UN Partner Portal

USER MANUAL

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1. Understanding the User Manual

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1.1. Objective of the user manual

This user manual has been developed to orient the members of the **UN Agencies and Civil Society Organizations** to use the UN Partner Portal.

This manual is intended for all users and roles, these being:

User Roles	Abbreviations
HQ Editor	HQE
Reader User	RU
Basic Editor	BE
Advanced Editor – UN Secretariat	AE-UN

1.2. What is needed?

To follow this user manual and use UN Partner Portal, the user will need to have the following elements:

- Access to a computer/laptop to use the UN Partner Portal
- Access to internet
- Have login access credentials.

2. Resources And Library	Accessible by:
	Web version

The users can also access the following links to get more information on :

Partner Verification:

https://unpartnerportalhelpcenter.zendesk.com/hc/en-us/articles/360012946334-Verify-Partner

Adding Observations/ Risk Flags:

https://unpartnerportalhelpcenter.zendesk.com/hc/en-us/articles/360013064373-Partner-Observations

UN Partner Portal

Production URL: https://www.unpartnerportal.org/login

UAT URL: https://uat.unpartnerportal.org/landing/

# 3. Access and connect to UN Partner Portal	Accessible by:
	Web version

3.1. Access to UN Partner Portal

- **Step 1:** Open the computer/laptop internet navigator.
- **Step 2:** Insert the following link: https://www.unpartnerportal.org/login
- **Step 3:** Select "ENTER" to open the UN Partner Portal.

3.2. Login to UN Partner Portal

- **Step 1:** Open UN Partner Portal in the browser

- **Step 2:** Select "EMAIL" and type your email address used during registration.
- **Step 3:** Select "PASSWORD" and type password created during registration.
- **Step 4:** Select "SIGN IN" to access UN Partner Portal.

4. Partner Registration and Profile Completion

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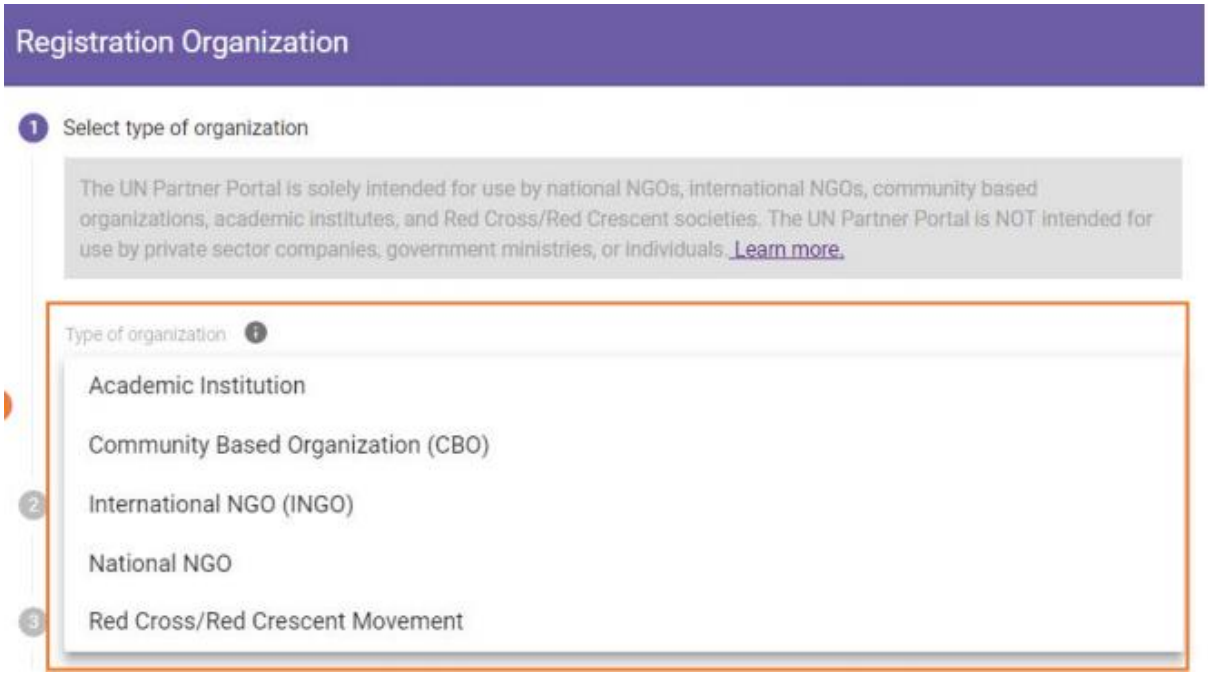
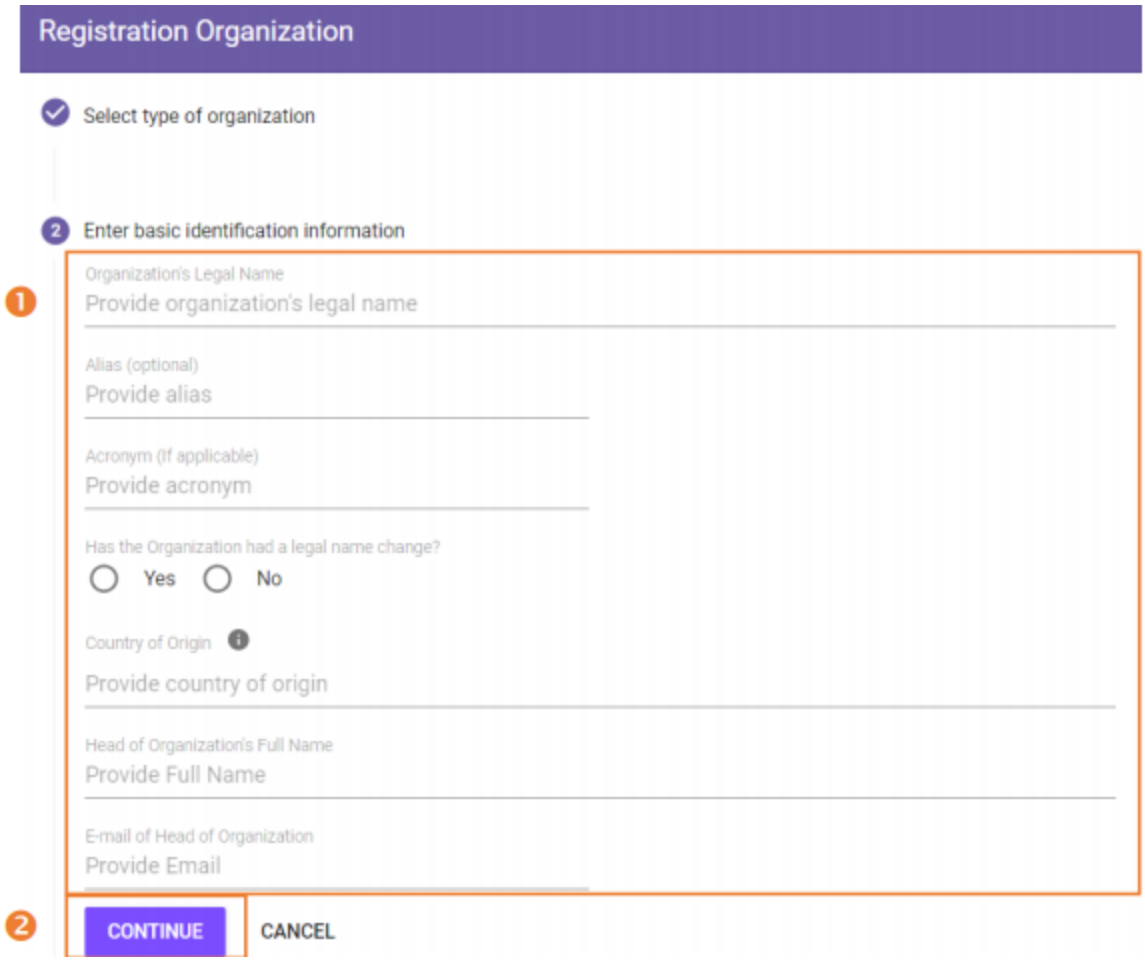
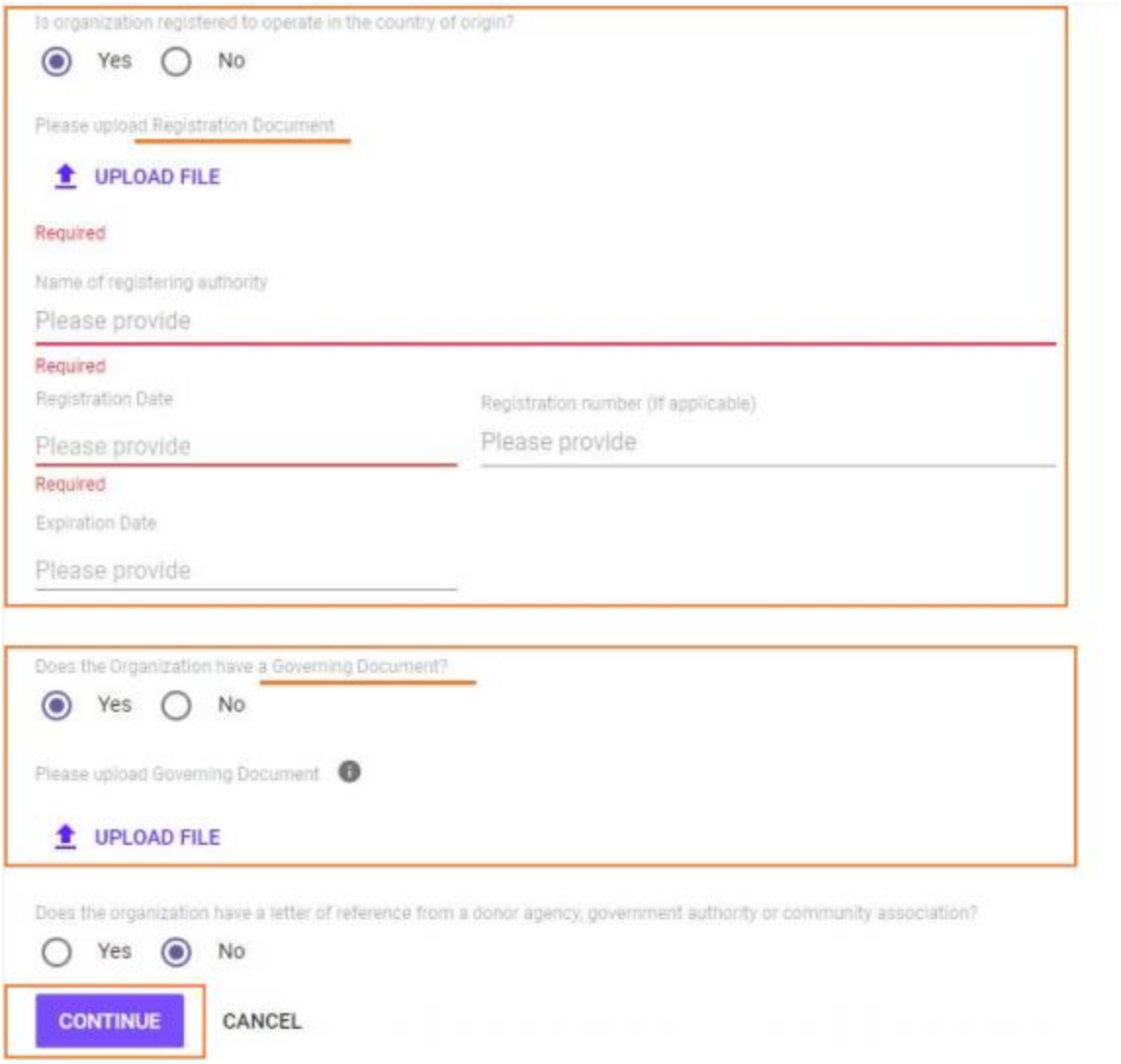
Web version

- **Step 1:** Login to the UN Partner Portal https://www.unpartnerportal.org/registration
- **Step 2:** Enter the Type of the organization and other basic information like Legal Name, Legal Status

