner organization.

UNICEF staff contacts GSSC through service gateway to acquire role(s) in respective country. UNICEF user may request to access other countries with same or different roles while on surge mission, special assignment or regional staff member.

Access Management for ePD and PRP

All users affiliated with CSOs are managed through the Access Management Portal at https://etools.unicef.org/amp. This portal is accessible to both CSO members and UNICEF staff. While the following roles are primarily designed for PRP, any CSO user with any role can be designated as authorized officer or partner focal person in ePD. Once added, all users have the ability to access ePD, review partnership details, and edit partner focal person information.

- **The IP Authorized Officer** role is granted by UNICEF to those individuals designated as Authorized Officers within a civil society organization, as specified in the signed agreements with UNICEF. Typically, this role is held by senior staff member(s) within the partner organization. IP Authorized Officers have the authority to sign programme documents, create and modify all active reports within PRP, submit all reports, and manage and adjust user roles within PRP.
  IP Authorized Officer role only allocated by UNICEF Focal Person in eTools during Agreement development or agreement amendment.

- T**he IP Admin** role is exclusively granted by UNICEF personnel to IP staff members who possess the capability to include new users within the Organization, including those assigned roles such as IP Authorized Officer, IP Editor, and IP Viewer within the Partner Reporting Portal. Additionally, IP Admins have the authority to modify the roles of existing users. UNICEF Reviewers are required to approve new users added by IP Admin.

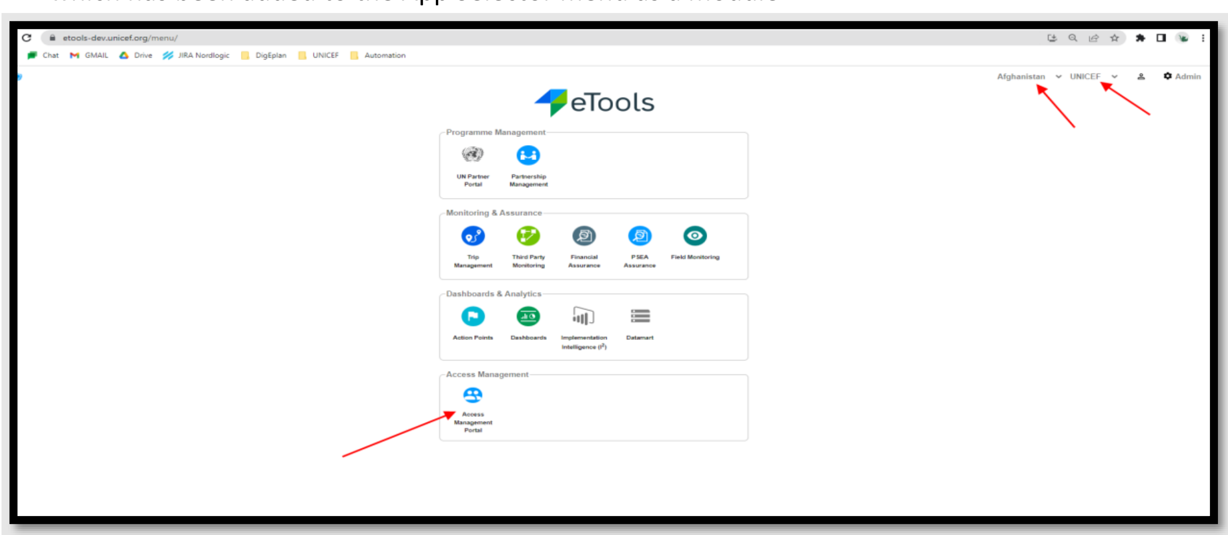
- **The IP Editor** role is typically designated by either the IP Authorized Officer, IP Administrators, or UNICEF staff to IP users responsible for inputting reporting data into the Partner Reporting Portal. IP Editors also have the capability to submit reports on behalf of the IP Authorized Officer.

- **The IP Viewer role i**s assigned by either the IP Authorized Officer, IP Administrators, or UNICEF staff to users who will not be entering reporting data and are limited to viewing information within the Partner Reporting Portal.

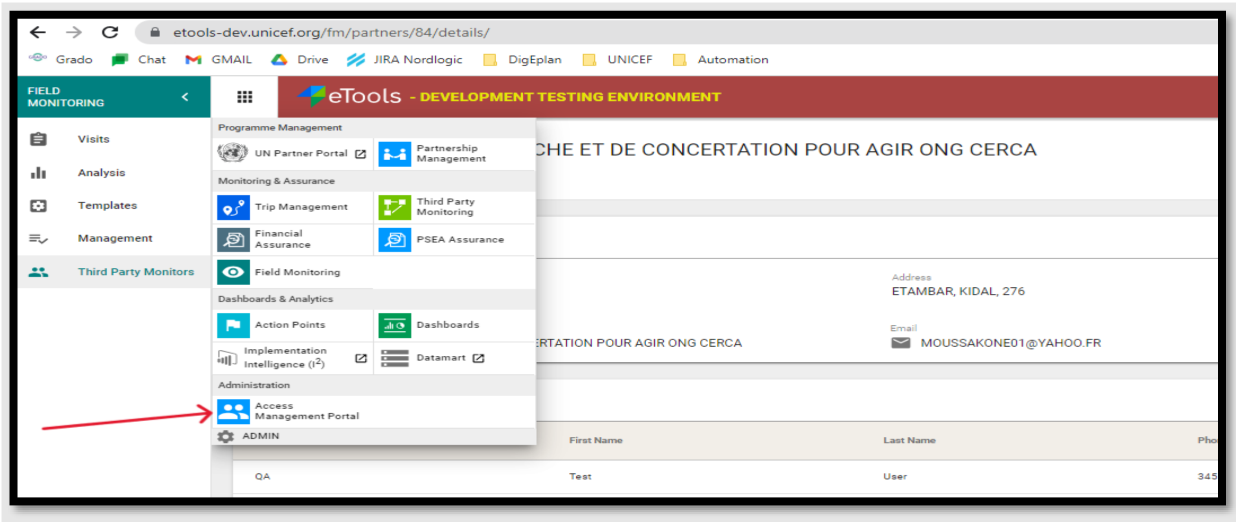
Important:
It is strongly advised to include all subordinate roles for IP staff as follows:
When adding an IP Authorized Officer, also include the Editor, Viewer, and Admin roles.
When adding an IP Editor, also include the IP Viewer role.
When adding an IP Viewer, do not add any other roles.

<u>Module functionality:</u>

1. **Access**: On the eTools landing page, in the Application selector, click the Access Management Portal which has been added to the App Selector menu as a module

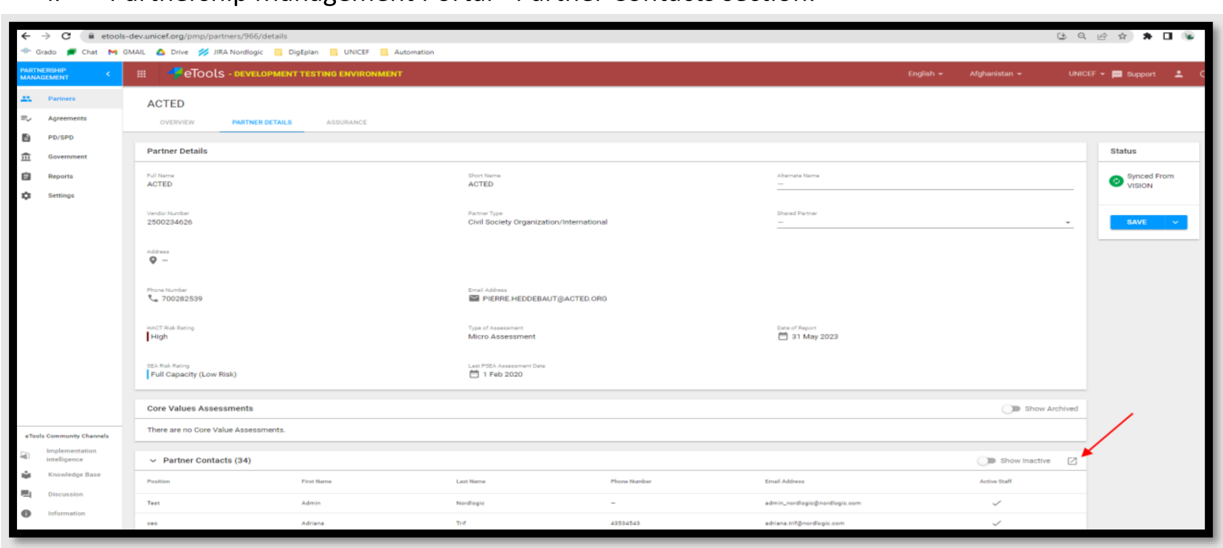


The Access Management Portal can also be selected from through the app selector below

