Explore. Discover. Experience.

Quick Guide
to the

TREASURY CLIENT CENTER

http://eTCC.worldbank.org

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Introduction

In the **Treasury Client Center** (http://eTCC.worldbank.org), you will be able to access reports, register for events, and access our online repository of advisory content. You will be able to select your favorite reports for easy access, subscribe to reports to get it via email, manage your events participation, discover robust cyber security, all this while being tablet-friendly!

Currently, there are two access types for a user in eTCC:

- View Reports
- View Events (for RAMP & Prospective RAMP Clients)

All users can access the advisory content.

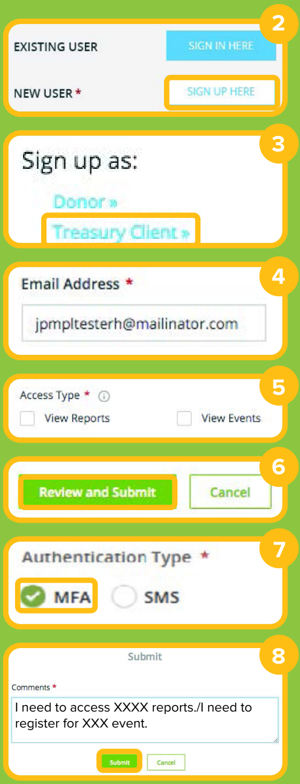
Role & Responsibilities

1. The **Primary Liaisons** are assigned by Treasury's Primary Contact from your organization. They have the following responsibilities, as applicable:
   - Complete/Edit the organization registration form
   - Approve User access to reports &/or events
   - Add/Delete/Manage Regular Users
   - Manage organization profile & Primary Liaisons
2. **Regular Users** sign-up and request eTCC access for the Primary Liaisons' approval. They are responsible for keeping their profile up-to-date & to report issues encountered in the system. Regular Users need to let their Primary Liaisons know what access type (reports &/or events) they need.

Request Access to eTCC

Users can request for access only after the Primary Liaison has registered the organization. eTCC users can then sign-up for access at **eTCC.worldbank.org** Your access request will be reviewed and approved by your Primary Liaison.

1. Open an Internet Browser and type the URL: **eTCC.worldbank.org**
2. Click **SIGN UP HERE.**
3. Select **Treasury Client** and you will be directed to fill out the access request form.
4. Enter your official institution **Email Address,** and the **Organization Name, Country** and **Client Type** will be pre-filled for you.
5. For Access Type, select **View Reports** &/or **View Events** (for RAMP & Prospective RAMP Clients).
6. Select your **Authentication Type.** Select **MFA** (multifacttor authentication) for the most secure authentication through your smartphone - **preferred option.** Select SMS for an alternative authentication using text messages.
7. After completing the form, click **Review** and **Submit.**
8. The **Comment** field is used to specify the report(s) &/or event(s) that you need to access or register.



Set Up Your Account

You will receive an email to create an account with secure authentication for the eTCC after your access request has been approved by your Primary Liaision and provisioned in the system.

Dear XXX,

This is to inform you that your role as XXX for XXX has been approved in the **Treasury Client Center** (eTCC).

To activate your account, please click here. Account activation instructions have been included in this user guide for your reference.

Thank you,
Asset Management & Advisory Client Services
The World Bank Treasury
contact us: amacs@worldbank.org;

1. In the email (1) from Treasury Services, click on the hyperlinked **Click Here.** You may be asked to enter your email and password to start the process.

   This is the password associated with your email address (your email password). Alternatively, you may be prompted for a one-time password that will be sent to your email.

2. Follow the on-screen prompts or refer to the user guide hyperlinked in the email you received for detailed instructions.