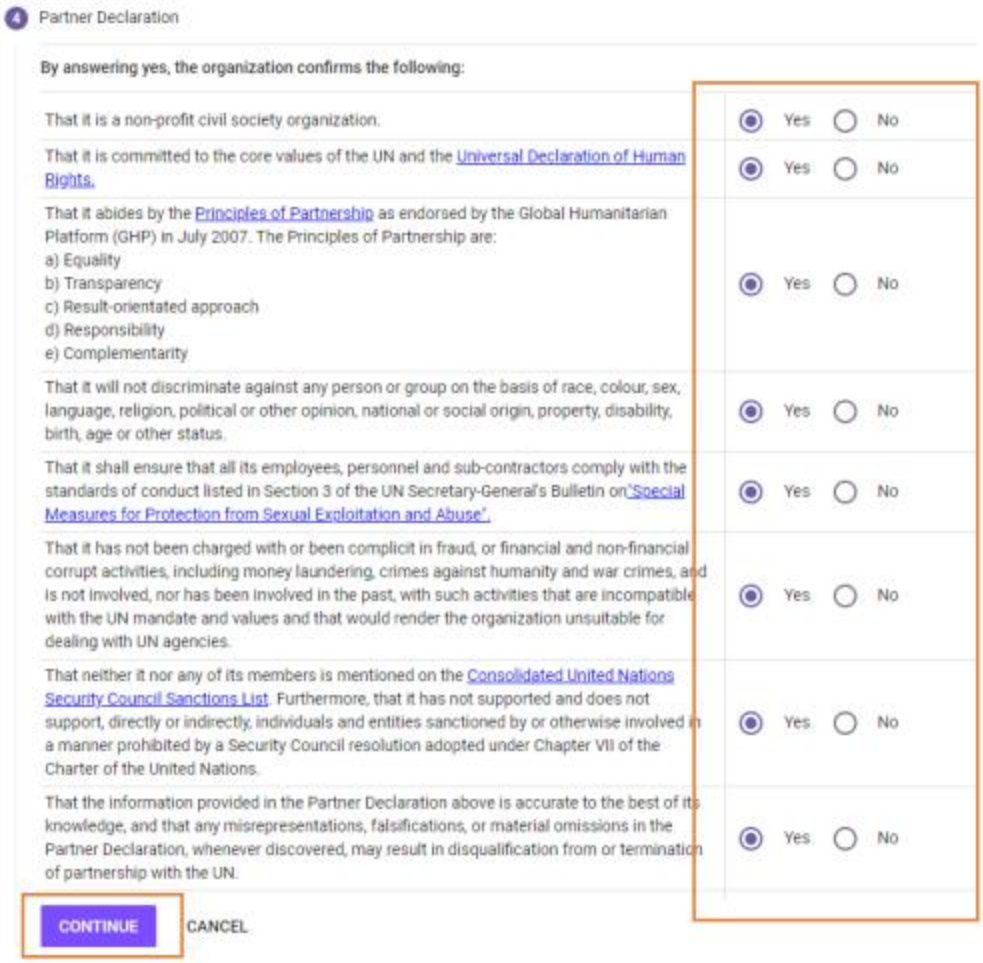




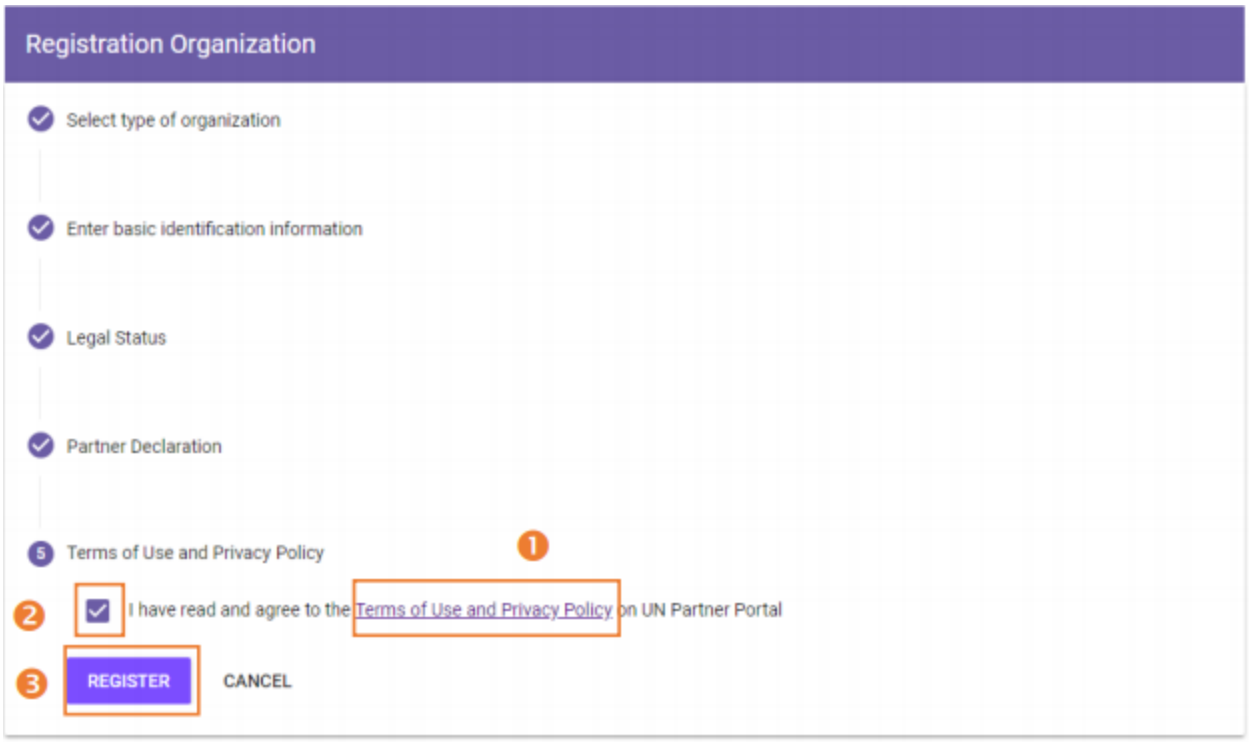
➢ **Step 3:** Upload the necessary documents like Registration and Governing document or Letter of reference



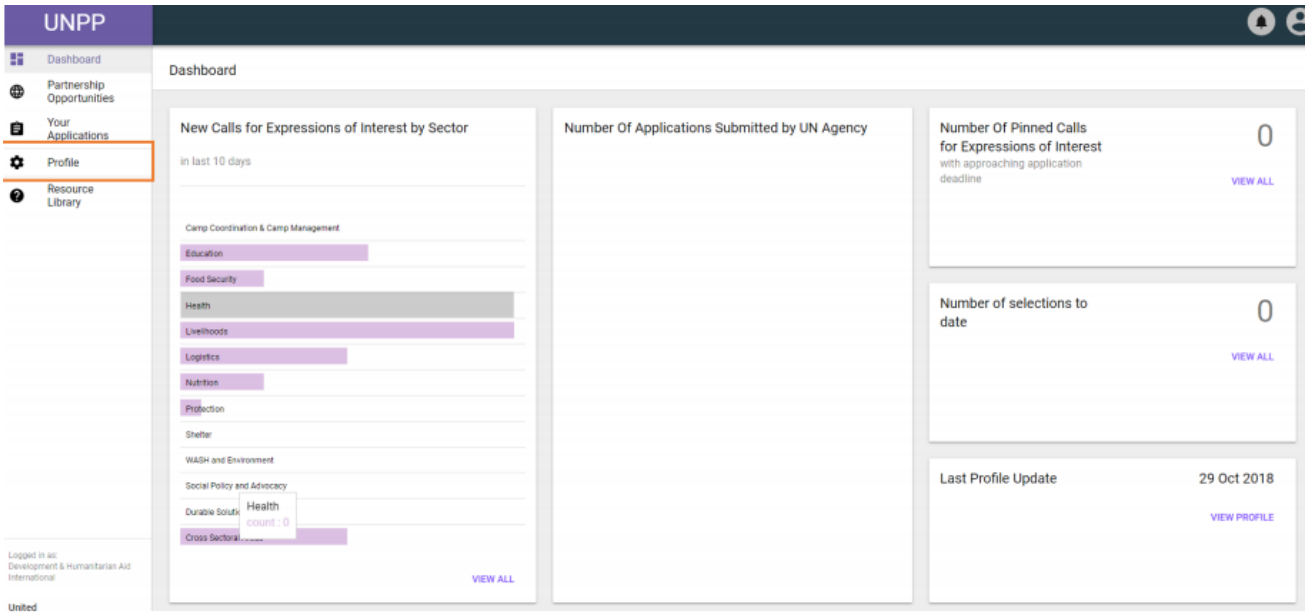
➢ **Step 4:** Fill in the Partner Declaration section



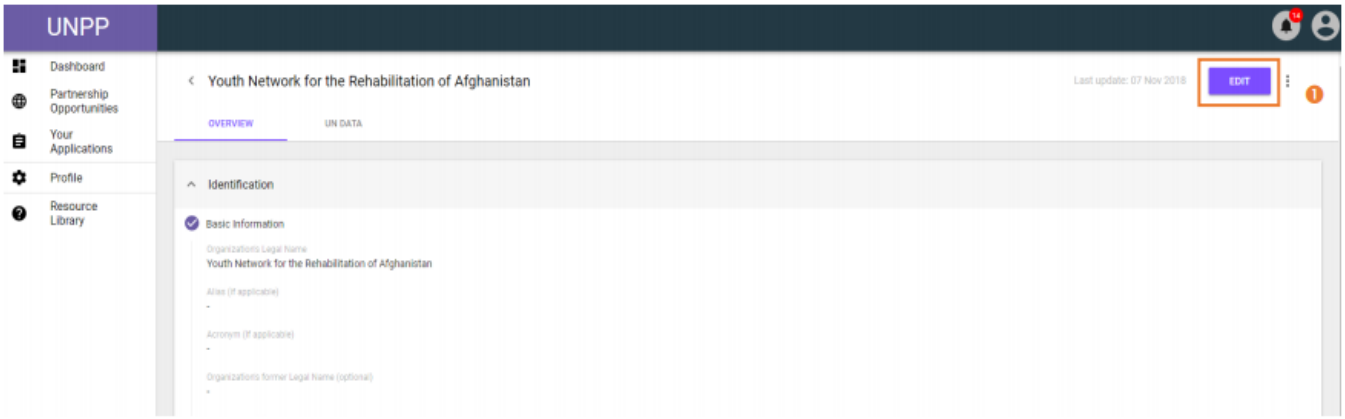
- **Step 5:** Acknowledge the Terms of use of Privacy Policy
- **Step 6:** Click on Register button

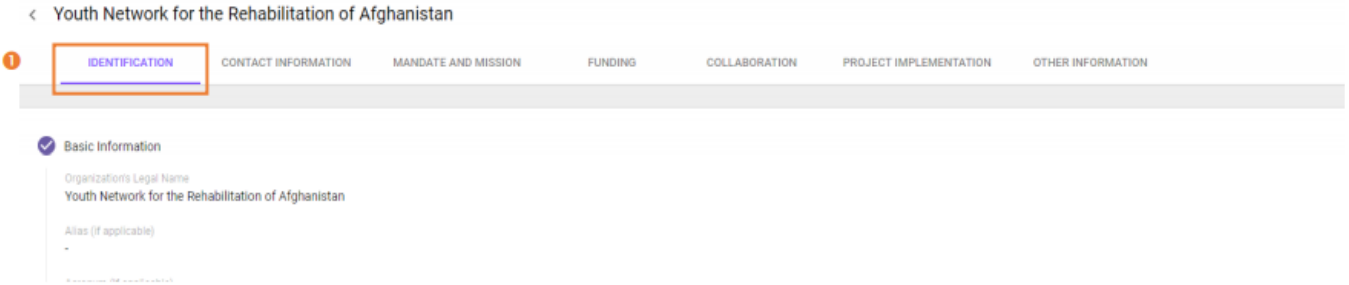


- **Step 7:** After successful registration of the Partner the partner profile needs to be completed
- **Step 8:** Login as the Partner in UN Partner Portal and click on Profile tab In the Left Navigation Bar



- **Step 9**: Click on Edit button and fill in all the details under Identification, Contact Information, Mandate and Mission , Funding, Collaboration, Project Implementation and Other Information sections





