**UN User Roles & Permissions: HQ Editor**

**Objective:** Understand the activities a user can do based on the roles assigned to them by their organization

**HQ Editor** is an agency user with universal access to their agency's account on the portal. This user also has user management permissions.

| Steps | Activity | Permissions |
|-------|----------|-------------|
| 1 | Add users to agency's country office or headquarters | **YES** |
| 2 | View organization's dashboard | **YES** |
| 3 | Verify all international civil society organization's headquarters profile | **YES** |
| 4 | Verify civil society organization's (country) profile in the user's country | **YES** |
| 5 | Verify civil society organization's (country) profile not in user's country | **YES** |
| 6 | Add observations and risk flags to organization's account in user's country | **YES** |
| 7 | Add observations and risk flags to organization's account not in user's country | **YES** |
| 8 | Escalate risk flags user created to UN Headquarters | **YES** |
| 9 | Add civil society organizations' vendor number/partner ID | **YES** |
| 10 | Run partner mapping and partner information report | **YES** |
| 11 | Run partnership opportunity reports | **YES** |
| 20 | Run observations and verification | **YES** |

**Partnership Opportunities Workflow Permissions**

| Steps | Activity | Permissions | | |
|-------|----------|-------------|-------------|----------|
| | | **CFEI/DSR Creator** | **Focal Point** | **Reviewer** |
| 1 | Create calls for expressions of interest and direct selection/retention | **NO** | **NA** | **NA** |
| 2 | Be a focal point on a call for expressions of interest or direct selection/retention | **NO** | **NO** | **NA** |
| 3 | Publish calls for expressions of interest and direct selection/retention | **NO** | **NA** | **NA** |
| 4 | Respond to requests for clarifications or further information on a call for expressions of interest | **NO** | **NA** | **NA** |
| 5 | Add reviewers to a call for expressions of interest | **NO** | **NA** | **NA** |
| 6 | Assess applications on a call for expressions of interest | **NO** | **NA** | **NA** |
| 7 | View your scores on a call for expressions of interest | **NO** | **NA** | **NA** |
| 8 | View all scores on a call for expressions of interest | **NO** | **NA** | **NA** |
| 9 | Finalize a call for expressions of interest or direct selection/retention | **NO** | **NA** | **NA** |

**UN User Roles & Permissions: Administrator**

**Objective:** Understand the activities a user can do based on the roles assigned to them by their organization
**Administrator** is an agency user with administrative permissions on their agency's account on the portal.

| Steps | Activity | Permissions |
|---|---|---|
| 1 | Add users to agency's country office | **YES** |
| 2 | View organization's dashboard | **YES** |
| 3 | Verify all international civil society organization's headquarters profile | **NO** |
| 4 | Verify civil society organization's (country) profile in the user's country | **NO** |
| 5 | Verify civil society organization's (country) profile not in user's country | **NO** |
| 6 | Add observations and risk flags to organization's account in user's country | **NO** |
| 7 | Add observations and risk flags to organization's account not in user's country | **NO** |
| 8 | Escalate risk flags user created to UN Headquarters | **NO** |
| 9 | Add civil society organizations' vendor number/partner ID | **YES** |
| 10 | Run partner mapping and partner information report | **YES** |
| 11 | Run partnership opportunity reports | **NO** |
| 20 | Run observations and verification | **NO** |

**Partnership Opportunities Workflow Permissions**

| Steps | Activity | Permissions | | |
|---|---|---|---|---|
| | | CFEI/DSR Creator | Focal Point | Reviewer |
| 1 | Create calls for expressions of interest and direct selection/retention | **NO** | **NA** | **NA** |
| 2 | Be a focal point on a call for expressions of interest or direct selection/retention | **NO** | **NO** | **NA** |
| 3 | Publish calls for expressions of interest and direct selection/retention | **NO** | **NA** | **NA** |
| 4 | Respond to requests for clarifications or further information on a call for expressions of interest | **NO** | **NA** | **NA** |
| 5 | Add reviewers to a call for expressions of interest | **NO** | **NA** | **NA** |
| 6 | Assess applications on a call for expressions of interest | **NO** | **NA** | **NA** |
| 7 | View your scores on a call for expressions of interest | **NO** | **NA** | **NA** |
| 8 | View all scores on a call for expressions of interest | **NO** | **NA** | **NA** |
| 9 | Finalize a call for expressions of interest or direct selection/retention | **NO** | **NA** | **NA** |