Sign-in to eTCC

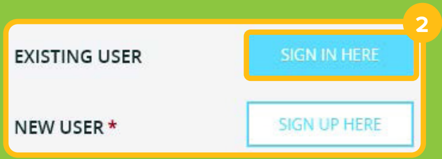
1. Open an Internet Browser and type the URL: **eTCC.worldbank.org**

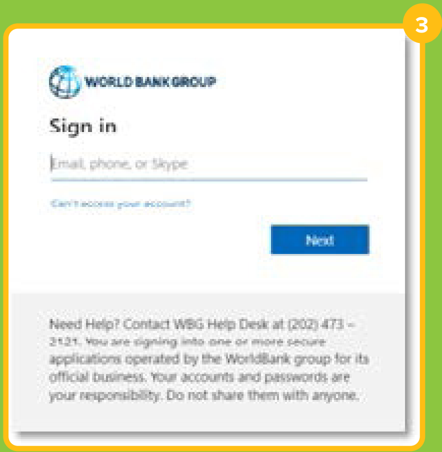
2. Click **SIGN IN HERE** button as an **EXISTING USER.**

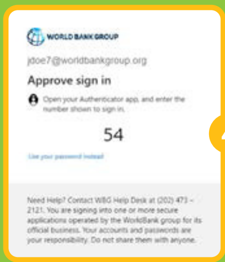
3. Enter your registered email address. Click **Next.**

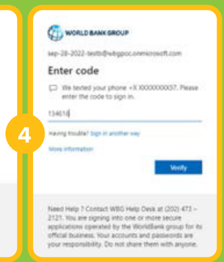
   * You may be asked to enter your password. This is the password associated with your email address (your email password). Alternatively, you may be prompted for a one-time password that will be sent to your email.

4. Then, you will be prompted for the secure authentication method you selected when creating your account: MFA (image 1 below) or SMS (image 2 below). Follow the on-screen prompts to sign in & you will be directed to the home page of eTCC.









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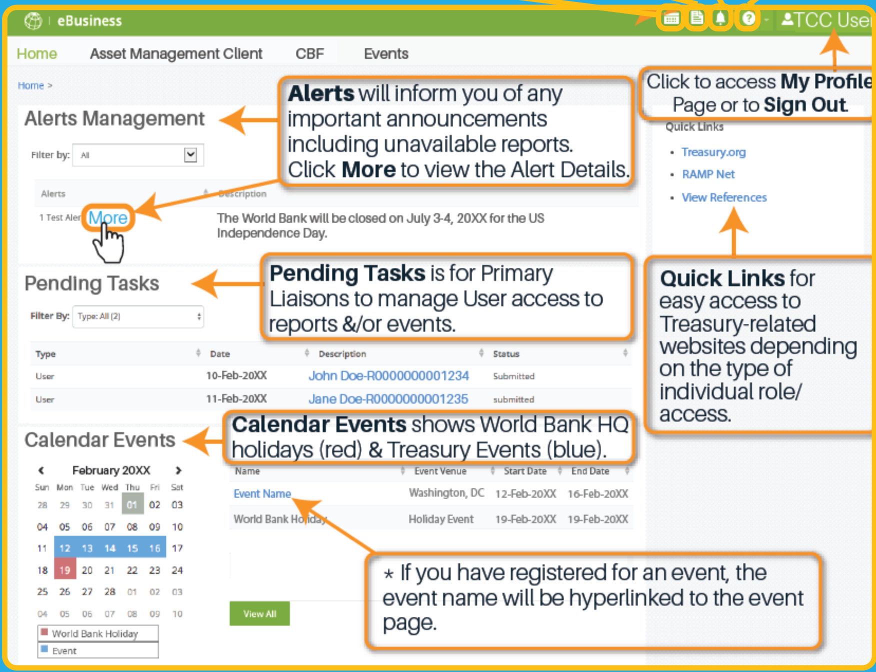
Home Page

Calendar: Quick View of Calendar Events

Page: Quick View of Pending Tasks

Bell: Quick View of Alert Details

Question Mark: Report an Issue, Access Tutorials and Printable User Guides & Contact Us

