# BASIC PORTAL USER GUIDE

# PORTAL

**Portal for Contact Management:**

- Allow National Commission and Permanent Delegation members to access to the portal and update their personal data.

- Grant focal points to see and update their Organization and Organization's contacts information.

- Updates will go through an approval process by PAX.

The access to this site is restricted to Member States, namely Permanent Delegations and National Commissions, and users from Intergovernmental Organizations (IGOs) maintaining official relations with UNESCO and Non-Governmental Organizations in official relations with UNESCO, by invitation.

**Information related to access to the CRM Portal**

- The members of Permanent Delegations and Permanent Observer Missions having an UNESCO nominative account already have access to the CRM Portal in consultation mode, using their @unesco-delegations.org account and the associated password.

- The Permanent Delegations and Permanent Observer Missions can designate on request a member with diplomatic status who will be responsible within the Permanent Delegation/ Permanent Observer Mission for updates in the CRM Portal; an UNESCO account will be created if the designated person does not already have one. It will then be possible to propose modifications to the own Organization data and to all contacts inside the Organization

- Members of Permanent Delegations who do not have a UNESCO nominative account can request for access following the directives available on http://www.unesco.org/new/en/member-states/resources/how-to-use-this-site/.

- Members of National Commission for UNESCO who have already a nominative account @natcom.unesco.org can access in edit mode using this account and the associated password (it is possible to propose modifications to the own Organization data and to all contacts inside the Organization).

- Members of National Commission for UNESCO who do not have a nominative UNESCO account can request for access following the directives available on http://www.unesco.org/new/en/member-states/resources/how-to-use-this-site/.

- Other UNESCO official partners can request for access by e-mail at helpdesk@unesco.org.

Should you have any questions related to the access, please contact the UNESCO's Support (HelpDesk) Services through telephone during standard working hours (Paris time) by dialing 11 or through e-mail: helpdesk@unesco.org.

## Access to the Portal

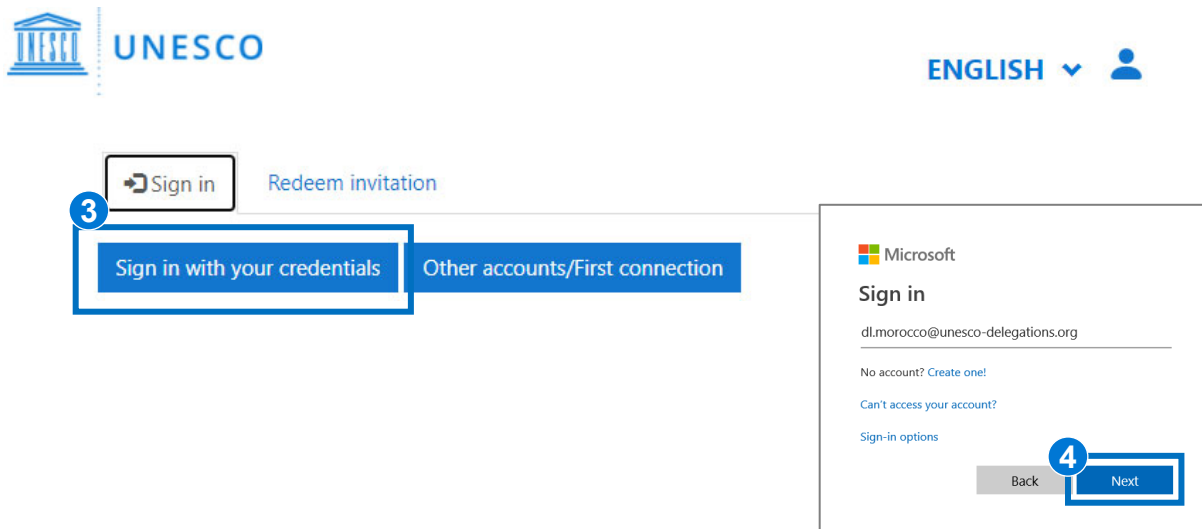Access link: https://crmportal.unesco.org/  **1**



**UNESCO**  FRANÇAIS ∨  **2**

1. Open the access link in a browser (Chrome or Microsoft Edge)
2. Click on
3. Click on Sign in with your credentials
4. Enter your UNESCO email and click Next

You will be redirected to UNESCO website. Enter your password

**UNESCO**  ENGLISH ∨

Sign in    Redeem invitation

**3**

Sign in with your credentials    Other accounts/First connection

Microsoft

Sign in

dl.morocco@unesco-delegations.org

No account? Create one!

Can't access your account?

