User’s Guide
IUCN Union Portal

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1. In a nutshell

1.1 Why

The Union Portal has been developed to allow for improved networking, interaction and the sharing of information across the entire Union: the 1200+ Member organizations and institutions, National and Regional Committees of IUCN Members, our 11,000 Commission members, the IUCN Council and the Secretariat.

1.2 Who

The Union is composed of:

- Councillors
- Commission members
- IUCN Members
- National and Regional Committees
- Secretariat staff

The Union counts over 16,000 people. All of them have access to the Union Portal (users).

1.3 How

Within the Portal, the Union is organized in Official groups according to the affiliation(s) each person has to IUCN constituents (Council, Commissions, Members, Committees, Secretariat).
There are some 300 *Official groups* according to the table below

<table>
<thead>
<tr>
<th>Official groups</th>
<th>No. of Groups</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Council</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Council groups</td>
<td>12</td>
<td>Approx. count</td>
</tr>
<tr>
<td>Commissions</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Commission groups</td>
<td>255</td>
<td>Approx. count</td>
</tr>
<tr>
<td>IUCN Members (global)</td>
<td>1</td>
<td>Includes Regional and National Committees</td>
</tr>
<tr>
<td>IUCN Members by operational regional/sub-regional groupings</td>
<td>11</td>
<td>Includes Regional and National Committees</td>
</tr>
<tr>
<td>IUCN Secretariat staff</td>
<td>50</td>
<td>Approx. Count</td>
</tr>
</tbody>
</table>

In addition to *Official groups* Union Portal users can define/create their own *User Generated groups*. Affiliation to *User Generated groups* is directly maintained by group managers who can select group members from a list of all Portal users.

**NOTE:** Affiliation to *User Generated groups* is stored on the Union Portal only (no data is sent nor stored in the IUCN Constituency Relationship Management - CRM).

### 1.4 What

The Union Portal allows the Union to *share information*.

All Portal users can *create/upload* documents, news stories, consultations, events and opportunities (content). Content must be related to at least one group (either an *Official group* or a *User Generated group*). Content is then displayed under its related group’s web space.

All groups (*Official groups* and *User Generated groups*) have a web space where group members can post information.
Content can be shared with the whole Union (public) or restricted to users affiliated to a specific group (private).

The Union Portal also provides the Union with a centralized and up to date directory of people and organizations related to IUCN.

Portal users (except for IUCN Secretariat staff) are able to update their own contact details. Officially recognized representatives of IUCN Member organizations/institutions are additionally able to update the contact details of their organizations/institutions.
2. Getting there and around

2.1 Access

NOTE: The Union Portal is optimized for Google Chrome and Mozilla Firefox browsers.

Access the Union Portal with your username and password.

If you experience any issues logging in, please use the Recover password link or contact supportportals@iucn.org

![User login form]

- Recover password
- Request new account
- Recover existing account

Log in
2.2 Main navigation

Two menus will be constant on the Union Portal:

1. The **top menu** features the language selector and user specific options.
2. The **main menu** allows users to access the main sections of the Portal as well the option to create/upload content.
2.3 **My IUCN section**

After log in users arrive at the main page of the *My IUCN* section.

The *My IUCN* section has a submenu to allow users access other lists of content as well as the user’s profile page.

The right-hand side of the *My IUCN* section displays two options:

The first is the default view: *My groups content* which displays all of the latest public content as well as any private content related to the groups to which the user is affiliated.

The second option displays: *All groups content*, which, if clicked, will show all the public content of all the existing groups in the Portal.

In the right-hand column of this page, users can also access links to their most recently added favourite groups and documents, as well as a preview of the user profile, and a mini *Calendar* that provides users with a *Calendar* view of Events.
### My groups content