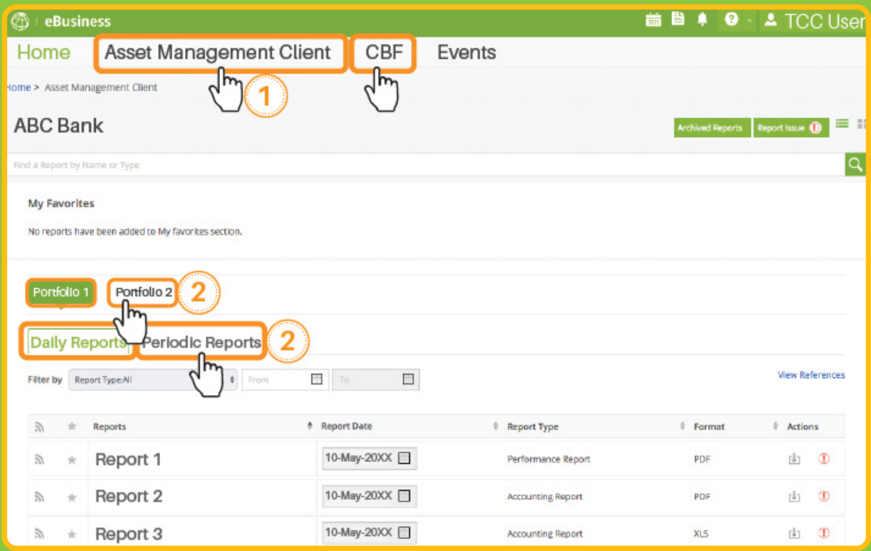


Finding Reports

1. Depending on your access, click the **Asset Management Client** or the **CBF** tab to find the reports you need.

2. For **RAMP** & **Asset Management Only** clients with multiple portfolios, select the portfolio you want.

3. Select either **Daily Reports** or **Periodic Reports** (Weekly, Monthly, Quarterly &/or Annual Reports).



Access Archived/Older Reports

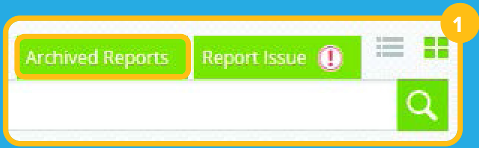
The default date range for **Daily & Weekly** reports is one year, but you can set it to any one-year period to download older reports; and for **Monthly, Quarterly,** and **Annual** reports, it is three years, and you can set it to any three-year period.

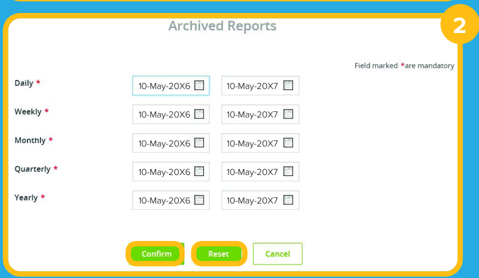
1. Click the **Archived Reports** box above the Search bar to change the period of the current reports from the default settings.

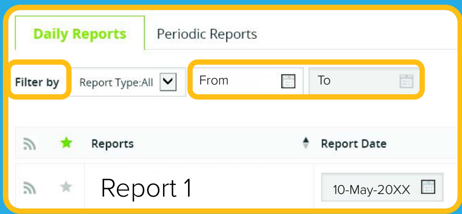
2. Once the new date range has been selected, click **Confirm.**

   Click the **Reset** button to reset the date ranges back to the latest reports.

* Please note that the date **Filters** above the reports must match or fall within the date range set under **Archived Reports.**

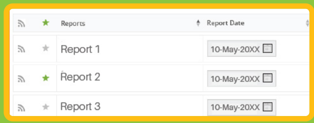




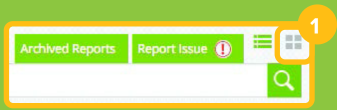


Customize Report Views

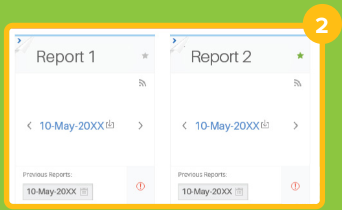
* There are two available report views, **List** & **Tile.** The default view is set as **List.** You can change the default view layout to **Tile** under **My Profile > General Preferences.**



1. Click the **Tile** view icon at the top right of the search bar to temporarily change the report layout from **List** to **Tile.**



2. After clicking the **Tile** view icon, the reports will be displayed in **Tile** for easy finger navigation on tablets.