**UN User Roles & Permissions: Advanced Editor**

**Objective:** Understand the activities a user can do based on the roles assigned to them by their organization
**Advanced editor** is a UNICEF or WFP user with creation and publishing permissions on their agency's account on the portal.

| Steps | Activity | Permissions |
|---|---|---|
| 1 | Add users to agency's country office | **NO** |
| 2 | View organization's dashboard | **YES** |
| 3 | Verify all international civil society organization's headquarters profile | **NO** |
| 4 | Verify civil society organization's (country) profile in the user's country | **YES** |
| 5 | Verify civil society organization's (country) profile not in user's country | **NO** |
| 6 | Add observations and risk flags to organization's account in user's country | **YES** |
| 7 | Add observations and risk flags to organization's account not in user's country | **NO** |
| 8 | Escalate risk flags user created to UN Headquarters | **YES** |
| 9 | Add civil society organizations' vendor number/partner ID | **YES** |
| 10 | Run partner mapping and partner information report | **YES** |
| 11 | Run partnership opportunity reports | **YES** |
| 20 | Run observations and verification | **YES** |

**Partnership Opportunities Workflow Permissions**

| Steps | Activity | Permissions | | |
|---|---|---|---|---|
| | | **CFEI/DSR Creator** | **Focal Point** | **Reviewer** |
| 1 | Create calls for expressions of interest and direct selection/retention | **YES** | **NA** | **NA** |
| 2 | Be a focal point on a call for expressions of interest or direct selection/retention | **YES** | **NA** | **NA** |
| 3 | Publish calls for expressions of interest and direct selection/retention | **YES** | **YES** | **NA** |
| 4 | Respond to requests for clarifications or further information on a call for expressions of interest | **YES** | **YES** | **NA** |
| 5 | Add reviewers to a call for expressions of interest | **YES** | **YES** | **NA** |
| 6 | Assess applications on a call for expressions of interest | **YES** | **YES** | **YES** |
| 7 | View your scores on a call for expressions of interest | **YES** | **YES** | **YES** |
| 8 | View all scores on a call for expressions of interest | **YES** | **YES** | **NO** |
| 9 | Finalize a call for expressions of interest or direct selection/retention | **YES** | **YES** | **NO** |

**UN User Roles & Permissions: Basic Editor**

**Objective:** Understand the activities a user can do based on the roles assigned to them by their organization
**Basic editor** is a UNICEF or WFP user with creation permissions on their agency's account on the portal.

| Steps | Activity | Permissions |
|---|---|---|
| 1 | Add users to agency's country office | **NO** |
| 2 | View organization's dashboard | **YES** |
| 3 | Verify all international civil society organization's headquarters profile | **NO** |
| 4 | Verify civil society organization's (country) profile in the user's country | **NO** |
| 5 | Verify civil society organization's (country) profile not in user's country | **NO** |
| 6 | Add observations and risk flags to organization's account in user's country | **NO** |
| 7 | Add observations and risk flags to organization's account not in user's country | **NO** |
| 8 | Escalate risk flags user created to UN Headquarters | **NO** |
| 9 | Add civil society organizations' vendor number/partner ID | **YES** |
| 10 | Run partner mapping and partner information report | **YES** |
| 11 | Run partnership opportunity reports | **YES** |
| 20 | Run observations and verification | **NO** |

