

CRM

Customer Relationship Management

TRAINING SESSION

- **This tutorial consists on hands-on exercises**
 - You will need access to our CRM training instance
- **If you are a NIL...**
 - You should be able to use the CRM training instance authenticating yourself with your EGI SSO.
- **If you are not a NIL or you never used EGI CRM...**
 - We must know your EGI SSO and NGI to provide you access.

I. INTRODUCTION TO CRM

- CRM in Business
- CRM in EGI

II. WORKING WITH CRM

- Generalities and Main Modules

III. USE CASES

- Record Projects & Institutions and associated Contacts
- Explore Activities (ToDos / Events) and Documents
- Explore Metrics Portal (Advanced)
- Create Custom Reports (Advanced)

‘The better a business can manage the relationships it has with its customers the more successful it will become’

- Used to track relations with customers, share information within the company and create new business opportunities
- Ease the process of identifying, contacting, following-up and evaluating customer needs and satisfaction
- Improve communication among the different actors and increase productivity and efficiency

EGI needs an optimized management of relationships between EGI.eu, NGIs and their potential user leads

- EGI partners and their “clients” are distributed
- Conversations with “clients” happen at different places, context and time, and EGI partners should be able to share that information
- EGI needs to construct a portfolio of prospective clients and explore the opportunities

A CRM system has been setup to help coordinate and monitor the 'outreach to new user communities'

- EGI members record key findings about the e-infrastructure needs of potential clients of EGI services
- CRM stores '*needs*' of the following types of clients:
 - Projects and Scientific Collaborations
 - Research Institutes, Universities, Companies, ...
 - Researchers, Principal Investigators, Project Spokespersons, Representatives of Research Infrastructures, ...

A CRM system has been setup to help coordinate and monitor the 'outreach to new user communities'

- EGI members record key findings about the e-infrastructure needs of potential clients of EGI services
- CRM stores '*needs*' of the following types of clients:
 - Projects and Scientific Collaborations
 - Research Institutes, Universities, Companies, ... **Organizations**
 - Researchers, Principal Investigators, Project Spokespersons, Representatives of Research Infrastructures, **Person Contacts**

- **Those in EGI responsible for the outreach activities:**
 - NGI International Liaisons
 - Marketing and User Community Support Teams of EGI.eu
- **Access & Login**
 - The authentication is performed through EGI SSO
 - Access is not automatic. If you are a NGI staff, and you need access to EGI CRM, contact your NIL
 - NILs can ask for the inclusion of other actors, forming a network of trust, by requesting the access