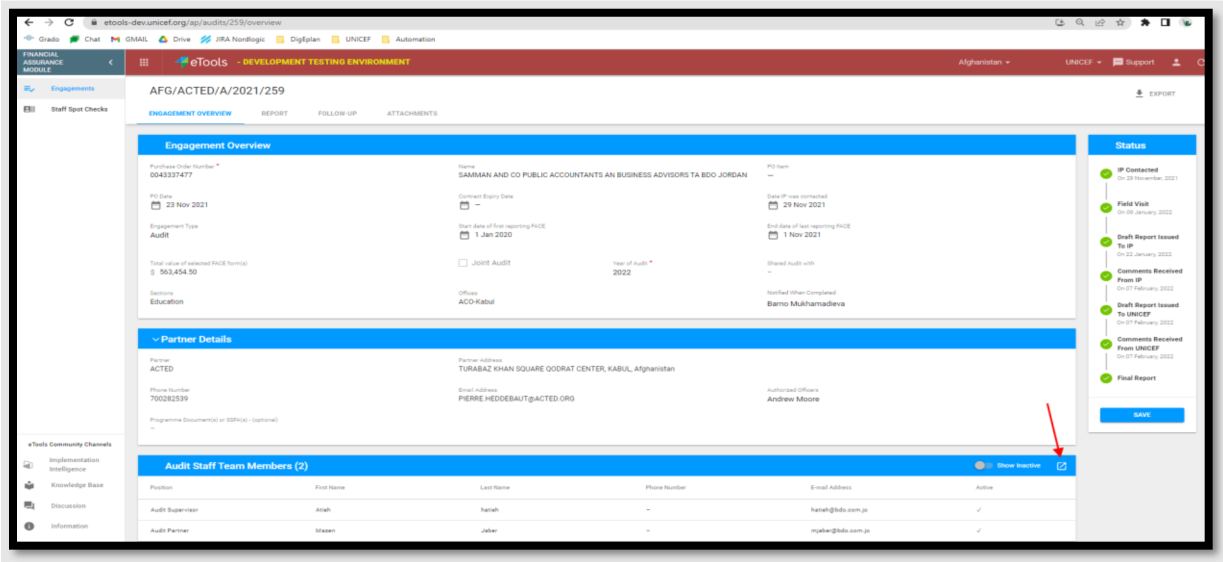


2. **Access to the module:** the Access Management Module can also be accessed from all the modules below:
   i. Partnership Management Portal
   ii. Financial Assurance Module
   iii. Field Monitoring
   iv. Partner Reporting Portal - IP Reporting

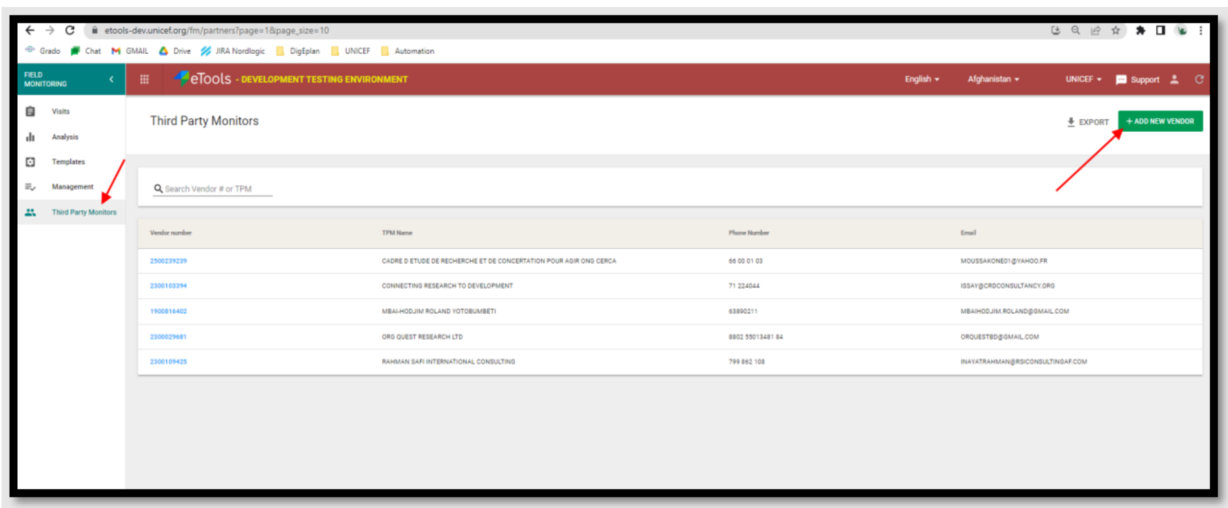
   i. Partnership Management Portal - Partner Contacts section:

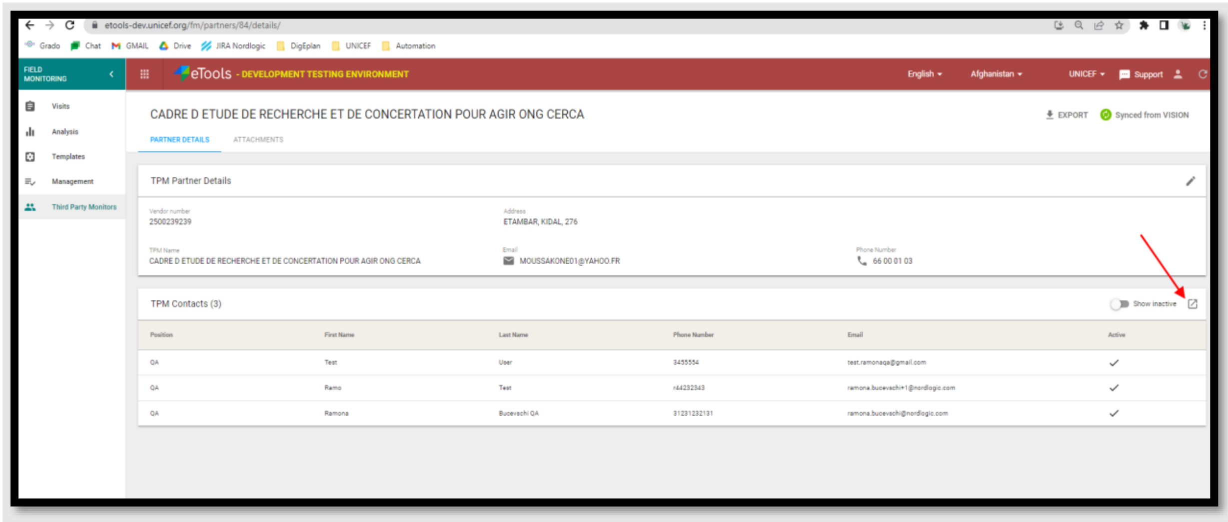


   ii. Financial Assurance Module - Audit Staff Team Members section in Engagements details

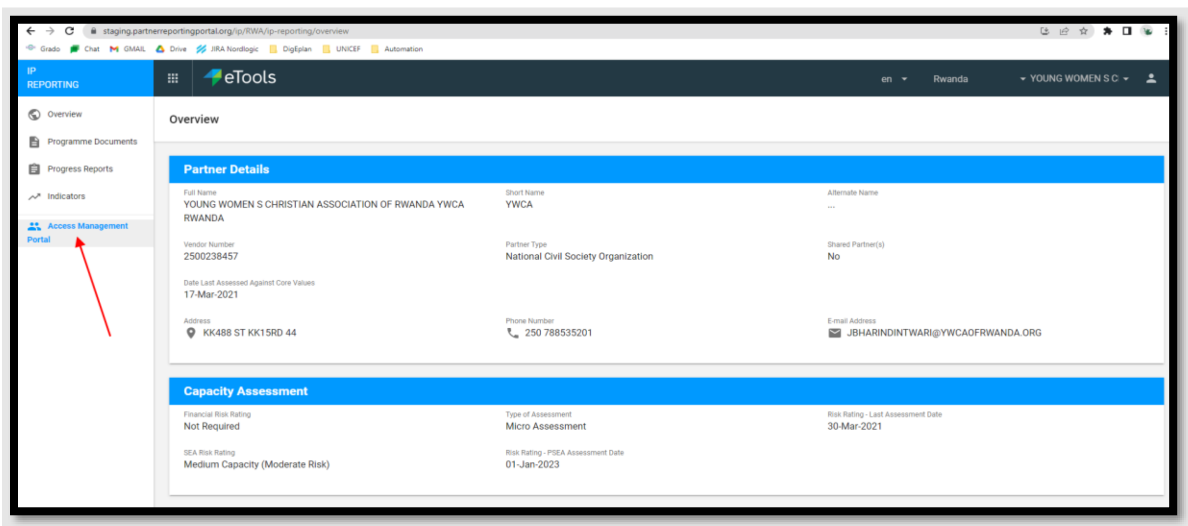


iii. Field Monitoring - Third Party Monitors List was moved from Third Party Monitoring app in Field Monitoring and AMP was linked in TPM Partner details