<table>
<thead>
<tr>
<th>Title</th>
<th>Content type</th>
<th>Sort by</th>
<th>Order</th>
<th>Apply</th>
</tr>
</thead>
<tbody>
<tr>
<td>Documentation and analysis of NBSAP Revision Processes</td>
<td>News</td>
<td>Post date</td>
<td>Desc</td>
<td></td>
</tr>
<tr>
<td>National Biodiversity Strategies and Action Plans (NBSAPs) are the main vehiciles of national implementation of the Convention on Biological Diversity...</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gender Equity and Empowerment of Women in Lebanon</td>
<td>News</td>
<td>Post date</td>
<td>Desc</td>
<td></td>
</tr>
<tr>
<td>The overall objective is to enhance the institutional capacity of the National Commission for Lebanese Women(LCLUV) for a more effective...</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Support for the collective rights of women, persons with disabilities and the right to freedom of expression, Djibouti</td>
<td>Opportunity</td>
<td>Post date</td>
<td>Desc</td>
<td></td>
</tr>
<tr>
<td>The overall objective of this call for proposals is to strengthen the promotion and protection of human rights, including by strengthening the role...</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Country-Based Support Schemes Libya 2013</td>
<td>Opportunity</td>
<td>Post date</td>
<td>Desc</td>
<td></td>
</tr>
<tr>
<td>The specific objectives of this Call for Proposals are: LOT 1 (Human Rights) To support actions which seek to enhance and foster effective policy...</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Peace Building Partnership Programme: Youth employment as conflict prevention and peace-building vector</td>
<td>Opportunity</td>
<td>Post date</td>
<td>Desc</td>
<td></td>
</tr>
<tr>
<td>The specific objectives of this call for proposals are: (i) to provide an enabling environment for income generation activities in order to prevent...</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non state actors and local authorities in development in Gabon - 2014</td>
<td>Opportunity</td>
<td>Post date</td>
<td>Desc</td>
<td></td>
</tr>
<tr>
<td>The specific objectives of this call for proposals are: (i) strengthen the advocacy capacity of NSAs so that they represent a real support in the...</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
2.3.1 **My favourites**

The second option in the submenu on the *My IUCN* Main page displays a list of all of your Favourite content: Documents, News, Consultations, Groups, etc.

You can access this section by clicking on the *My Favourites* link. The title of each ‘Favourite’ links directly to the relevant content. The link *Remove from Favourites* lets users remove content from the list of favourites.

---

![My favourites section from the IUCN Union Portal](image-url)
2.3.2 **My groups**

The third option in the submenu displays a list of all the groups you belong to.

You can access this section by clicking on the *My Groups* link. The title of each Group links directly to the web space.
2.3.3 **My content**

This option in the submenu displays all of the content that you have created. It has two views: the first that is shown by default *Managed by me* displays your created content (live on the Portal); the other option *Unpublished contents* displays your “Unpublished” content (please see *Creating step by step* or *Hiding/deleting content* below).

![Managed by me](image)

2.3.4 **My profile**

The last option in the submenu of the *My IUCN* main page is a link to your Full Profile.

This option called *My Profile* provides one of the links to accessing your full profile page (please see the *Editing your profile* section below).
2.4 People section

The People section presents a list of individuals affiliated to the Union. Lists are set to show 50 records per page. Use the bottom pager to navigate between pages.

Use the filter options on top of the list to search for a person/people.

A detailed profile can be retrieved by clicking on a person’s name.

**NOTE:** To search for people related to an organization or a specific IUCN constituent group you should use other sections of this Portal to identify the organization or IUCN constituent first and then you will be able to obtain the list of related people. For an example, please see 2.5 IUCN Members below.
2.5 IUCN Members section

The IUCN Members section provides a list of IUCN Member organizations/institutions, a list of National and Regional Committees of IUCN Members, as well as a list of IUCN Member groups divided geographically, via which you can access the Member-related web spaces. Use the submenu to navigate between these lists.

Lists are set to show 50 records per page. Use the bottom pager to navigate between pages.

A detailed organizational profile can be retrieved by clicking on an organization’s name.

A list of people related an organization can be retrieved by clicking on the people icon next to the organization’s name.
2.6 Commissions section

The IUCN Commissions and Commission groups section provides a list of IUCN Commissions and Commission groups.

Lists are set to show 50 records per page. Use the bottom pager to navigate between pages.

The Commission or Commission group web space can be retrieved by clicking on the web space icon next to the Commission or Commission group name.

A list of people related a Commission or Commission group can be retrieved by clicking on the people icon next to the Commission or Commission group’s name.
2.7 Council section

The IUCN Council and Council groups section provides a list of IUCN Council and Council groups.

The Council or Council group web space can be retrieved by clicking on the web space icon next to the Council or a Council group name.

A list of people related to Council or a Council group can be retrieved by clicking on the people icon next to Council or the Council group’s name.
2.8 Secretariat section

The IUCN Secretariat section provides a list of IUCN Secretariat offices.