The workshop instance:
<http://crmworkshop.lip.pt>



User Name

your EGI sso id

Password

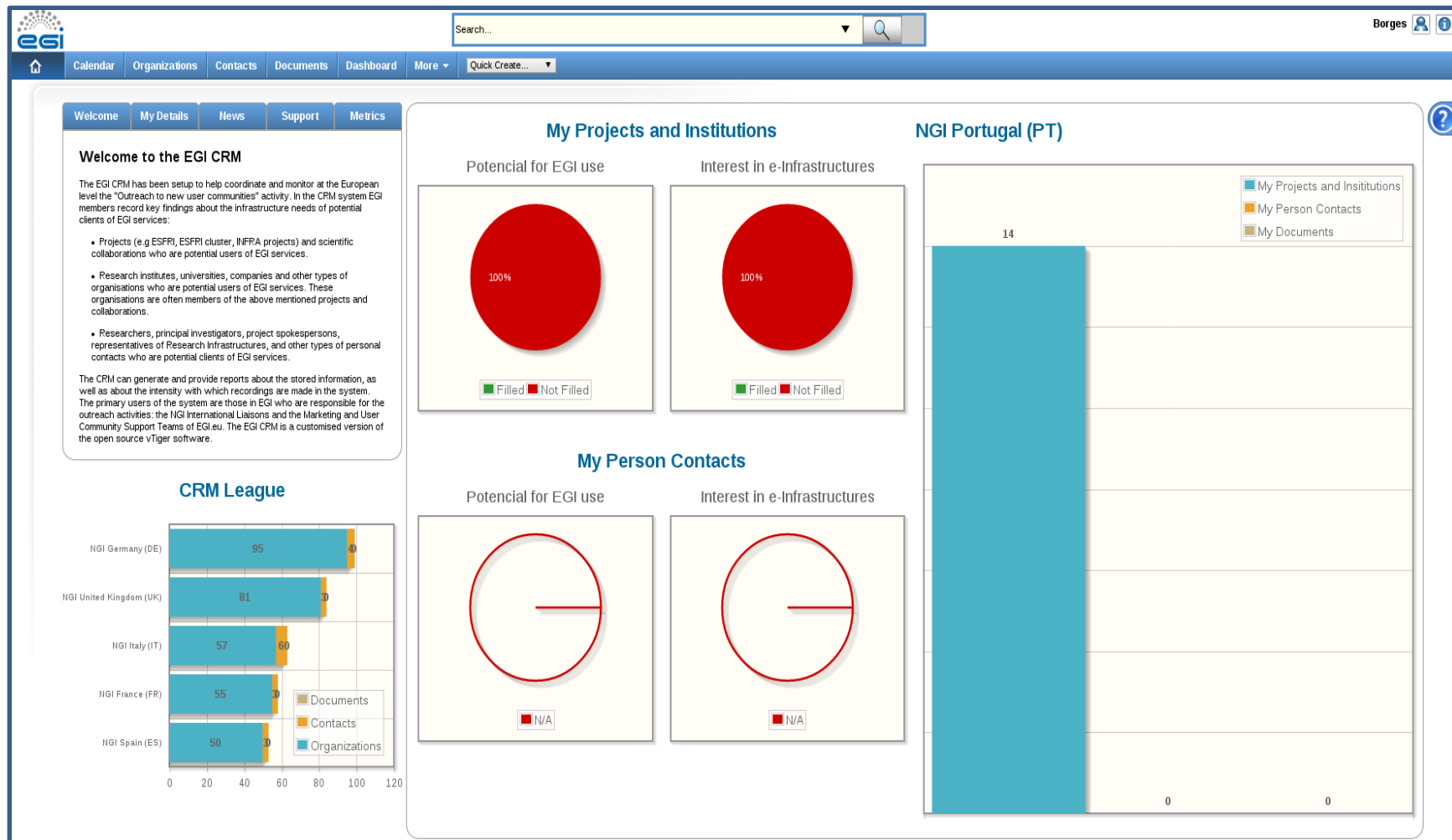
your EGI sso passwd

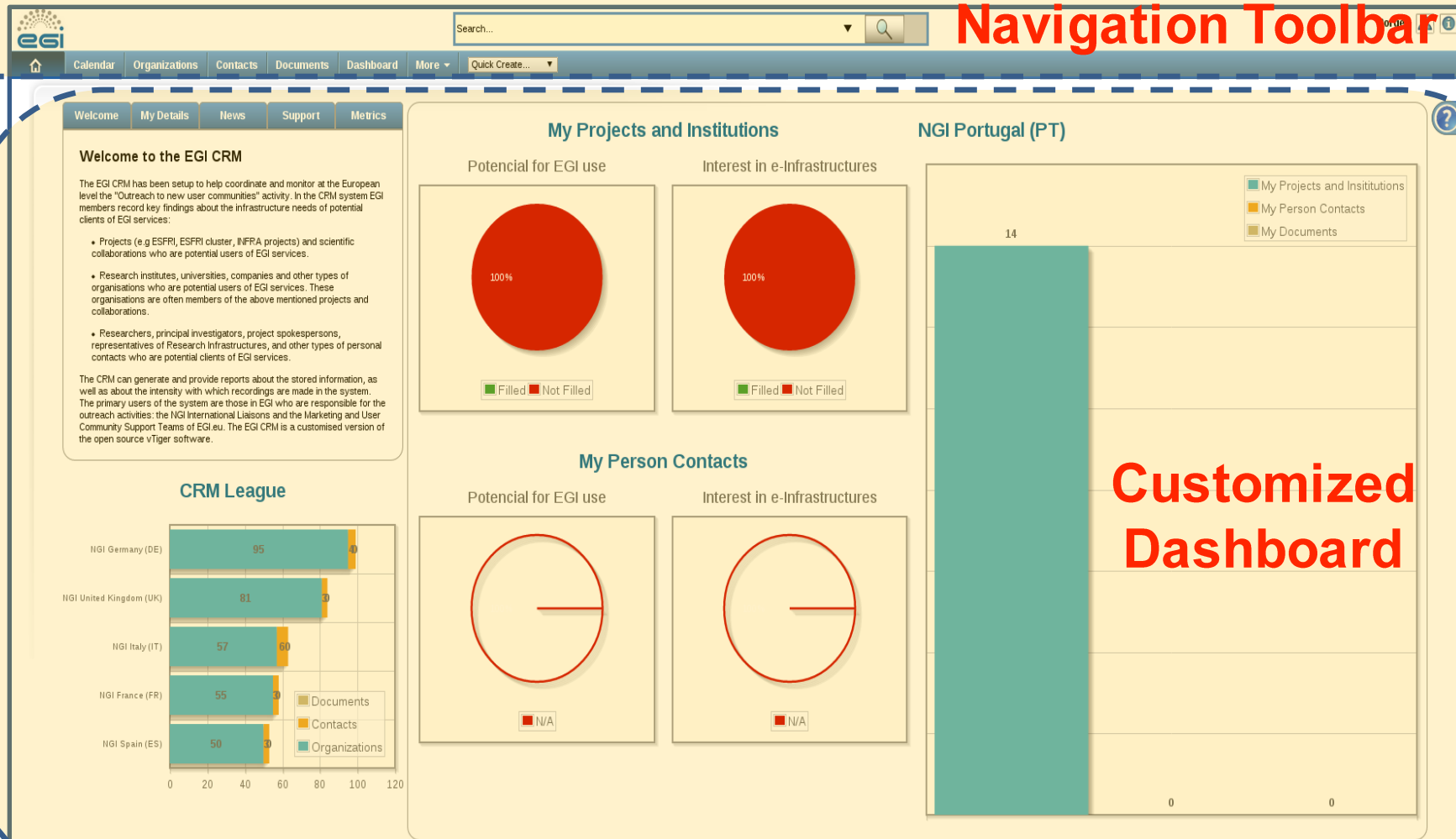
Login

[User Manual](#) | [CRM contact](#) | [Read License](#) | © 2004 - 2013

The production instance:
<https://crm.egi.eu>

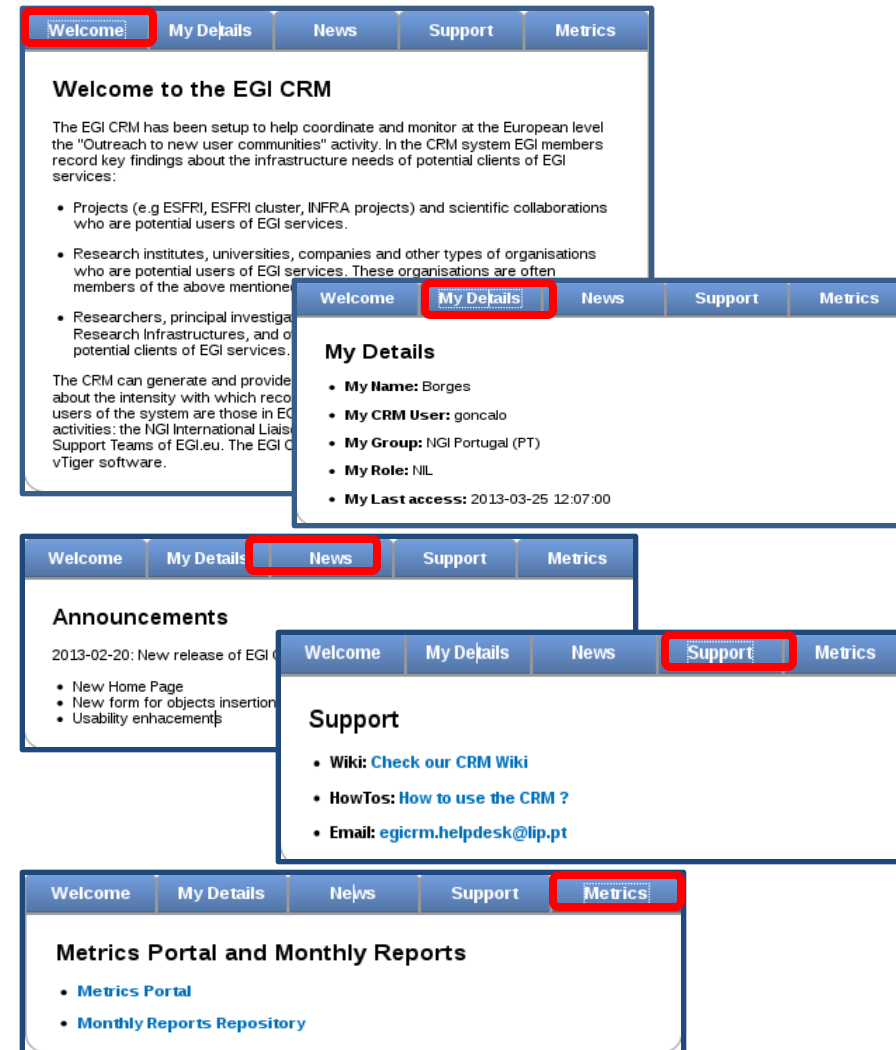
Don't use this one during the
workshop





• Customized Menu

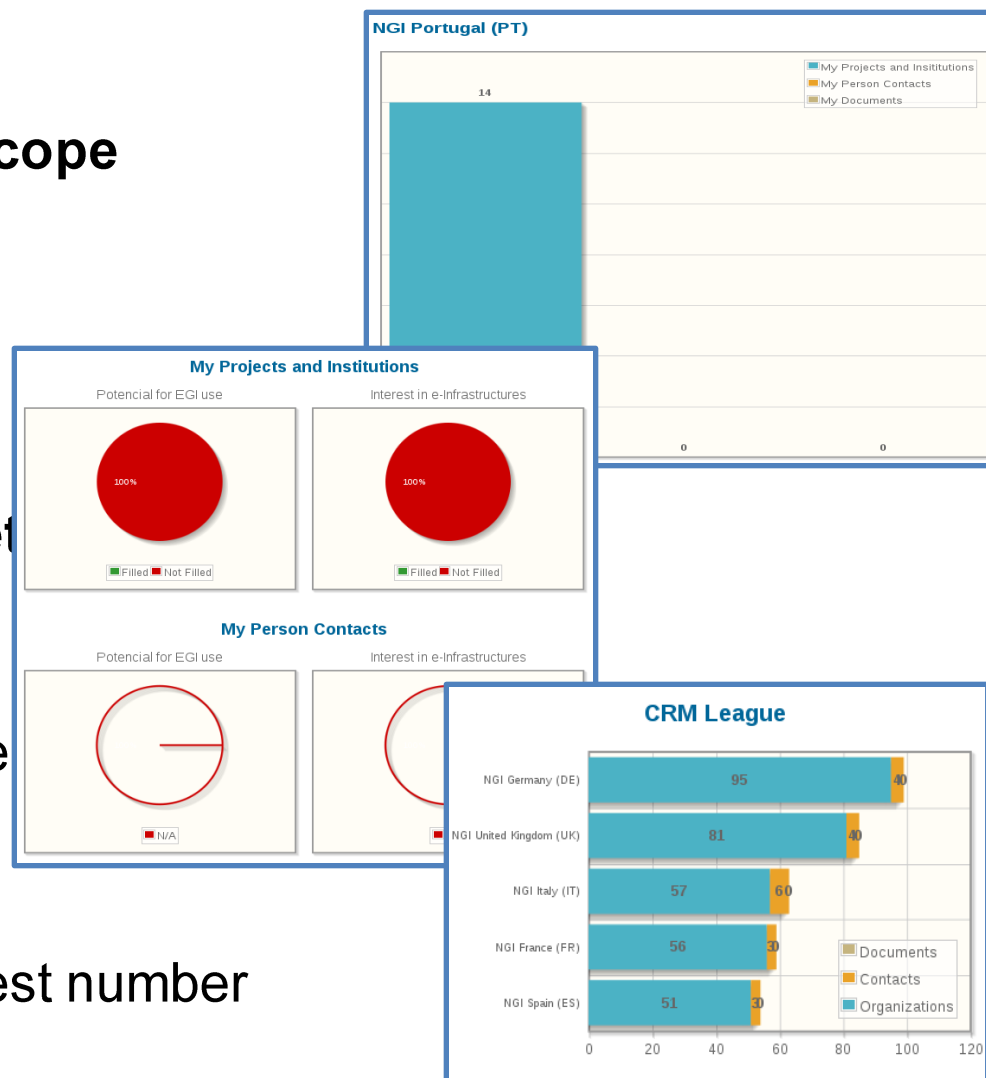
- Welcome Message
- My Details
 - Users Data (SSO, Groups, Roles)
- News (and Announcements)
- Support
 - Contact Email; Wikis and How-Tos
- Metrics
 - CRM Metrics Portal and Reports Repository