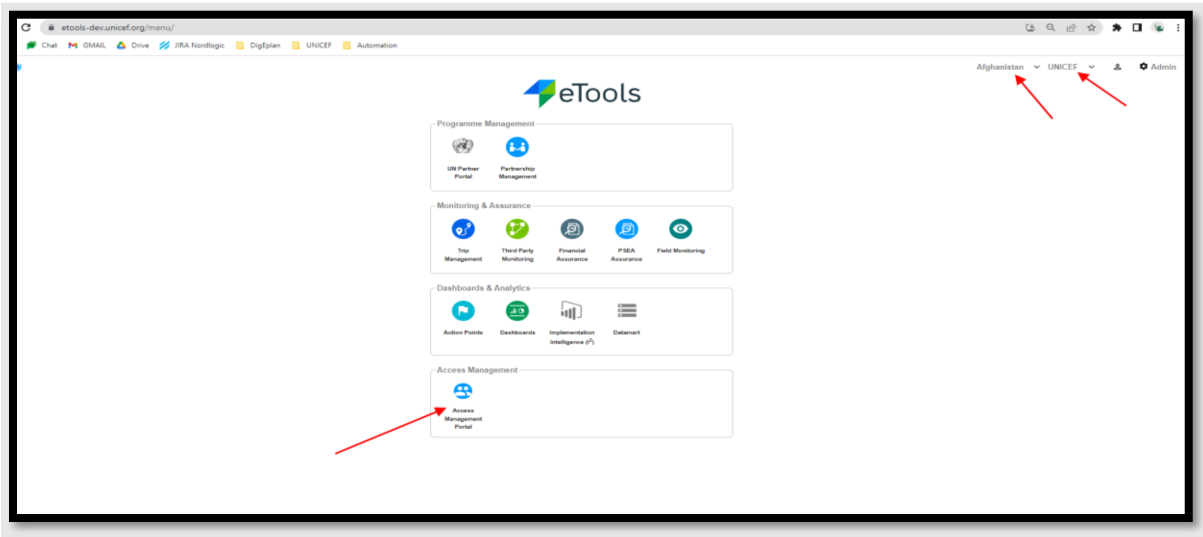
iv. Partner Reporting Portal - IP Reporting - Access Management Portal



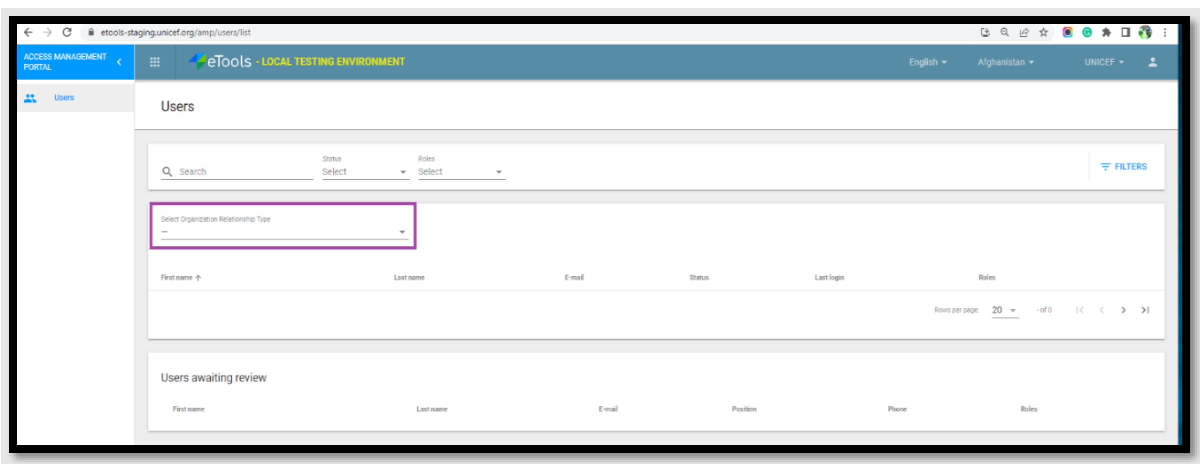
3. Adding users' roles:

To add a user role to a partner organisation, identify the partner and user role required. Refer to the section on user roles to determine the relevant required role: IP Authorized Officer, IP Admin, IP Editor, IP Viewer

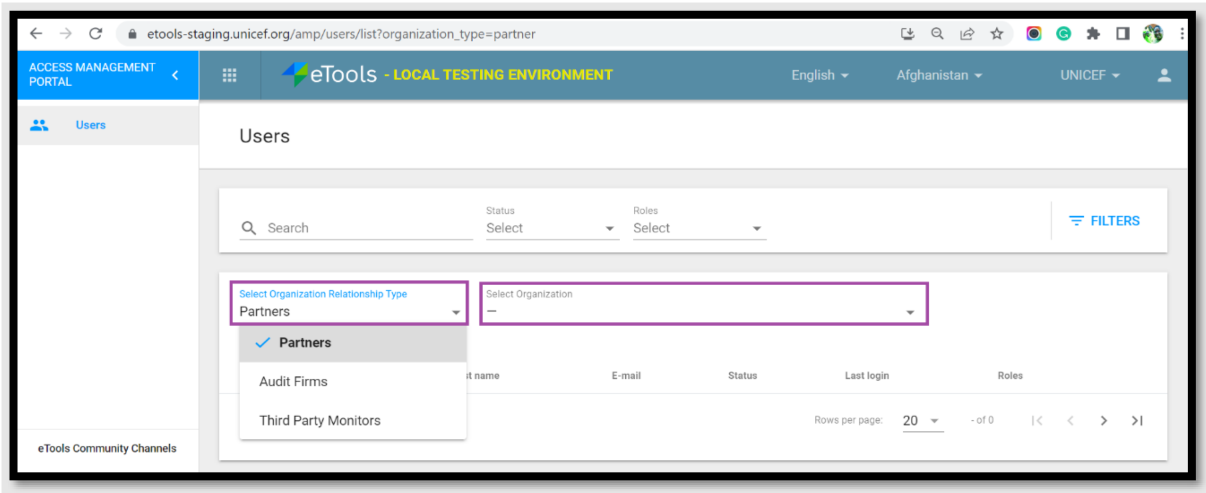
Step 1: In the Application selector, click the Access Management Portal



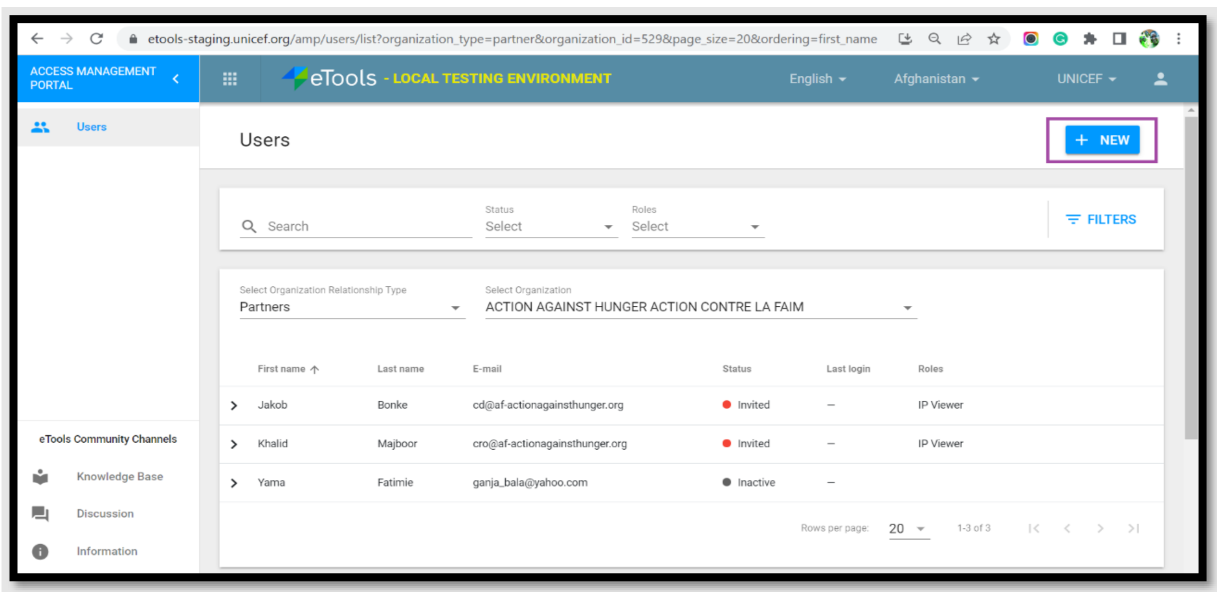
Step 2: In the users' section, under select organisations relationship type, select the relevant partner type: Partners, Audit Firms and Third-Party Monitors