The Secretariat office web space can be retrieved by clicking on the web space icon next to the Secretariat office name.

A list of people related to a Secretariat office can be retrieved by clicking on the people icon next to the Secretariat office’s name.
2.9 **User groups section**

The User Generated Groups section presents a list of User Generated Groups.

The User Generated Group web space can be retrieved clicking on the web space icon next to the User Generated group name.

A list of people related to a User Generated group can be retrieved by clicking on the people icon next to the User Generated group’s name.

You can remove yourself from a User Generated group by clicking on the *Remove Myself from Group* link.
2.10 Group web spaces

All groups (Official groups and User Generated groups) have a web space where group content is displayed.

Each group web space has a submenu to allow users to access lists of the group’s content as well as a list of related groups.

On the main page of a group web space, users are presented with a dashboard of the content related to the group with the most recently posted items at the top. If the user is not affiliated to the group, the dashboard will only display public content related to the group. If the user is affiliated to the group, the dashboard will display public and private content related to the group.

On the left-hand column of this page users can find group details including the group description (with a link called More to see the full group description in a modal window), group type and parent group(s).

Depending on the user’s affiliation to the group, this column will also display links for specific actions such as editing the group, mass mailing group members, displaying group members, removing yourself from the group and the option to add the group to your favourites.

The left-hand column also displays the Custom navigation links of the Group that managers can create/update/remove at any time.

Finally, a mini Calendar is available, providing users with a Calendar view of the Events.
3. Creating/Uploading content

3.1 Types of content

All Portal users can create/upload documents, news stories, consultations, events and opportunities (content).

- Documents: any type of document, e.g. reports, publications, newsletters, etc.
- News stories: updates, results, news, announcements, etc.
- Consultations: information that is open for discussion
- Events: promote events
- Opportunities: job openings, funding, awards, capacity building, etc.

Portal users can also create User Generated Groups and Folders.

- User Generated groups: a custom-built group of users that shares a web space
- Folders: a directory to organize documents within the document section of a web space

3.2 Creating step by step

a) Click on the Create & Upload link located on the main navigation bar.
b) Select the type of content you would like to create from the list.

![Create & Upload]

- **Documents & Folders**: Upload reports, publications, newsletters, and many other types of documents. Folders help you organize documents within the document section of a web space.
- **Consultations**: To post information that is open for discussion and invite users to provide their feedback.
- **Events**: To promote your events.
- **News stories**: To communicate updates, results, news, announcements, etc.
- **Opportunities**: To share opportunities for job openings, funding, awards, etc.

- **Groups**: User generated Groups to create your own group and share content with a specific group of people.

![Create News stories]

c) On the Create form displayed there are two distinct and very important sections *Content* and *Publishing info.*
d) Under the Content section of the form you input the data pertinent to the content you are creating, i.e. title, type, body (with the option to edit a body summary), image, documents, links, etc. For more information read the specific descriptions provided under each field.

e) Under the Publishing info section of the form you need to set a couple of properties that define the way your content is published and who should have access to it. These settings are very important so make sure you read the descriptions provided under each field.
NOTE: this section doesn’t apply to User Generated groups nor Directory.

Language – Allows you to define a specific language for your content. It’s only needed if you are planning to translate the content. If you are planning to translate it, then select the corresponding language version. If you are not, set the content as Language neutral. For more information please see Content translations below. This field is not applicable for Documents or for Folders.

Group(s) – Define in which group web spaces your content should be posted. You must choose at least one group. You will notice you only have the right to post content in the web spaces of groups to which you are affiliated. If you wish to post content in another group web space please see Posting content to a group you are not affiliated to below.

NOTE: Documents and Folders don’t include a related Group(s) field, but a Parent folder(s) field.
**Access level – Very important!** By default content is set to *Private*, meaning that only people affiliated to the groups listed on the *Group(s)* field above have access to it. If you set the content to *Public, all Union users will have access to it.*

**Managers** – Content managers will have the right to edit your content. This can be helpful if you wish to share responsibility for a piece of content or if you wish to post content on web spaces of groups to which you are not affiliated (please see *Posting content to a group you are not affiliated to* below.)

**Parent folder(s)** – Define in which group web spaces (or folders) your content should be posted. You must choose at least one group or folder.

f) After filling in both sections of the *Create* form make sure you save your new content type by clicking on the *Save* button at the bottom of the form.

