Client Connection
Account Management System
For Organization Liaisons

User’s Guide

Table of Contents

Introduction .............................................................................................. 2
   Key Concepts ........................................................................................... 2
   Acronyms and Definitions ........................................................................ 3

AMS Workflow.......................................................................................... 4
   Create a User ............................................................................................ 4
   Edit a User ............................................................................................... 5
   Delete a User ........................................................................................... 5

Logging In ................................................................................................ 6
   From a Client Connection Web Page ..................................................... 6

Pending Tasks ............................................................................................ 6

Creating a User ........................................................................................ 9
   Adding the User Attributes ...................................................................... 9
   Setting the User Authorization ................................................................. 10
   Confirming the Request for a New User .................................................. 11

Editing a User Profile .............................................................................. 13
   Searching for a User ................................................................................ 13
   Editing the User Attributes ..................................................................... 14
   Editing the User Authorization Information .......................................... 15
   Confirming the Change Request ............................................................. 16

Deleting a User ...................................................................................... 17
   Searching for a User ................................................................................ 17
   Confirming the Deletion Request ............................................................ 17

Viewing User Account Details ................................................................. 18
   Searching for an Existing User ............................................................... 18

Creating a Custom Profile ...................................................................... 19

Index ....................................................................................................... 24
Introduction

This User’s Guide provides background information and step-by-step instructions for using the Client Connection Account Management System (AMS).

The Client Connection AMS supports registration for organizations that have an official relationship with the World Bank. It ensures that only authorized users can access the information available in Client Connection.

Key Concepts

Role-based Access

The Account Management System is role-based: users may only perform the actions on a request consistent with their role. For instance, a champion can initiate a request to create an organization and edit the details of the request, but may not approve it. A liaison can add users for their own organization, but cannot create organizations or add users to other organizations.

Request

A request captures information about a new user or organization, a change to a user or organization or the deletion of a user or organization. Each such activity is a separate request. Once someone in a role initiates a request, it is pending. The system notifies the users who need to approve it, and waits for them to do so. Once all required approvals have been recorded, the system provisions the request – creating or updating accounts as needed.

Workflow

Each type of request follows a particular series of approval steps. The logic to determine who must approve each particular request and in what order are the request type’s workflow.
Acronyms and Definitions

AMS
Account Management System

AMT
Account Management Team

COC
Country Office Champion

PIU
Project Implementing Agency or Unit

SU
Superuser: selected staff on the Client Connection team who may update accounts directly after due diligence.
AMS Workflow

Create a User

**Note:** Liaisons may only create users for active organizations for which they serve as liaisons. The Champion or AMT can initiate create user requests for pending organizations; they will be held at step 1 until the organization becomes active.

<table>
<thead>
<tr>
<th>Step</th>
<th>Role</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Liaison or Bank staff member | Initiates a request.  
*If the request is from a liaison, no Bank staff approval is required, and the process continues at step 4.*  
*If the request is from a Bank staff member, the process continues to step 2.* |
| 2.   | System                | Sends e-mail messages to both liaisons; the message contains a link for approving the request. The request also appears in the liaisons’ Pending Task list. |
| 3.   | Liaison               | Sends an e-mail message confirming approval.                          |
| 4.   | System                | Sends e-mail messages to the new user; the message contains a link for verifying the user’s e-mail address. |
| 5.   | New User              | Responds by clicking on the link and verifying the e-mail address.     |
| 6.   | New User              | The system sends an “initial PassKey” email to the user with a temporary password. When the user logs in to Client Connection for the first time, he or she will be prompted to change this password. |

The following workflow diagram illustrates the process in detail. Each step in the workflow is shown with the notifications (emails) it generates, the expected action from users and the common exception cases.

Note that the reviewers vary depending on the role of the initiator.
## Create User

<table>
<thead>
<tr>
<th>Workflow</th>
<th>Notifications</th>
<th>Expected Action</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Handle Additions</td>
<td>Liaison Initiates Request</td>
<td>Liaison Review</td>
<td>Liaison approves request online</td>
</tr>
<tr>
<td>Create User Requests</td>
<td>Champion or AMT Initiates Request</td>
<td>User Review</td>
<td>User approves request online</td>
</tr>
<tr>
<td></td>
<td></td>
<td>User Account Created</td>
<td>User changes temporary password</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New User Changes Password</td>
<td>Temporary Password</td>
<td>One Liaison approves request online</td>
<td>User approves by email, AMT must bypass approval.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Edit a User

If a liaison edits a user, the changes occur when the request is confirmed with no further approval.