➢ **Step 10** Click on Save to complete the Profile

5. Partner Management	Accessible by:
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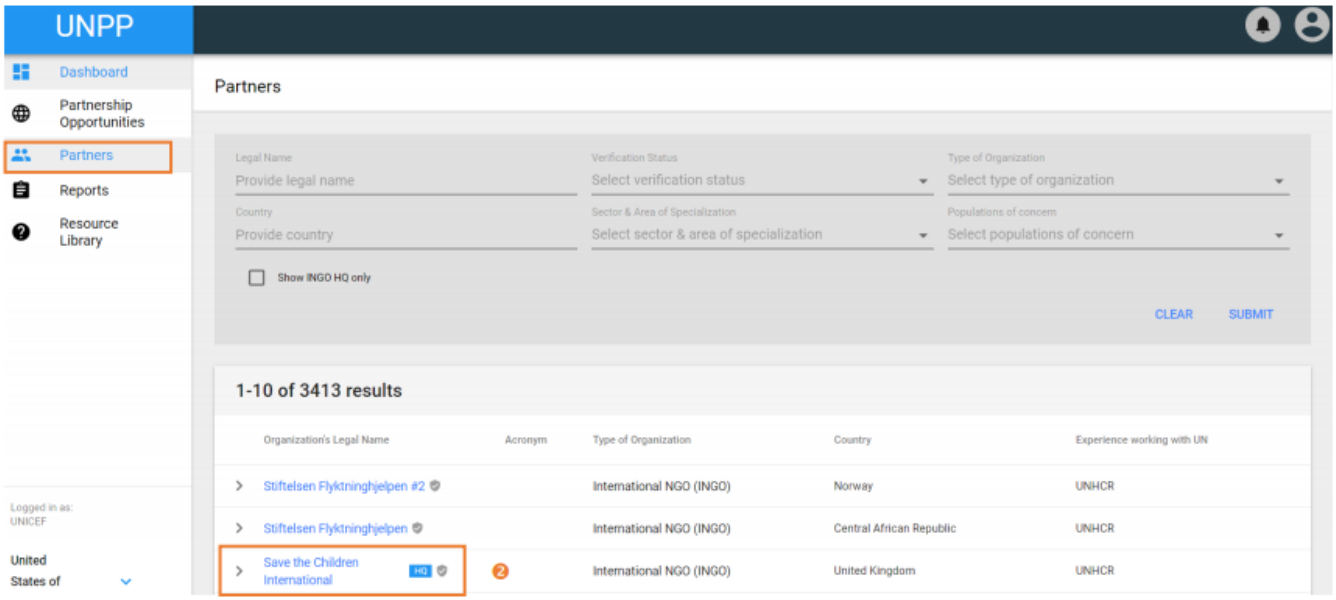
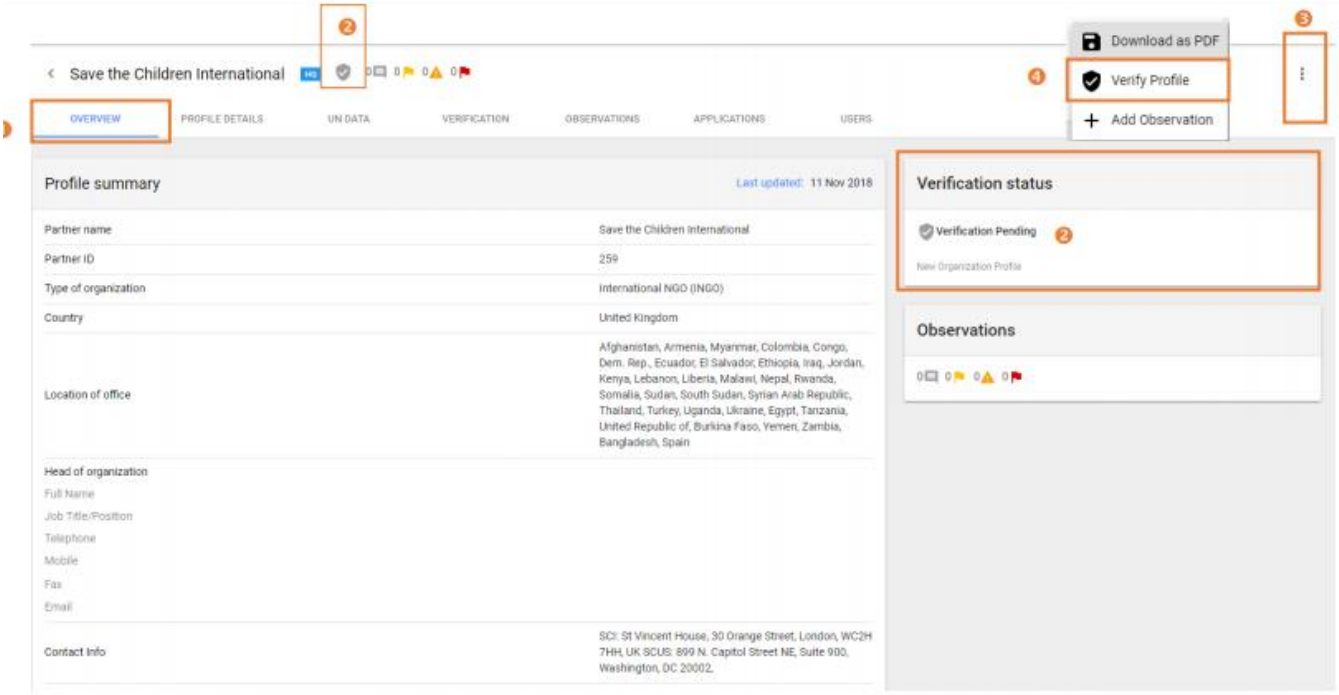
5.1 PARTNERS/INGO HQ Profiles Verification

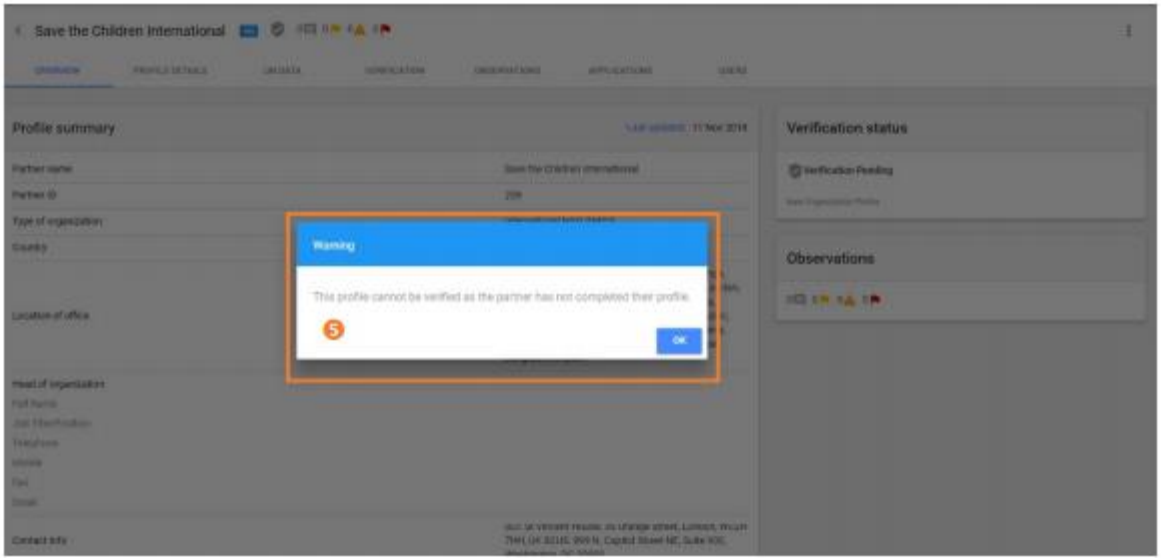
Partner Organizations profiles should be verified by the a UN Agency member in order for the Partner application to be selected to establish a potential partnership. The partner should fulfill all the requirements for getting successfully verified. Partners that are flagged with red risk flag cannot be verified.

- **Step 1:** Click on Partners icon to access Partners Page
- **Step 2:** Click on Partner Organization Name to be verified

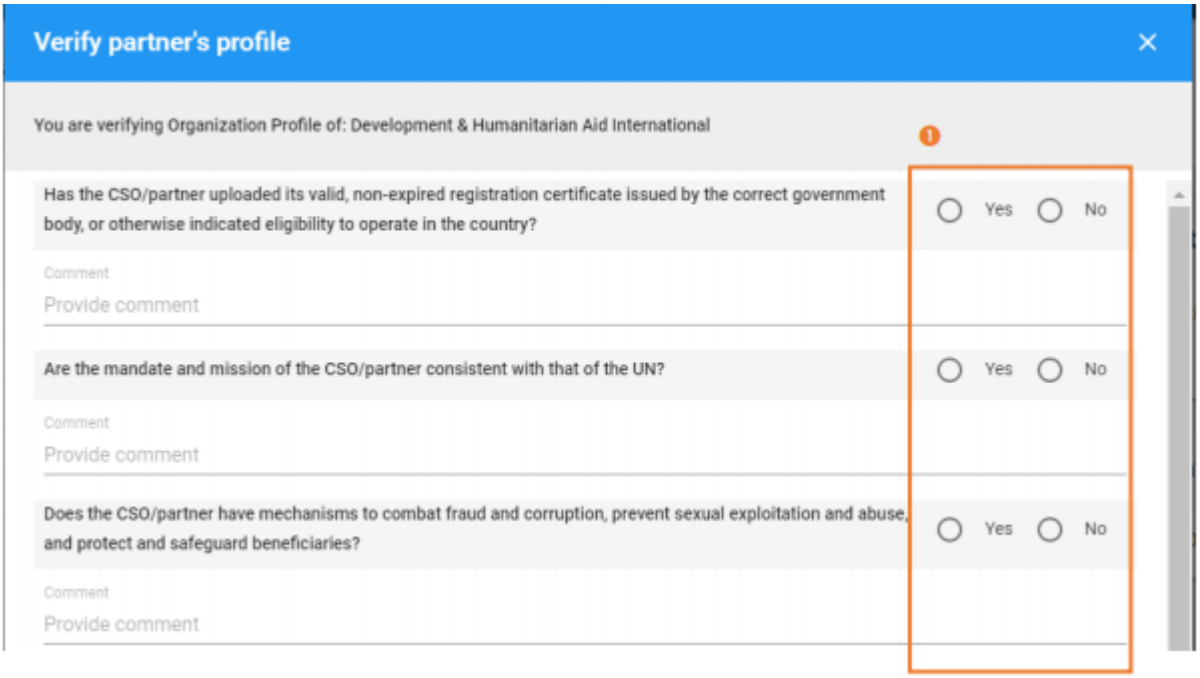


- **Step 3:** In the Partner Page view the summary of the Partner's organization in Overview tab
- **Step 4:** Click on the three vertical dots displayed in the summary page and click on Verify Profile