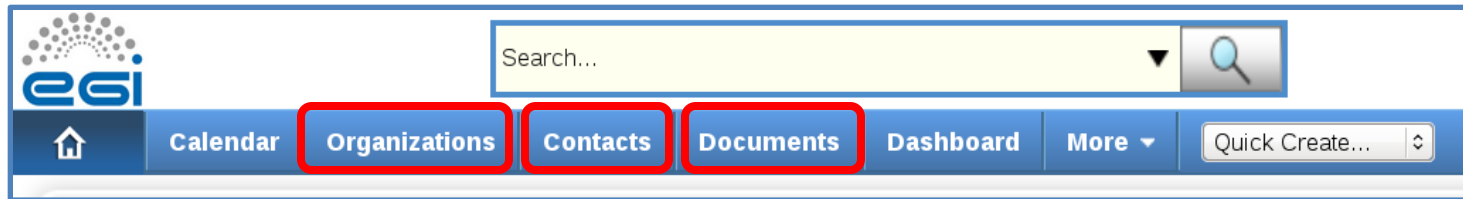


The image displays four screenshots of the EGI CRM dashboard, each showing a different section of the application. The top navigation bar in each screenshot contains five items: Welcome, My Details, News, Support, and Metrics. A red box highlights the selected menu item in each screenshot.

- Welcome:** The first screenshot shows the 'Welcome' section. The 'Welcome' menu item is highlighted. The content includes a welcome message, a description of the EGI CRM, and a list of potential users (Projects, Research institutes, Researchers).
- My Details:** The second screenshot shows the 'My Details' section. The 'My Details' menu item is highlighted. The content includes a list of user details: My Name: Borges, My CRM User: goncalo, My Group: NGI Portugal (PT), My Role: NIL, and My Last access: 2013-03-25 12:07:00.
- News:** The third screenshot shows the 'News' section. The 'News' menu item is highlighted. The content includes a list of announcements: 2013-02-20: New release of EGI CRM, New Home Page, New form for objects insertion, and Usability enhancements.
- Support:** The fourth screenshot shows the 'Support' section. The 'Support' menu item is highlighted. The content includes a list of support links: Wiki: Check our CRM Wiki, HowTos: How to use the CRM ?, and Email: egicrm.helpdesk@lip.pt.
- Metrics:** The fifth screenshot shows the 'Metrics' section. The 'Metrics' menu item is highlighted. The content includes a list of metrics: Metrics Portal and Monthly Reports Repository.

- Customized Graphics
 - # of objects under user's scope
 - # Organizations
 - # Contacts
 - # Documents
 - % of objects with incomplete information
 - Potential for EGI
 - Interest in e-infrastructure
 - CRM League Plot
 - Top-5 NGIs with the highest number of objects





- **Organizations**

- Enables NILs to create, edit, browse information about Organizations (customers or leads)

- **Contacts**


- Enables NIL users to create, edit, browse information about Contacts (persons associated to an Organization)

- **Documents**



- Enables NILs to manage documents related to Organizations or Contacts


- The term **Organization** represents entities which are being (or should be) contacted by NGIs or EGI
 - NILs / EGI.eu have identified potencial EGI users
 - NILs / EGI.eu have identified tools that could be of benefit for the community
 - NILs have identified possible synergies between different EGI and non-EGI communities
 - EGI and NGIs can be a valuable bridge

- **What goals are we aiming for?**
 - **Store information about Research Projects that are being executed (in Europe or at national level)**
 - Ex: INFRA, ESFRI, ESFRI-Cluster, National
 - **Store information about the Organizations that are participating or involved in those Research Projects**
 - Ex: Research Institutions (Universities, Labs, ...), Companies, Non-Profit Organizations, ...
 - **Capture the needs / source of possible synergies**
 - Ex: Description (Needs and expectations), Potential for EGI, Interest in e-infrastructures.



Search...

Borges  












[Calendar](#)

ORGANIZATIONS

[Contacts](#)
[Documents](#)
[Dashboard](#)
[More ▾](#)

Quick Create...

Organizations

Search

Go to Advanced Search

Search for

In Organization Name

Search Now

[X]




A B C D E F G H I J K L M N O P Q R S T U V W X Y Z


Showing Records 1 - 100 of 836

Filters : List All Organizations [Administrator] Create Filter | Edit | Delete



1 of 9


[Mass Edit](#)
[Send Mail](#)
[Mailer Export](#)

<input type="checkbox"/>	Organization Name	Account Type	Scientific Discipline	Assigned To	Potential for EGI use	Interest in e-Infrastructures	Action
<input type="checkbox"/>	European Extremely Large Telescope	ESFRI Project	Physical Sciences and Engineering	EGI Group Management			edit 
<input type="checkbox"/>	Neutron Scattering and Muon Spectroscopy...	ESFRI Project	Analytical Facilities and Material Scien...	EGI Group Management			edit 
<input type="checkbox"/>	Collaborative European Digital/Archival ...	ESFRI Project	Social Sciences and Humanities	EGI Group Management	CENDARI is from DARIAH-EU cluster ESFRI		edit 













Search...

Borges  


[Calendar](#)
[ORGANIZATIONS](#)
[Contacts](#)
[Documents](#)
[Dashboard](#)
[More ▾](#)

Quick Create... ▾

Organizations

Search

Go to Advanced Search

Search for

In Organization Name ▾

Search Now

[X]




A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Showing Records 1 - 100 of 836

Filters : List All Organizations [Administrator] ▾ [Create Filter](#) | [Edit](#) | [Delete](#)

1 of 9

[Mass Edit](#)
[Send Mail](#)
[Mailer Export](#)

<input type="checkbox"/>	Organization Name	Account Type	Scientific Discipline	Assigned To	Potential for EGI use	Interest in e-Infrastructures	Action
<input type="checkbox"/>	European Extremely Large Telescope	ESFRI Project	Physical Sciences and Engineering	EGI Group Management			edit 
<input type="checkbox"/>	Neutron Scattering and Muon Spectroscopy...	ESFRI Project	Analytical Facilities and Material Scien...	EGI Group Management			edit 
<input type="checkbox"/>	Collaborative European Digital/Archival ...	ESFRI Project	Social Sciences and Humanities	EGI Group Management	CENDARI is from DARIAH-EU cluster ESFRI		edit 