If a COC or the AMT edits the authorization profile of a user, the system emails the liaisons and one must approve the request before the changes occur.

## Delete a User

When the COC or AMT deletes a user, the user is disabled immediately with no further approval.
Logging In

From a Client Connection Web Page

From the Client Connection system, click one of the Account Management links to access the Account Management system. The links are located in the following places:

- At the top of the page, on the right side of the navigation bar; and
- At the bottom of the page, in the page footer.

Pending Tasks

Viewing Pending Requests

The Pending Tasks page opens. The left navigation bar lists tasks that you can perform, and the Pending Tasks list on the right lists requests which you can monitor, edit, or take some action on.

To view the details of any pending task, click on the request type name, e.g. “Create Organization” or “Create User”.

Figure 1. Pending Tasks List

Note: Pending tasks are not tasks that the user must act on, they are tasks the user may act on. For instance, no request is ever actually waiting for action by the country office champion, but the champion may edit the details of most pending requests.
Editing a Pending Request

Liaisons may edit the details of some pending requests. While viewing the request, click on the “Edit Details” button. You can edit the request using the same screens as used to create the request.

In this case, clicking edit details will show the wizard for creating a user.

Continue through the wizard as though creating a user. Your changes will not be applied to the request until you click “Confirm” in the “Confirm Request” tab.
Changing a request may affect the approval process. Depending on the status of the request and the details changed using Edit Details, the status of the request will change.

<table>
<thead>
<tr>
<th>Request Type: Status</th>
<th>Details Changed</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create User: Waiting for user</td>
<td>User name, address, phone number or authorization profile</td>
<td>No change to workflow and no new notifications</td>
</tr>
<tr>
<td></td>
<td>Email address</td>
<td>A new email is sent to the user.</td>
</tr>
</tbody>
</table>

1. To determine whether the liaisons have acted on a request, click the Request Status tab. The Pending Tasks - Request Status page opens.

Tip: The status for each liaison appears in the Action column.

Figure 2. Pending Tasks - Request Status Page

Each row in this table represents a past event or a pending event for this request. Past events show the acting user’s role, their actual name, the action they performed and the date of the action. In this case, a test user in the role of Champion initiated the request on 19-Aug. If an AMT or the SU acts on behalf of a user, liaison or country director, the name of the AMT or SU is shown.

Pending events do not show a user name, since it is not yet known who will actually perform the action.
Creating a User

Liaisons can create users for their own organizations.

Adding the User Attributes

Click on User -> Create in the navigation bar.

This page includes such information as the new user’s e-mail address, affiliated country, organization, full name, and postal address. Table 2 (on this page) lists all of the fields.

1. Using the information from Step 1 of the printed User Account Request form, complete the required entry fields listed in Table 2.

Note: All of the User Attributes fields are required.

Table 2. Create User – User Attributes

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>E-mail Address*</td>
<td>Enter the user’s e-mail address. The system will ensure that the address is not already in use.</td>
</tr>
<tr>
<td>Country Affiliated</td>
<td>This field automatically displays the affiliated country of the organization with which the user is associated. You cannot edit this field.</td>
</tr>
<tr>
<td>Organization</td>
<td>This field automatically displays the organization for which the User is being created. You cannot edit this field.</td>
</tr>
<tr>
<td>Full Name*</td>
<td>Enter the user’s full name.</td>
</tr>
<tr>
<td>Postal Address*</td>
<td>This field automatically displays the user’s postal address.</td>
</tr>
</tbody>
</table>
### Field Name | Description
--- | ---
Phone Number* | This field automatically displays the organization’s phone number.
Preferred Language* | Select a language from the list.

2. Click **Next**. The **User Authorization** page appears.

### Setting the User Authorization

**Figure 4. Create User – User Authorization Page**

In the **User Authorization** page, select from the following options:

- **Option 1**: Apply maximum authorization for a user in the organization
- **Option 2**: Create Custom Profile
- **Option 3**: Apply Profile from liaison
- **Option 4**: Apply Profile from liaison2
To apply the maximum authorization for a user, select one of the options in Error! Reference source not found..