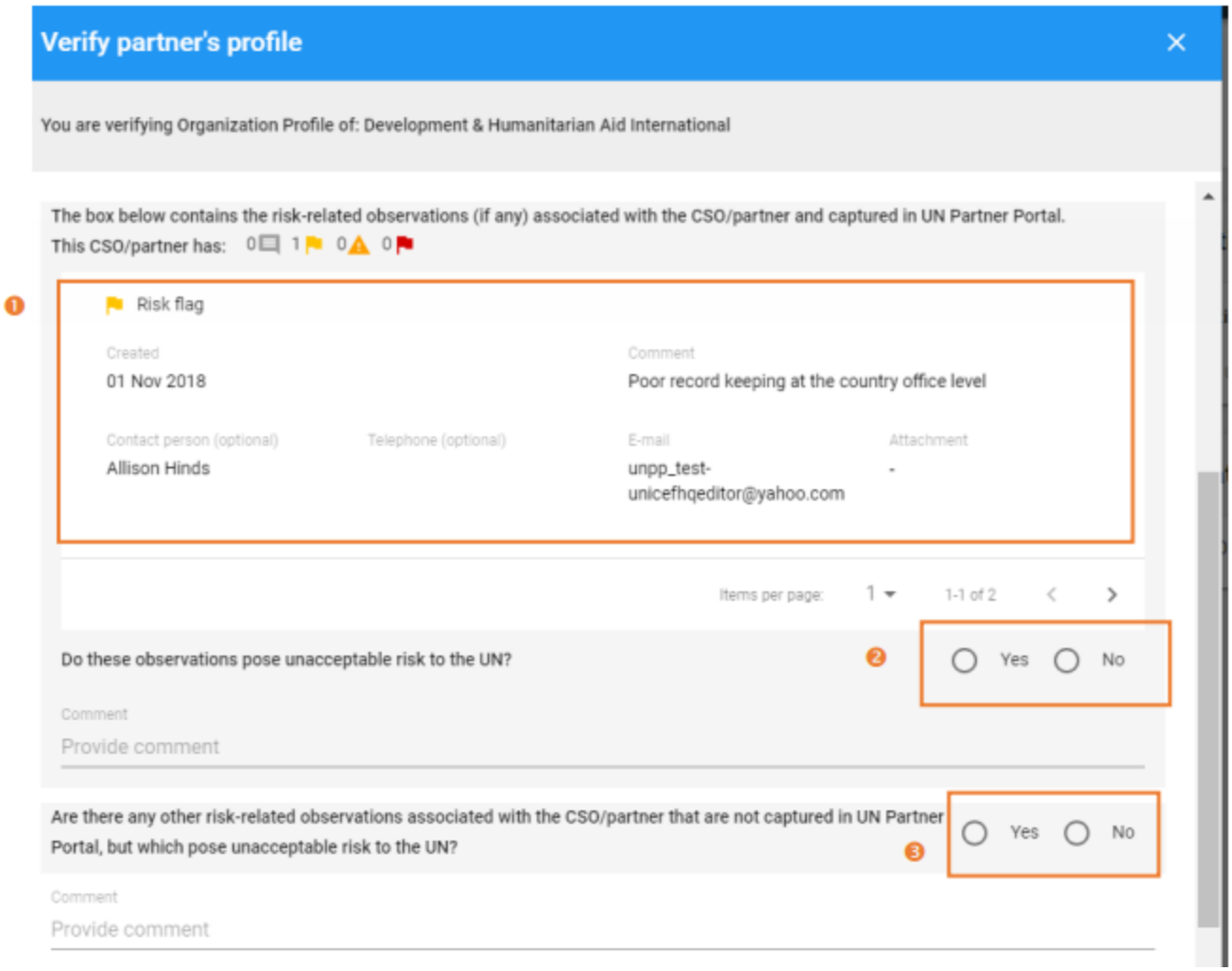

Save the Children International
OVERVIEW
PROFILE DETAILS
UN DATA
VERIFICATION
OBSERVATIONS
APPLICATIONS
USERS
Download as PDF
Verify Profile
Add Observation
Profile summary
Last updated: 11 Nov 2018
Partner name
Save the Children International
Partner ID
259
Type of organization
International NGO (INGO)
Country
United Kingdom
Location of office
Afghanistan, Armenia, Myanmar, Colombia, Congo, Dem. Rep., Ecuador, El Salvador, Ethiopia, Iraq, Jordan, Kenya, Lebanon, Liberia, Malawi, Nepal, Rwanda, Somalia, Sudan, South Sudan, Syrian Arab Republic, Thailand, Turkey, Uganda, Ukraine, Egypt, Tanzania, United Republic of, Burkina Faso, Yemen, Zambia, Bangladesh, Spain
Head of organization
Full Name
Job Title/Position
Telephone
Mobile
Fax
Email
Contact Info
SCI: St Vincent House, 30 Orange Street, London, WC2H 7HH, UK SCUS: 899 N. Capitol Street NE, Suite 900, Washington, DC 20002.
Verification status
Verification Pending
New Organization Profile
Observations


Save the Children International
Profile summary
Verification status
Observations
Warning
This profile cannot be verified as the partner has not completed their profile.
OK

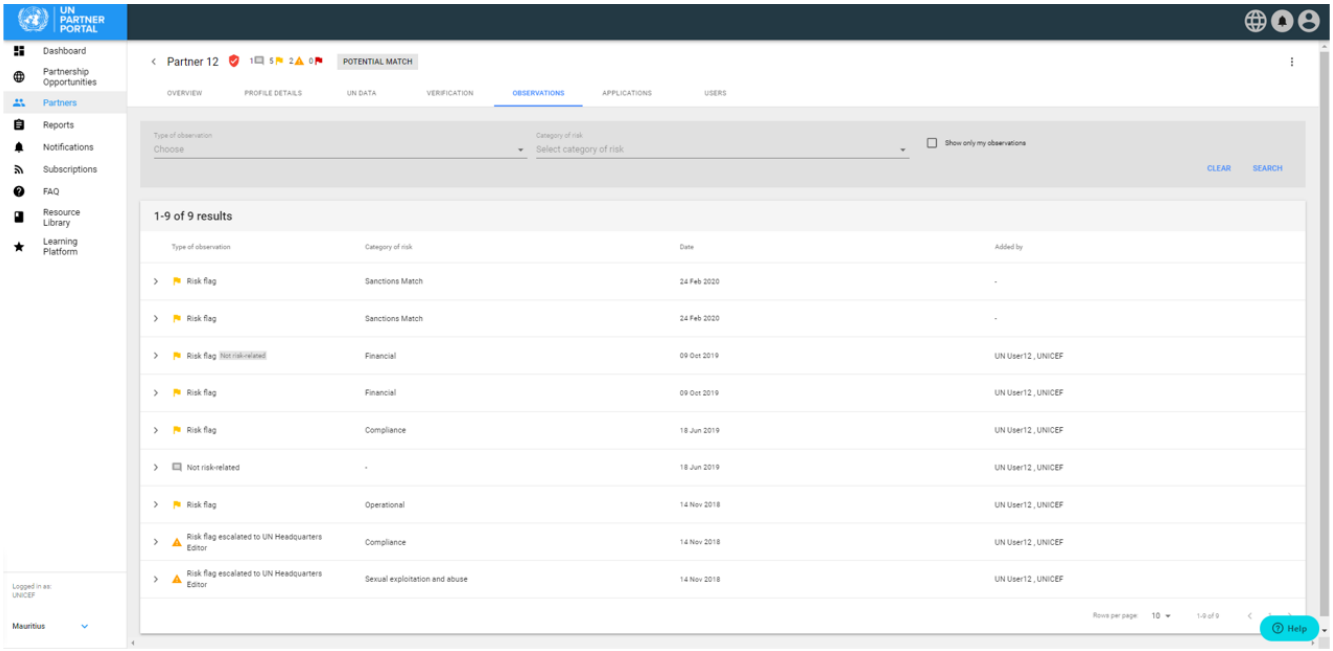
- **Step 5:** Complete the verification questions by answering Yes or No and entering comments in the appropriate section



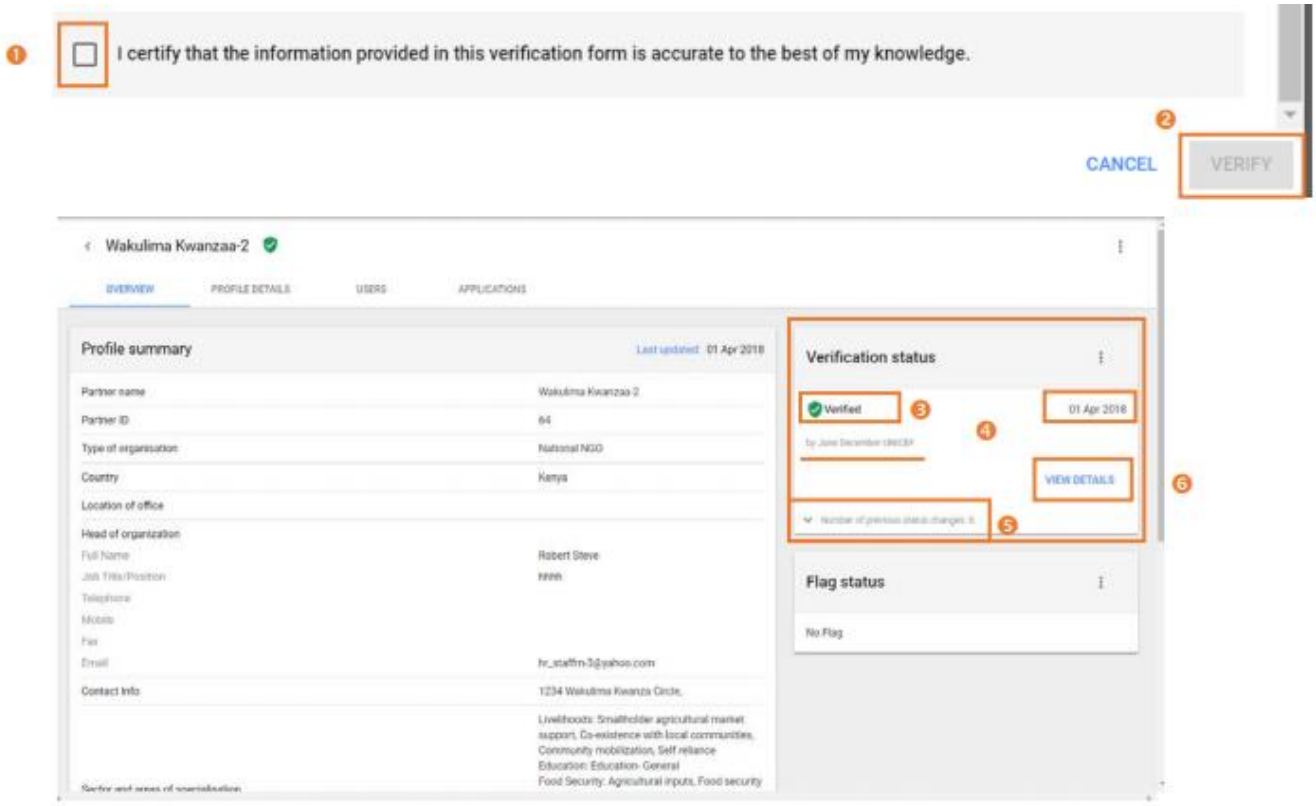
- **Step 6:** Review risks flags that have been raised by different people in regards to this partner profile. Please Answer the question whether the listed risk poses unacceptable risk to the UN by yes or no, and add comments if necessary. Raise, if necessary, additional unacceptable risks this profile might have, by answering the last question.



- **Step 7:** Review the flag raised when the partner's profile is present in the sanctions list and the partner profile is flagged as a 'Potential Match'



➢ **Step 8:** Certify the information provided by checking the checkbox and click on Verify button



5.2 Add Observations and Risks Flags to All Profiles

Add Observation: UN Agency members having permissions can add an Observation against a Partner Profile. The count of observations can be viewed by all agency members.

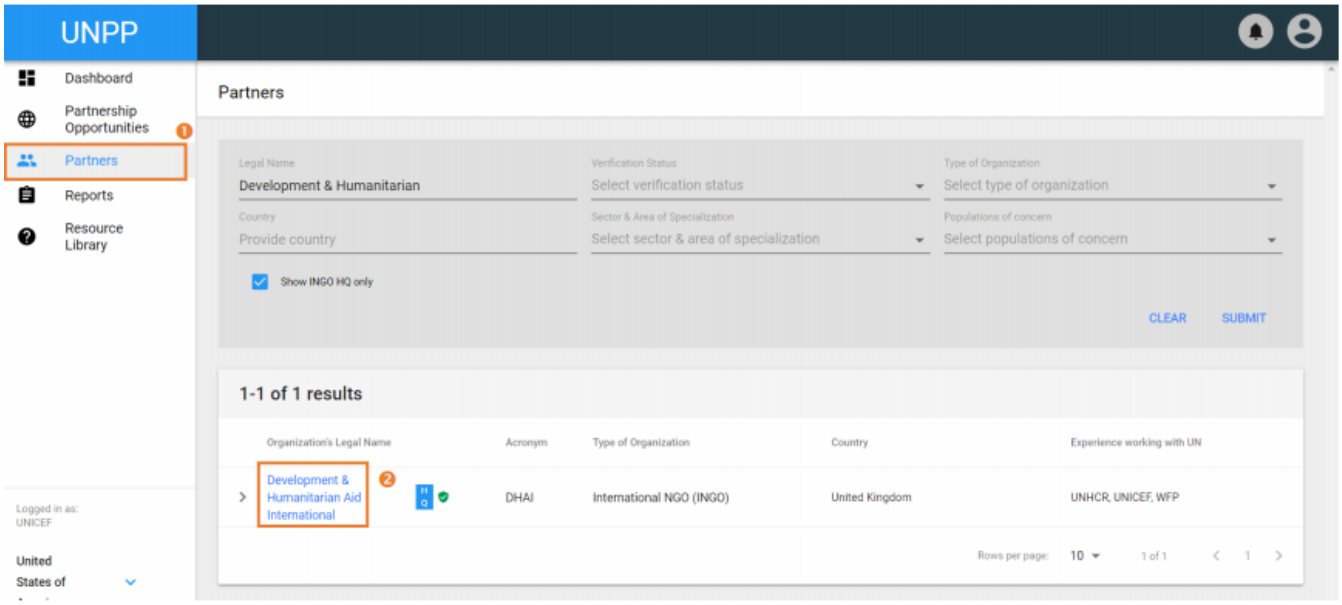
Add yellow flag: UN Agency members having permissions can add a Yellow Risk flag against a Partner Profile. The count of yellow flags can be viewed by all agency members.

