

# **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 required 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.
- **The 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** is 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:

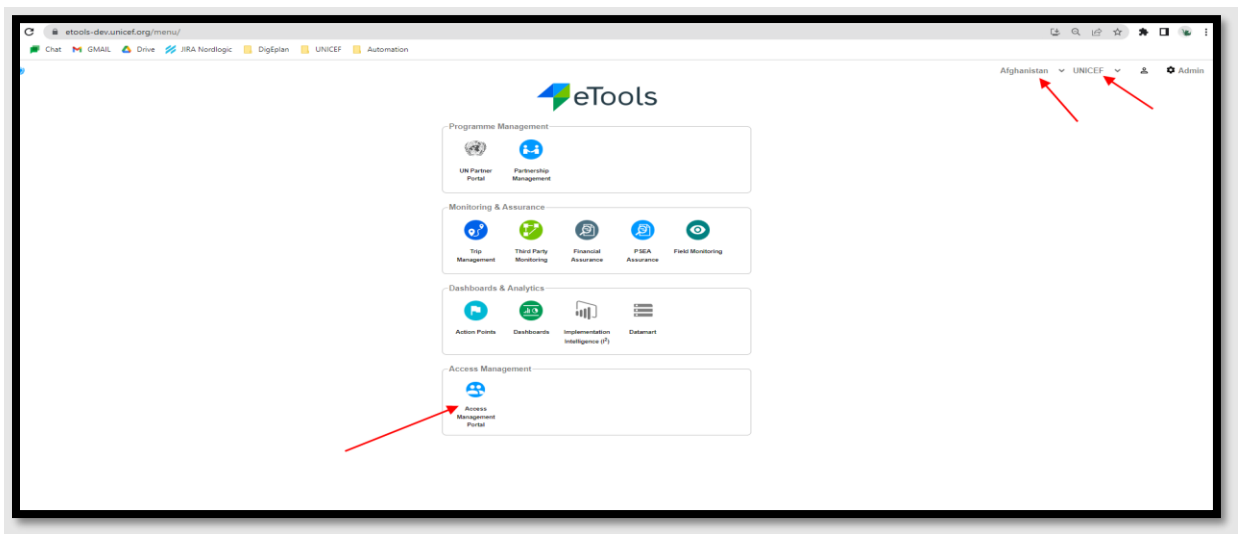
When adding an IP Authorized Officer, also include the Editor, Viewer, and Admin roles.

When adding an IP Editor, also include the IP Viewer role.

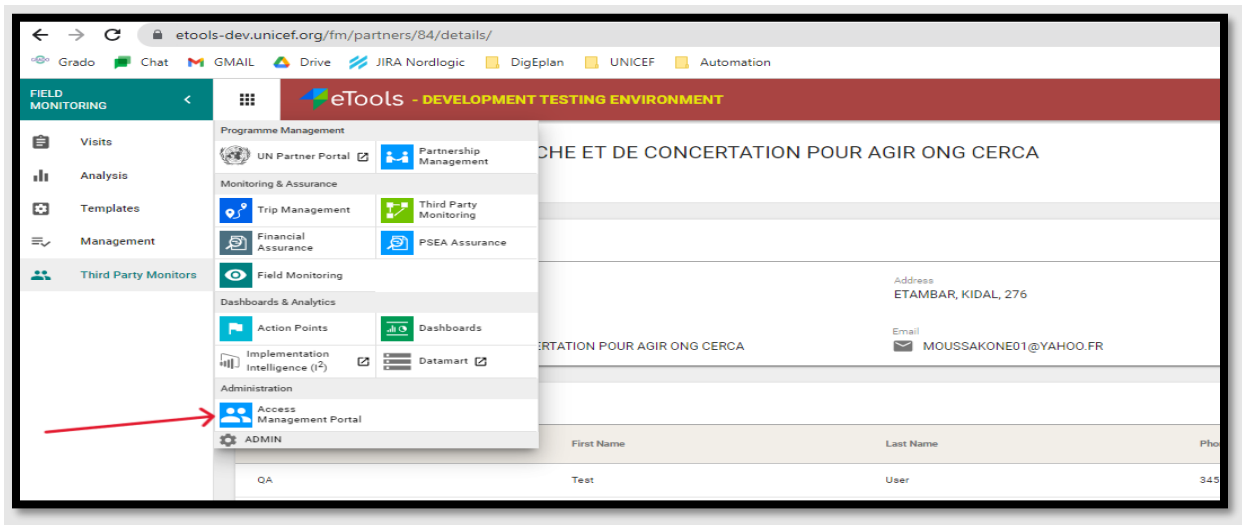
When adding an IP Viewer, do not add any other roles.

**Module functionality:**

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



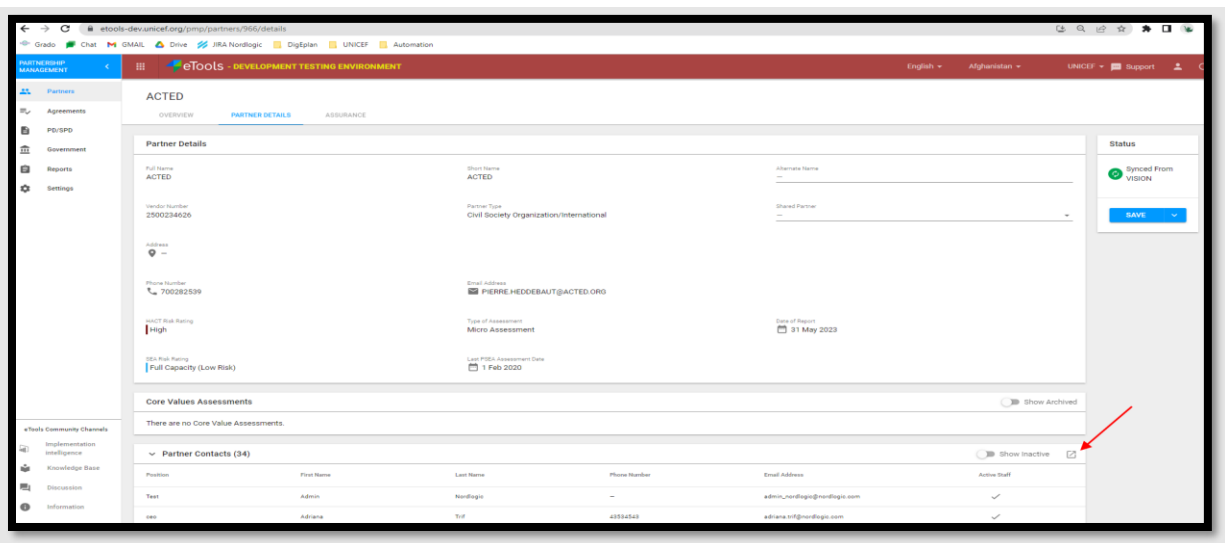
The Access Management Portal can also be selected from through the app selector below



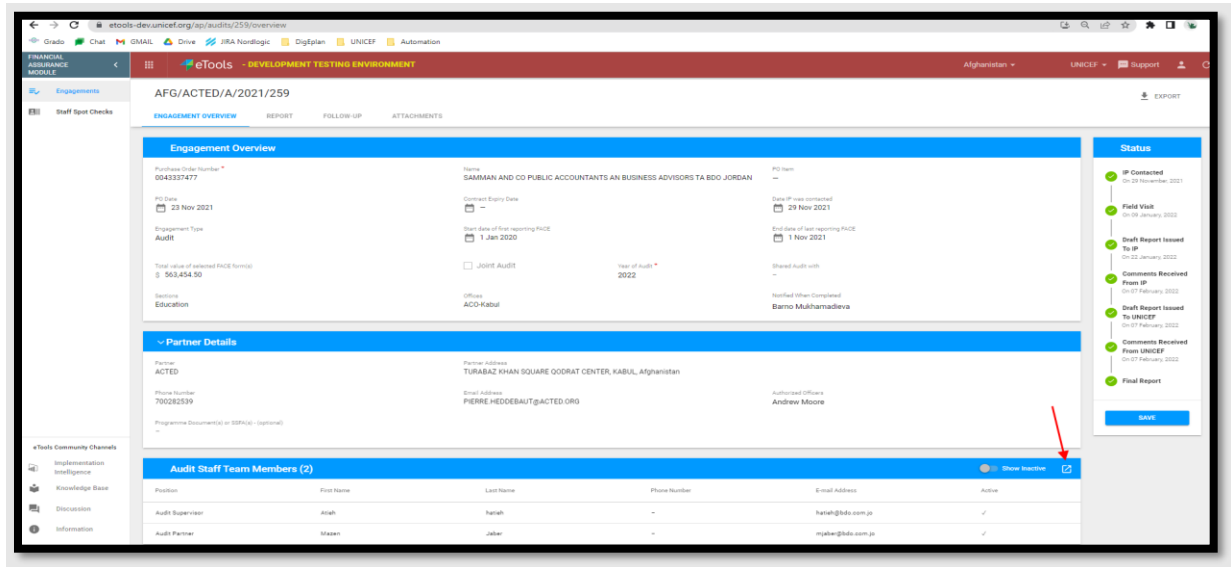
2. **Access to the module:** the Access Management Module can also be accessed from all the modules below:

- 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



**Engagement Overview**

Engagement ID: 004337477  
 PO Date: 23 Nov 2021  
 Engagement Type: Audit  
 Total value of selected POs (USD): 565,454.50  
 PO Name: SAMMAN AND CO PUBLIC ACCOUNTANTS AN BUSINESS ADVISORS TA BDO JORDAN  
 Contract Start Date: 1 Jan 2020  
 Start date of last reporting PO: 1 Jan 2020  
 Year of Audit: 2022  
 PO Name: BDO JORDAN  
 Date PO was contacted: 29 Nov 2021  
 End date of last reporting PO: 1 Nov 2021  
 Shared Audit with: BDO JORDAN  
 Notified When Completed: Bano Muhammadieva

**Partner Details**

Partner: ACTED  
 Phone Number: 700282539  
 Program Document(s) or SOP(s) (optional):  
 Partner Address: TURABAZ KHAN SQUARE QODRAT CENTER, KABUL, Afghanistan  
 Email Address: PIERRE.HEDDEBAUT@ACTED.ORG  
 Authorized Officer: Andrew Moore

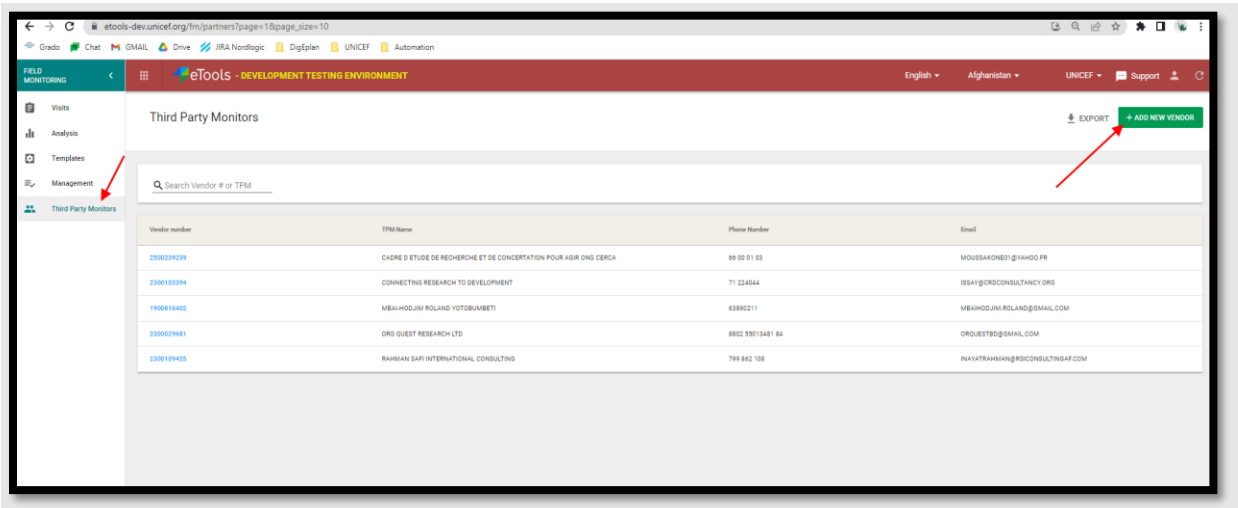
**Audit Staff Team Members (2)**

| Position         | First Name | Last Name | Phone Number | Email Address     | Active |
|------------------|------------|-----------|--------------|-------------------|--------|
| Audit Supervisor | Ahish      | hahish    | -            | hahish@bdo.com.jo | ✓      |
| Audit Partner    | Mahesh     | Jahesh    | -            | mahesh@bdo.com.jo | ✓      |

**Status**

- PO Contacted: 29 Nov 2021
- Field Visit: 29 Nov 2021
- Draft Report Issued To PO: 29 Nov 2021
- Comments Received From PO: 29 Nov 2021
- Draft Report Issued To UNICEF: 29 Nov 2021
- Comments Received From UNICEF: 29 Nov 2021
- Final Report: 29 Nov 2021

- 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

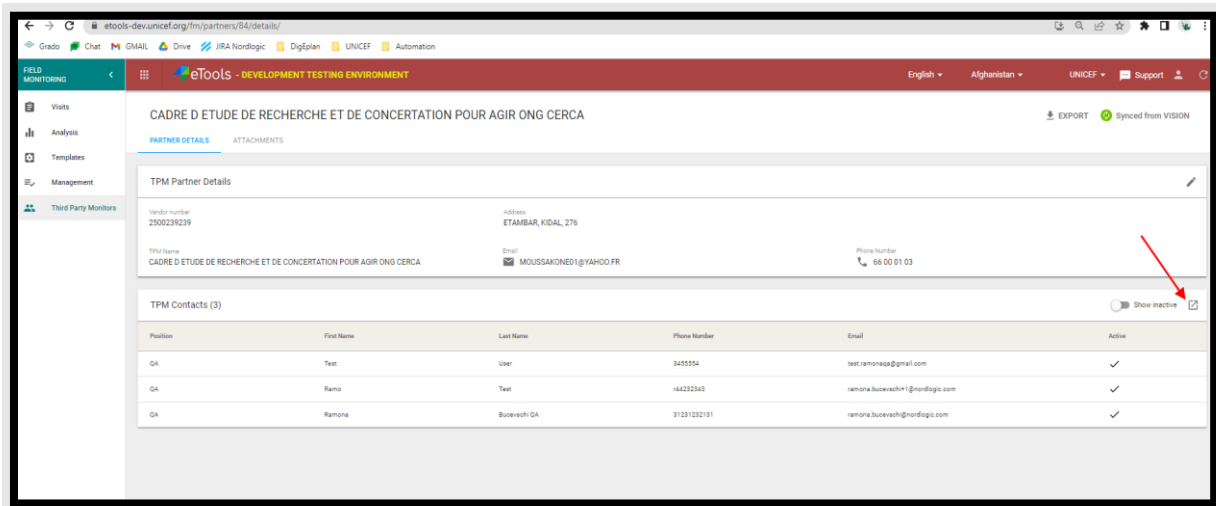


**Third Party Monitors**

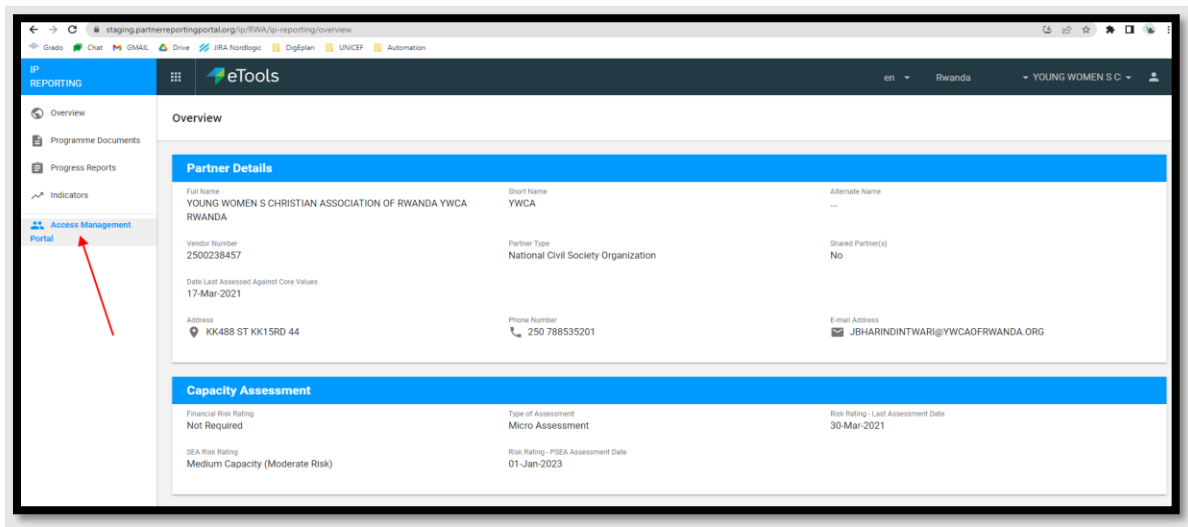
Search Vendor # or TPM: \_\_\_\_\_

| Vendor number | TPM Name  | Phone Number     | Email                         |
|---------------|---|------------------|-------------------------------|
| 230029039     | CADRE D ETUDE DE RECHERCHE ET DE CONCERTATION POUR ASIR DNS CERCA | 66 00 01 00      | MOUSAKONE1@YAHOO.FR           |
| 230010394     | CONNECTING RESEARCH TO DEVELOPMENT                                | 71 224044        | ISSAH@CRDCONSULTANCY.ORG      |
| 1900816402    | MBU-HODJIM ROLAND YOTOUABETI                                      | 63890211         | MBU-HODJIM.ROLAND@GMAIL.COM   |
| 2300029081    | ORG QUEST RESEARCH LTD  | 8802 95013481 84 | ORQUESTED@GMAIL.COM           |
| 2300109405    | BAHMAN SAFI INTERNATIONAL CONSULTING                              | 799 862 108      | BAHMANSAFI@RICONSULTINGAF.COM |