**IMPORTANT:** at the bottom of the *Create form* is the *Publishing options* tab with a “Published” check box that is checked by default and lets the users know that the content is visible on the Portal. If a user unchecks this option the content will be “Unpublished”/hidden/removed from the Portal.
3.3 Editing content

Content owners and content managers have the right to edit content. To edit content click on the *Edit* tab shown below the content’s title.

You will notice that the edit form is similar to the create form. For more information read the specific descriptions provided under each field.

**NOTE:** If you can’t see the Edit tab it means you don’t have the right to edit that piece of content.
3.4 Editing groups

Group managers have the right to edit group details. To edit a group click on the *Edit group* link shown on the left column of a group page.

You will notice that the edit form is similar to the create form. For more information read the specific descriptions provided under each field.

**NOTE:** If you can’t see the *Edit group* link it means you don’t have the right to edit that group’s details.
3.5 Creating folders

Users can create folders to organize documents inside of the groups they are affiliated to. A folder will be related to a group or to another folder (Parent folder), like a file system directory.

A group can contain more than one folder; each folder can also contain more folders.

To create a Folder:

a) Click on the option Folders on the Create & Upload page. The link to the Create & Upload page is located on the main navigation bar menu.

b) Input the data pertinent to the fields for the folder: name, description, parent folder, and manager(s).

c) After filling the required fields on the form make sure you save your new content type by clicking on the Save button at the bottom of the form.

NOTE: A parent folder can be a group or another folder, but only one value is permitted here.
3.6 Editing folders

Folder managers have the right to edit the folders. To edit a folder you have to go to the Documents section of the web space and click on the Edit link shown next to the folder’s name.

**NOTE:** If you can’t see the Edit link it means you don’t have the right to edit that folder.

**NOTE:** Group managers have two quick action links: New folder here and New document here to create quickly a new Folder or a new Document in the current group or folder.
Folders inside a web space can have different levels and you can navigate the directories via the path that indicates links to the folders or the web space.

You will notice that the edit form is similar to the create form.
4. Specific cases

4.1 Content translations

The Union Portal allows you to provide language versions of your content (translations) in the three official IUCN languages: English, French and Spanish.

a) Create new content or edit an existing one
b) Use the Language field to define a specific language for your content
c) Save your content
d) A new Translate tab will be shown. Click over the Translate tab

![Translate tab](image)

Submitted by Moreno, Wilson on Mon, 10/14/2013 - 15:47

Esta es una comunicación para los usuarios del grupo.

Document type: Letter

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e) Select the translation you would like to add from the available options

<table>
<thead>
<tr>
<th>Language</th>
<th>Title</th>
<th>Status</th>
<th>Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>English</td>
<td>Documento de comunicación para los usuarios del grupo</td>
<td>Published</td>
<td>edit</td>
</tr>
<tr>
<td>French</td>
<td>n/a</td>
<td>Not translated</td>
<td></td>
</tr>
<tr>
<td>Spanish</td>
<td>n/a</td>
<td>Not translated</td>
<td></td>
</tr>
</tbody>
</table>

![Add Translation Button](image)

f) A new content form will be shown. Fill in the form with the translated content and press the Save button at the bottom of the form. The new translation is now available.

---

4.2 Updating/replacing an existing document

Often you will find yourself wanting to replace a document with a new version. To do so, you don’t need to create a new document from scratch; you can just replace the existing document with a new file.

a) Navigate to the page of the document you wish to update and press on the Edit tab shown below the content title.
NOTE: If you can’t see the Edit tab it means you don’t have the right to edit that piece of content.

b) Scroll down to the Document file(s) section and delete the current file using the Remove button.
c) Scroll to the bottom of the form and save the changes.

![Save button](image)

d) Edit the content again and scroll down to the **Document file(s)** section. This time add a new file using the **Add a new file** option.

![Add a new file](image)

![Related link(s) and document(s)](image)

e) Make sure you scroll to the bottom of the form and save the changes again.

![Save button](image)

4.3 **Document versioning**

If you wish you can create a historical archive of document versions (versioning) by uploading new files to an existing document without deleting the previous file(s).