Escalate yellow to Red flag: UN Agency members having permissions can escalate a Yellow Risk flag to Red Flag against a Partner Profile. The count of red flags can be viewed by all agency members.

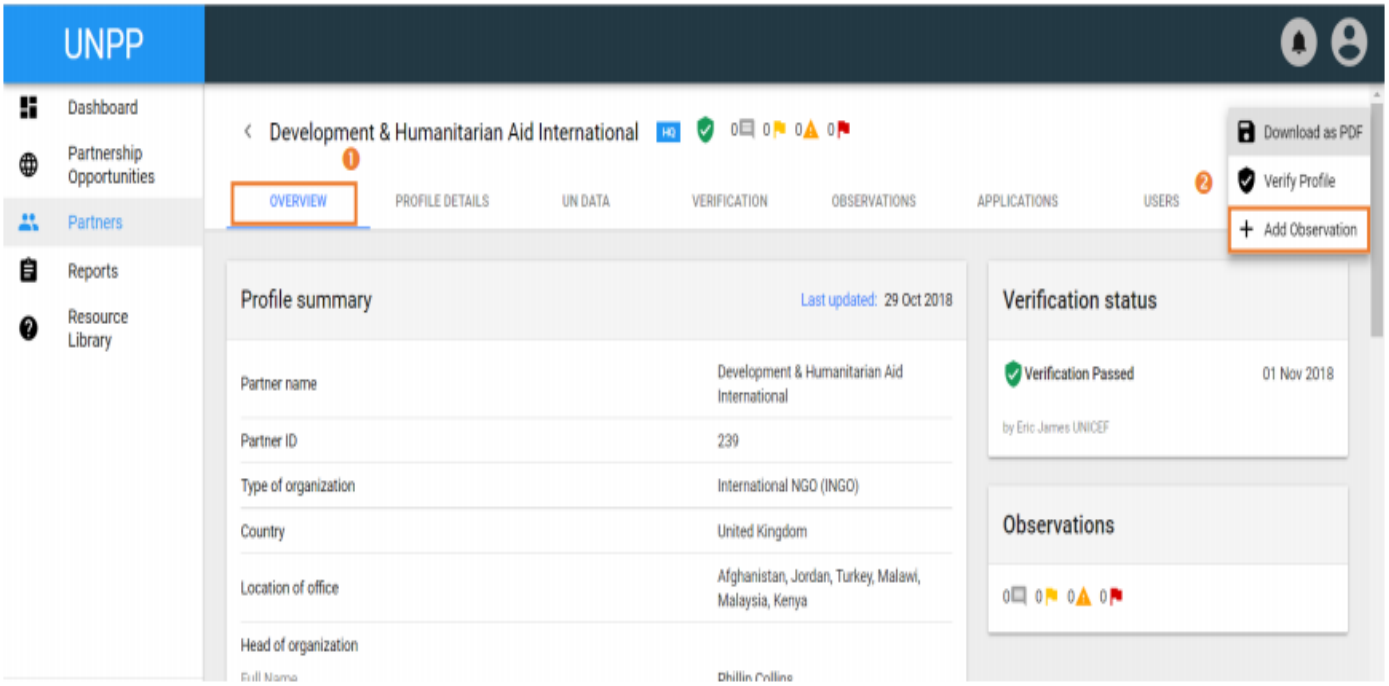
Invalidate the Yellow Flag: UN Agency members having permissions can invalidate a Flag.

5.2.1 Add Observation on PARTNERS /INGO HQ Profiles

- **Step 1:** Click on Partners icon to access the partners' page
- **Step 2:** C lick on the partner organization's name that you want to flag



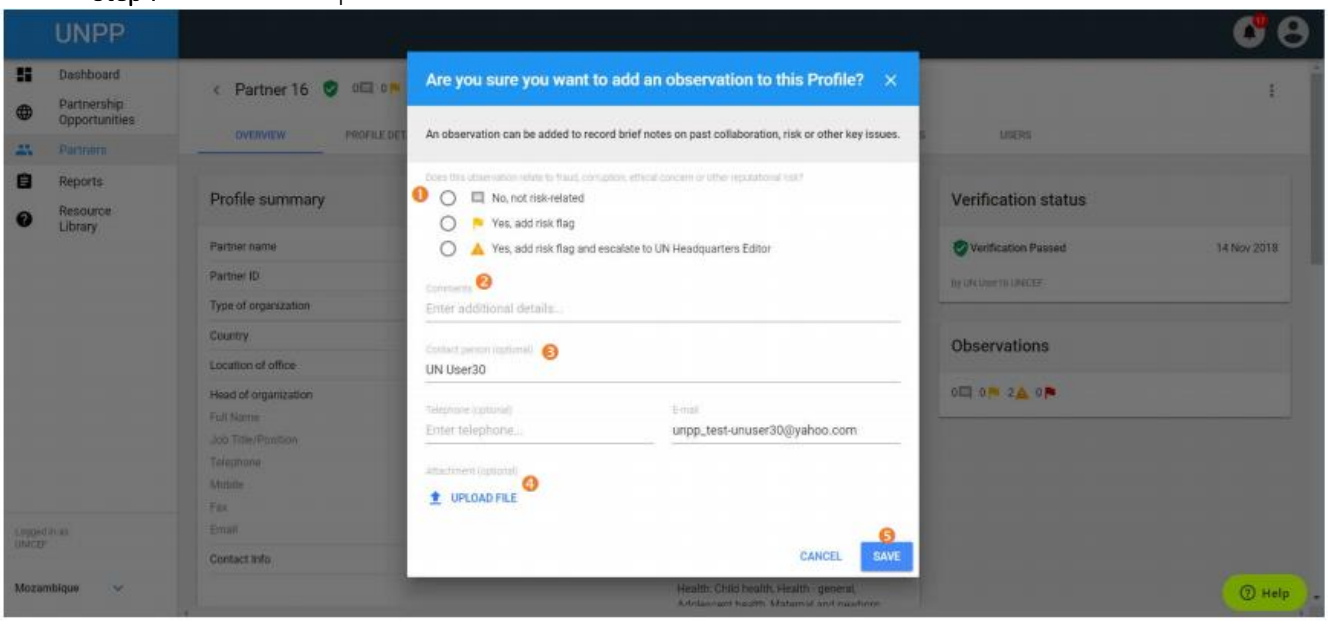
- **Step 3:** View a summary of the partner organization in the 'Overview' tab and click on vertical bullets to 'Add Observation'



- **Step 5:** In response to the question- Does this observation relate to fraud, corruption, ethical concern or other reputational risk? Select 'No, not risk-related'

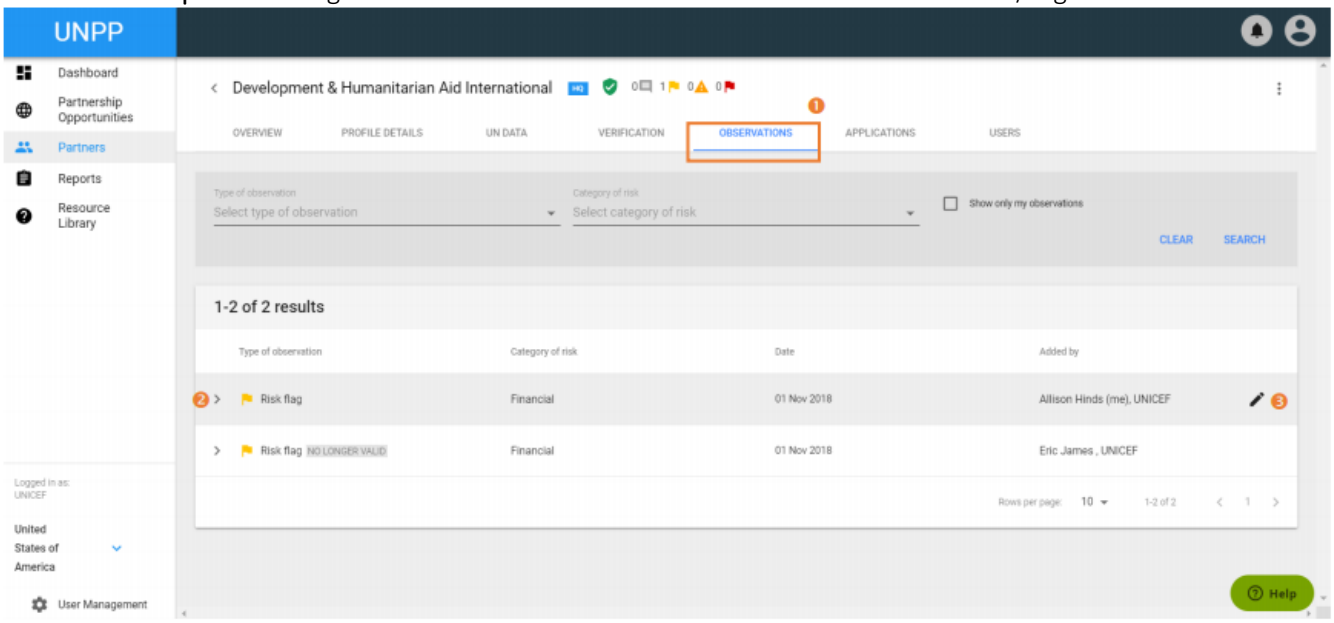
- **Step 6**: In the comments section enter the details of the observation You can also choose to enter the details of the individual raising the flag (name, telephone, email). (This information will be auto populated from the user profile).