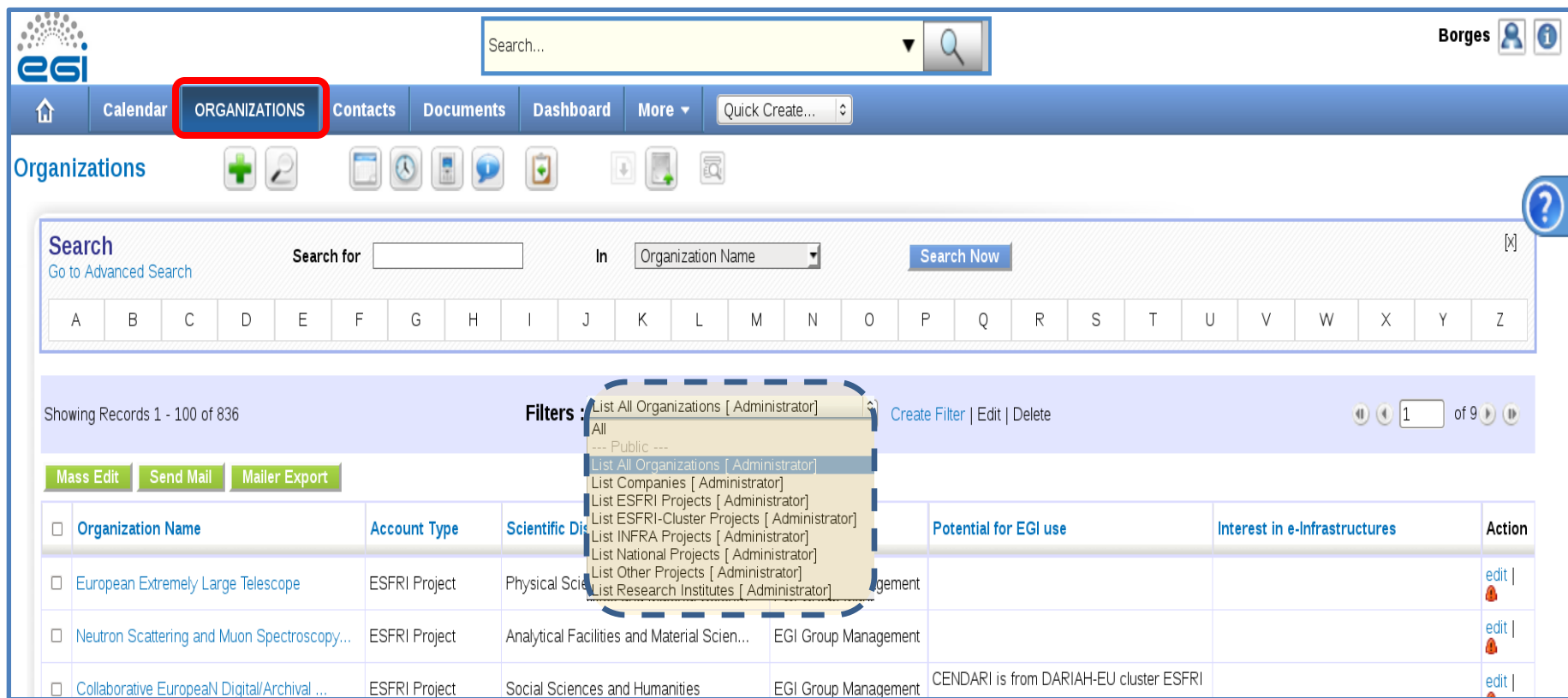
Full name

Type

Domain

Owner

Potential Snapshot



The screenshot shows the EGI Organizations interface. At the top, there is a search bar and a navigation menu with 'ORGANIZATIONS' highlighted. Below the navigation bar, there is a 'Search' section with a search bar and a 'Search Now' button. A list of letters (A-Z) is provided for filtering. Below this, a 'Filters' dropdown menu is open, showing options like 'List All Organizations [Administrator]', 'List Companies [Administrator]', 'List ESFRI Projects [Administrator]', 'List ESFRI-Cluster Projects [Administrator]', 'List INFRA Projects [Administrator]', 'List National Projects [Administrator]', 'List Other Projects [Administrator]', and 'List Research Institutes [Administrator]'. The main table displays a list of organizations with columns for 'Organization Name', 'Account Type', 'Scientific Discipline', 'Potential for EGI use', 'Interest in e-Infrastructures', and 'Action'. The first three rows are visible, showing organizations like 'European Extremely Large Telescope', 'Neutron Scattering and Muon Spectroscopy...', and 'Collaborative European Digital/Archival ...'.

All Organizations

ESFRI

ESFRI
Cluster

INFRA

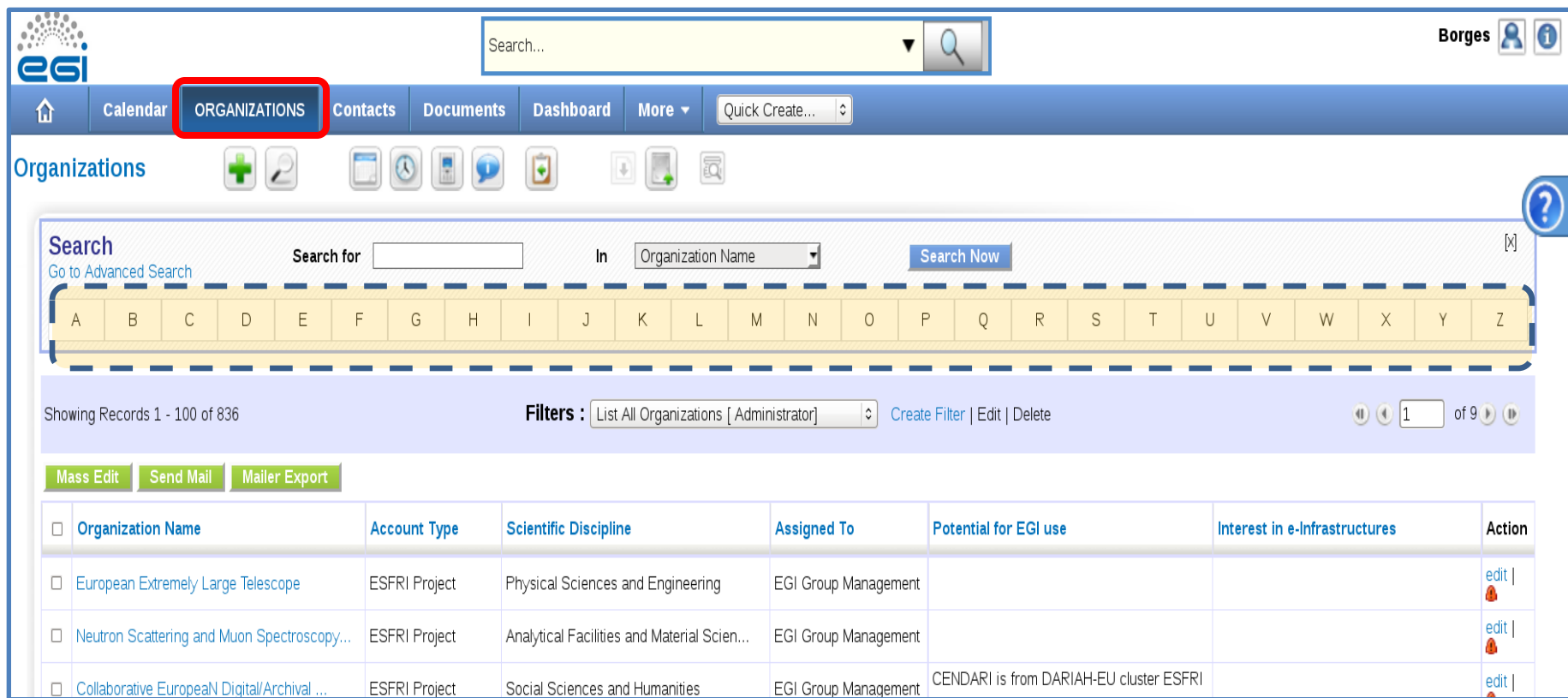
National

Other

Research
Institution

Company

Non-Profit
Organization



Search
Go to Advanced Search


Search for In

Showing Records 1 - 100 of 836

Filters :