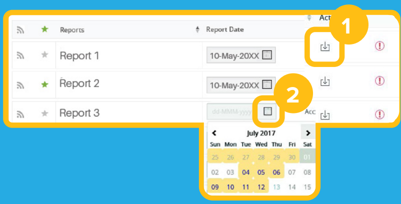


Download Reports

IN LIST VIEW:

1. Click the **Download** button under Actions to download the report.

2. Click the **Calendar** icon to access previous reports. The date range is defined under **Archived Reports** and can be customized to access older reports.



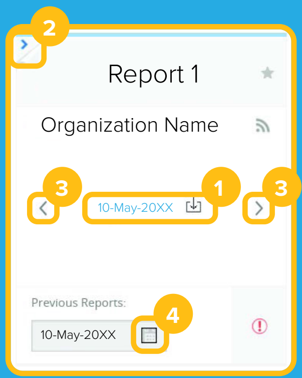
IN TILE VIEW:

1. Click the date or the **Download** button to download the report.

2. Click the **Flip Tile** on the top left to view basic information of the report.

3. Use the left & right arrows to access the most recent reports.

4. Click the **Calendar** icon to access and download older reports.

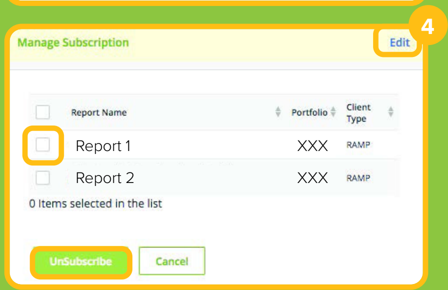


* Colored dates represent dates on which a report is available.

Subscribe to Reports

Once you subscribe to a report, you will start receiving an email with the report attached whenever a new report is available.

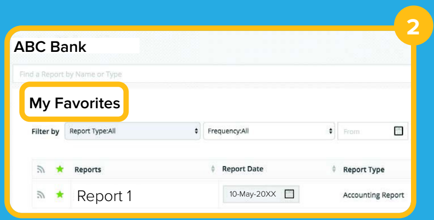
1. Click the **Subscribe** icon to subscribe to a specific report.
2. To unsubscribe, you can click the colored **Subscribe** icon again.
3. You can view your subscription list and unsubscribe to reports from the **Manage Subscription** section under **My Profile.**
4. Click **Edit** to unsubscribe by selecting the report(s) you want to stop receiving via email and click **Unsubscribe** to confirm the action.

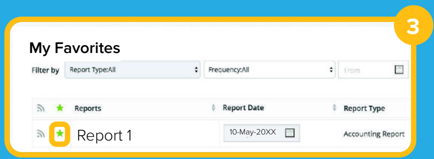


Favorite Reports

1. Click the **Favorite** icon (star) next to the report name.
2. View the reports that you designated as Favorite under **My Favorites** section at the top section of the page.
3. To remove a report from the **My Favorites** section, click the colored star icon to unfavorite.

* The star icon will change color to confirm that your action has been successfully completed.





Search Reports

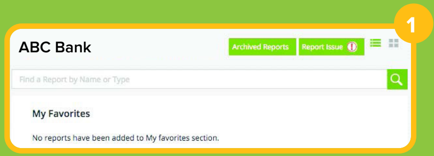
1. Type keywords such as report name/report type (e.g. Performance) in the **Search** bar, and the search results will be automatically displayed under **Daily Reports** and **Periodic Reports** tabs.

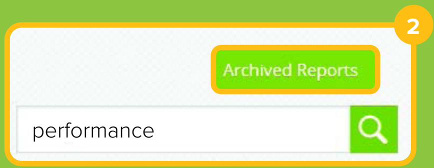
* The default date range for the available **Daily & Weekly** reports in the search results is set for one year; **Monthly, Quarterly & Annual** reports are set for three years.