**+ ADD NEW VENDOR**



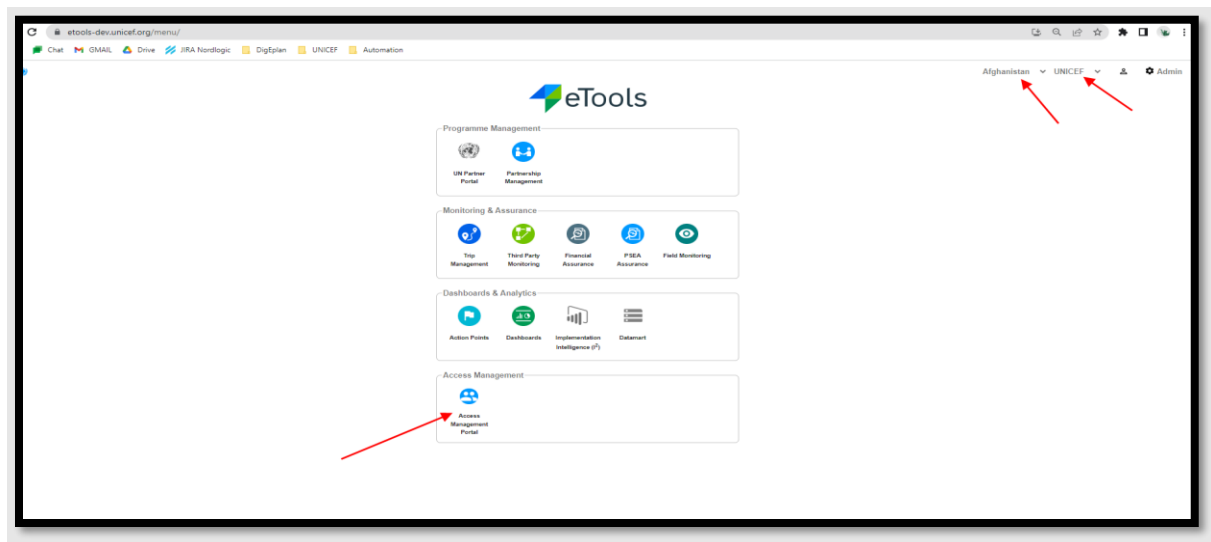
#### iv. Partner Reporting Portal - IP Reporting - Access Management Portal



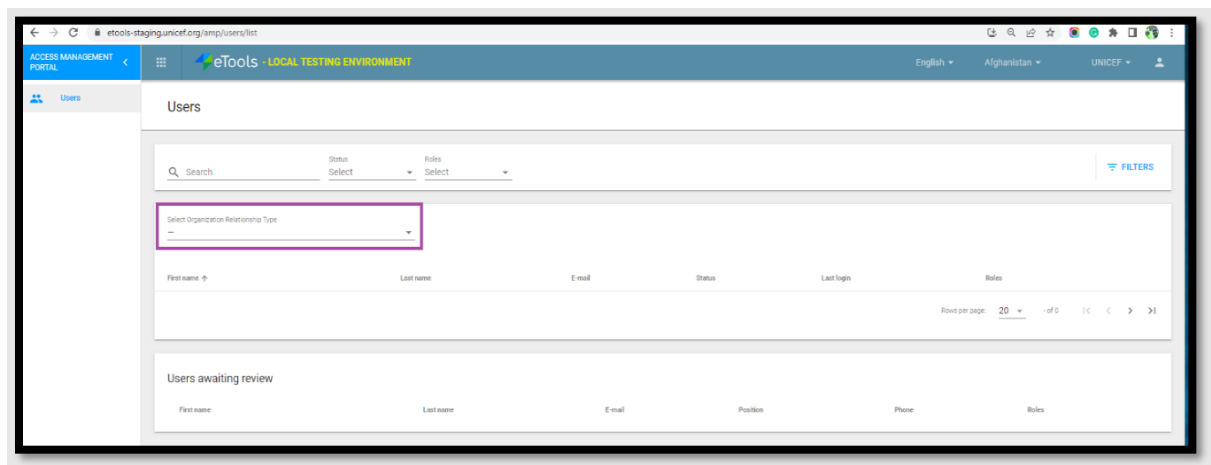
### 3. Adding users' roles:

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

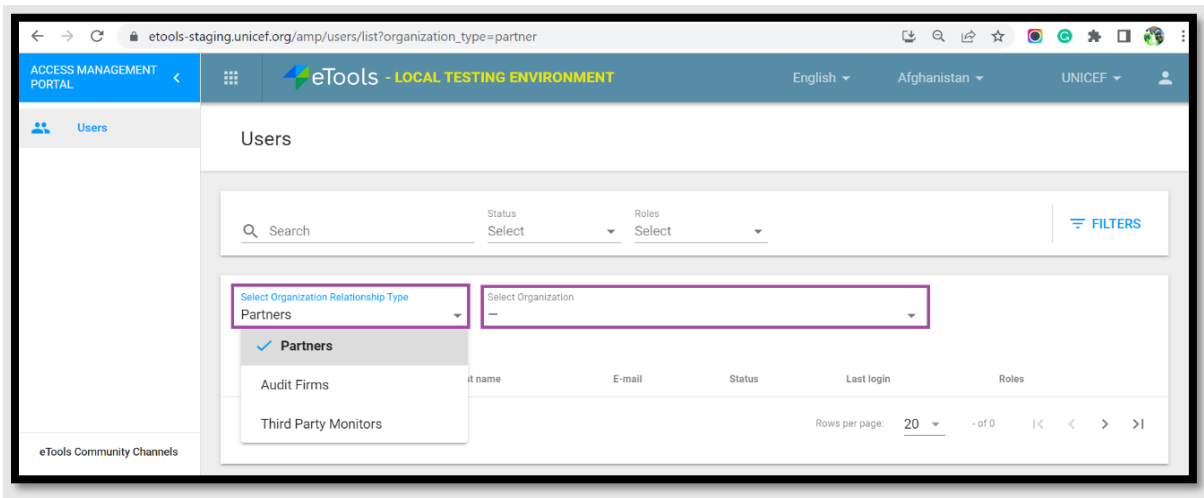


**Step 2:** In the users' section, under select organisations relationship type, select the relevant partner type: Partners, Audit Firms and Third-Party Monitors



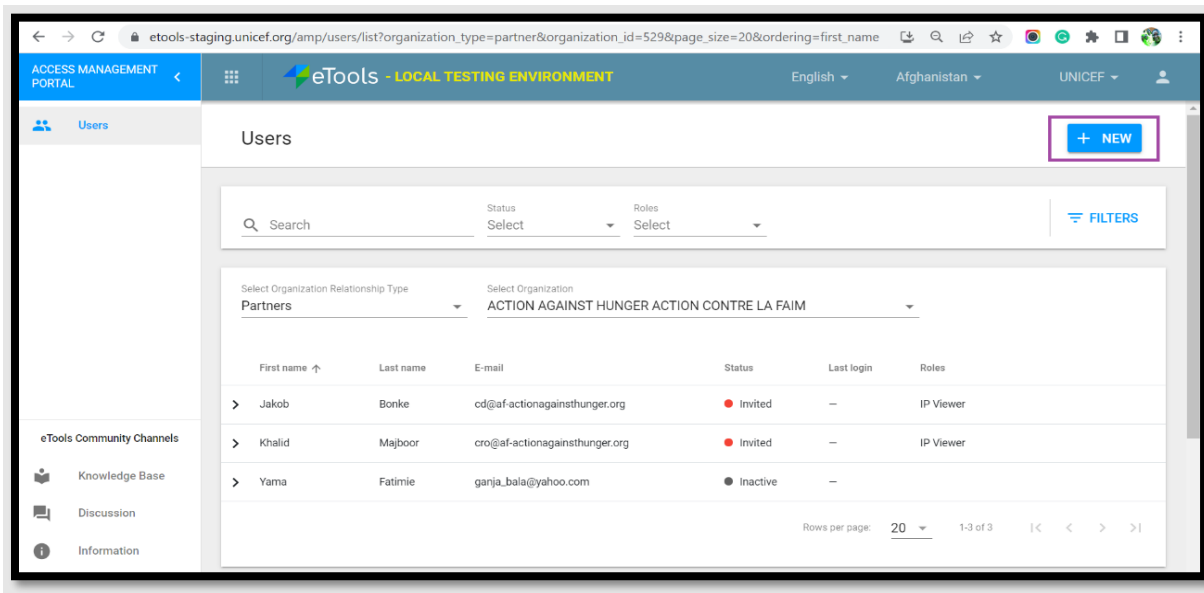
**Step 3:** Select the organisations where new users need to be added.