<input type="checkbox"/>	Organization Name	Account Type	Scientific Discipline	Assigned To	Potential for EGI use	Interest in e-Infrastructures	Action
<input type="checkbox"/>	European Extremely Large Telescope	ESFRI Project	Physical Sciences and Engineering	EGI Group Management			edit
<input type="checkbox"/>	Neutron Scattering and Muon Spectroscopy...	ESFRI Project	Analytical Facilities and Material Scien...	EGI Group Management			edit
<input type="checkbox"/>	Collaborative European Digital/Archival ...	ESFRI Project	Social Sciences and Humanities	EGI Group Management	CENDARI is from DARIAH-EU cluster ESFRI		edit

Select and Sort “Organization Name” by alphabetic order



Enrique Bayonne

[Calendar](#)
[ORGANIZATIONS](#)
[Contacts](#)
[Documents](#)
[Dashboard](#)
[More](#)

[Organizations](#)

[\[ACC1193 \] DISCOVER THE COSMOS: e-Infrastructures for an Engaging Science Classroom - Organization Information](#)
Updated 144 days ago (18 Oct 2012) By Administrator

[Organization Information](#)
[More Information](#)

[Edit](#)
[Duplicate](#)
[Delete](#)

Organization Information

Organization Name	DISCOVER THE COSMOS: e-Infrastructures for an Engaging Science Classroom	Organization No	ACC1193
Account Acronym	DCOSMOS	Account Status	--None--
Country	--None--	Website	http://www.discoverthecosmos.eu/
Account Type	INFRA Project	Email	
Scientific Discipline	Other	Assigned To	EGI Group Management
EGI-InSPIRE partner	No	Created Time	14-06-2012 14:45:53
Start Date	01-09-2011	End Date	31-08-2013
Modified Time	18-10-2012 19:59:56		

Description Information

Potential for EGI use	From the Objective: "...to involve teachers and students in eScience through the use of existing e-infrastructures in order to spark young people's interest in science and in following scientific careers..."	Interest in e-Infrastructures	Coordination actions, conferences and studies supporting policy development, including international cooperation, for e-Infrastructures
Description	<p>Contacts of the partners can be found at http://cordis.europa.eu/search/index.cfm?fuseaction=proj.document&PJ_RCN=12361810</p> <p>Objective: The Discover the COSMOS coordination action aims to demonstrate innovative ways to involve teachers and students in eScience through the use of existing e-infrastructures in order to spark young people's interest in science and in following scientific careers. It aims to support policy development by a) demonstrating effective community building between researchers, teachers and students and empowering the latter to use, share and exploit the collective power of unique scientific resources (research facilities, scientific instruments, advanced ICT tools, simulation and visualisation applications and scientific databases) in meaningful educational activities, that promote inquiry-based learning and appreciation of how science works, b) demonstrating effective integration of science education with e-infrastructures through a monitored-for-impact use of eScience activities, which will provide feedback for the take-up of such interventions at large scale in Europe and c) documenting the whole process through the development of a roadmap that will include guidelines for the design and implementation of effective educational and outreach activities that could act as a reference to be adapted for stakeholders in both scientific research outreach and science education policy.</p>		

[Edit](#)
[Duplicate](#)
[Delete](#)

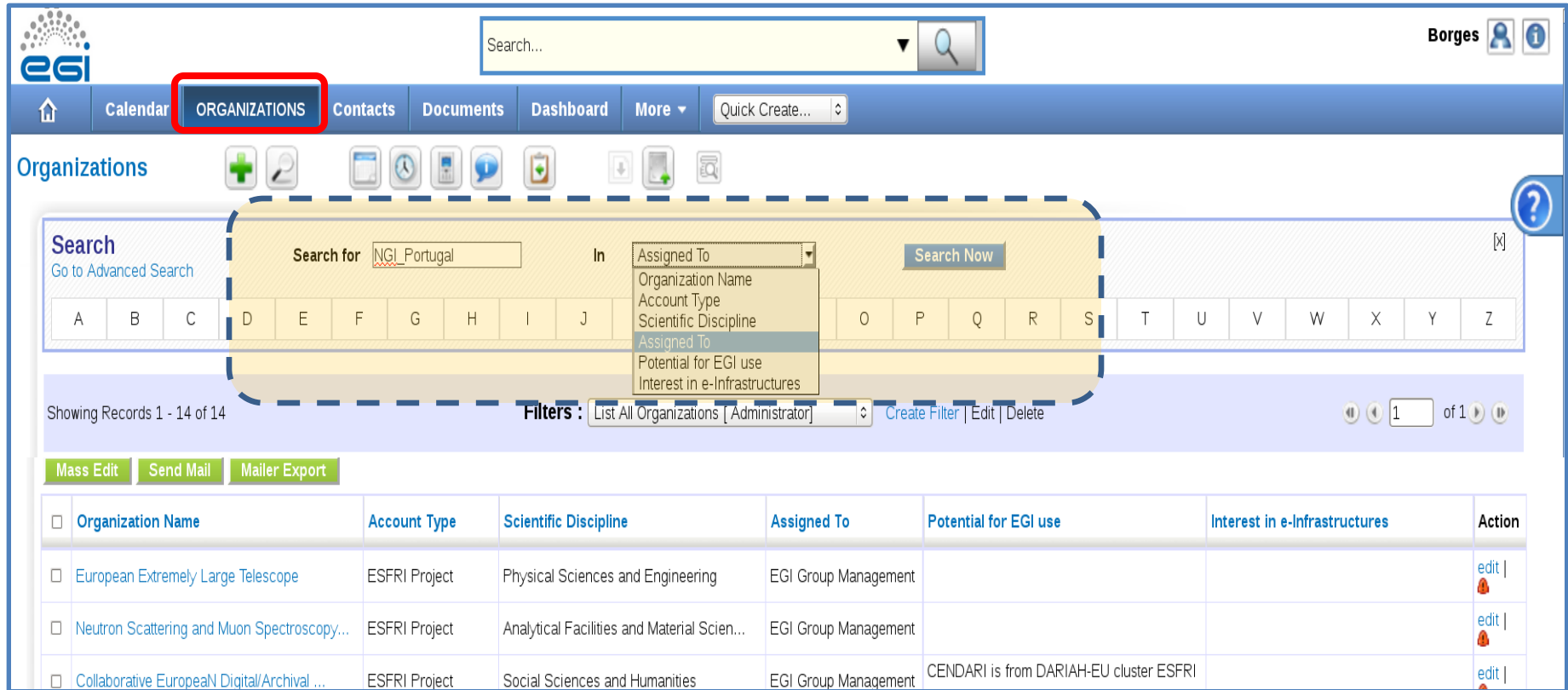
[Organization Information](#)
[More Information](#)

[Edit](#)
[Duplicate](#)
[Delete](#)

[Send Mail](#)
[Add Event](#)
[Add To Do](#)
[Add Note](#)
[Show Organization Hierarchy](#)
[View History](#)

Select template to Mail Merge:
[Create Mail Merge templates](#)

Organizations – Searching (Basic)



Search
Go to Advanced Search


Search for In

Showing Records 1 - 14 of 14



Filters:


<input type="checkbox"/>	Organization Name	Account Type	Scientific Discipline	Assigned To	Potential for EGI use	Interest in e-Infrastructures	Action
<input type="checkbox"/>	European Extremely Large Telescope	ESFRI Project	Physical Sciences and Engineering	EGI Group Management			edit
<input type="checkbox"/>	Neutron Scattering and Muon Spectroscopy...	ESFRI Project	Analytical Facilities and Material Scien...	EGI Group Management			edit
<input type="checkbox"/>	Collaborative European Digital/Archival ...	ESFRI Project	Social Sciences and Humanities	EGI Group Management	CENDARI is from DARIAH-EU cluster ESFRI		edit

Basic Search using one of the “main” Organization fields













Search...