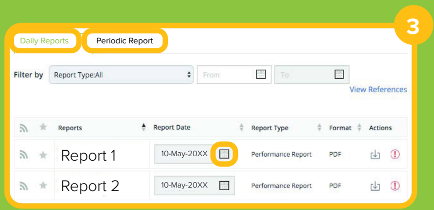
2. If you want to access older reports, click **Archived Reports** to change the default date range.

3. Select either **Daily Reports** or **Periodic Reports** and click the calendar icon to select the specific date of the report you want.

* Colored dates represent dates on which a report is available.







Register for an Event

FOR RAMP & PROSPECTIVE RAMP CLIENTS

1. If you are nominated to attend a RAMP event, click the registration link provided in the invitation package sent via email.

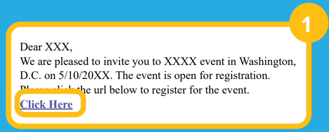
   Enter your eTCC log-in credentials and you will be directed to the event page.

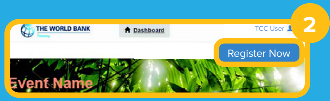
2. Click **Register Now** to fill out the event registration form.

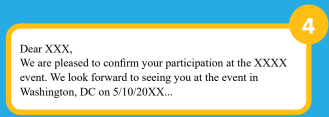
3. You will receive an email acknowledging your successful registration.

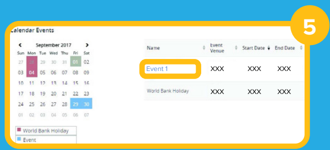
4. You will receive another email with a status update once your registration has been reviewed and confirmed by the RAMP Events team.

5. If your event participation was approved, you can easily find the event details by logging in to eTCC. Click the event hyperlink under the **Calendar Events** section of the Home page or via the **Events** tab.







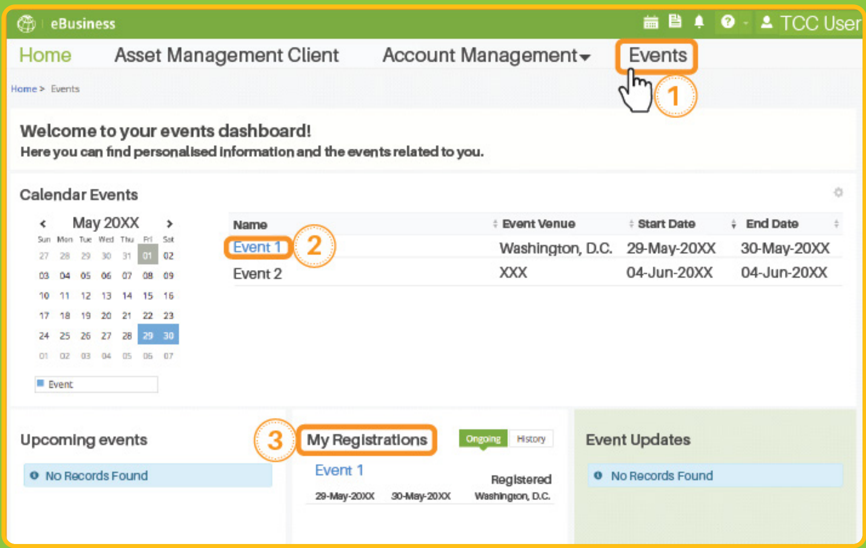


For inquiries, email RAMPevents@worldbank.org

Events Dashboard

FOR RAMP & PROSPECTIVE RAMP CLIENTS

1. Navigate to the **Events** dashboard.
2. Click the event name hyperlink to view the event page of your registered events.
3. View your current registration records and historical participation to RAMP events under **My Registrations.**