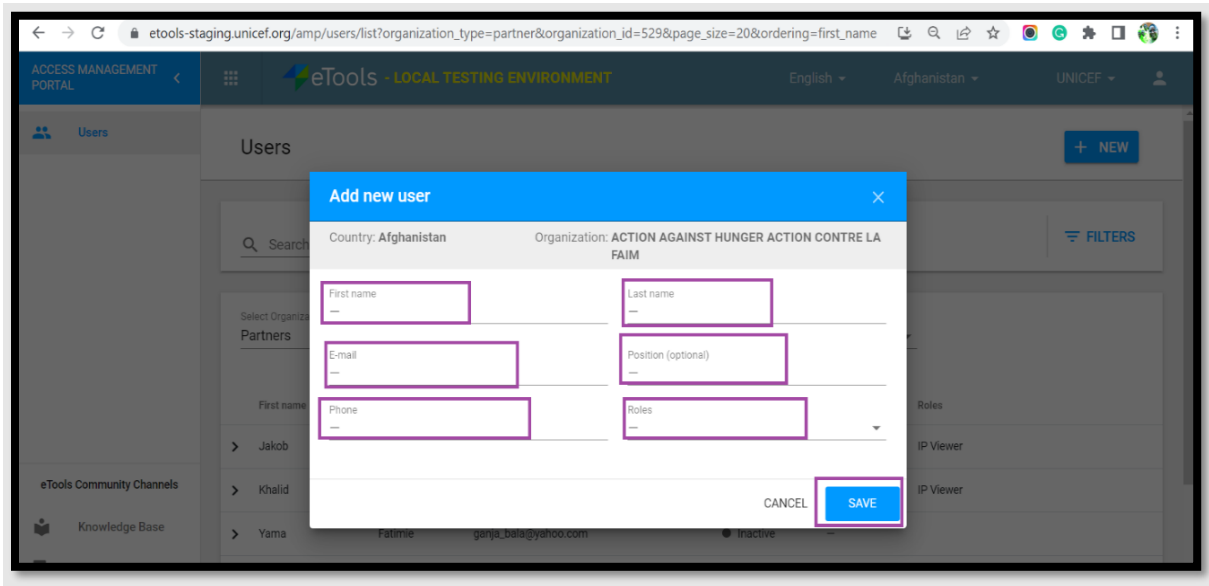
The screenshot shows the 'Users' management page in the eTools interface. The 'Add new' icon, represented by a blue plus sign in a red box, is located in the top right corner of the page. The page includes a search bar, filters for Status and Roles, and a dropdown menu for 'Select Organization Relationship Type' with 'Partners' selected. The 'Select Organization' dropdown is also highlighted with a red box.

**Step 4:** Click the Add new icon



The screenshot shows the 'Users' management page in the eTools interface. The 'Add new' icon, represented by a blue plus sign in a red box, is located in the top right corner of the page. The page includes a search bar, filters for Status and Roles, and a dropdown menu for 'Select Organization Relationship Type' with 'Partners' selected. The 'Select Organization' dropdown is also highlighted with a red box.

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



**Add new user**

Country: Afghanistan Organization: ACTION AGAINST HUNGER ACTION CONTRE LA FAIM

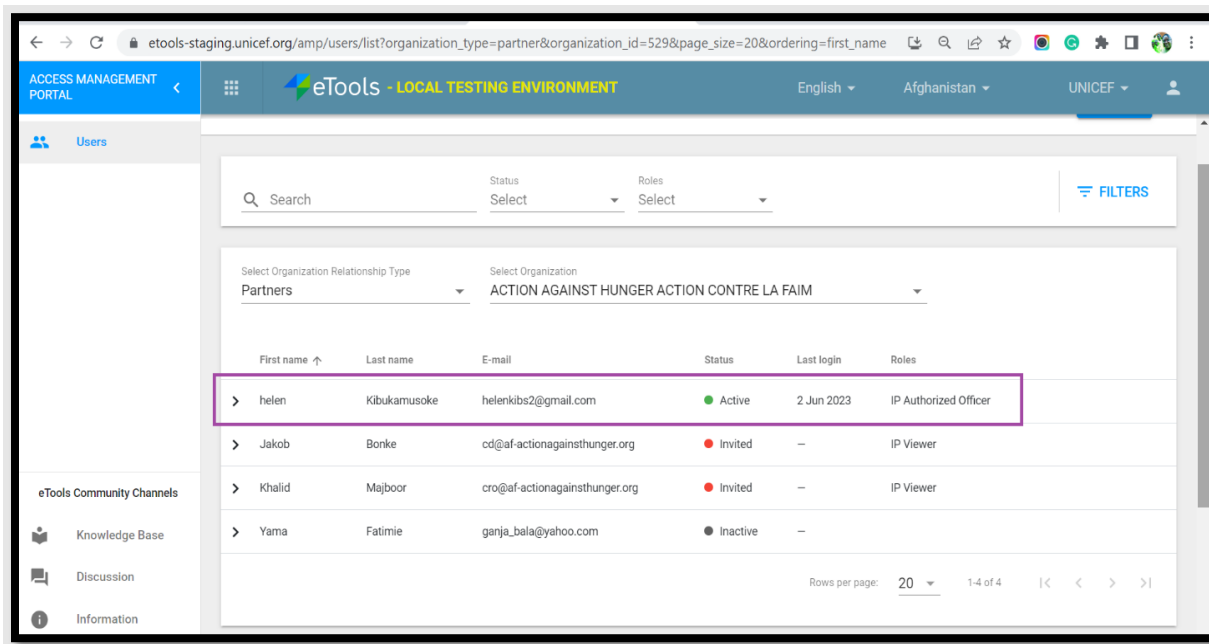
First name:  Last name:

E-mail:  Position (optional):

Phone:  Roles:

CANCEL **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.



etools-staging.unicef.org/amp/users/list?organization\_type=partner&organization\_id=529&page\_size=20&ordering=first\_name

ACCESS MANAGEMENT PORTAL eTools - LOCAL TESTING ENVIRONMENT English Afghanistan UNICEF

Users

Search Status Select Roles Select FILTERS

Select Organization Relationship Type: Partners Select Organization: ACTION AGAINST HUNGER ACTION CONTRE LA FAIM

| First name | Last name    | E-mail                         | Status   | Last login | Roles                 |
|------------|--------------|--------------------------------|----------|------------|-----------------------|
| > helen    | Kibukamusoke | helenkibs2@gmail.com           | Active   | 2 Jun 2023 | IP Authorized Officer |
| > Jakob    | Bonke        | cd@af-actionagainsthunger.org  | Invited  | —          | IP Viewer             |
| > Khalid   | Majboor      | cro@af-actionagainsthunger.org | Invited  | —          | IP Viewer             |
| > Yama     | Fatimie      | ganja_bela@yahoo.com           | Inactive | —          |                       |

Rows per page: 20 1-4 of 4

**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.

Select Organization Relationship Type

Partners

Select Organization

ACTED

| First name ↕ | Last name   | E-mail                        | Status    | Last login  | Roles                                       |
|--------------|-------------|-------------------------------|-----------|-------------|---|
| > Andrew     | Moore       | andrew.moore@acted.org        | Invited   | —           | IP Viewer                                   |
| > francois   | hericher    | francois.hericher@acted.org   | Invited   | —           | IP Viewer                                   |
| > Javlon     | Hamdov      | javlon.hamdov@acted.org       | Invited   | —           | IP Viewer                                   |
| > Jessica    | Durant      | jessica.durant@acted.org      | Invited   | —           | IP Viewer                                   |
| > Kathryn    | Bruce       | kathryn.bruce@acted.org       | Inactive  | —           |   |
| > Katrina    | Zacharewski | katrina.zacharewski@acted.org | No Access | —           |   |
| > Lucian     | Sarosi      | lucian.sarosi@nordlogic.com   | Active    | 21 Jul 2023 | IP Viewer; IP Editor; IP Authorized Officer |
| > Lucian     | Test1       | lucian.sarosi+1@nordlogic.com | No Access | 14 Jul 2023 |   |
| > Lucine     | Febel       | lucine.febel@acted.org        | Invited   | —           | IP Viewer                                   |
| > Pascal     | Bernard     | pascal.bernard@acted.org      | Invited   | —           | IP Viewer                                   |
| > Thibault   | Larose      | thibault.larose@acted.org     | Invited   | —           | IP Viewer                                   |