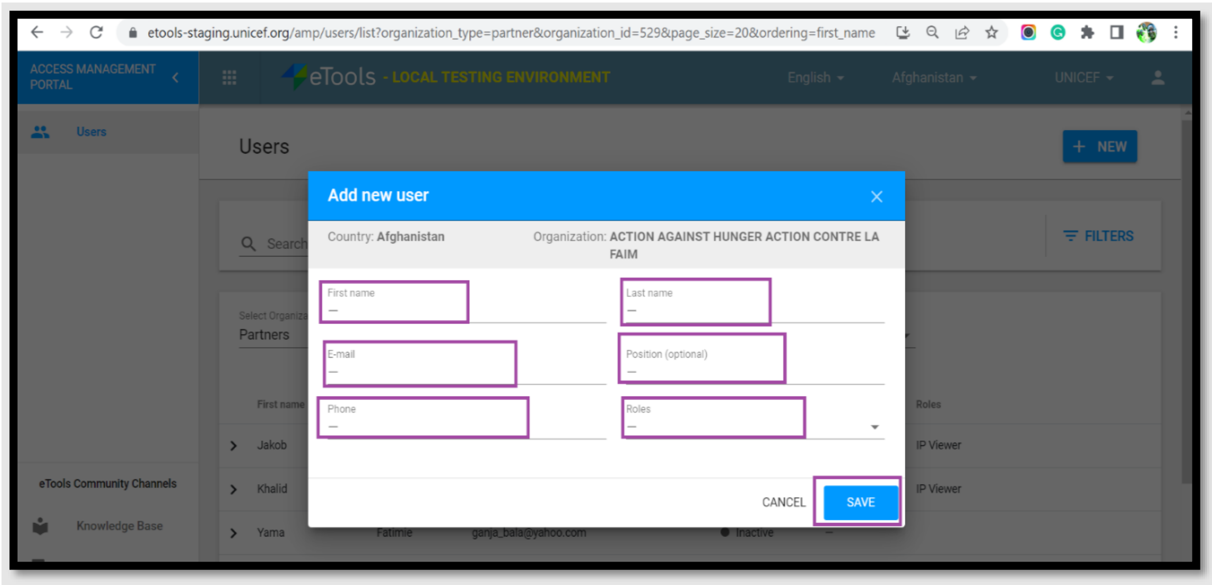
Step 3: Select the organisations where new users need to be added.



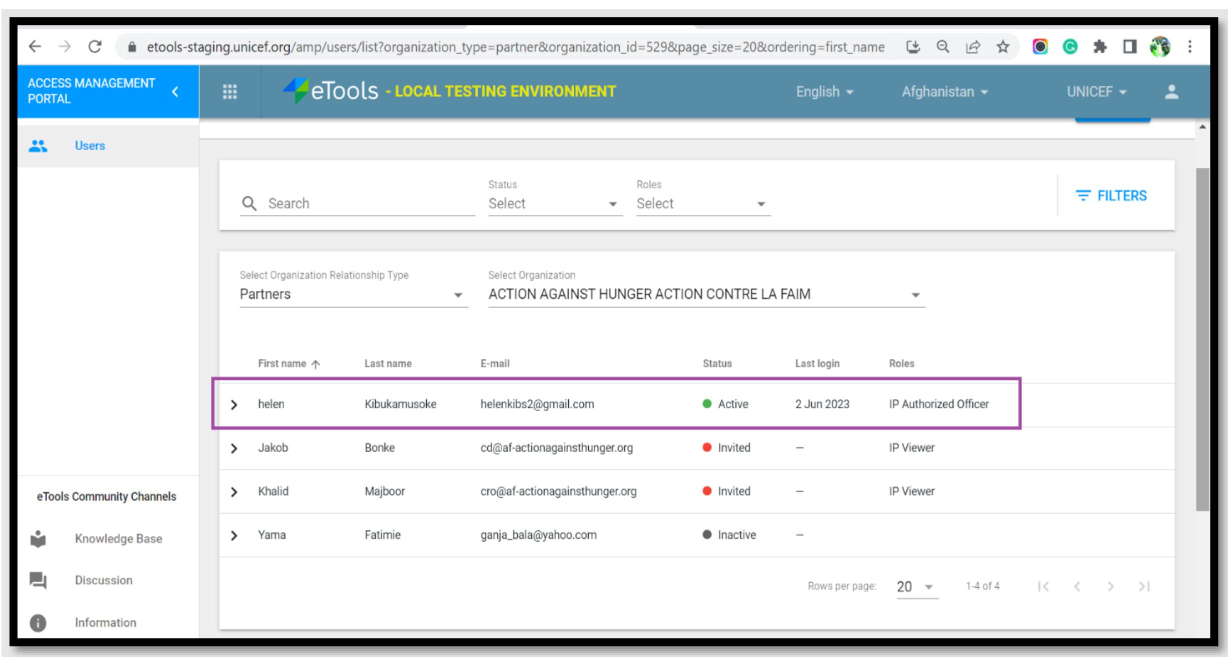
Step 4: Click the Add new icon



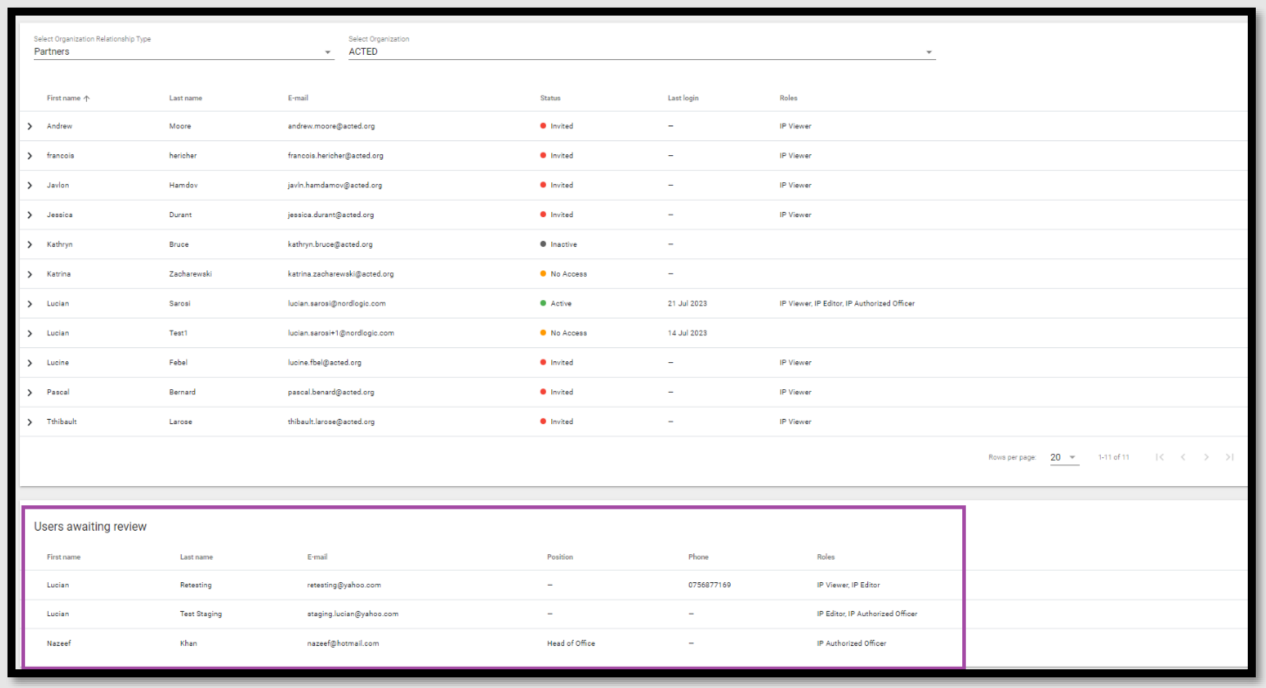
Step 5: Fill in the relevant information including First name, last name, email, phone, roles and save.