Borges  


[Calendar](#)
[ORGANIZATIONS](#)
[Contacts](#)
[Documents](#)
[Dashboard](#)
[More ▾](#)

Quick Create... ▾

Organizations

Search

Go to Advanced Search

Search for

In Organization Name ▾

Search Now

✕




A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

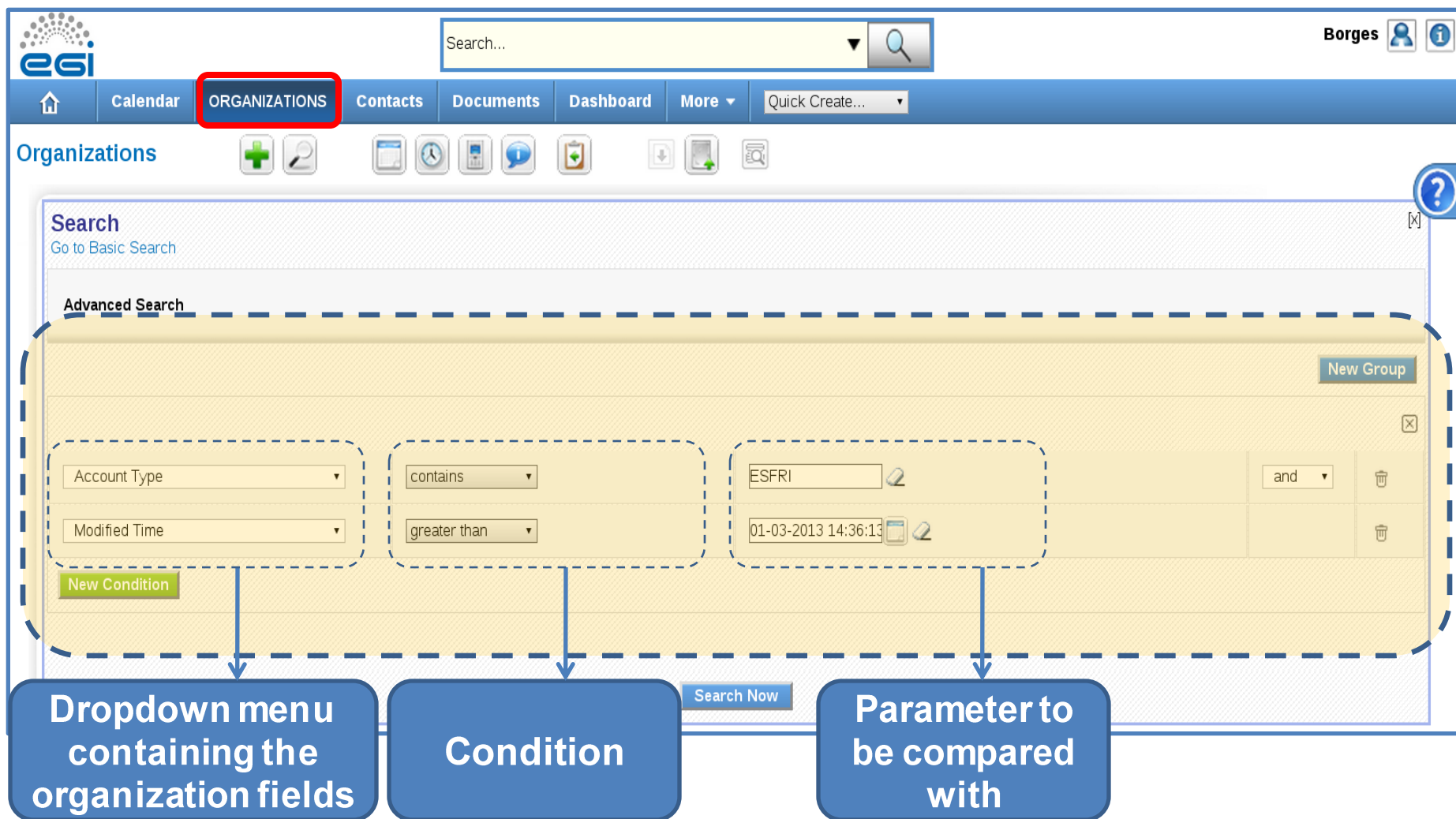
Showing Records 1 - 100 of 836

Filters : List All Organizations [Administrator] ▾ [Create Filter](#) | [Edit](#) | [Delete](#)

1 of 9

[Mass Edit](#)
[Send Mail](#)
[Mailer Export](#)

<input type="checkbox"/>	Organization Name	Account Type	Scientific Discipline	Assigned To	Potential for EGI use	Interest in e-Infrastructures	Action
<input type="checkbox"/>	European Extremely Large Telescope	ESFRI Project	Physical Sciences and Engineering	EGI Group Management			edit 
<input type="checkbox"/>	Neutron Scattering and Muon Spectroscopy...	ESFRI Project	Analytical Facilities and Material Scien...	EGI Group Management			edit 
<input type="checkbox"/>	Collaborative EuropeaN Digital/Archival ...	ESFRI Project	Social Sciences and Humanities	EGI Group Management	CENDARI is from DARIAH-EU cluster ESFRI		edit 



The screenshot shows the ESI Organizations search interface. The top navigation bar includes the ESI logo, a search bar, and user information (Borges). The main navigation bar highlights the **ORGANIZATIONS** tab. Below this, the **Organizations** section is active, showing a **Search** panel with a **Go to Basic Search** link and an **Advanced Search** section. The **Advanced Search** section is highlighted with a dashed blue box. It contains a table of search conditions. The first condition is defined by a dropdown menu (Account Type), a condition (contains), and a parameter (ESFRI). The second condition is defined by a dropdown menu (Modified Time), a condition (greater than), and a parameter (01-03-2013 14:36:13). A **New Condition** button is visible. A **Search Now** button is at the bottom. Three blue callout boxes with arrows point to the dropdown menus, the condition dropdowns, and the parameter input fields, respectively.

Search
Go to Basic Search

Advanced Search

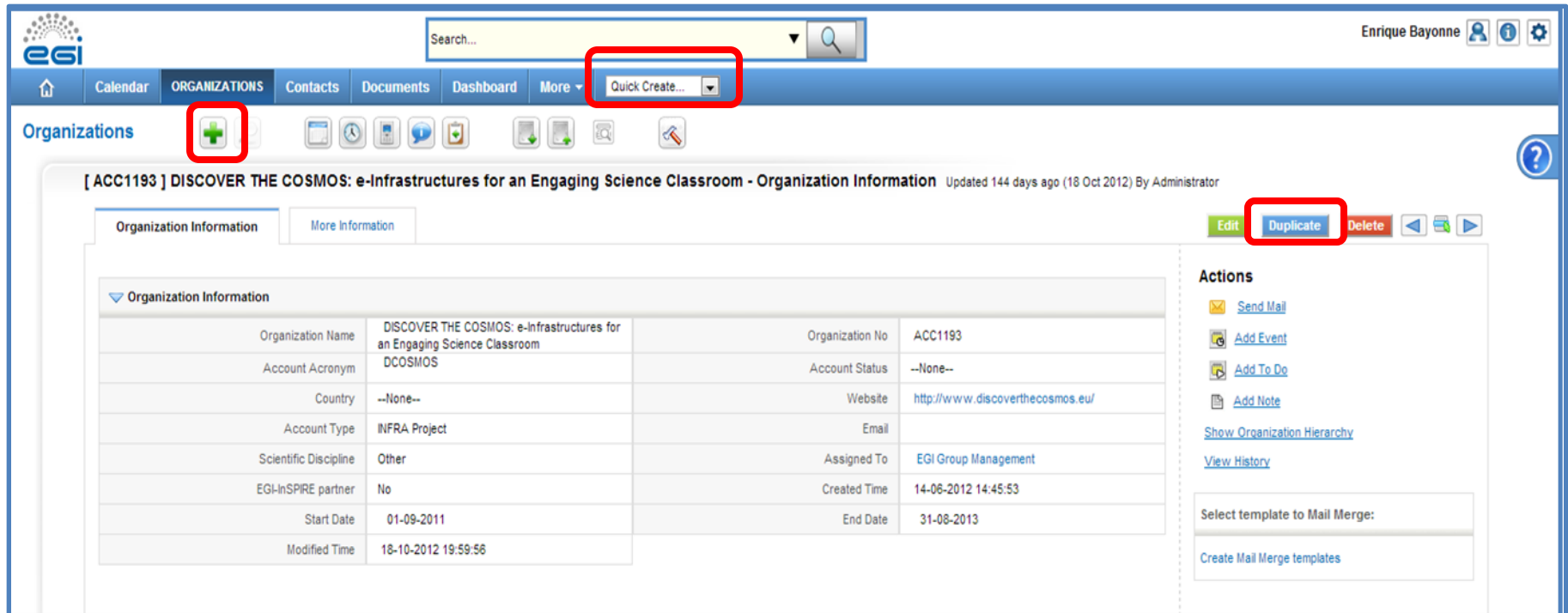
Field	Condition	Value	Operator	Action
Account Type	contains	ESFRI	and	Remove
Modified Time	greater than	01-03-2013 14:36:13		Remove