Rows per page: 201-11 of 11<>>>

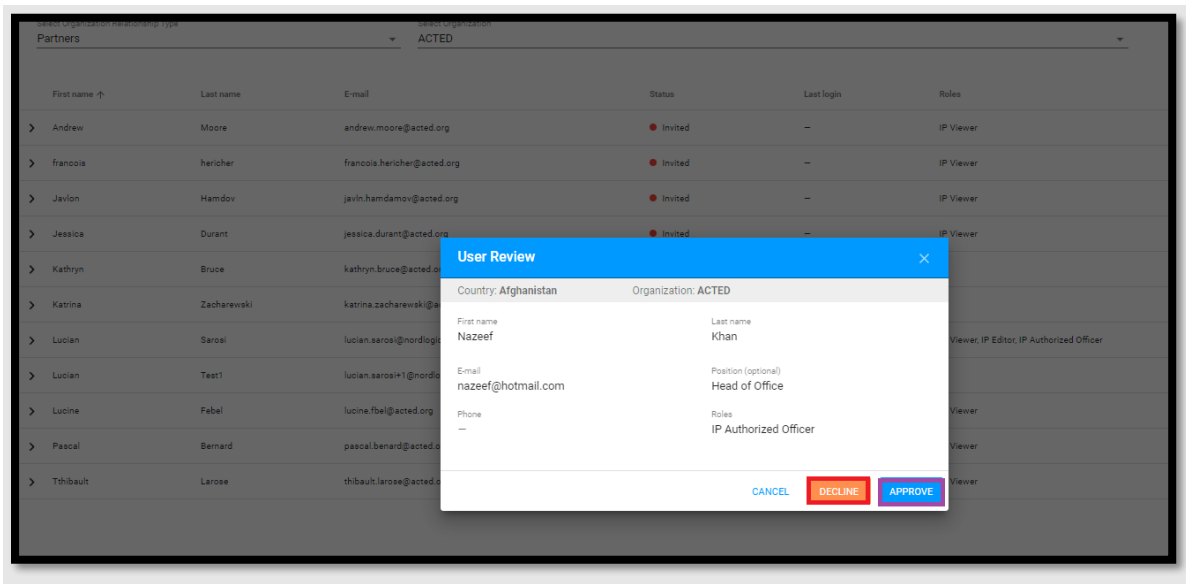
Users awaiting review

| First name | Last name    | E-mail                   | Position       | Phone      | Roles                            |
|------------|--------------|--------------------------|----------------|------------|----------------------------------|
| Lucian     | Retesting    | retesting@yahoo.com      | —              | 0756877169 | IP Viewer; IP Editor             |
| Lucian     | Test Staging | staging.lucian@yahoo.com | —              | —          | IP Editor; IP Authorized Officer |
| Nazeef     | Khan         | nazeef@hotmail.com       | Head of Office | —          | IP Authorized Officer            |

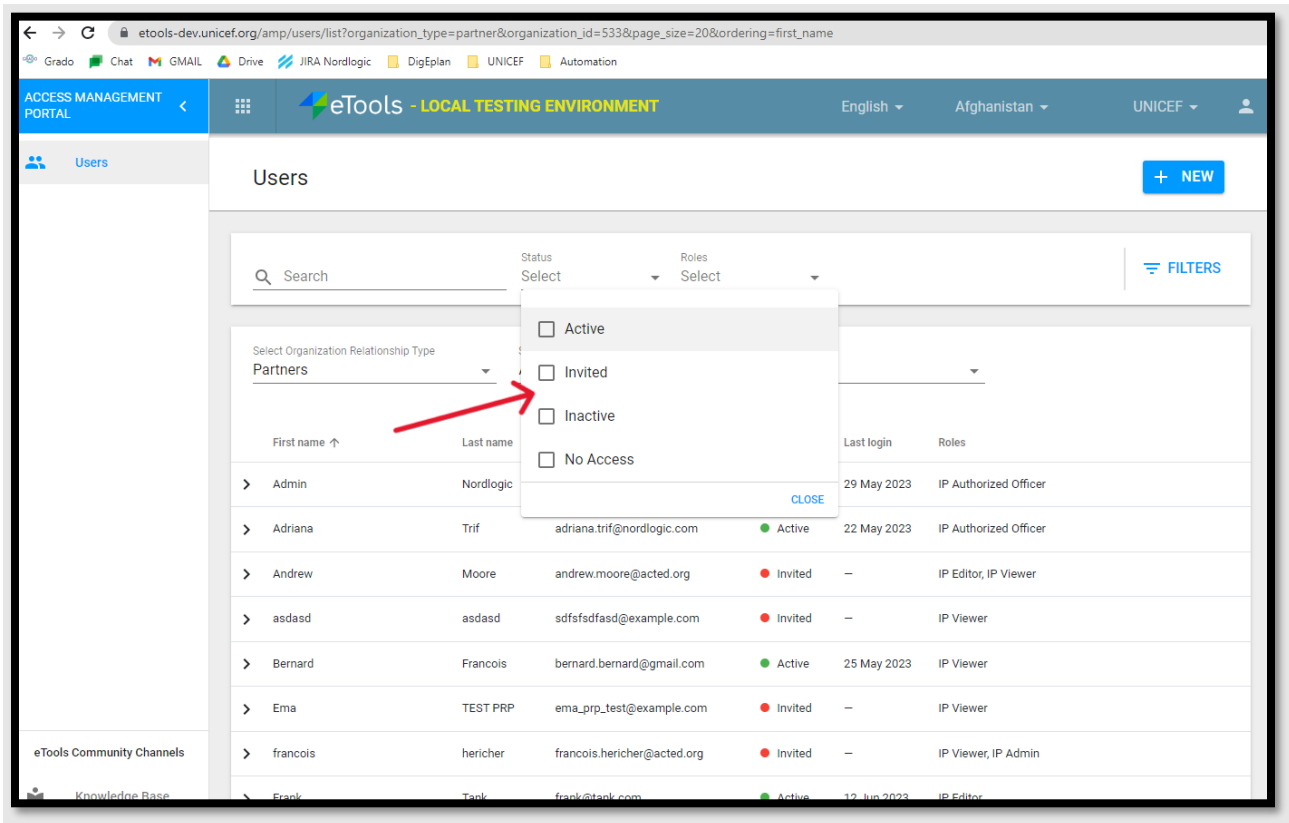
**Step 8:** The reviewer will hover over the partner whose details they wish to verify and click the edit icon

| Users awaiting review |              |                          |                |            |                                  |
|-----------------------|--------------|--------------------------|----------------|------------|----------------------------------|
| First name            | Last name    | E-mail                   | Position       | Phone      | Roles                            |
| Lucian                | Retesting    | retesting@yahoo.com      | —              | 0756877169 | IP Viewer, IP Editor             |
| Lucian                | Test Staging | staging.lucian@yahoo.com | —              | —          | IP Editor, IP Authorized Officer |
| Nazeef                | Khan         | nazeef@hotmail.com       | Head of Office | —          | IP Authorized Officer            |

**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** if the details are correct accept the addition of the partner information or **decline** to reject it.

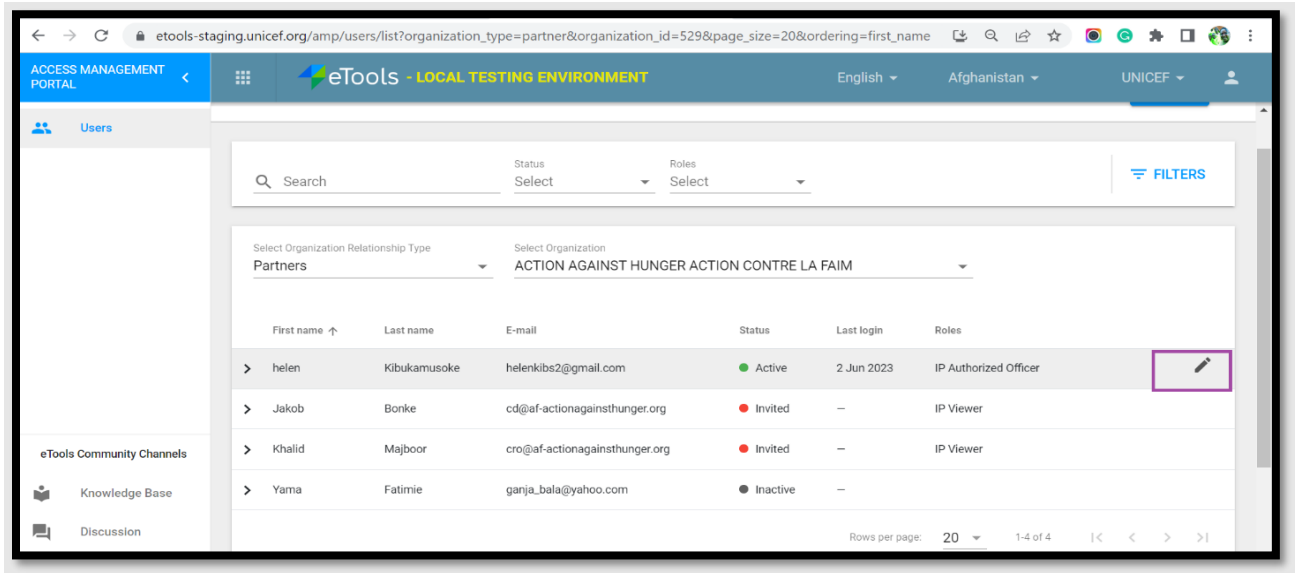


**Step 10:** When a new user is added to an Organization the status will be invited; the status changes to active when the user logs into the system.