Sign-in options

**4**

Back    Next

Note: UNESCO email is:
- for Permanent Delegations – the unesco-delegations.org email
- for National Commissions – the natcom.unesco.org email

**UNESCO**

## User Profile and Sign out

Access link: https://crmportal.unesco.org/

1. Click on [icon]
2. Click on Profile
3. If needed, complete the information
4. Click on Update
5. Click on Sign out to log out of the portal



**UNESCO** Building peace in the minds of men and women

ENGLISH ∨   👤 **1**

**2** Profile

My Organization    My Organization Contacts    Organizations ▾    Official Contacts    Countries

**5** Sign out

## Profile

Monica Crutescu

Profile

🔒 Security

Please provide some information about yourself.

The **First Name** and **Last Name** you provide will be displayed alongside any comments, forum posts, or ideas you make on the site.

The **Email Address** and **Phone** number are required but will not be displayed on the site.

### Your Information

### Profile

Jérôme Sorrel

Profile

🔒 Security

Manage External Authentication

Please provide some information about yourself.

The **First Name** and **Last Name** you provide will be displayed alongside any comments, forum posts, or ideas you make on the site.

The **Email Address** and **Phone** number are required but will not be displayed on the site.

Your **Organization** is required, and a **Title** is optional. They will be displayed with your comments and forum posts.

**3** Your Information

First Name *
Jérôme

Last Name *
Sorrel

E-mail *
j.sorrel@unesco.org

Business Phone

Title

How may we contact you? Select all that apply.

☑ Email
☑ Fax
☑ Phone
☑ Mail

**4** Update

**UNESCO**

## Menus

Access link: https://crmportal.unesco.org/
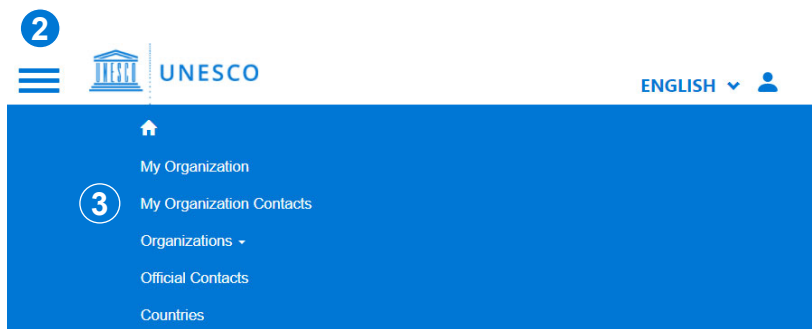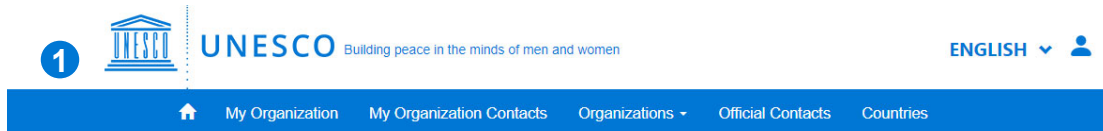


1. The Portal displays the menu horizontally on a large screen
2. Click on ▭ to display the menu on a narrow screen
3. Select on one option to display the related information

## Official lists

## Countries

4. To change the order of the list, click on the column title

5. Click on the text in blue to display more information

| English Name ↑ | English Long Name ↑ | UNESCO Membership ↑ | Region | ISO (Alpha-2) | ISO (Alpha-3) | Date of Admission |
|---|---|---|---|---|---|---|
| Afghanistan | the Islamic Republic of Afghanistan | 1. Member State | Asia and the Pacific | AF | AFG | 5/4/1948 |
| Albania | the Republic of Albania | 1. Member State | Europe and North America | AL | ALB | 10/16/1958 |
| Algeria | the People's Democratic Republic of Algeria | 1. Member State | Arab States | DZ | DZA | 10/15/1962 |

## Changes on Organization (from the Portal)

Access link: https://crmportal.unesco.org/



1. Once logged on to the Portal, click on My Organization
2. Select the Organization you wish to modify

Connected users can propose changes for their own Organization.
These changes are visible after their validation by PAX.

## Changes on Organization (from the Portal)

**3**

# My Organization Detail

## Summary

### ORGANIZATION INFORMATION

**Organization Name (original)** *

Commission suisse pour l'UNESCO

**Organization Category** *

National Commission

**Email**

natcom.ch@natcom.unesco.org

**Other Email**

**Rattachement to Ministry EN**

Ministère de l'éducation

### ADDRESS

**Street 1**

Département fédéral des affaires étrang

**Street 2**

**City**

3003 BERNE

**State/Province**

**Postal Code**

3. Modify the information that you want
4. Scroll down and click Submit.

Then, a message appears to inform you that your change request has been taken into account and sent for validation.