**NOTE:** To optimize the storage space we recommend you **do not** keep various versions of the same document unless it is absolutely necessary.

a) Navigate to the page of the document you wish to update and press on the **Edit** tab shown below the content title.
NOTE: If you can’t see the Edit tab it means you don’t have the right to edit that piece of content.

b) Scroll down to the Document file(s) section and add a new file using the Add a new file option.

c) Scroll to the bottom of the form and save the changes.
4.4  **Posting content to a group you are not affiliated to**

If you wish to post content to a group to which you don’t have access you can do so by adding a user affiliated to the group where you wish to post, as a manager of the content.

Once the content has been published this manager can edit the content and relate it to his/her groups.

4.5  **Posting other people’s content on one of your groups**

If you wish to display some existing content on one of your groups you should contact one of the managers of the content and ask him/her to add your group to the list of related groups.

If the current manager is not affiliated to the group where you wish to publish the content you can ask him/her to add you as a manager. Once you are a manager of a content you can edit the content and relate it to any of your groups.

**NOTE:** Please follow these steps rather than duplicating content.

4.6  **Editing your profile**

The Union Portal allows you to keep your profile up to date.

**NOTE:** The screenshots used in this section are only examples. The specific data shown is mostly fictitious.

   a)  To navigate to the *My Profile* page you have three options. The first one is the link on the top menu of the page in the User options.
The second option is the link on the *My IUCN* main page Submenu:

![My IUCN main page Submenu]

The third option is the *Full profile* link in the right-hand column option in the *My Profile* section:

![My Profile]

b) Click on the *EDIT PROFILE* link.

![Mr. Gabriel DÁVILA]

- Quick biography
- Areas of Expertise
- Geographical scope of expertise
c) A form will be shown prefilled with your details. Update your data and click on the Save link at the bottom of the form. For security reasons it is mandatory that you provide your password on the edit details form.

![Form with fields](image)

*Note:* Your First name, Family name, and E-mail are not editable. If you wish to update this information please send a message to: supportportals@iucn.org.

*Note:* Changes to your profile can take up to 24 hours before they are shown in the Union Portal.
d) To edit the Expertise or Geographical scope of expertise, click on the *Edit Expertise* or *Edit Geographic scope* links. Check the boxes and click on the *Update* button.
e) To upload or update your Photo or C.V., click on the Update/Upload Photo or Update/Upload CV links. This opens a new page where you can upload your Photo or CV and include a description.

**NOTE:** Remember to include any photo credits in the image description.

**NOTE:** All users have an option to read the full biography of a Contact by clicking on the READ MORE link.
4.7 Editing your IUCN Member organization’s details

The Union Portal allows the Primary Contact, Additional Primary contact, Financial Contact or Head of Organization to edit the details of your organization. *NOTE: The screenshots used in this section are only examples. The specific data shown is mostly fictitious.*

a) Navigate to your Member Organizational profile page. Use the quick link [+ ] My Organization’s profile at the top of your My IUCN page:

Clicking on the [+ ] button will open up quick links for your organization’s profile and expertise, contacts and dues. Click on Profile & expertise to access the main organizational profile view.

Alternatively, you can start from the My Profile page:

The right-hand column displays your roles. Your organization’s name is shown as a link. Click on this link.
b) The Organization profile page will be displayed, with your organization’s details. Update your Organization’s data using the *EDIT ORGANIZATION* link.

**NOTE:** If you can’t see the Edit tab it means you don’t have the right to edit that piece of content.
c) A form will be shown prefilled with your Organization details. Update your data and click on the Save link at the bottom of the form.
d) To edit the Expertise or the Geographical scope of expertise, click on the *Edit Expertise* or *Edit Geographic scope* links. Check the relevant boxes and click on the *Update* button.
e) To upload/update your organization’s Logo or add/update photos, click on the Upload/Update Logo or Add/Update Photo links. This opens a new page where you can upload the logo or photo(s) of your organization and give them a description.

NOTE: Remember to include any photo credits in the image description.

NOTE: All users have an option to read the full mission or description of an Organization by clicking on the READ MORE links.

NOTE: To access your IUCN Member dues account and make online payments see section 4.15
4.8 Customized navigation in Groups

If you wish to display additional information related to your Group, you can add this in the Customized navigation section when creating or editing the group. You can save a list of links (text – URL – and menu titles) to store your chosen references.

Use this customized navigation tool to link to key content stored in the group space. This can be useful when wishing to highlight important content in a group space containing a great deal of content. You can also include links to external publically-available documents or web pages.