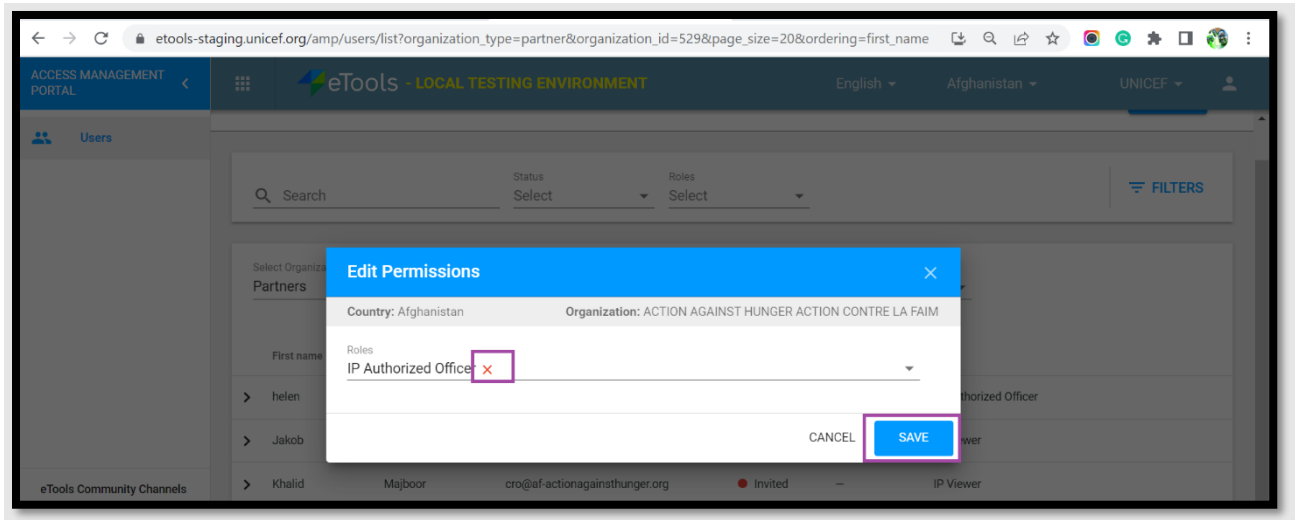


**Step 11:** To deactivate a user, hover over the user you wish to deactivate and click the edit icon.

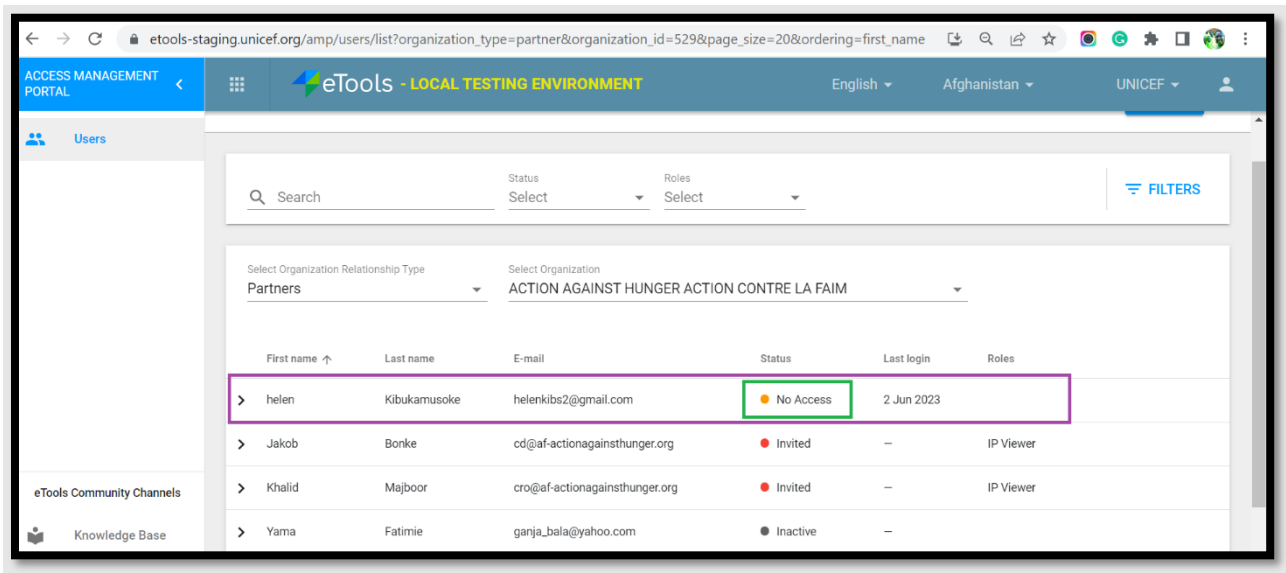
Knowledge: Currently we can update only the user Roles (Permissions) for all Organization Relationship Types (you cannot update name, email, position and the phone number):



**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”



etools-staging.unicef.org/amp/users/list?organization\_type=partner&organization\_id=529&page\_size=20&ordering=first\_name

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Users

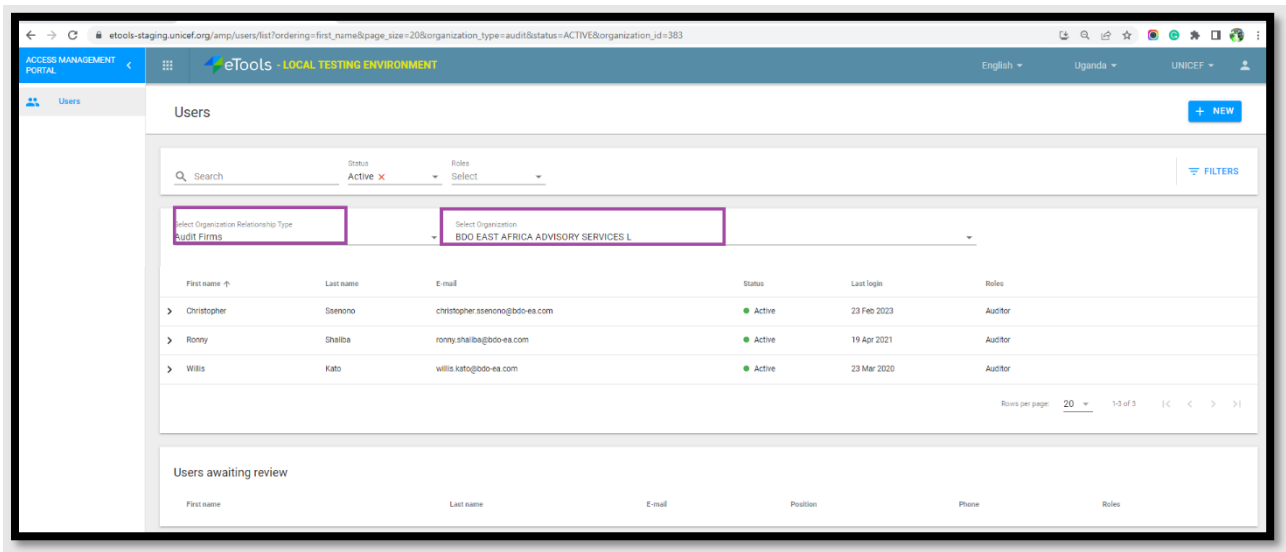
Search | Status Select | Roles Select | FILTERS

Select Organization Relationship Type: Partners | Select Organization: ACTION AGAINST HUNGER ACTION CONTRE LA FAIM

| First name ↑ | Last name    | E-mail                         | Status    | Last login | Roles     |
|--------------|--------------|--------------------------------|-----------|------------|-----------|
| > helen      | Kibukamusoke | helenkibs2@gmail.com           | No Access | 2 Jun 2023 |           |
| > Jakob      | Bonke        | cd@af-actionagainsthunger.org  | Invited   | —          | IP Viewer |
| > Khalid     | Majboor      | cro@af-actionagainsthunger.org | Invited   | —          | IP Viewer |
| > Yama       | Fatimie      | ganja_bala@yahoo.com           | Inactive  | —          |           |

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**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.



etools-staging.unicef.org/amp/users/list?ordering=first\_name&page\_size=20&organization\_type=audit&status=ACTIVE&organization\_id=383

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Users

Search | Status Active x | Roles Select | FILTERS

Select Organization Relationship Type: Audit Firms | Select Organization: BDO EAST AFRICA ADVISORY SERVICES L