**Applying an Organization’s Maximum Authorization to a New User**

**Note:** The user's maximum authorization is limited to the organization's maximum authorization.

1. Click **Option 1: Apply an organization’s maximum authorization to a new user**.
2. Click **Next** to display the **Confirm Request** page.

**Applying an Existing User’s Authorization to a New User**

1. Click the option with the user whose profile is needed.
2. Click **Next** to display the **Confirm Request** page.

**Creating a Custom Profile for a New User**

1. Select **Option 2: Create a custom profile for a new user**.
2. Click **Next**. The **Create User – User Authorization** page appears.
3. Add resources to the profile. See
4. When you have finished, click **Next** to display the **Confirm Request** page.

**Figure 5. Buttons for Creating Custom Profile**

![Create User page](image)

**Confirming the Request for a New User**

The **Confirm Request** page summarizes all of the information entered on the previous pages: Affiliated Organization, User Attributes, and User Authorization.

1. Compare the summarized request details to the original printed form or other reference.
2. If you need to change or correct any information, click **Back** to go to the necessary page.
3. When you are ready to submit the new user profile and send the information to the liaisons, click **Confirm**.

**Figure 6. Create User - Confirm Request Page**

The system sends three e-mail messages:

- Liaison 1 receives a message requesting approval for the new user;
- Liaison 2 receives a message requesting approval for the new user;
- The new user receives a message requesting verification of the user’s e-mail address.
Editing a User Profile

Liaisons may create edit the user profiles for their organization.

1. Ensure that the Pending Tasks page is currently displayed.

2. Using the left navigation bar, click User > Edit. The Edit User – Select User page opens on the right.

Figure 7. Edit User – Select User Page

Searching for a User

1. Enter all or part of the user’s name or e-mail address in the Search User field.

2. Click Go.

3. In the Search Results list, names in the User Name column are hyperlinks. Click on a user name to display the Confirm Request page.
Editing the User Attributes

1. On the User Attributes page, edit the fields listed in Table 3.

**Note:** Non-editable fields are identified in the table listing.

![Edit User – User Attributes Page](image)

Table 3. User Attributes – Data Entry Fields

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>E-mail Address</td>
<td>Displays the user’s e-mail address. If you change the address, the system will ensure that the address you add is not already in use. <strong>Note:</strong> The user cannot be a World Bank associate.</td>
</tr>
<tr>
<td>Country Affiliated</td>
<td>This field automatically displays the affiliated country of the organization with which the user is associated. You cannot edit this field.</td>
</tr>
<tr>
<td>Organization</td>
<td>This field automatically displays the organization for which the User is being created. You cannot edit this field.</td>
</tr>
<tr>
<td>Full Name</td>
<td>Enter the user’s full name.</td>
</tr>
<tr>
<td>Postal Address</td>
<td>This field automatically displays the user’s postal address.</td>
</tr>
<tr>
<td>Phone Number</td>
<td>This field automatically displays the organization’s phone number. You can edit this field.</td>
</tr>
<tr>
<td>Preferred Language</td>
<td>Select a language from the list.</td>
</tr>
</tbody>
</table>

Editing the User Authorization Information

1. Select one of the options described in Table 4.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retain Current Profile</td>
<td>Leaves the user’s current authorization unchanged.</td>
</tr>
<tr>
<td></td>
<td>Selecting this option and clicking Next opens the Confirm Request page.</td>
</tr>
<tr>
<td>Edit Current Profile</td>
<td>Enables you to edit or add resources to the user’s profile.</td>
</tr>
<tr>
<td></td>
<td>Selecting this option and clicking Next displays four buttons: Add Country,</td>
</tr>
<tr>
<td></td>
<td>Add Borrower, Add Projects, and Add Loans. For more information on using</td>
</tr>
<tr>
<td></td>
<td>these buttons, see Adding Resources to a Custom Profile on page 19.</td>
</tr>
<tr>
<td>Apply maximum Authorization for a user in</td>
<td>Assigns the user the same level of authorization as the affiliated organization.</td>
</tr>
<tr>
<td>the organization</td>
<td>Selecting this option and clicking Next opens the Confirm Request page.</td>
</tr>
<tr>
<td>Apply profile from another user</td>
<td>Assigns the user the same level of authorization as an existing user.</td>
</tr>
<tr>
<td></td>
<td>Selecting this option and clicking Next opens the Confirm Request page.</td>
</tr>
</tbody>
</table>