NOTE: You can add more than one group of customized menus.
4.9 **Subscribe to Consultations**

By subscribing to a consultation, you are indicating your interest in the consultation. The manager of the consultation will be able to access an email list of interested persons, which he/she may use, if wished, for any related follow up actions.

**NOTE:** Subscribing to a consultation does not guarantee that you will receive any additional information, unless explicitly stated in the consultation description.

Click on *Subscribe to this content* link under the main consultation description.

**NOTE:** You can “unsubscribe” at any moment accessing the content and clicking on the *Unsubscribe* option.
4.10 Hiding/deleting content

An extra feature to help users remove or hide content such as Documents, News, Consultations, etc., in the Portal, is an option called *Publishing options* with a “Published” check box that is checked by default at the bottom of each content form.

If a user unchecks this option, the content will be “Unpublished”/hidden/removed from the Portal.

**NOTE:** The hiding option is only available for the Managers of the content.

**NOTE:** The hidden contents can be located in the submenu *My content – Unpublished contents* option. From here you can edit and re-publish the content.
4.11 Browse by Expertise

When you are searching the directories: People or IUCN Member Organizations there is a filter that allows you to search by Expertise or by Geographical scope of expertise, as shown below.

NOTE: Users can search using multiple values.
4.12 Include attachments in Comments

When you comment on any content, you can add a file or image as an attachment by using the option *Attachment file*, as shown in the picture below.

![Attachment file option](image)

4.13 Flag Content as Inappropriate

Content deemed inappropriate can be flagged as inappropriate by Portal users, by clicking on the link *Flag as inappropriate*, as shown in the picture below.

![Flag as inappropriate link](image)
4.14 Google translate feature in Consultations

An additional feature to help users translating Consultations is the possibility to include a Google translation tool in the content.

**NOTE:** This feature enables users to access more information, participate and follow comments where translations were previously not available. Google translate does not always provide perfect translations, but can contribute to breaking language barriers.

a) When Creating or Editing a Consultation you can locate the *Google translate* option under the *Publishing info* tab. If you choose *Show google buttons*, then the feature will be added to your *Consultation*, allowing the description and any comments added to be translated.
b) The Google button will then be shown as a combo box where users can select a preferred language.

4.15 **Accessing your IUCN Member dues account and making online payments**

Representatives of IUCN Members (the Head of Organization, Primary Contact, Additional Primary Contacts and the Financial Contact) can access the dues information for their Member organization and view, at a glance, if their account is in good standing or in arrears.

This is a useful feature to ensure that Members stay up-to-date with membership dues payments to enable them to participate fully in the governance of the Union, and in particular in important electronic votes.

Members’ dues information is available under each Member’s organizational profile.

**NOTE:** Only the Member representatives listed can view the dues information for that specific Member organization. The information is not visible to representatives from other Member organizations.
NOTE: The screenshots used in this section are only examples. The specific data shown is mostly fictitious.

a) Navigate to your Member Organizational profile page. You can access this via your personal profile, or you can use the quick link [+]+ My Organization’s profile at the top of your My IUCN page:

Clicking on the [+]+ button will open up quick links for your organization’s profile and expertise, contacts and dues. Click on Profile & expertise to access the main organizational profile view.

You will notice a block in the right-hand column entitled: Your membership dues account which displays the current membership dues balance alongside a link to access the full account status, payment by credit card and additional information.

NOTE: If you can’t see the block Your membership dues account it means that you don’t have the rights to access this information.

When you click on the link to access your account status, payment by credit card and additional information, you will arrive on the page shown below.

You can access a more detailed view of your membership dues account, listing any open transactions (invoices to pay in full or in part) along with the account balance. You can access information for making membership dues payments, including secure payments via credit card online.
### Membership payment status

<table>
<thead>
<tr>
<th>Posting Date</th>
<th>Type</th>
<th>Description</th>
<th>Amount</th>
<th>Remaining Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/1/2011</td>
<td>Invoice</td>
<td>Membership dues 2011</td>
<td>430.00</td>
<td>430.00</td>
</tr>
<tr>
<td>1/1/2012</td>
<td>Invoice</td>
<td>MEMBERSHIP DUES 2012</td>
<td>433.00</td>
<td>433.00</td>
</tr>
<tr>
<td>1/1/2013</td>
<td>Invoice</td>
<td>MEMBERSHIP DUES 2013</td>
<td>443.00</td>
<td>443.00</td>
</tr>
<tr>
<td>1/1/2014</td>
<td>Invoice</td>
<td>Membership Dues 2014</td>
<td>441.00</td>
<td>441.00</td>
</tr>
</tbody>
</table>

Balance: 1,747.00

Only transactions that comprise the outstanding balance will be displayed. More details can be obtained by contacting finance.members@iucn.org

### Pay by Credit Card

Enter the amount you wish to pay below (CHF only) and press the button Pay now. You will be redirected to the secure payment Web page of DataPays.