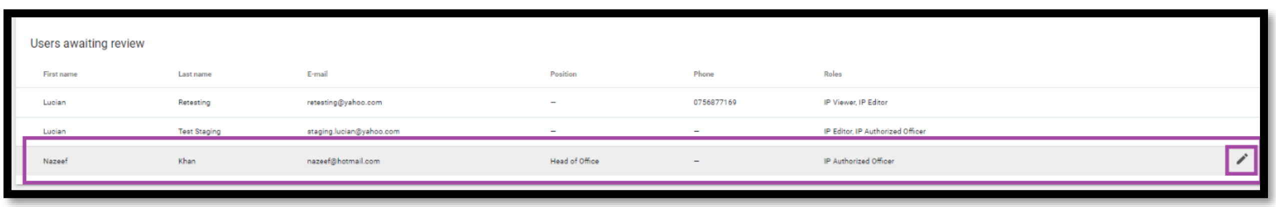
Step 6: The saved entry can be reviewed as part of the partner contact list which displays the First Name, Last Name, E-mail, Status, Last Login and Roles; on details expand the Position and Phone number are displayed.



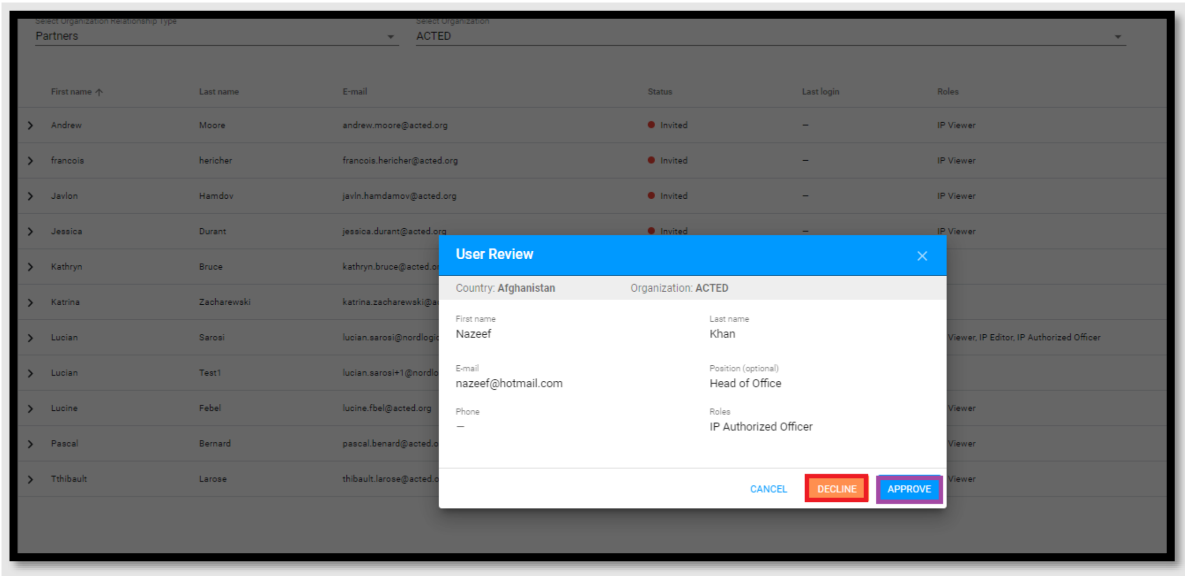
Step 7: The focal point will add details for the new partner focal point details in AMP and notify the reviewer of the addition. The new partner information will be available under the users awaiting review section.



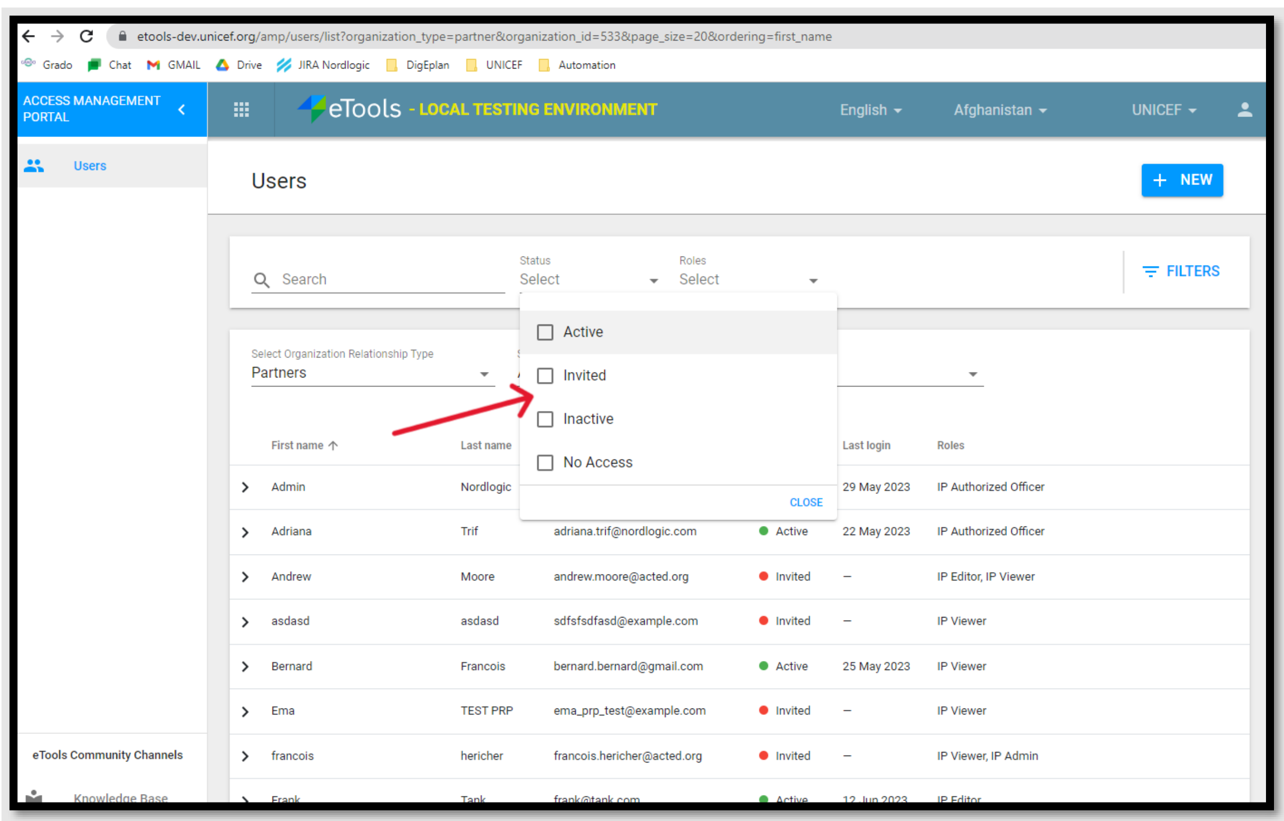
Step 8: The reviewer will hover over the partner whose details they wish to verify and click the edit icon



Step 9: In the pop-up window, review the partner details checking that the correct information e.g. Organization, Country, email address and title are correct. Click **approve** is the details are correct accept the addition of the partner information or **decline** to reject it.

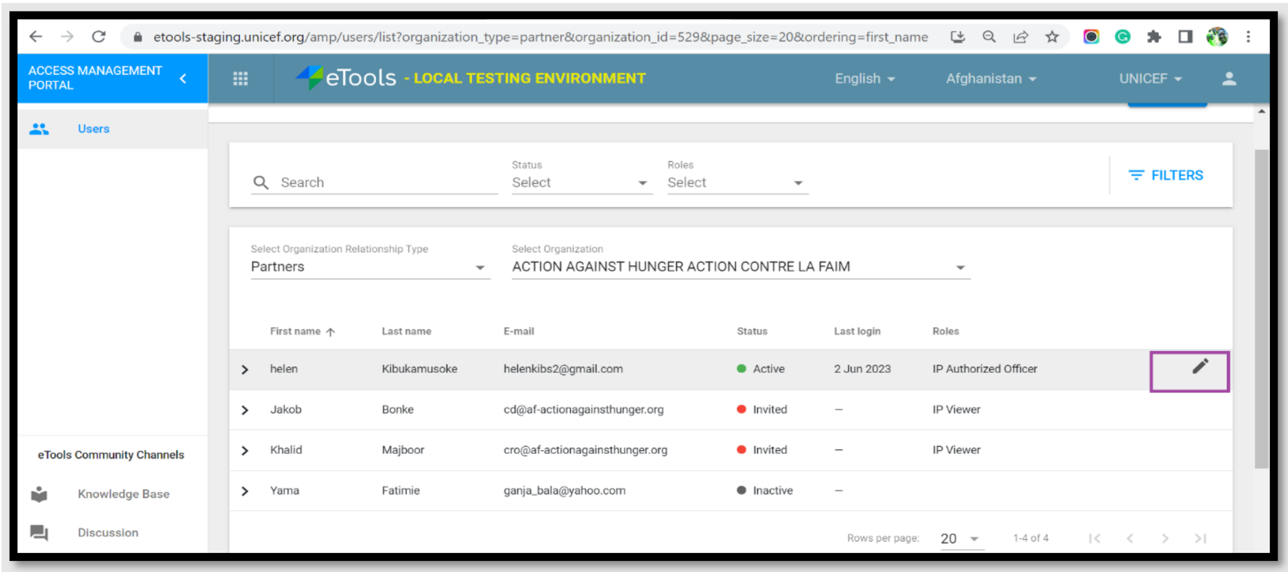


Step 10: When a new user is added to an Organization the status will be invited; the status changes to active when the user logs into the system.