Report an Issue

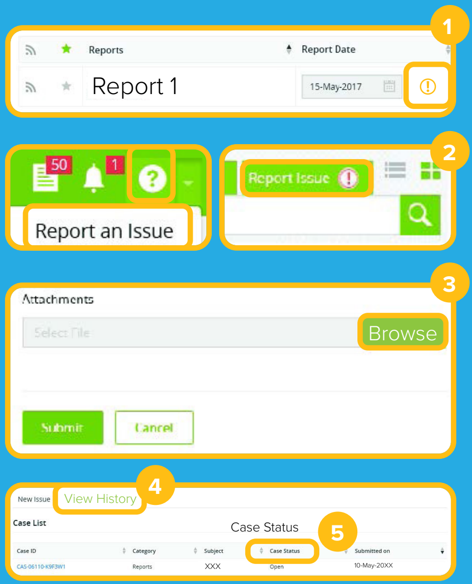
1. You can report an issue for a specific report by clicking the red exclamation mark icon.

2. You can also report any general website issues by clicking **Report an Issue** via the drop-down in the Question Mark icon on the Home Page or by clicking the **Report an Issue** button above the Search bar.

3. In the Report an Issue form, you have the option to upload a file and provide further details of the issue (e.g. own calculations) by clicking the **Browse** button, **attach** then **Submit.**

4. Click the **View History** tab to find details of any past reported issues and the case status of pending issues.

5. Once the issue is resolved, the **Case Status** will be updated accordingly.



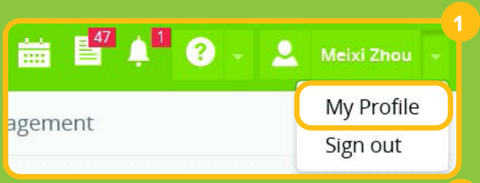
Update Profile

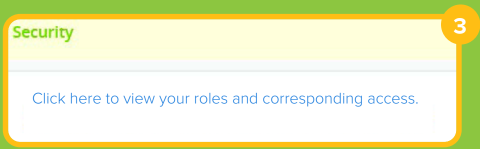
1. Navigate to the drop-down arrow next to the User's name on the top right corner and click **My Profile.**

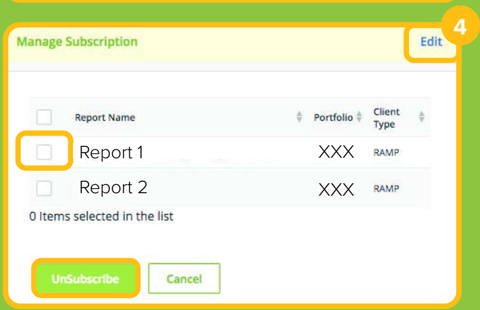
2. You can change your **Default View Layout** from List to Tile under the **General Preferences** section.

3. Change or view your roles and corresponding accesses under the **Security** section.

4. You can easily unsubscribe from the reports you are receiving via email by clicking **Edit** under the **Manage Subscription** section.



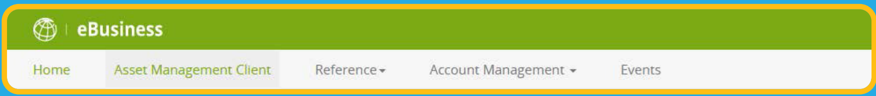




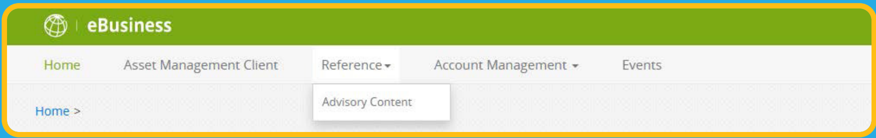
Learning and Outreach Repository

FOR RAMP CLIENTS

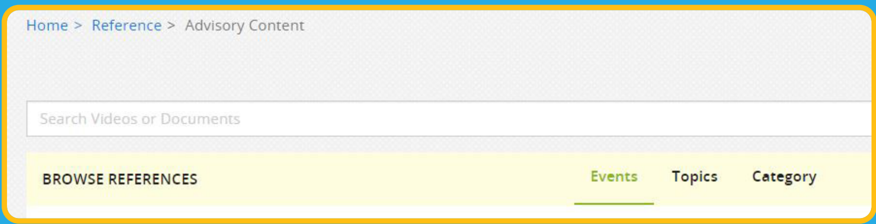
1. Once logged into the eTCC, please navigate to the menu displayed on the top of your screen and click on **Reference.**