- **Step 7**: The user can upload a file that relates to the observation and click on Save



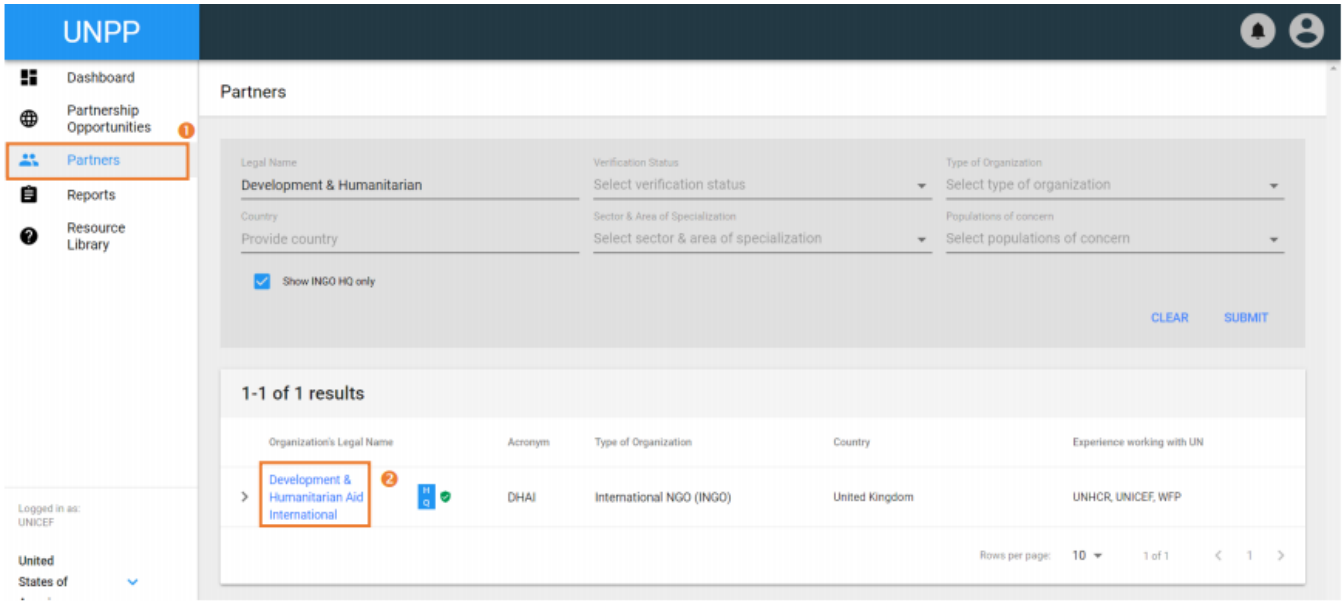
5.2.2 Edit Observation on PARTNERS/INGO HQ Profiles

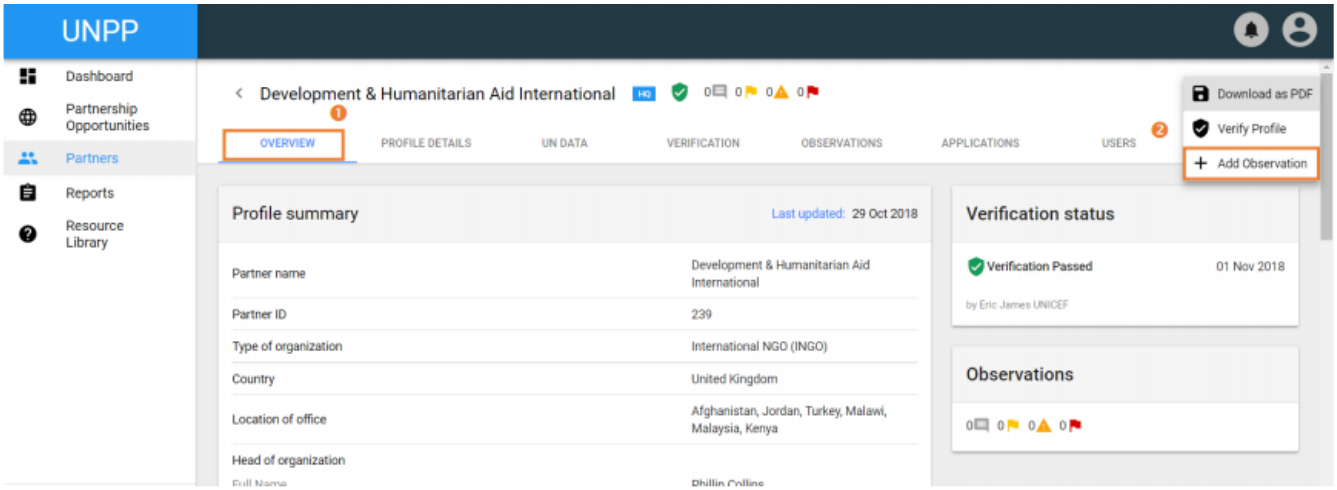
- **Step 1**:I n the partner's page click on the 'Observations' tab to view the details of the observations and flags posted on the organization's profile.
- **Step 2***: C* lick on the > arrows to view the details of the observation/flag
- **Step 3:** In the flag details screen click on the Pencil icon to edit the observation/flag.



5.2.3 Add Yellow Risk Flag on PARTNERS /INGO HQ Profiles

- **Step 1:** Click on the 'Partners' icon to access the partners page
- **Step 2:** Click on the partner organization's name (2) that you want to flag
- **Step 3:** View a summary of the partner organization in the 'Overview' tab Click on vertical bullets to 'Add Observation'

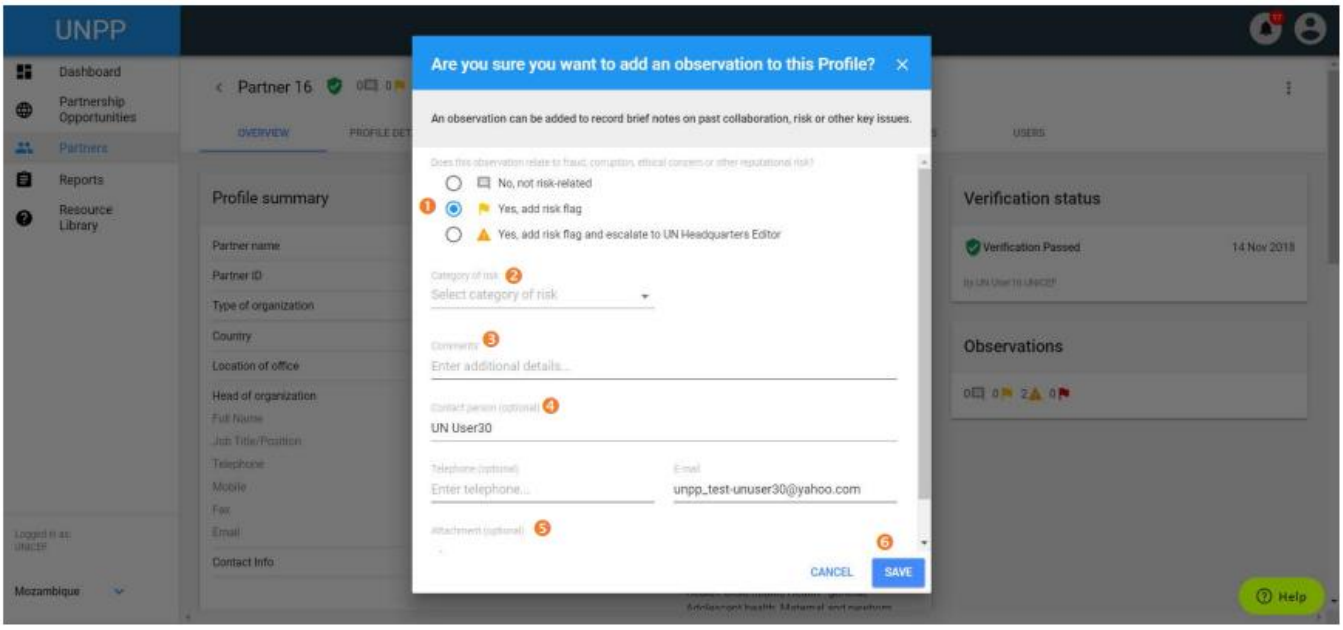




- **Step 4:** In response to the question- Does this observation relate to fraud, corruption, ethical concern or other reputational risk? Select the yellow flag- 'Yes, add risk flag'

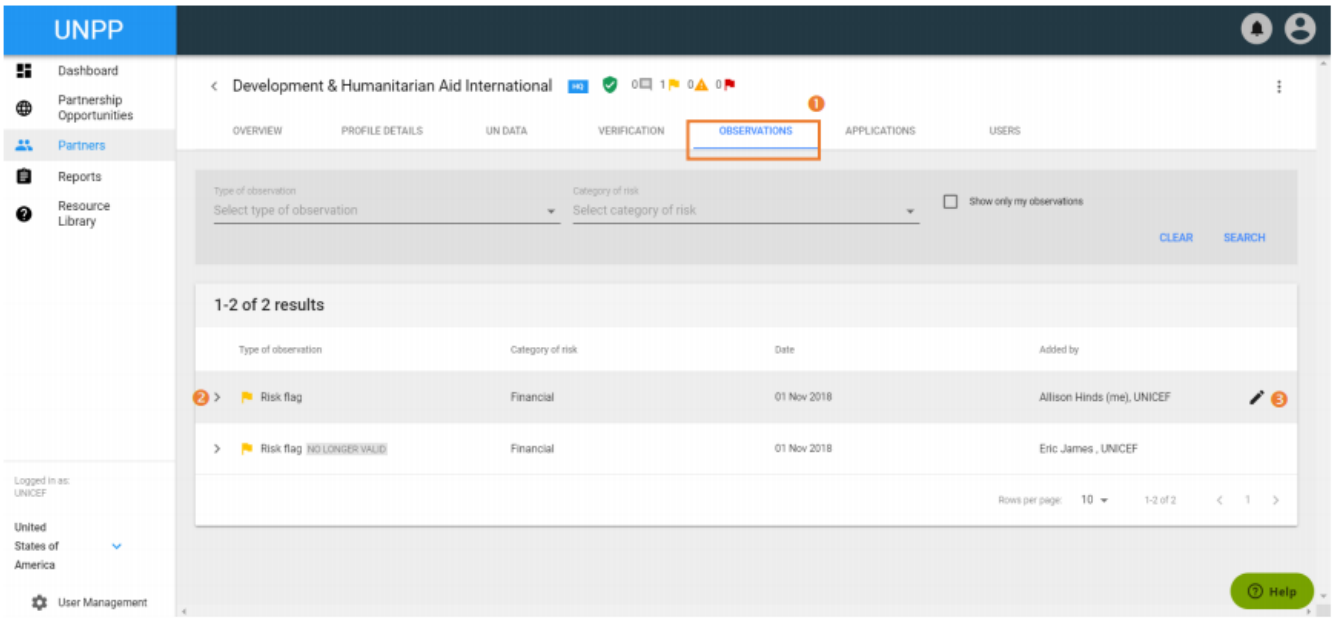
- **Step 5:** Select the 'Category of risk' and In the 'Comments' box enter the details of your observation. You can also choose to enter the details of the individual raising the flag (name, telephone, email). (This information will be auto populated from the user profile).

- **Step 6:** If needed you can also upload a file that is related or supports the observation and Click Save

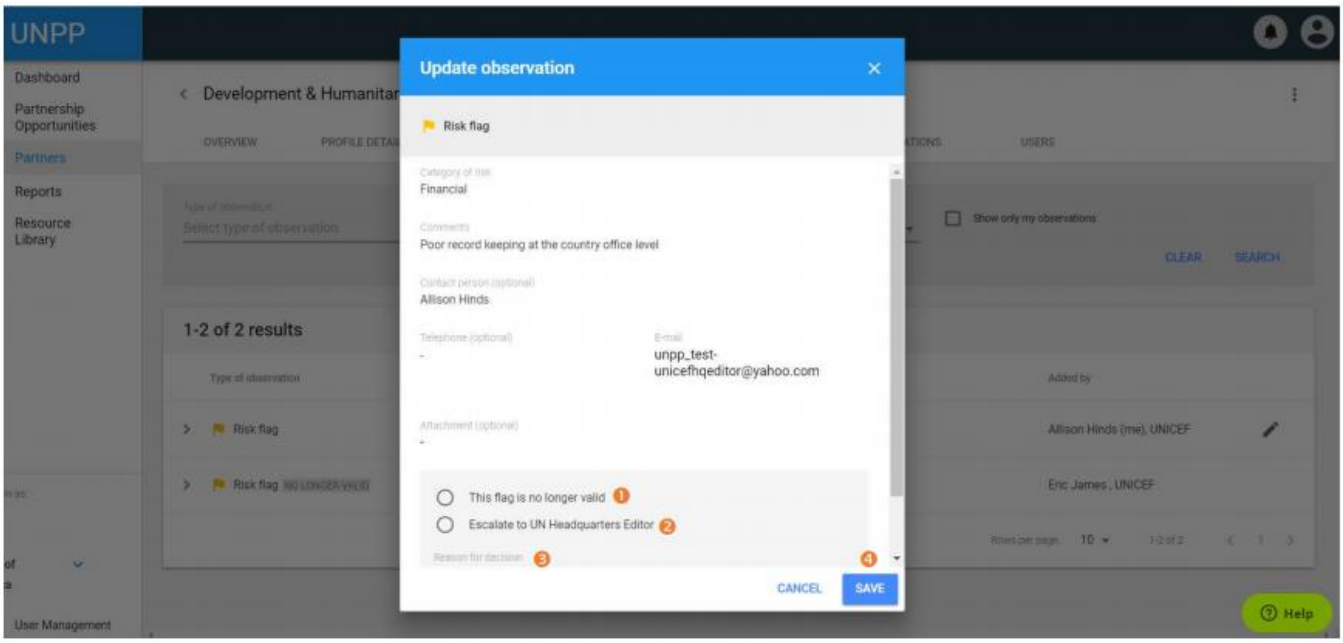


5.2.4 Edit /Invalidate the Yellow Risk Flag for Profiles

- **Step 1**:In the partner's page click on the 'Observations' tab to view the details of the observations and flags posted on the organization's profile.
- **Step 2***: C* lick on the > arrows to view the details of the observation/flag
- **Step 3:** In the flag details screen click on the Pencil icon to edit the observation/flag.