**Amount:** Fill in the value (CHF)

[Pay now]

*Note: Transaction charges for credit card payments will be borne by IUCN. In order to limit charges to an acceptable level we recommend that Members pay dues by bank transfer if the payment amount exceeds CHF 5,000 (five thousand Swiss francs).*

### Other payment methods

**Bank transfer**

If your preferred method of payment is by bank transfer, please use the details below. Please note that you will bear all charges for the bank transfer.

**IMPORTANT:** Please quote the exact name "IUCN, International Union for Conservation of Nature and Natural Resources" as well as your Member ID and organization name when making your payment.

<table>
<thead>
<tr>
<th>IUCN account</th>
<th>CHF account</th>
</tr>
</thead>
<tbody>
<tr>
<td>UBE 8 A.</td>
<td>Account No 24333503501W</td>
</tr>
<tr>
<td>Place St. Francois 16</td>
<td>IBAN: CH23 0832 3243 3300 3501 W</td>
</tr>
<tr>
<td>CH-1002 Lausanne</td>
<td></td>
</tr>
<tr>
<td>Stasse</td>
<td></td>
</tr>
<tr>
<td>Swift code: UBSWCHZH60A</td>
<td></td>
</tr>
</tbody>
</table>

### Additional information

IUCN membership does not expire unless the IUCN Member is withdrawn or expelled from IUCN as detailed in Article 13 of the IUCN Statutes, or unless the IUCN Member withdraws voluntarily by providing IUCN with written notification of its intention to withdraw its membership. Members withdrawing from the Union must ensure that all outstanding membership dues have been paid, up to and including the year of the notification of withdrawal.

As part of our efforts to reduce administrative costs, kindly note that receipts for payments will only be issued upon request.

May we kindly remind you to inform us of any important changes in your organization which may affect your organization's membership of IUCN, such as the category of membership or the dues group. If your statutes and/or expenses have significantly changed since your organization joined IUCN, please provide your **Membership Focal Point** with your organization's most recent statutes and/or financial report, including details of your organization's operating expenses.

Download a copy of the Membership Dues Guide here.

For other queries about your payment(s) or membership dues please contact finance.members@iucn.org.

Thank you for your continued support to IUCN.
b) You can make a credit card payment in the section *Pay by Credit Card*. To do this, insert the amount you wish to pay (in CHF) in the box and click on the *Pay now* button.

**Note:** Use a dot for cents (maximum 2 digits).

![Credit Card Payment Screen](image)

![Membership Dues Payment Confirmation Screen](image)

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c) A confirmation page will appear asking you to confirm the amount entered. Click the *Pay now* button if you agree and have no further changes.

d) You will then be redirected to the Datatrans payment page where you must choose your credit card, insert the data (card number, expiration date, CVV code) and click on the *Pay* button.
e) After this, you will receive a confirmation message for the transaction. This may be a ‘payment successful’ message, a cancellation message, or an error message. The confirmation message will include a transaction ID number.

f) Finally, you will see that a Pending transaction notification will appear on your Financial Information page, detailing information about the credit card payment in progress. This will disappear once the payment has been received by IUCN (up to three or four weeks) and your balance will be adjusted accordingly.
4.16 Assigning a Member organization’s Authorized vote holder and checking Member voting rights

Between sessions of the World Conservation Congress, the Authorized vote holder is the person who is authorized by the Member organization/institution to receive and cast the Member’s vote(s) when electronic ballots take place.

It is the responsibility of the Head of Organization to nominate the Authorized vote holder for his/her respective Member organization/institution. The Head of Organization can then assign this role via the Union Portal directly, or request that the Primary contact or Additional Primary contact assigns the role accordingly via the Union Portal.
The link to assign the Authorized vote holder is available under each Member’s organizational profile under a block entitled: *Electronic voting* (visible on the right hand side of your screen). To assign the designated *Authorized vote holder*, the Head of Organization or Primary contact or Additional Primary contact should login to the Union Portal and follow the steps indicated below.