**Partnership Opportunities Workflow Permissions**

| Steps | Activity | Permissions | | |
|---|---|---|---|---|
| | | **CFEI/DSR Creator** | **Focal Point** | **Reviewer** |
| 1 | Create calls for expressions of interest and direct selection/retention | **YES** | **NA** | **NA** |
| 2 | Be a focal point on a call for expressions of interest or direct selection/retention | **NO** | **NA** | **NA** |
| 3 | Publish calls for expressions of interest and direct selection/retention | **NO** | **NA** | **NA** |
| 4 | Respond to requests for clarifications or further information on a call for expressions of interest | **YES** | **NA** | **NA** |
| 5 | Add reviewers to a call for expressions of interest | **YES** | **NA** | **NA** |
| 6 | Assess applications on a call for expressions of interest | **YES** | **NA** | **YES** |
| 7 | View your scores on a call for expressions of interest | **YES** | **NA** | **YES** |
| 8 | View all scores on a call for expressions of interest | **YES** | **NA** | **NO** |
| 9 | Finalize a call for expressions of interest or direct selection/retention | **YES** | **NA** | **NO** |

**UN User Roles & Permissions: MFT User**

**Objective:** Understand the activities a user can do based on the roles assigned to them by their organization
**MFT User** is a UNHCR user with approval permissions on their organization's account.

| Steps | Activity | Permissions |
|---|---|---|
| 1 | Add users to agency's country office | **NO** |
| 2 | View organization's dashboard | **YES** |
| 3 | Verify all international civil society organization's headquarters profile | **NO** |
| 4 | Verify civil society organization's (country) profile in the user's country | **NO** |
| 5 | Verify civil society organization's (country) profile not in user's country | **NO** |
| 6 | Add observations and risk flags to organization's account in user's country | **YES** |
| 7 | Add observations and risk flags to organization's account not in user's country | **NO** |
| 8 | Escalate risk flags user created to UN Headquarters | **YES** |
| 9 | Add civil society organizations' vendor number/partner ID | **NO** |
| 10 | Run partner mapping and partner information report | **YES** |
| 11 | Run partnership opportunity reports | **YES** |
| 20 | Run observations and verification | **YES** |

**Partnership Opportunities Workflow Permissions**

| Steps | Activity | Permissions | | |
|---|---|---|---|---|
| | | **CFEI/DSR Creator** | **Focal Point** | **Reviewer** |
| 1 | Create calls for expressions of interest and direct selection/retention | **NO** | **NA** | **NA** |
| 2 | Be a focal point on a call for expressions of interest or direct selection/retention | **NO** | **YES** | **NA** |
| 3 | Publish calls for expressions of interest | **NO** | **NO** | **NA** |
| 4 | Publish direct selection/retention | **YES** | **YES** | **NA** |
| 4 | Respond to requests for clarifications or further information on a call for expressions of interest | **NO** | **NO** | **NA** |
| 5 | Add reviewers to a call for expressions of interest | **NO** | **NO** | **NA** |
| 6 | Assess applications on a call for expressions of interest | **YES** | **NA** | **YES** |
| 7 | View your scores on a call for expressions of interest | **YES** | **YES** | **YES** |
| 8 | View all scores on a call for expressions of interest | **YES** | **YES** | **YES** |
| 9 | Finalize a call for expressions of interest or direct selection/retention | **YES** | **YES** | **NO** |

**UN User Roles & Permissions: PAM User**

**Objective:** Understand the activities a user can do based on the roles assigned to them by their organization
**PAM User** is a UNHCR user with creation permissions on their organization's account.