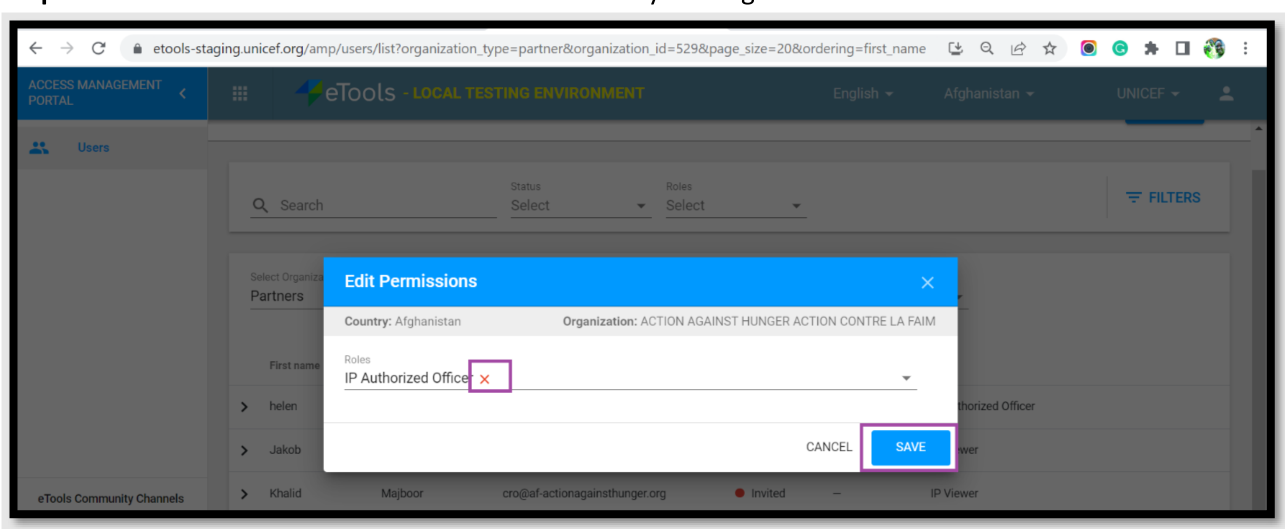


Step 11: To deactivate a user, hover over the user you wish to deactivate and click the edit icon.

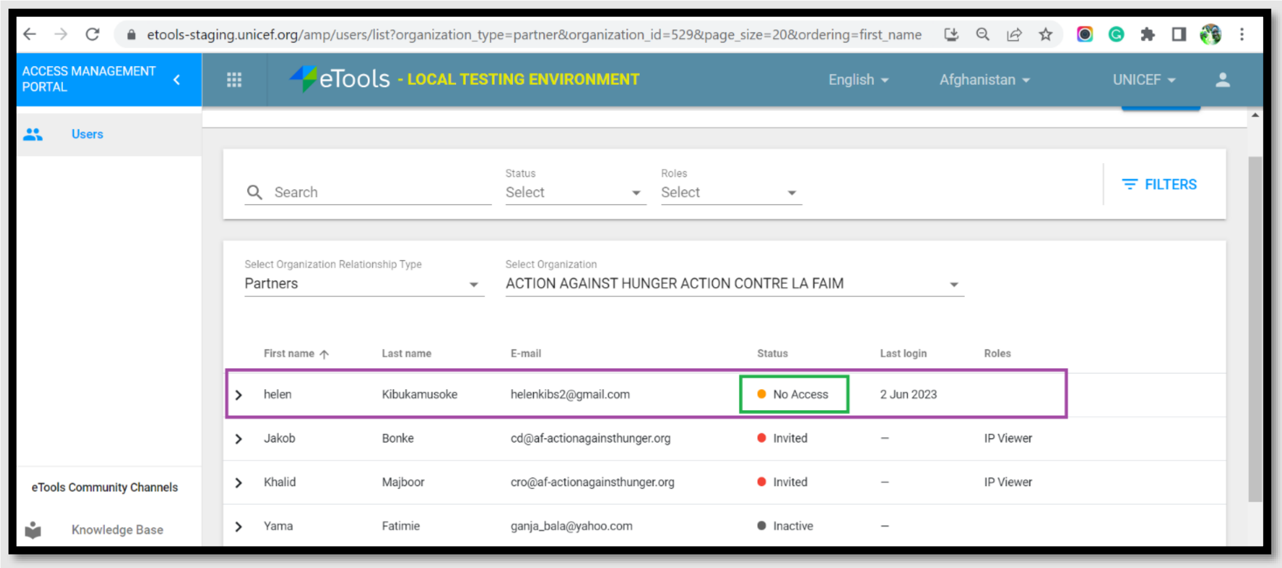
Knowledge: Currently we can update only the user Roles (Permissions) for all Organization Relationship Types (you cannot update name, email, position and the phone number):



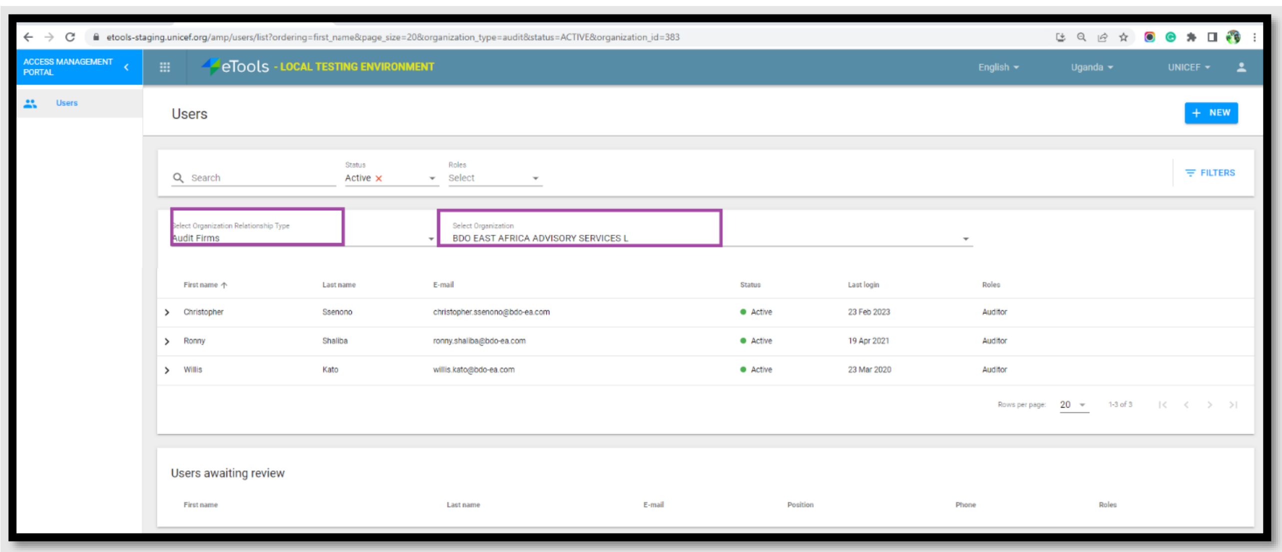
Step 12: Remove all the roles from the related email by clicking the **x** and click save.