2. After selecting an option, click Next. For all options except Edit Current Profile, the Confirm Request page opens.

Note: If you selected the Edit Current Profile option, add resources as described in the section titled Creating a Custom Profile on page 19, then click Next.
Confirming the Change Request

1. On the Edit User – Confirm Request Page, verify the user information to ensure that the changes are visible.

2. If you need to make additional changes or corrections, click Back.

3. To submit the changes, click Confirm. The system returns to the Pending Tasks list.

Figure 9. Edit User – Confirm Request Page
Deleting a User
Liaisons should immediately delete users for their organization whenever the user resigns, is terminated or changes roles so as not to need Client Connection access.

Using the left navigation bar, click **User > Delete**. The **Delete User – Select User** page opens on the right.

![Delete User – Select User Page](image)

**Figure 10. Delete User – Select User Page**

**Searching for a User**
1. Enter all or part of the user’s name or e-mail address in the **Search User** field.
2. Click **Go**.
3. In the **Search Results** list, names in the **User Name** column are hyperlinks. Click on a user name to display the **Confirm Request** page.

**Confirming the Deletion Request**
1. On the **Delete User – Confirm Request** page, ensure that the displayed user is the user you intended to delete.
2. Click **Confirm** to complete the deletion.
Viewing User Account Details

Searching for an Existing User

1. Using the left navigation bar, click User > List. The List User – Select User page appears to the right.

2. Enter all or part of the user’s name or e-mail address in the Search User field.

3. Click Go.

4. In the Search Results list, names in the User Name column are hyperlinks. Click on a user name to view more information.
Creating a Custom Profile

Adding Resources to a Custom Profile

The four “add” buttons enable you to add a country, a borrower, projects, and loans to the profile. The following four sections explain how to use each of the four buttons to add resources.

**Important!** You can only add resources that are part of the organization’s maximum authorization. You are likely only to need to add Projects and Loans when building a custom profile.

**Figure 11. Buttons for Creating a Custom Profile**

**Adding a Country**

1. Click **Add Country**. The pop-up window shown in Figure 12 appears.

**Figure 12. Add Country Window**
2. The selection defaults to the organization’s affiliated country. To choose that country, just click OK. To select a different country, click on it in the Choose Country list. To select multiple countries, press [Ctrl] and click the additional country names.

3. Click OK. The selected countries are added to the list of available resources.

Adding a Borrower

Note: Borrower access is only recommended if the organization is a unique borrower of record with a well-defined portfolio of projects. If there are multiple entries in LAS for a borrower or if the borrower name is ambiguous, please give access to individual projects instead.

1. Click Add Borrower. The Add Borrower window appears.

2. Select a country from the Choose Country list. A Choose Borrower list for the selected country appears in the lower half of the window.

Figure 13. Add Borrower Window

3. Select a borrower from the Choose Borrower list. To select multiple borrowers, press [Ctrl] and click the additional borrower names.

4. Click OK.

The selected borrowers are added to the list of available resources.
Adding Projects


2. Select a country from the Choose Country list. A list of associated projects appears in the window.

**Figure 14. Add Projects Window**

<table>
<thead>
<tr>
<th>Project ID</th>
<th>Project Name</th>
<th>Loan Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>P0727293</td>
<td>Private Sector Support Services Project</td>
<td>IDA 25786</td>
</tr>
<tr>
<td>P0728141</td>
<td>Health, Nutrition and Population Sector Program Project</td>
<td>IDA 25995</td>
</tr>
<tr>
<td>P0673391</td>
<td>Agriculture and Rural Development Program Project</td>
<td>IDA 25786</td>
</tr>
<tr>
<td>P040712</td>
<td>Water Sector Improvement Project</td>
<td>IDA 25981</td>
</tr>
<tr>
<td>P0497383</td>
<td>Telecommunications Project (05)</td>
<td>IDA 25991</td>
</tr>
<tr>
<td>P0522590</td>
<td>Ganges River Restoration Project</td>
<td>IDA 25981</td>
</tr>
<tr>
<td>P0566171</td>
<td>Bangladesh Water Supply Program Project</td>
<td>IDA 25991</td>
</tr>
<tr>
<td>P0777790</td>
<td>Education Sector Development Support Credit</td>
<td>IDA 25991</td>
</tr>
<tr>
<td>P0028390</td>
<td>Economic Management TA Program (EMTAP)</td>
<td>IDA 25991</td>
</tr>
</tbody>
</table>