Dropdown menu containing the organization fields

Condition

Parameter to be compared with

Search Now



Search...

Enrique Bayonne

Calendar ORGANIZATIONS Contacts Documents Dashboard More Quick Create...

Organizations

[ACC1193] DISCOVER THE COSMOS: e-Infrastructures for an Engaging Science Classroom - Organization Information Updated 144 days ago (18 Oct 2012) By Administrator

Organization Information More Information

Organization Information

Organization Name	DISCOVER THE COSMOS: e-Infrastructures for an Engaging Science Classroom	Organization No	ACC1193
Account Acronym	DCOSMOS	Account Status	--None--
Country	--None--	Website	http://www.discoverthecosmos.eu/
Account Type	INFRA Project	Email	
Scientific Discipline	Other	Assigned To	EGI Group Management
EGI-InSPIRE partner	No	Created Time	14-06-2012 14:45:53
Start Date	01-09-2011	End Date	31-08-2013
Modified Time	18-10-2012 19:59:56		

Actions

- Send Mail
- Add Event
- Add To Do
- Add Note
- Show Organization Hierarchy
- View History

Select template to Mail Merge:


Create Mail Merge templates



Ways to create an Organization:

‘+’ sign

‘Quick Create’ drop down menu











Duplicate an existing one then edit it




Borges



Calendar
ORGANIZATIONS
Contacts
Documents
Dashboard
More ▾
Quick Create... ▾

Organizations









Creating New Organization

Organization Information




Save
Cancel

Organization Information

*Organization Name 	<input style="width: 90%;" type="text"/>
Account Acronym 	<input style="width: 90%;" type="text"/>
Country	--None-- ▾
*Account Type 	--None-- ▾
Scientific Discipline 	--None-- ▾

Organization No	AUTO GEN ON SAVE
Account Status 	--None-- ▾
Website	<input style="width: 90%;" type="text"/>
Email	<input style="width: 90%;" type="text"/>
*Assigned To 	<input type="radio"/> User <input checked="" type="radio"/> Group NGI Portugal (PT) ▾

Description Information

*Potential for EGI use 	*Interest in e-Infrastructures 
Description 	

Save
Cancel

EGI Search... Borges

Calendar ORGANIZATIONS Contacts Documents Dashboard More Quick Create...

Organizations

Creating New Organization

Organization Information

Help

Save Cancel

Organization Information

*Organization Name		Organization No	AUTO GEN ON SAVE
Account Acronym		Account Status	--None--
Country	--None--	Website	
*Account Type	--None--	Email	
Scientific Discipline	--None--	*Assigned To	<input type="radio"/> User <input checked="" type="radio"/> Group NGI Portugal (PT)


General Information

Description Information

*Potential for EGI use		*Interest in e-Infrastructures	
Description			

Save Cancel

- The form changes dynamically according to the selected Account Type
 - “**Projects**”: INFRA, ESFRI, ESFRI-Cluster, National
 - “**Institutes**”: Research Institute, Company, Non-Profit org.
- “**Institutes**” are associated to the “**Projects**” they are working on via the “*Project List*” section
 - “*Project List*” is a dynamic section only displayed for “Institute” Account Types
 - Link each institute to the project they are working on via the proper “Project” acronym.



Search...

Borges

Home

Calendar

ORGANIZATIONS

Contacts

Documents

Dashboard

More

Quick Create...

Organizations

+

?

📅

🕒

📁

💬

📧

📎

🔍

?

Creating New Organization

Organization Information

Save

Cancel

Organization Information

*Organization Name

Account Acronym

Country

--None--

*Account Type

Research Institute

Scientific Discipline

--None--

*EGI-InSPIRE partner

No

Organization No

AUTO GEN ON SAVE

Account Status

--None--

Website

Email

User

Group

*Assigned To

NGI Portugal (PT)

Projects List

☒ ESFRI

☐ ESFRI-Cluster

☐ INFRA

☐ National

☐ Other International

ESFRI Projects

-none-

ANAEE

ARISE

BBMRI

Description Information

*Potential for EGI use


*Interest in e-Infrastructures

Description

Save

Cancel

- **Capture the organization needs and objectives**
 - **“Potential for EGI”**
 - What does the organization tries to achieve?
 - How could EGI contribute to help the organization?
 - What benefit could this bring to the organization?
 - **“Interest in e-infrastructures”:**
 - What services does the Project or Institute need from EGI?
 - Are these EGI services already available, or should they be developed?
 - Is there a need to involve other NGIs into the support process (e.g. to develop and/or to provide the demanded services)? If yes, then clarify the type of involvement.



Borges

Calendar
ORGANIZATIONS
Contacts
Documents
Dashboard
More
Quick Create...

Organizations

+

?

Creating New Organization

Organization Information

Save

Cancel

Organization Information

*Organization Name	<input type="text"/>	Organization No	AUTO GEN ON SAVE
Account Acronym	<input type="text"/>	Account Status	--None--
Country	--None--	Website	<input type="text"/>
*Account Type	--None--	Email	<input type="text"/>
Scientific Discipline	--None--	*Assigned To	<input type="radio"/> User <input checked="" type="radio"/> Group NGI Portugal (PT)

Description Information

*Potential for EGI use	<input type="text"/>	*Interest in e-Infrastructures	<input type="text"/>
Description	<input type="text"/>		

Save

Cancel

Capture of Needs

- You have identified an active international project
 - IDGF-SP. International Desktop Grid Federation - XXX
 - <http://idgf-sp.eu/>
 - FP7. Call 10. Research Infrastructure
 - ESFRI Project
 - From 01.11.2012 to 31.10.2014
- Some institutes in your region are working on that project
 - Laboratory of Parallel and Distributed Systems XXX (<http://www.lpds.sztaki.hu/>)
 - Sony Computer Science Laboratory XXX (<http://www.csl.sony.fr/>)

- Start by using the “Advanced Search” to know if the project “International Desktop Grid Federation” is already in the system
 - Use several search conditions to be sure!
- Create the Project if it is not available in EGI CRM
 - It is an ESFRI project. Select the appropriate “Account Type”
 - It is not a project under your control. Assign it to the proper “Group”
 - Capture the projects needs and objectives either in the “Description”, “Potential for EGI” or “Interest in e-infrastructure” fields

- Use the “Advanced Search” to know if any of the institutes are already in the system
 - Use several search conditions to be sure!
- Create or modify the institutes in EGI CRM
 - Select the appropriate “Account Type”
 - Create / modify the association to the project list the organization is working with (through the “Project List” section)
 - Capture the projects needs and objectives either in the “Description”, “Potential for EGI” or “Interest in e-infrastructure” fields