- **Step 4:** Click on 'This flag is no longer valid' ,enter the reason for decision (Only the person created can edit the flag)
- **Step 5:** Click Save

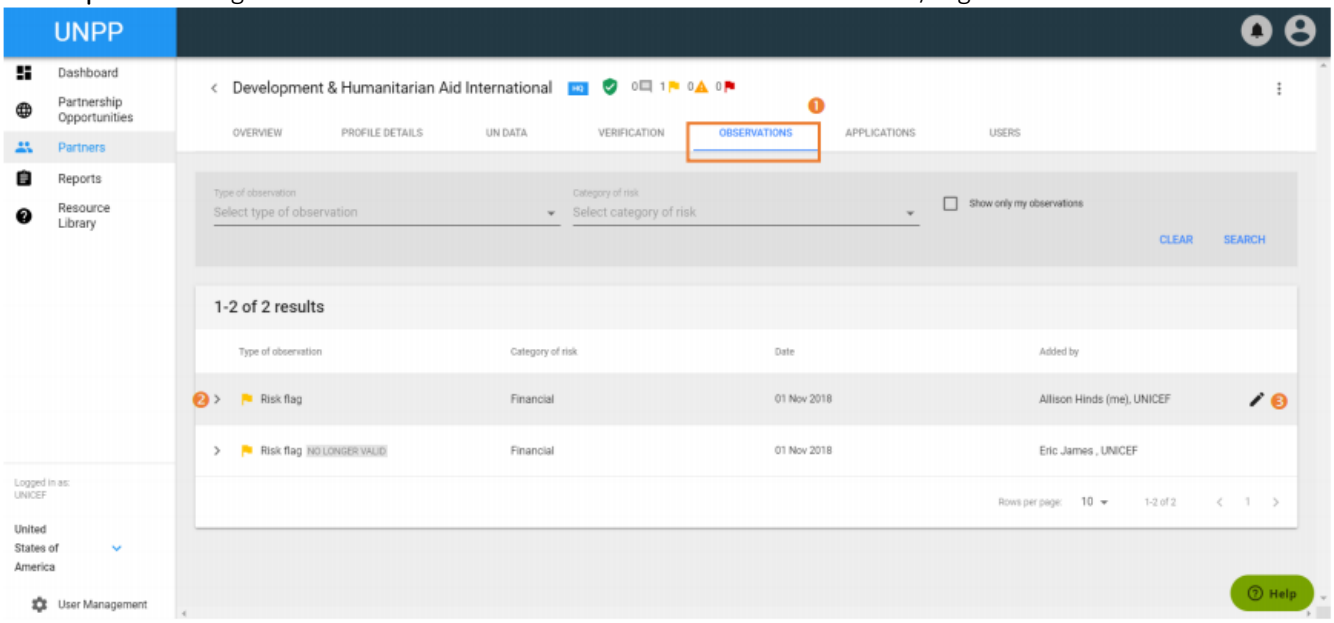


5.2.5 Escalate Yellow Risk Flag to HQ

- **Step 1**: In the partner's page click on the 'Observations' tab to view the details of the observations and flags posted on the organization's profile.

- **Step 2***: C* lick on the > arrows to view the details of the observation/flag

- **Step 3:** In the flag details screen click on the Pencil icon to edit the observation/flag.



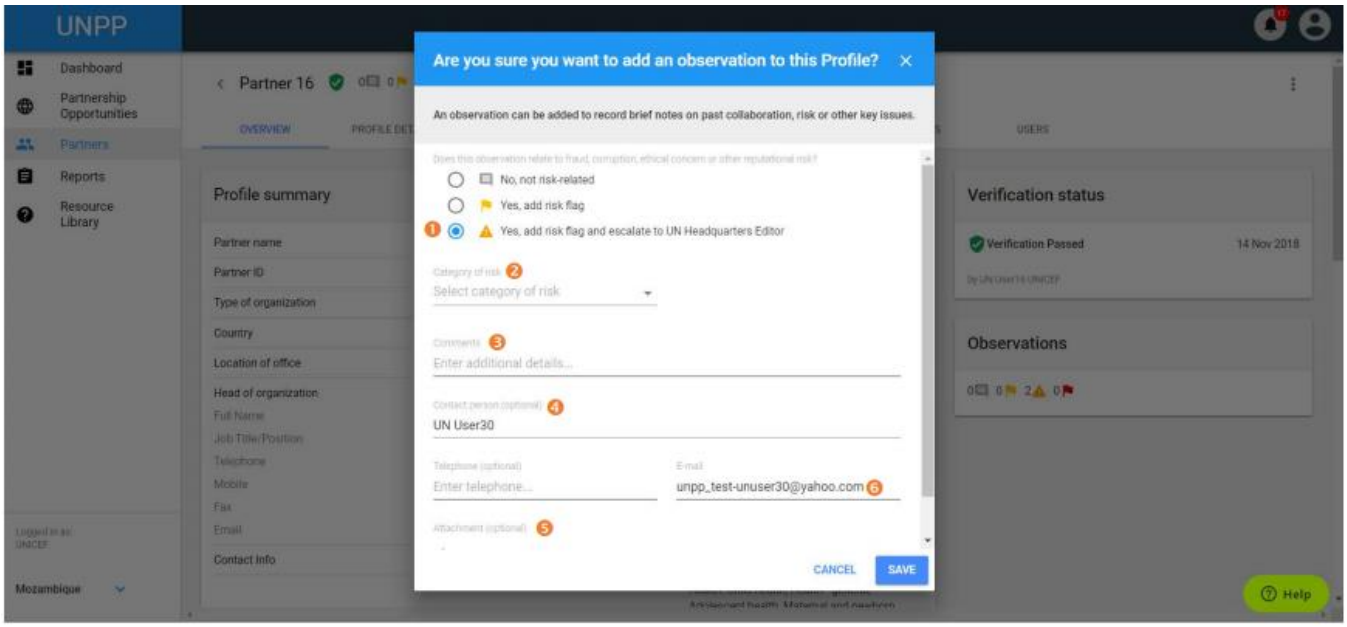
- **Step 4:** Click on select 'Escalate to UN Headquarters Editor' enter the reason for decision (Only the person created can edit the flag)

- **Step 5:** Click Save

  OR

- **Step 6:** Click on Add Observation button in the Overview of a Partner and select the ' Yes Add risk flag and escalate to UN Headquarters Editor

- **Step 7:** Fill in other mandatory and applicable fields and Click SAVE



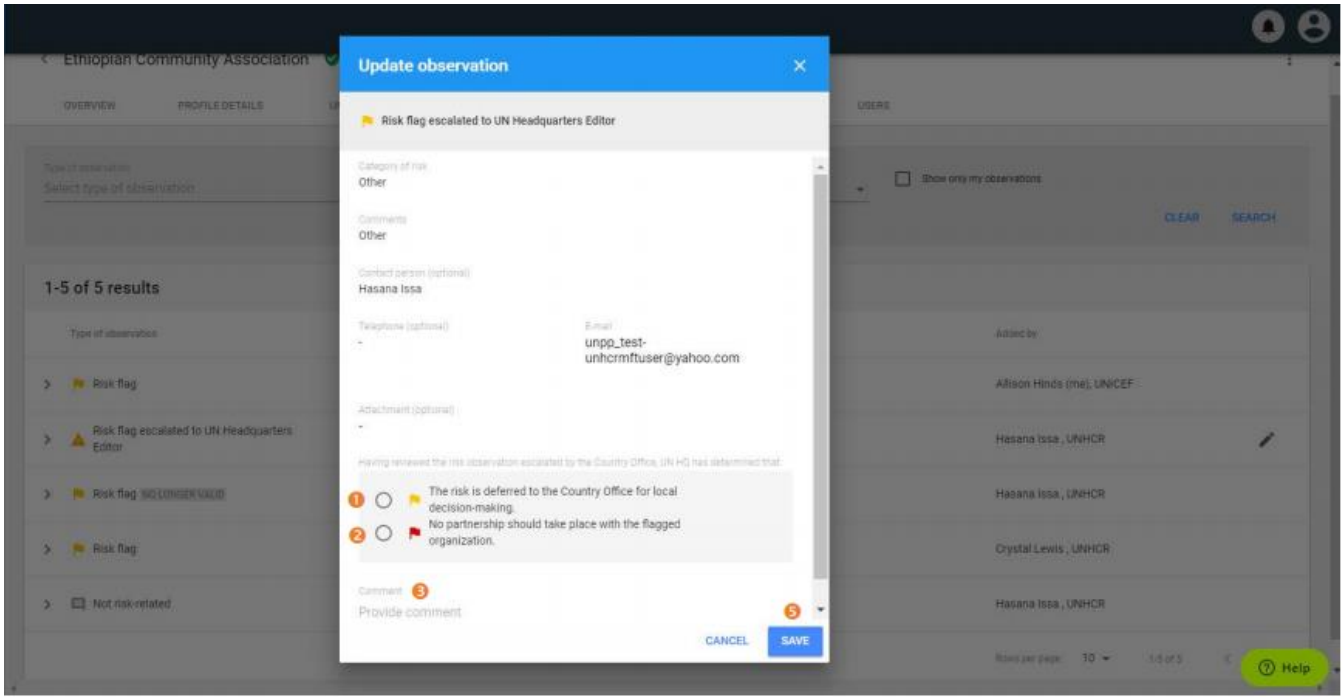
5.2.6 Edit the Escalated Yellow Risk Flag to HQ

- **Step 1**: In the partner's page click on the 'Observations' tab to view the details of the observations and flags posted on the organization's profile.
- **Step 2***: C* lick on the > arrows to view the details of the observation/flag
- **Step 3:** In the flag details screen click on the Pencil icon to edit the observation/flag escalated to HQ.
- **Step 4:** Click on 'This risk is deferred to the country office for local decision making' provide a comment (To Inform UNPP users that the risk should be managed at the country level)
- **Step 5:** Click Save

OR

- **Step 6:** Select 'No partnership should take place with the flagged organization', provide a comment (to inform UNPP users that no partnership should take place with the organization)
- **Step 7:** Click save.

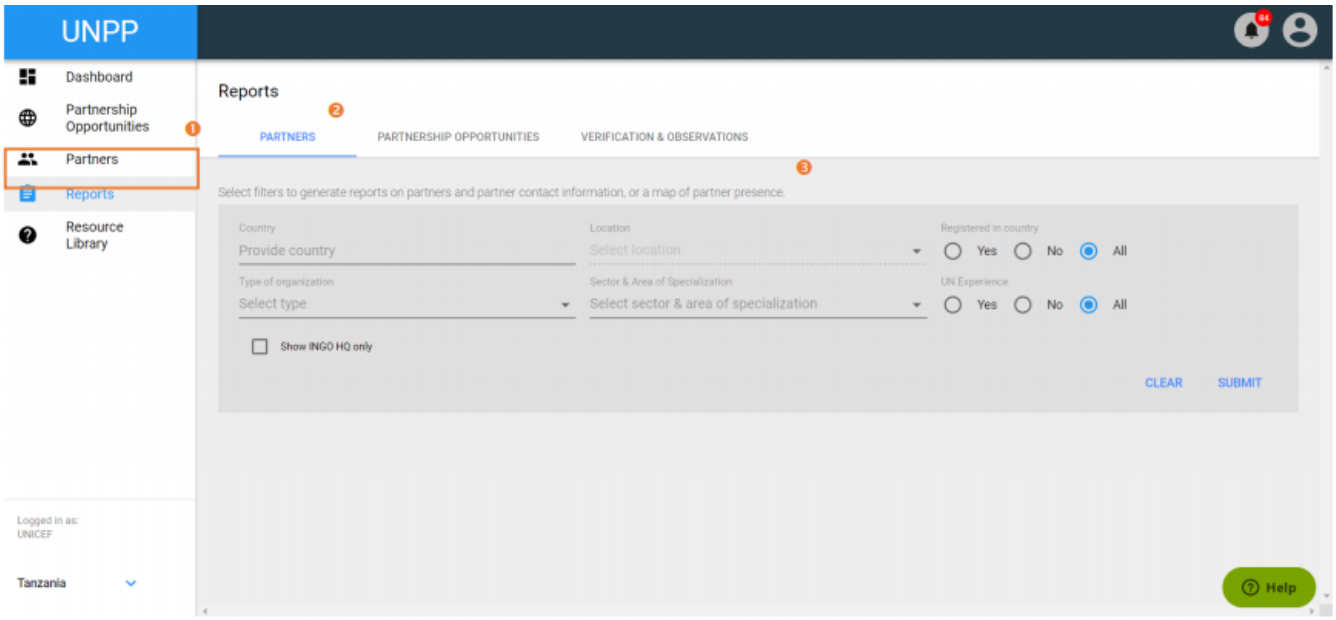
PS: Red flagging an organization means that all agencies using the UNPP will not be able to partner with this organization using the portal.