**Tip:** Use Internet Explorer’s Find feature to find listed projects. To open the Find window, select Edit > Find (on This Page) from the browser’s Menu Bar, or press [Ctrl] + F.

Try using loan numbers or trust fund numbers to find projects. The search results will be determined by the criteria that were used to set up the projects.

3. To add projects, click the check box located to the left of each project ID.

4. Click OK.

As shown in Error! Reference source not found. on the following page, the selected projects are added to the list of available resources.

Adding Loans

1. Click Add Loans. The Add Loans window opens.
2. Select a country from the **Choose Country** list. A list of associated loans appears in the window.

**Figure 15. Add Loans Window**

<table>
<thead>
<tr>
<th>Project ID</th>
<th>Project Name</th>
<th>Loan Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>P037253</td>
<td>Private Sector Support Services Project</td>
<td>JPN 25784</td>
</tr>
<tr>
<td>P074841</td>
<td>Health, Nutrition and Population Sector Program Project</td>
<td>JPN 50005</td>
</tr>
<tr>
<td>P063539</td>
<td>Agriculture and Rural Development Program Project</td>
<td>JPN 26766</td>
</tr>
<tr>
<td>P04712</td>
<td>Water Sector Improvement Project</td>
<td>JPN 29289</td>
</tr>
<tr>
<td>P04278</td>
<td>Telecommunications Project (04)</td>
<td>JPN 25991</td>
</tr>
<tr>
<td>P055290</td>
<td>Goral River Restoration Project</td>
<td>JPN 25205</td>
</tr>
<tr>
<td>P068661</td>
<td>Bangladesh Water Supply Program Project</td>
<td>IDA 14010</td>
</tr>
<tr>
<td>P077789</td>
<td>Education Sector Development Support Credit</td>
<td>IDA 34730</td>
</tr>
<tr>
<td>P083390</td>
<td>Economic Management TA Program (EMTAP)</td>
<td>IDA 31070</td>
</tr>
</tbody>
</table>

3. To add loans, click the check box located to the left of each loan number.

4. Click **OK**.

As shown in Figure 16, the selected countries are added to the list of available resources.

**Figure 16. Available Resources List with Added Loans**
Assigning Special Permissions

After adding countries, borrowers, projects, and loans, the Create Organization - Maximum Authorization page displays the complete list of available resources. You can control the permissions assigned to each resource.

1. Check the appropriate boxes in the Special Permissions column. Table 5 describes the available permissions.

   Table 5. Special Permissions

<table>
<thead>
<tr>
<th>Permission</th>
<th>Applies to</th>
</tr>
</thead>
<tbody>
<tr>
<td>View overdues</td>
<td>Country, Borrower</td>
</tr>
<tr>
<td>Submit procurement documents</td>
<td>Project</td>
</tr>
</tbody>
</table>

   Note: No special permissions apply to loans.

2. (Optional) To delete any of the resources in the Available Resources list, click the Delete link to the left of the resource.

   Click Next to continue to the Liaison 1 page.
Index

A
Account Management System
described, 2
user types, 2
workflow, 4
acronyms, 3

B
borrower, adding to profile, 20

C
country, adding to profile, 19

L
liaisons
in workflow, 4
loans, adding to profile, 21
logging in, 6

O
organizations
adding resources to profile, 19
borrower, adding, 20
country, adding, 19
loans, adding, 21
permissions, assigning, 23
projects, adding, 21

P
projects, adding to profile, 21

R
resources, adding to profile, 19

S
searching
for existing users, 18

U
users
attributes, adding, 9
creating, 9
initiating roles and processes, 4
maximum authorization, 10
searching for, 18