## INFO

**Document Attachments**

⊕ Add files    📁 New folder

**Name** ↑                    **Modified**

📄 I feel good.docx (19 KB)       7 days ago       ⌄

**4**

Submit

Add files

Choose files    Choisir des fichiers | Aucun fichier n'a été sélectionné

☑ Overwrite existing files

Please send an email to **UNESCO** to alert us about new documents attached

**5**                              Add files    Cancel

5. When you attach a file, please do not forget to send us an email (click on "UNESCO")

UNESCO

# Changes on Contact (from the Portal)

Access link: https://crmportal.unesco.org/



1. Once logged on to the Portal, click on My Organization
2. The Portal will then show your Organization Click on its name if you wish to open/modify
3. Go to Related Contacts area
4. Select the Contact you want to edit
5. Click on Edit

6. You can also display the Contacts of your Organization selecting "My Organization Contacts" from the menu.

Connected users can propose changes for the contacts of their Organization.
These changes are visible after their validation by PAX.

## Changes on Contact (from the Portal)

Access link: https://crmportal.unesco.org/



**6** Summary

CONTACT INFORMATION

**Contact Status**

Inactive sent for approval

**Representing Country**

Austria

**Salutation (original)**

Mr

**Salutation (EN)**

Mr

**Salutation (FR)**

Monsieur

**Full Name** *

Jan Rick

**Job Title (original)**

Member

6. Modify the information that you want
7. Scroll down and click Submit.

Then, a message appears to inform you that your change request has been taken into account and sent for validation.

INFO

**Document Attachments**

⊕ Add files      🗀 New folder

There are no folders or files to display.

8. When you attach a file, please do not forget to send us an email (click on "UNESCO")

Add files

Choose files      Choisir des fichiers | Aucun fichier n'a été sélectionné

☑ Overwrite existing files

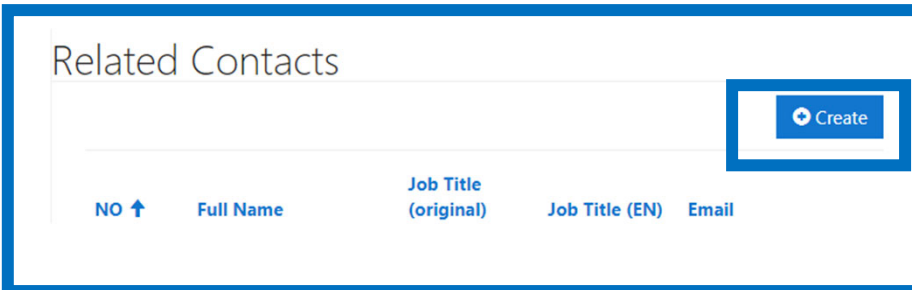Please send an email to UNESCO to alert us about new documents attached

**8**      Add files   Cancel

**7** Submit

UNESCO

## Creating a new Contact (from the Portal)

Go to: My Organization https://crmportal.unesco.org/en-US/myorganization/
Open your Organization, then go to Related contacts

**1**

### Related Contacts

**⊕ Create**

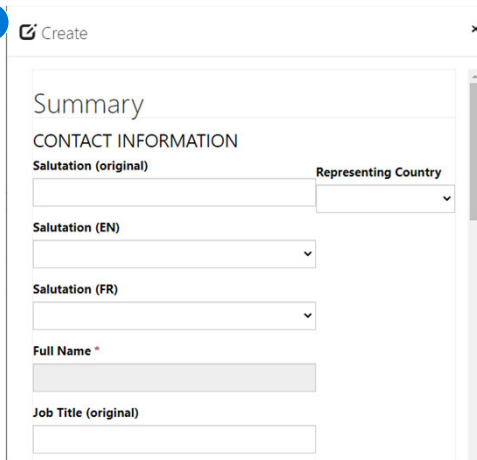| NO ↑ | Full Name | Job Title (original) | Job Title (EN) | Email |
|------|-----------|---------------------|----------------|-------|

1. Click on Create
2. A new form will open
3. Enter the related information
4. Scroll down and click Submit.

The contact will be sent to the related PAX unit for validation.

**2** ☑ Create ✕

### Summary
#### CONTACT INFORMATION
**Salutation (original)**

**Representing Country**

**Salutation (EN)**

**Salutation (FR)**

**Full Name** *

**Job Title (original)**

**Important Note**

If the contact is a member of a Permanent Delegation, please add the official Note Verbale in the attached documents.
1. Open the Contact in Edit mode
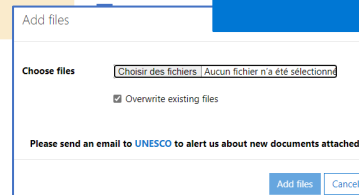2. Add the Note Verbale as an attached document.

### INFO
**Document Attachments**

**⊕ Add files**  **📁 New folder**

There are no folders or files to display.

When you attach a file, please do not forget to send us an email (click on "UNESCO")

**Add files**

Choose files  Choisir des fichiers | Aucun fichier n'a été sélectionné
☑ Overwrite existing files

Please send an email to **UNESCO** to alert us about new documents attached

Add files  Cancel

**Submit**