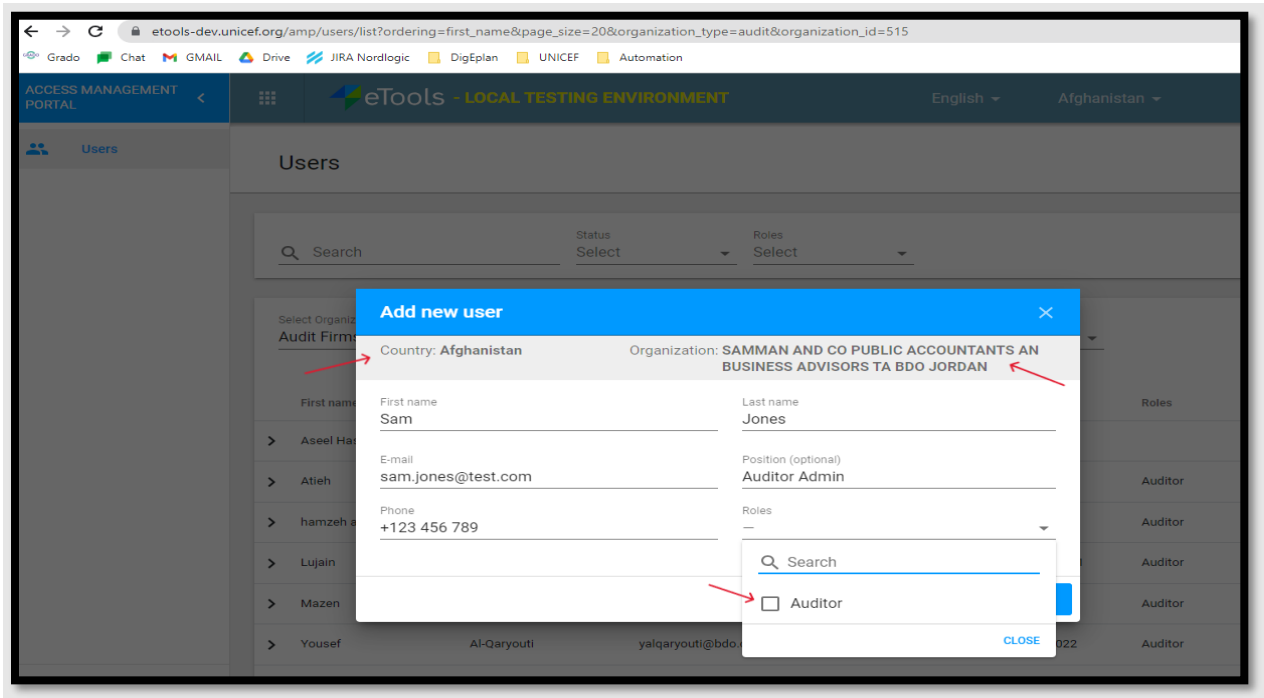
| First name ↑  | Last name | E-mail                         | Status | Last login  | Roles   |
|---------------|-----------|--------------------------------|--------|-------------|---------|
| > Christopher | Ssenono   | christopher.ssenono@bdo-ea.com | Active | 23 Feb 2023 | Auditor |
| > Ronny       | Shaliba   | ronny.shaliba@bdo-ea.com       | Active | 19 Apr 2021 | Auditor |
| > Willis      | Kato      | willis.kato@bdo-ea.com         | Active | 23 Mar 2020 | Auditor |

Rows per page: 20 | 1-3 of 3 | < >

Users awaiting review

| First name | Last name | E-mail | Position | Phone | Roles |
|------------|-----------|--------|----------|-------|-------|
|------------|-----------|--------|----------|-------|-------|

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



**Add new user**

Country: Afghanistan Organization: SAMMAN AND CO PUBLIC ACCOUNTANTS AN BUSINESS ADVISORS TA BDO JORDAN

First name: Sam Last name: Jones

E-mail: sam.jones@test.com Position (optional): Auditor Admin

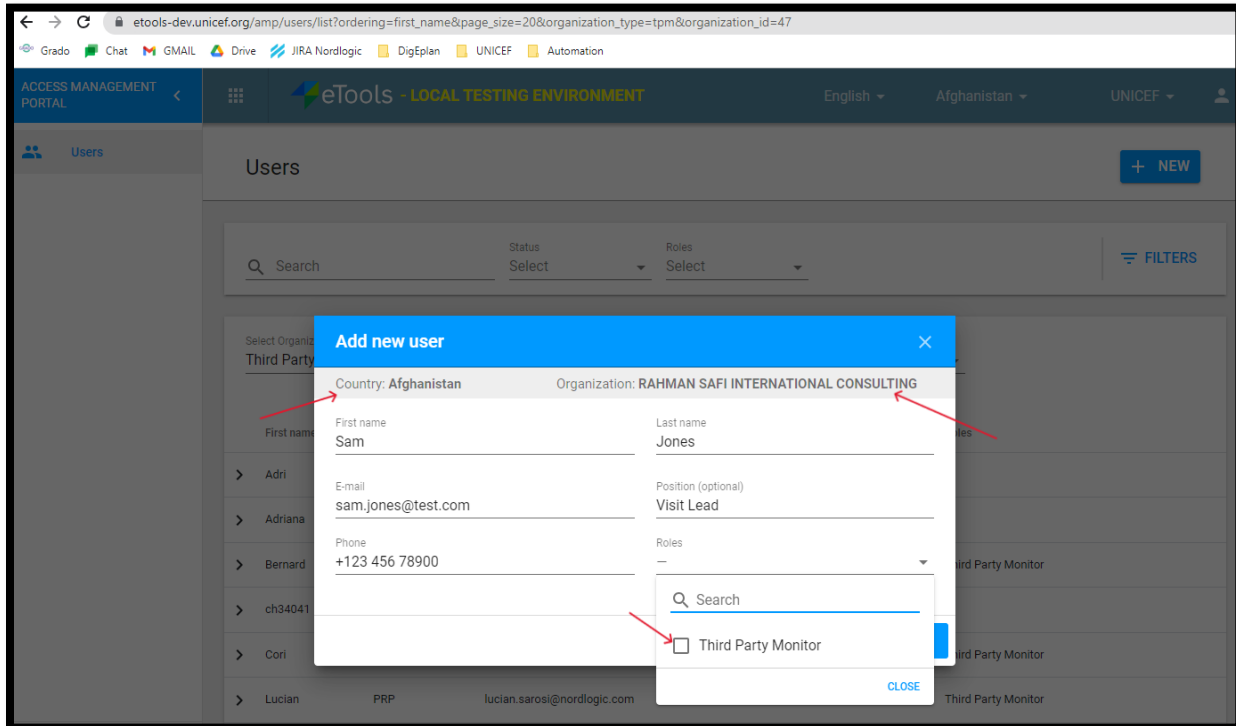
Phone: +123 456 789 Roles: Auditor

Search

☐ Auditor

CLOSE

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



**Add new user**

Country: Afghanistan Organization: RAHMAN SAFI INTERNATIONAL CONSULTING

First name: Sam Last name: Jones

E-mail: sam.jones@test.com Position (optional): Visit Lead

Phone: +123 456 78900 Roles: Third Party Monitor

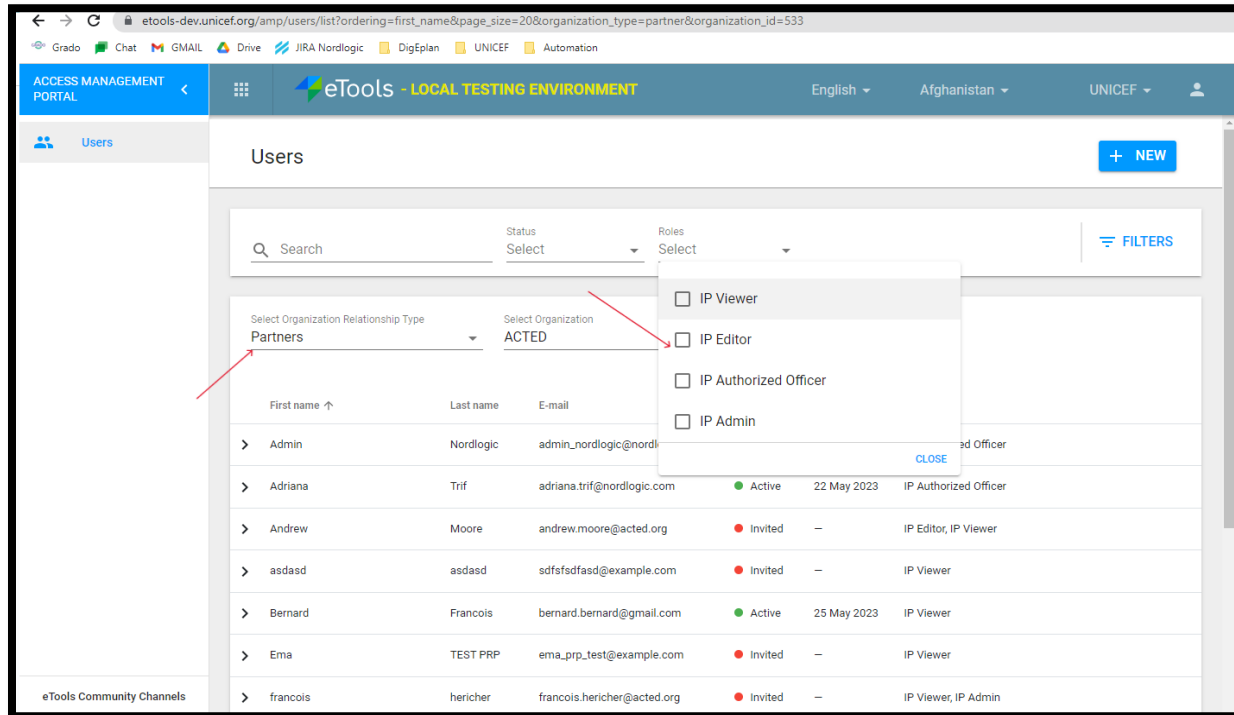
Search

☐ Third Party Monitor

CLOSE

**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



etools-dev.unicef.org/amp/users/list?ordering=first\_name&page\_size=20&organization\_type=partner&organization\_id=533