Ethiopian Community Association
OVERVIEW
PROFILE DETAILS
USERS
Show only my observations
CLEAR
SEARCH
1-5 of 5 results
Risk flag
Risk flag escalated to UN Headquarters Editor
Risk flag
Risk flag
Not risk-related
Allison Hinds (me), UNICEF
Hasana Issa , UNHCR
Hasana Issa , UNHCR
Crystal Lewis , UNHCR
Hasana Issa , UNHCR
Help
Update observation
Risk flag escalated to UN Headquarters Editor
Other
Other
Hasana Issa
unpp_test-unhcrmftuser@yahoo.com
The risk is deferred to the Country Office for local decision-making.
No partnership should take place with the flagged organization.
Provide comment
CANCEL
SAVE

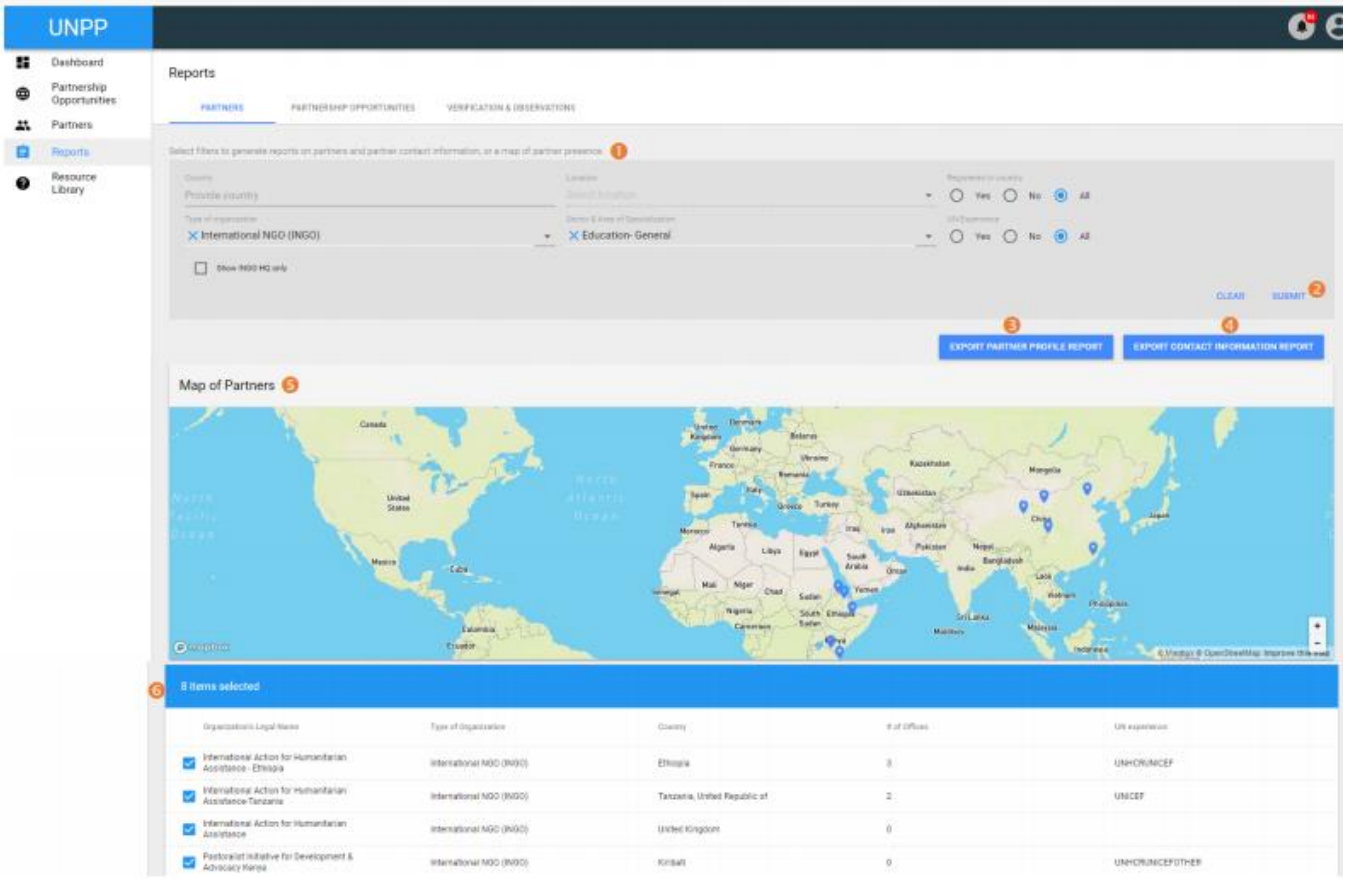
6. Reports	Accessible by:
	Web version

6.1 Generate Partner Reports

➢ **Step 1:** Click on Reports link in the left navigation bar



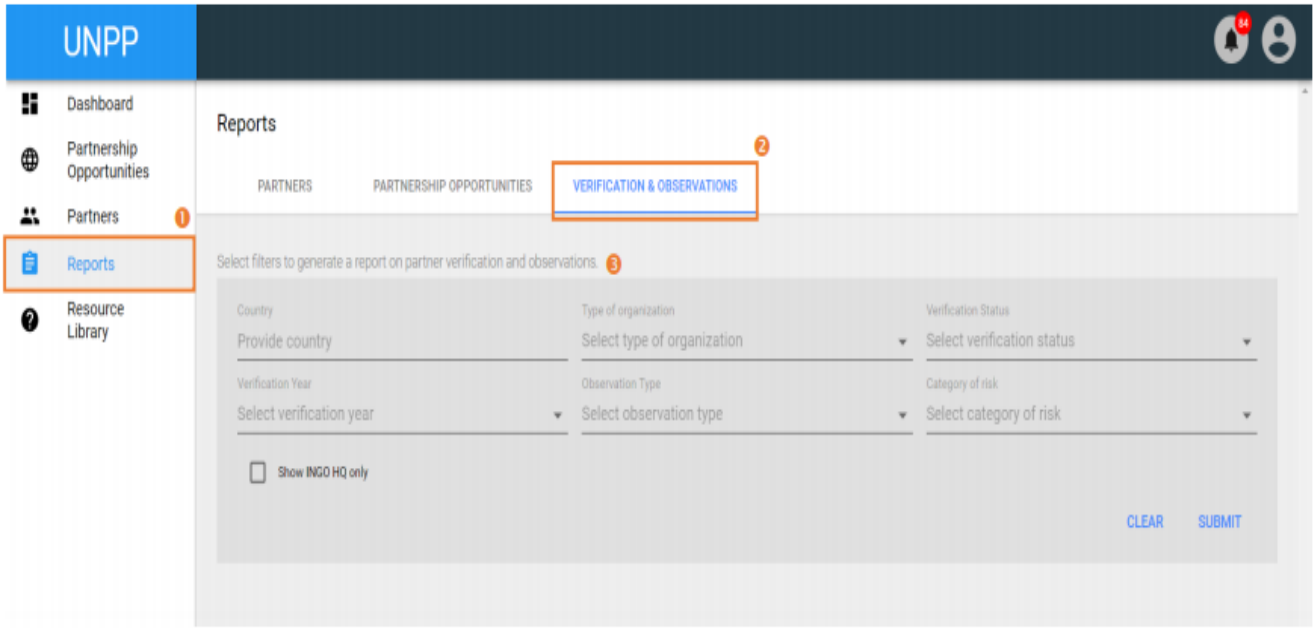
➢ **Step 2:** Use the filters to define the parameters of the partners report and click on Submit.



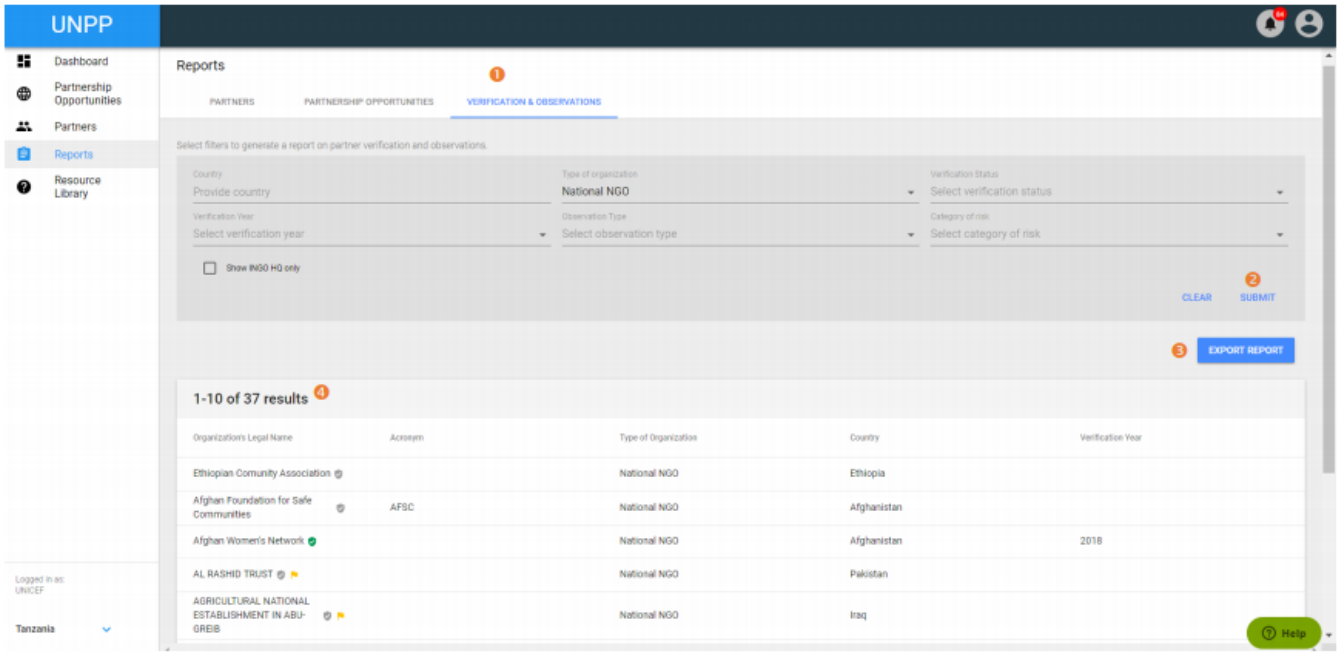
- **Step 3:** Click on Export Partner Profile Report to view the information on the filtered Partners Profile
- **Step 4:** Click on Export Contact Information Report to view the contact information on the filtered Partners Profile
- **Step 5:** Click Clear to clear the filters

6.2 Generate Verification and Observation Reports

- **Step 1:** Click on Reports link in the left navigation bar and select Verifications and Observations link



- **Step 2:** Use the filters to define the parameters of the report and click on Submit
- **Step 3:** Click on Export Report to download the excel file that has details about the Verification and Observation



- **Step 4:** Click on Clear button to reset the filters