| Steps | Activity | Permissions |
|---|---|---|
| 1 | Add users to agency's country office | **NO** |
| 2 | View organization's dashboard | **YES** |
| 3 | Verify all international civil society organization's headquarters profile | **NO** |
| 4 | Verify civil society organization's (country) profile in the user's country | **NO** |
| 5 | Verify civil society organization's (country) profile not in user's country | **NO** |
| 6 | Add observations and risk flags to organization's account in user's country | **NO** |
| 7 | Add observations and risk flags to organization's account not in user's country | **NO** |
| 8 | Escalate risk flags user created to UN Headquarters | **NO** |
| 9 | Add civil society organizations' vendor number/partner ID | **NO** |
| 10 | Run partner mapping and partner information report | **YES** |
| 11 | Run partnership opportunity reports | **YES** |
| 20 | Run observations and verification | **NO** |

**Partnership Opportunities Workflow Permissions**

| Steps | Activity | Permissions | | |
|---|---|---|---|---|
| | | CFEI/DSR Creator | Focal Point | Reviewer |
| 1 | Create calls for expressions of interest and direct selection/retention | **YES** | **NA** | **NA** |
| 2 | Be a focal point on a call for expressions of interest or direct selection/retention | **NO** | **NA** | **NA** |
| 3 | Publish calls for expressions of interest | **YES** | **NA** | **NA** |
| 4 | Publish direct selection/retention | **NO** | **NA** | **NA** |
| 4 | Respond to requests for clarifications or further information on a call for expressions of interest | **YES** | **NA** | **NA** |
| 5 | Add reviewers to a call for expressions of interest | **YES** | **NA** | **NA** |
| 6 | Assess applications on a call for expressions of interest | **YES** | **NA** | **YES** |
| 7 | View your scores on a call for expressions of interest | **YES** | **NA** | **YES** |
| 8 | View all scores on a call for expressions of interest | **YES** | **NA** | **NO** |
| 9 | Finalize a call for expressions of interest or direct selection/retention | **YES** | **NA** | **NO** |

**UN User Roles & Permissions: Reader**

**Objective:** Understand the activities a user can do based on the roles assigned to them by their organization
**Reader** is a UN user with view permissions on their agency's account on the portal.

| Steps | Activity | Permissions |
|-------|----------|-------------|
| 1 | Add users to agency's country office | **NO** |
| 2 | View organization's dashboard | **YES** |
| 3 | Verify all international civil society organization's headquarters profile | **NO** |
| 4 | Verify civil society organization's (country) profile in the user's country | **NO** |
| 5 | Verify civil society organization's (country) profile not in user's country | **NO** |
| 6 | Add observations and risk flags to organization's account in user's country | **NO** |
| 7 | Add observations and risk flags to organization's account not in user's country | **NO** |
| 8 | Escalate risk flags user created to UN Headquarters | **NO** |
| 9 | Add civil society organizations' vendor number/partner ID | **NO** |
| 10 | Run partner mapping and partner information report | **YES** |
| 11 | Run partnership opportunity reports | **NO** |
| 20 | Run observations and verification | **NO** |

**Partnership Opportunities Workflow Permissions**

| Steps | Activity | Permissions | | |
|-------|----------|-------------|------|------|
| | | **CFEI/DSR Creator** | **Focal Point** | **Reviewer** |
| 1 | Create calls for expressions of interest and direct selection/retention | **NO** | **NA** | **NA** |
| 2 | Be a focal point on a call for expressions of interest or direct selection/retention | **NO** | **NA** | **NA** |
| 3 | Publish calls for expressions of interest and direct selection/retention | **NO** | **NA** | **NA** |
| 4 | Respond to requests for clarifications or further information on a call for expressions of interest | **NO** | **NA** | **NA** |
| 5 | Add reviewers to a call for expressions of interest | **NO** | **NA** | **NA** |
| 6 | Assess applications on a call for expressions of interest | **NO** | **NA** | **NA** |
| 7 | View your scores on a call for expressions of interest | **NO** | **NA** | **NA** |
| 8 | View all scores on a call for expressions of interest | **NO** | **NA** | **NA** |
| 9 | Finalize a call for expressions of interest or direct selection/retention | **NO** | **NA** | **NA** |