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English Afghanistan UNICEF

Users

+ NEW

Search Status Select Roles Select FILTERS

Select Organization Relationship Type Partners Select Organization ACTED

First name Last name E-mail

> Admin Nordlogic admin\_nordlogic@nordlogic.org

> 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 sdfsfdsfads@example.com Invited IP Viewer

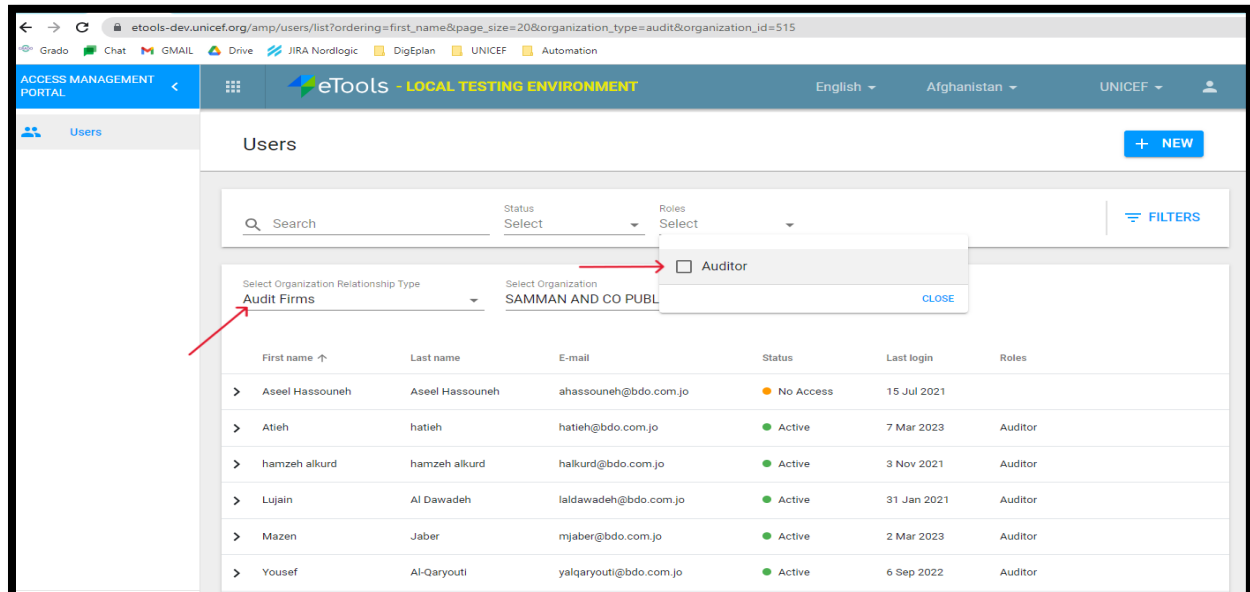
> Bernard Francois bernard.bernard@gmail.com Active 25 May 2023 IP Viewer

> Ema TEST PRP ema\_prp\_test@example.com Invited IP Viewer

> francois hericher francois.hericher@acted.org Invited IP Viewer, IP Admin

eTools Community Channels

### Step 15.2: To view Audit Firms: Auditor



etools-dev.unicef.org/amp/users/list?ordering=first\_name&page\_size=20&organization\_type=audit&organization\_id=515

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Users

+ NEW

Search Status Select Roles Select FILTERS

Select Organization Relationship Type Audit Firms Select Organization SAMMAN AND CO PUBL

First name Last name E-mail Status Last login Roles

> Aseel Hassouneh Aseel Hassouneh ahassouneh@bdo.com.jo No Access 15 Jul 2021

> Atieh hatieh hatieh@bdo.com.jo Active 7 Mar 2023 Auditor

> hamzeh alkurd hamzeh alkurd halkurd@bdo.com.jo Active 3 Nov 2021 Auditor

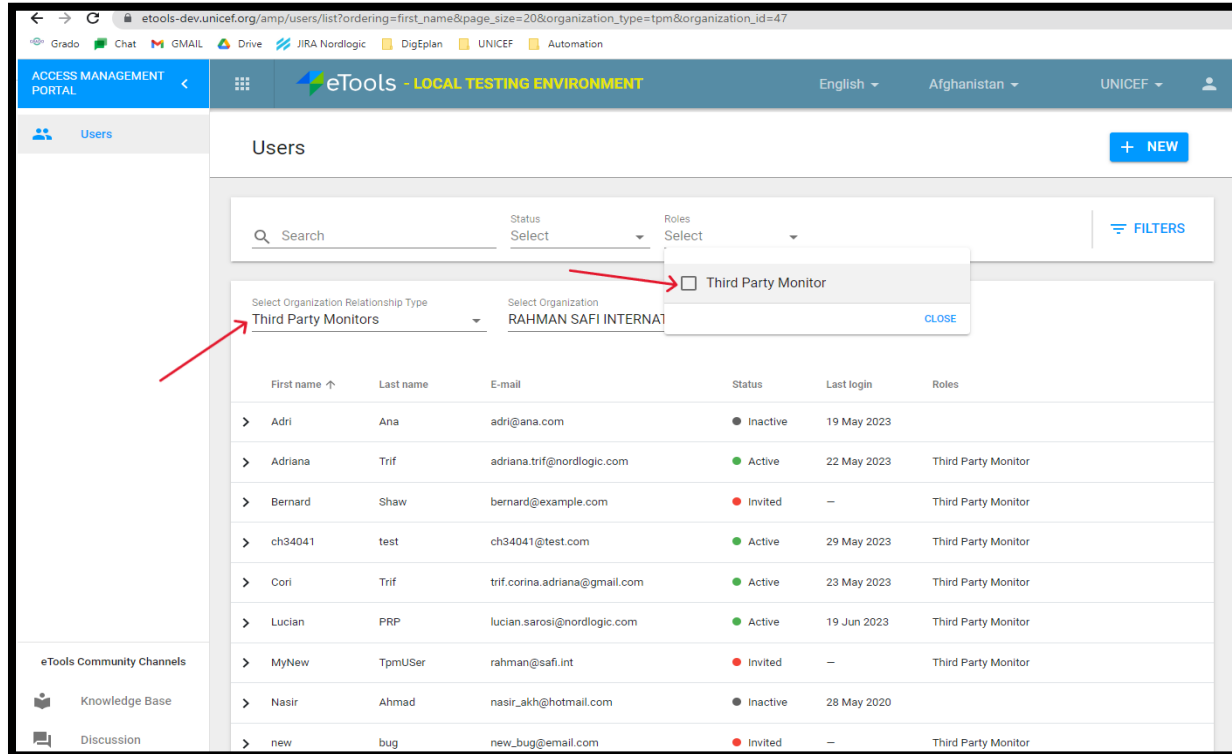
> Lujain Al Dawadeh laldawadeh@bdo.com.jo Active 31 Jan 2021 Auditor

> Mazen Jaber mjaber@bdo.com.jo Active 2 Mar 2023 Auditor

> Yousef Al-Qaryouti yalqaryouti@bdo.com.jo Active 6 Sep 2022 Auditor

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





The screenshot displays the 'Users' management page in the eTools interface. The page includes a search bar, status and role filters, and a table of users. A dropdown menu for 'Select Organization Relationship Type' is open, showing 'Third Party Monitors' selected. Another dropdown menu for 'Select Organization' is open, showing 'RAHMAN SAFI INTERNA'. A red arrow points to the 'Third Party Monitor' checkbox in the dropdown menu.

| First name | Last name | E-mail                        | Status   | Last login  | Roles               |
|------------|-----------|-------------------------------|----------|-------------|---------------------|
| Adri       | Ana       | adri@ana.com                  | Inactive | 19 May 2023 |                     |
| Adriana    | Trif      | adriana.trif@nordlogic.com    | Active   | 22 May 2023 | Third Party Monitor |
| Bernard    | Shaw      | bernard@example.com           | Invited  | —           | Third Party Monitor |
| ch34041    | test      | ch34041@test.com              | Active   | 29 May 2023 | Third Party Monitor |
| Cori       | Trif      | trif.corina.adriana@gmail.com | Active   | 23 May 2023 | Third Party Monitor |
| Lucian     | PRP       | lucian.sarosi@nordlogic.com   | Active   | 19 Jun 2023 | Third Party Monitor |
| MyNew      | TpmUser   | rahman@safi.int               | Invited  | —           | Third Party Monitor |
| Nasir      | Ahmad     | nasir_akh@hotmail.com         | Inactive | 28 May 2020 |                     |
| new        | bug       | new_bug@email.com             | Invited  | —           | Third Party Monitor |

### 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

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ACCESS MANAGEMENT PORTAL

eTools - LOCAL TESTING ENVIRONMENT

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Users

English

French

Spanish

Arabic

Portuguese

Russian

+ NEW

Search Status Select Roles Select

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    | sdfsdfasd@example.com         | Invited | —           | IP Viewer             |

FILTERS