**NOTE:** Only one person per IUCN Member can be designated as the *Authorized vote holder*. Prior to each electronic ballot, the Head of Organization, Primary contact or Additional Primary contact(s) will be given the opportunity to assign the role of *Authorized vote holder* to another person via the Union Portal.

**NOTE:** Only the Member representatives listed can view the electronic vote information for that specific Member organization. The information is not visible to representatives from other Member organizations.

*NOTE: The screenshots used in this section are only examples. The specific data shown is mostly fictitious.*

a) Navigate to your Member Organizational profile page. You can access this via your personal profile, or you can use the quick link [+ ] *My Organization’s profile* at the top of your *My IUCN* page:

![Image of My Organization’s profile]

Clicking on the [+ ] button will open up quick links for your organization’s profile and expertise, contacts and dues. Click on *Profile & expertise* to access the main organizational profile view.

b) You will notice a block in the right-hand column entitled: *Electronic voting* which displays your Member voting power, dues status and the name of your Authorized vote holder, alongside a link to modify the Authorized vote holder to another representative from your Member organization/institution.
A Member voting power of 0, 1, 2 or 3 will be displayed. This corresponds to the number of votes held by your organization/institution. See Articles 34 & 35 of the IUCN Statutes.

If your Member voting power is 0 then your organization does not have the right to vote in electronic ballots (e.g. for Affiliate Members; and for Government agency (GA) Members which share one collective vote, but which have not been nominated to hold and cast that vote on behalf of the other GA Members in their State). In these cases, the Member does not need to assign an Authorized vote holder.

Your Dues status will show as
- In order
- or-
- Not in order - payment outstanding

An explanation is provided in the block, on the left. E.g. To be eligible to vote in the April 2015 e-vote, payment for membership dues up to and including 2014 must be received by the IUCN Secretariat by 30 March 2015. Please refer to Article 13(a) of the IUCN Statutes. The rights of a Member will only be considered “in order” when the dues of that Member have been paid up to and including the year preceding the vote.

Click on the link for detailed definitions of IUCN Member representative roles (Head of Organization; Primary and Additional Primary contacts and Authorized vote holder).
**NOTE:** If you can’t see the block *Electronic voting* it means that you don’t have the rights to access this information.

When you click on the link *Change Authorized vote holder*, you will arrive on the page shown below:

You will see the number of individuals connected to your organization/institution as currently registered in IUCN’s database.

The current Authorized vote holder will also be noted. (In this example, the Authorized vote holder has yet to be assigned. However, by default, the Head of Organization will be assigned as the Authorized vote holder until further changes are made.)

You can change the Authorized vote holder to an **existing contact or to a new contact**.

**To change the Authorized vote holder to one of the existing contacts** click on *Assign as Authorized vote holder* and follow the steps outlined below under c).

**To change the Authorized vote holder to a new contact** click on the link at the bottom of the screen and follow the steps outlined below under d).
c) **Change the Authorized vote holder to one of the existing contacts:**

When you click on the link *Change Authorized vote holder*, you will arrive on the page shown below:

Follow the instructions on the screen. Click *Yes, assign as vote holder* to confirm your selection, or *Cancel/Close window* to cancel the action.

If you confirm the selection, the change will be made immediately and will be visible in the *Electronic voting block* under your Member organizational profile.

A confirmation of the modification will be sent to the Head of Organization, the newly assigned Authorized vote holder and to your email address for your records (i.e. to the person making the changes).
d) Change the Authorized vote holder to a new contact

If the person you want to assign as Authorized vote holder was not in the list of contacts related to your Member organization, you will have clicked on the link at the bottom of the screenshot shown under b), and will arrive on the page shown below:

![Assign Authorized vote holder to a new contact](image)

Enter the requested information to create a new contact in the Union Portal and assign him/her as the Authorized vote holder, then enter the text in the security box and press Submit.

**NOTE:** This change can take up to 2 working days and it will NOT be reflected in the Union Portal until then. Once the new contact has been created and the change has been made, the newly assigned Authorized vote holder will be visible in the Electronic voting block under your Member organizational profile.
A confirmation of the request will be sent to the Head of Organization, the newly assigned Authorized vote holder and to your email address for your records (i.e. to the person who has requested the change).