2. Reference will open a drop-down menu, select **Advisory Content.**



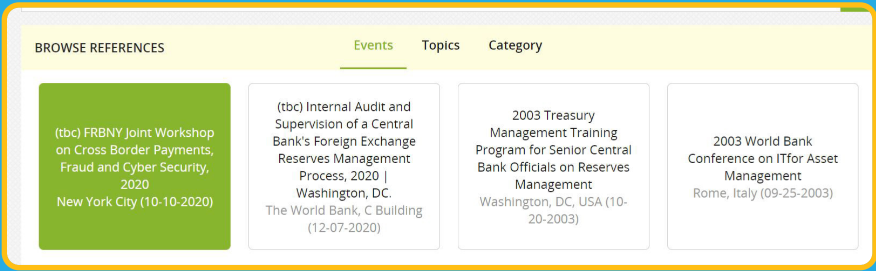
3. A three-category smart search will offer you to view content by **Events, Topics and Category**



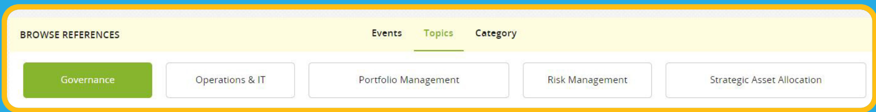
Learning and Outreach Repository

FOR RAMP CLIENTS

4. The navigation under Events, will offer opportunity to view in sequence of recent videos and/or recent documents. Browsing references will allow you click on specific events by title as well.



5. The navigation under Topics, will offer opportunity to view in sequence focus areas: Governance, Operations &IT, Portfolio Management, RIsk Management and Strategic Asset Allocation. Each category will allow you to sort and filter by topic, category, duration, date – depending on the content specific filter you want to activate. You can find both videos (if applicable) and learning materials through this filter.



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Learning and Outreach Repository

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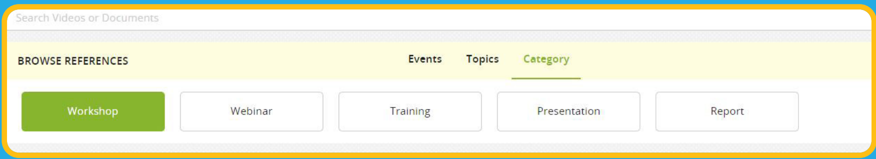
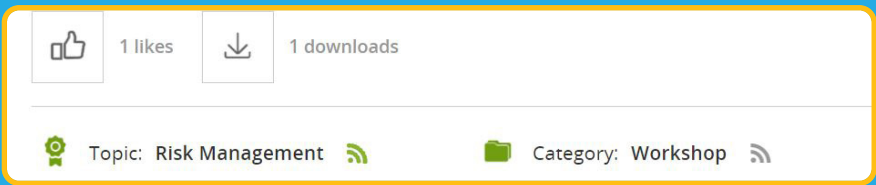
6. The browsing reference Category will group materials (files and recordings) by Workshops, Webinars, Training Events, stand alone Presentations or Reports.



7. The portal provides a subscription management feature. Go to the Topics, select the content you wish to view, and once it opens, you will see the icon which will allow you to follow either topics or category. By clicking the icon, it will turn green, meaning you are following the content update. In instances when content is posted under any of these categories, you will receive an alert from the system. Respectively by clicking on the icon again, it will turn gray , meaning you have unsubscribed to content update. Notifications will be received via email



Learning and Outreach Repository

FOR RAMP CLIENTS

Disclaimer

The eTCC is the central repository of RAMP proprietary learning and outreach materials. These include materials, recordings, and files delivered as part of workshops, conferences, webinars and other training or capacity building opportunities. In instances when speakers have not granted us the rights to record the event, or disseminate their exclusive materials, such files will not be accessible on this portal.

If you experience a problem accessing materials or finding the content of your interest, for inquiries and assistance, email RAMPevents@worldbank.org