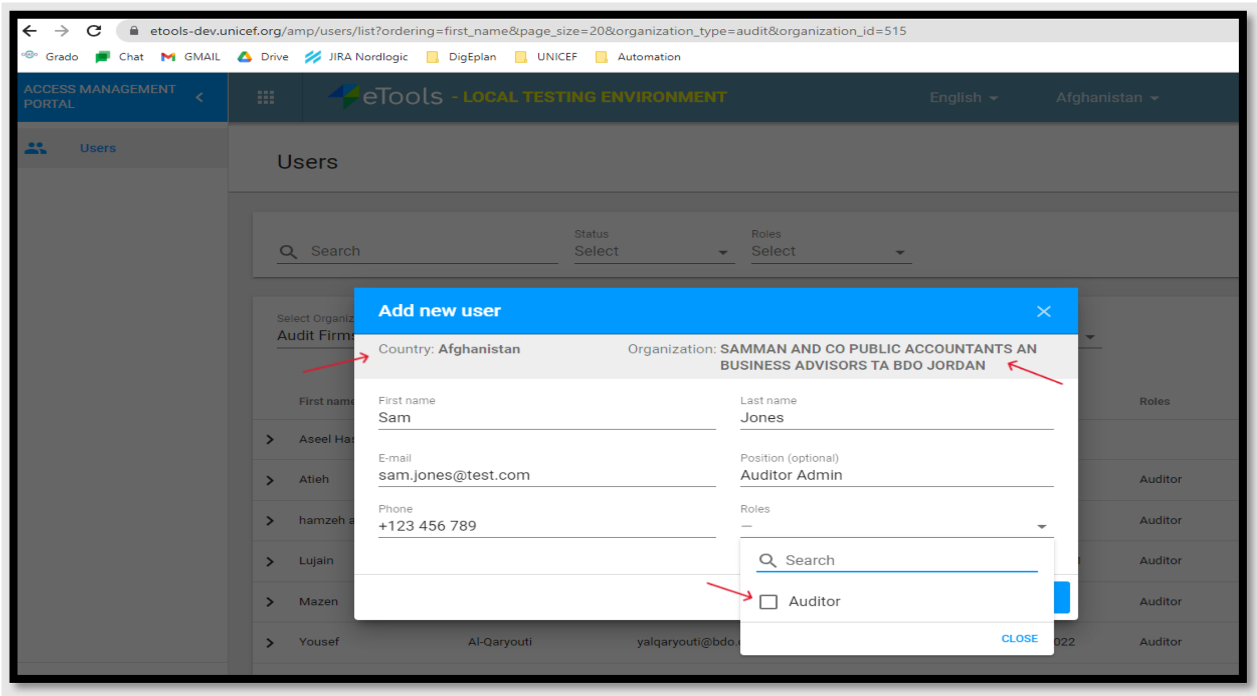
Step 13: The profile will be updated with the status “No Access”



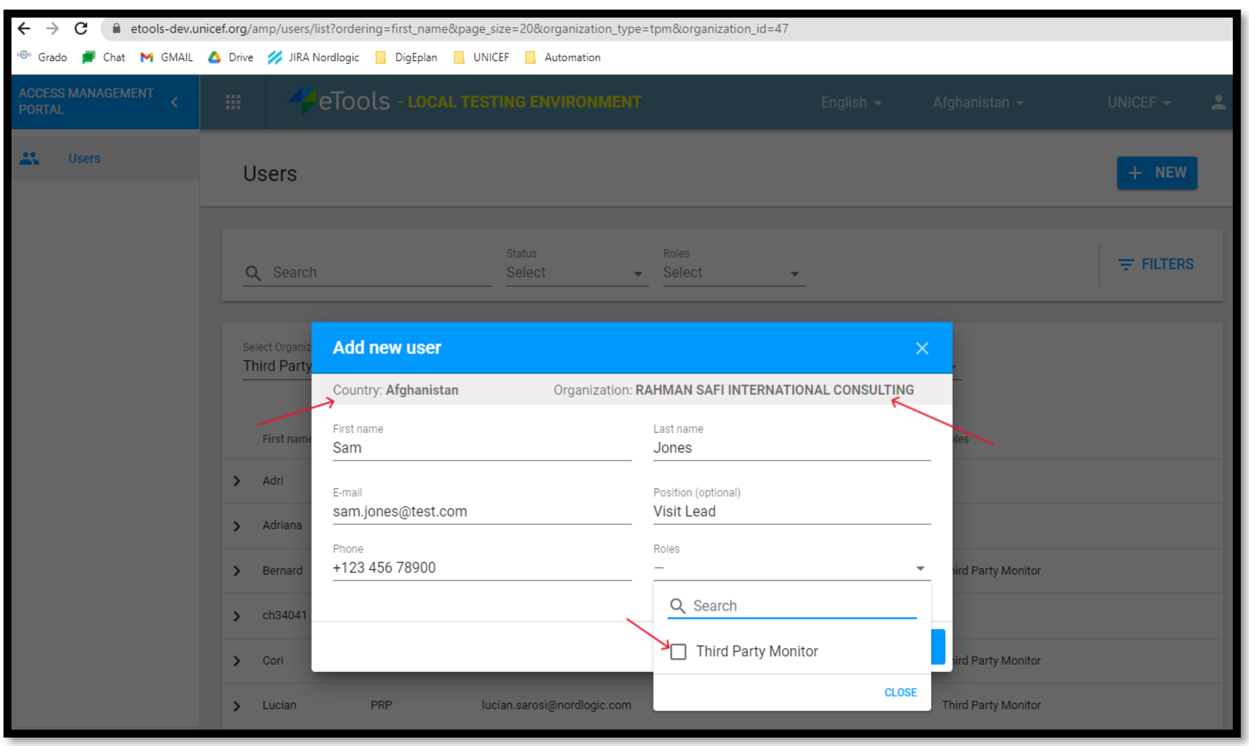
Step 14: To add different roles to an already existing contact with the same contact/email address, select the relevant organisations type: Partner, Third Party Monitor, Audit Firm.



Step 14.1: To add Audit firms' members and roles:

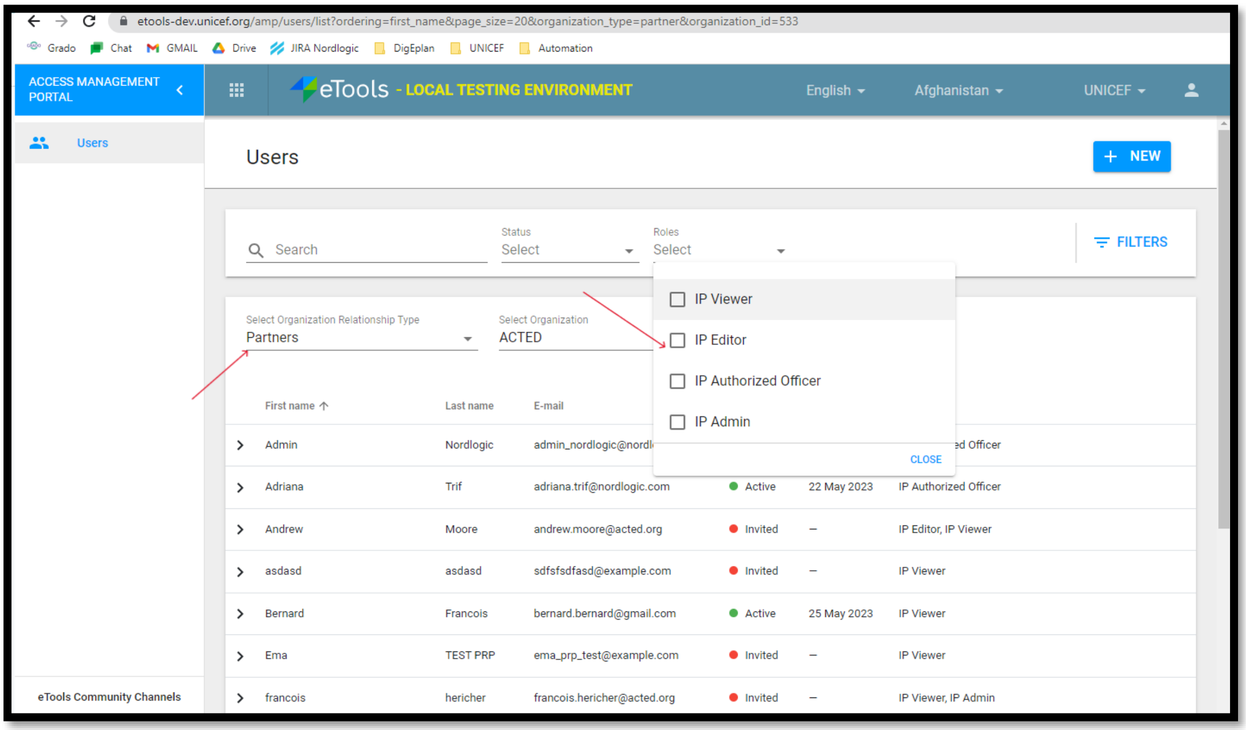


Step 14.2: To add Third Party Monitors firm members and roles:

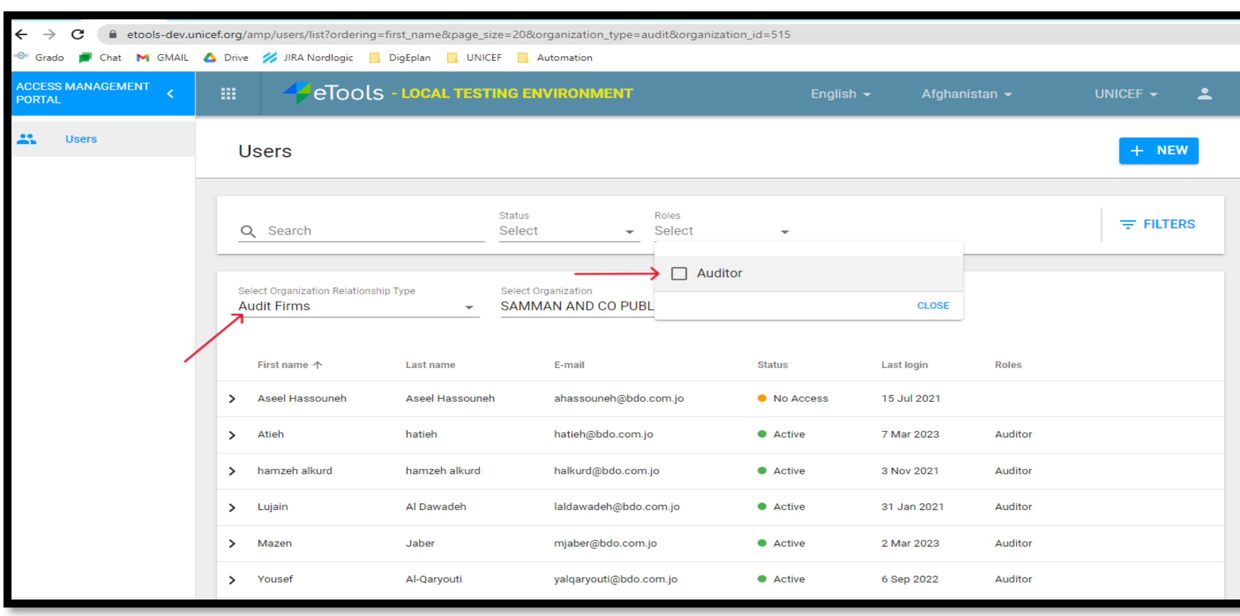


Step 15: To view the list of all existing partners by partner type, navigate to the Access management module and select the organization relationship type.

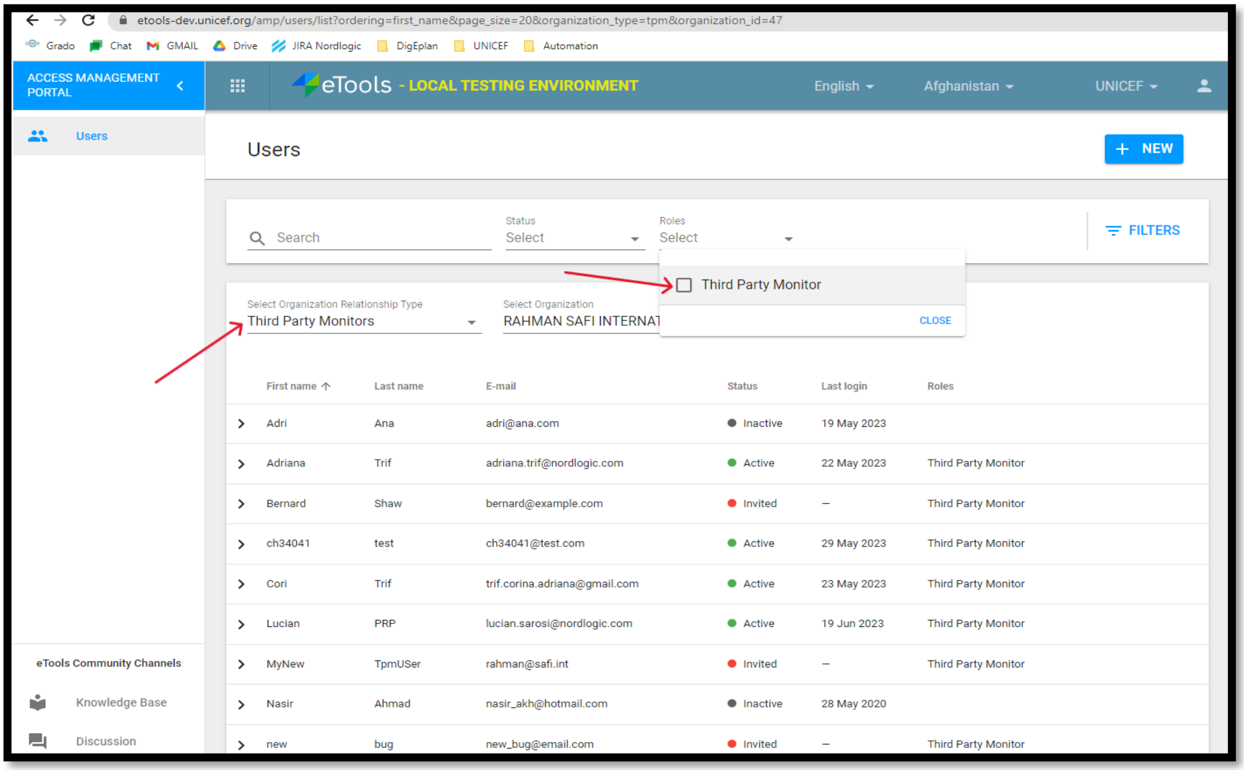
Step 15.1: To view partner contacts



Step 15.2: To view Audit Firms: Auditor

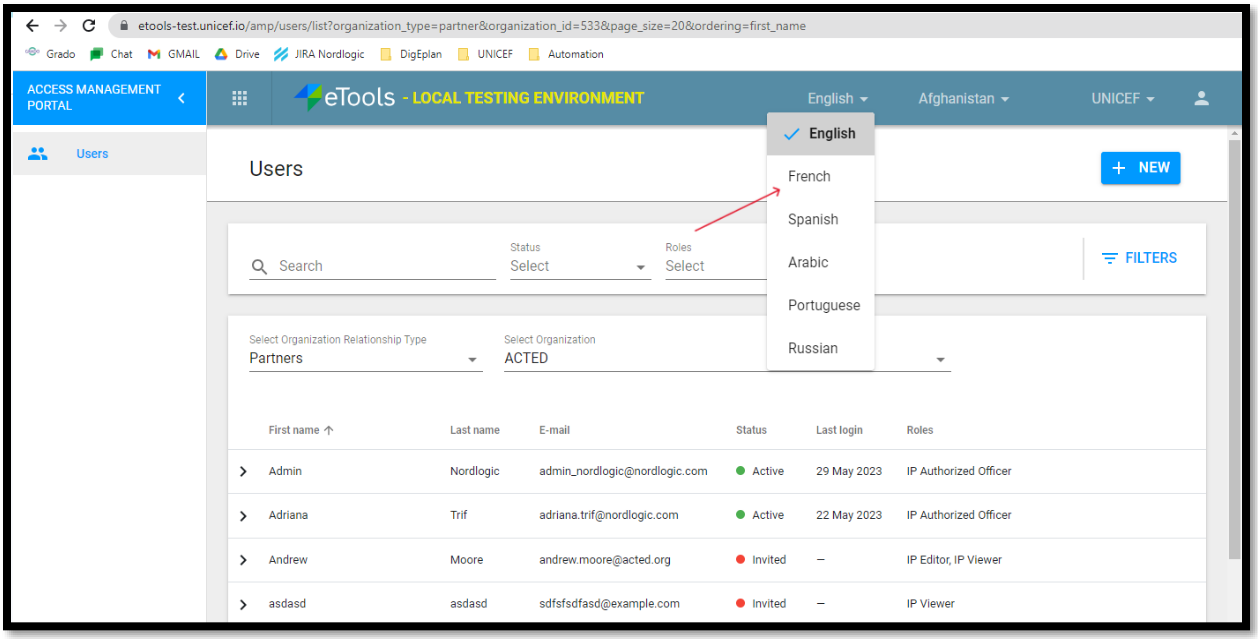


Step 15.3: To view Third Party Monitors: Third Party Monitors



Step 16: To change the language preference

The module is translated to French, Spanish, Arabic, Portuguese and Russian
Navigate to the top of the page, click the dropdown arrow beside the available language e.g., English, select the preferred language


etools-test.unicef.io/amp/users/list?organization_type=partner&organization_id=533&page_size=20&ordering=first_name
Grado Chat GMAIL Drive JIRA Nordlogic DigEplan UNICEF Automation
ACCESS MANAGEMENT PORTAL
eTools - LOCAL TESTING ENVIRONMENT
English
Afghanistan
UNICEF
Users
Users
NEW
English
French
Spanish
Arabic
Portuguese
Russian
Search
Status
Select
Roles
Select
FILTERS
Select Organization Relationship Type
Partners
Select Organization
ACTED
First name
Last name
E-mail
Status
Last login
Roles
Admin Nordlogic admin_nordlogic@nordlogic.com Active 29 May 2023 IP Authorized Officer
Adriana Trif adriana.trif@nordlogic.com Active 22 May 2023 IP Authorized Officer
Andrew Moore andrew.moore@acted.org Invited – IP Editor, IP Viewer
asdasd asdasd sdfsfsdfasd@example.com Invited – IP Viewer