[ACC1445] International Desktop Grid Federation - Organization Information Updated today (26 Mar 2013) By Borges

Organization Information

[More Information](#)

Organization Information

Organization Name	International Desktop Grid Federation	Organization No	ACC1445
Account Acronym	IDGF-SP	Account Status	Active
Country	--None--	Website	http://idgf-sp.eu
Account Type	ESFRI Project	Email	
Scientific Discipline	Research Infrastructure in all Scientific and Technological fields	Assigned To	EGI Group Management
EGI-InSPIRE partner	No	Created Time	20-03-2013 09:16:18
Start Date	01-11-2012	End Date	31-10-2014
Modified Time	26-03-2013 16:46:35		

Description Information

Potential for EGI use	Maintain the support infrastructure established and/or operated by IDGF. Key infrastructure elements; application repositories, bridges Promote Desktop Grids usage inside scientific organisations with special focus on university Desktop Grids.	Interest in e-Infrastructures	IDGF-SP helps strengthen the co-operation amongst Desktop Grid e-Infrastructure operators
Description	Main objective: Involve and engage in long-term significantly more citizens and new communities in the volunteer and private (campus-wide or enterprise) Distributed Computing Infrastructures by supporting the rapid creation, efficient operation, and dynamic expansion of this type of DCIs for e-Science. Coordinate and synchronise the dissemination and support activities of major European stakeholders of volunteer and Desktop Grids with focus on the International Desktop Grid Federation		

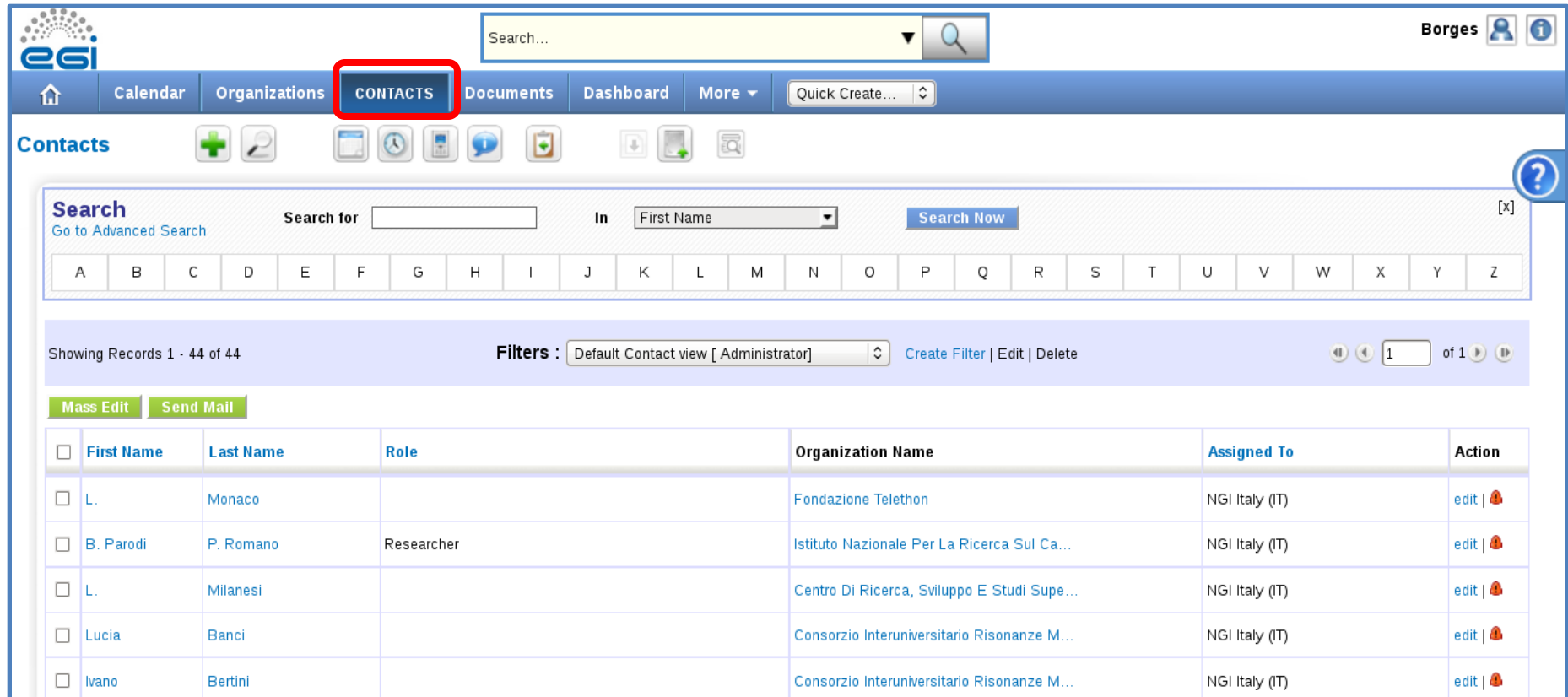
Organization Information			
*Organization Name ?	Laboratory of Parallel and Distributed Systems	Organization No	AUTO GEN ON SAVE
Account Acronym ?	MTA-SZTAKI	Account Status ?	--None--
Country	Hungary	Website	www.lpds.sztaki.hu/
* Account Type ?	Research Institute	Email	
Scientific Discipline ?	Research Infrastructure in all Scientific and Technological fields	*Assigned To ?	<input type="radio"/> User <input checked="" type="radio"/> Group NGI Hungary (HU)
* EGI-InSPIRE partner ?	No		

Projects List	
<input checked="" type="checkbox"/> ESFRI <input type="checkbox"/> ESFRI-Cluster <input type="checkbox"/> INFRA <input type="checkbox"/> National <input type="checkbox"/> Other International	
ESFRI Projects ?	<div> IAGOS -ERI ICOS IDGF-SP InfraCoMP </div>

Description Information	
* Potential for EGI use ?	Research Institute in grid technologies is a founding member of the Hungarian Grid Competence Centre and the Hungarian National Grid Initiative (NGI-HU), and coordinates several European Grid projects in the 7th Framework Programme (EDGI, DEGISCO, SHWA, SCI-BUS, and IDGF-SP)
* Interest in e-Infrastructures ?	founding member of the Hungarian Grid Competence Centre and the Hungarian National Grid Initiative (NGI-HU), and coordinates several European Grid projects in the 7th Framework Programme (EDGI, DEGISCO, SHWA, SCI-BUS, and IDGF-SP)
Description ?	Main research areas: - Grid computing including Desktop Grids; - Service Oriented Architecture; - Cloud systems; - Interoperation and interoperability; - Resource brokering; - Graphical development environments and gateways; - Workflow based IT solutions

- **A Contact represents persons of interest to EGI / NGIs.**
 - It can be representative persons of actual or potential user groups
 - It can be a person responsible for a Research Project, a Research Institute or any other organization of interest
 - It can be isolated contacts (with no associated organizations) considered important for the project.

- **What goals are we aiming for?**
 - **Store information about important Person Contacts**
 - **Link them to their main Organizations**
 - Ex: Research Institutions (Universities, Labs, ...), Companies, Non-Profit Organizations, ...
 - **Identify in which Projects are they working on**
 - Ex: INFRA, ESFRI, ESFRI-Cluster, National
 - **Capture the needs / source of possible synergies**
 - Ex: Description (Needs and expectations), Potential for EGI, Interest in e-infrastructures.



The screenshot shows the ESI Contacts management interface. At the top, there is a search bar and a navigation menu with tabs for Calendar, Organizations, **CONTACTS** (highlighted with a red box), Documents, Dashboard, and More. Below the navigation bar, there is a 'Contacts' section with various icons for adding, searching, and managing contacts. A search bar is present with the text 'Search for' and a dropdown menu set to 'First Name'. Below the search bar is a row of letters from A to Z for filtering. The main area displays a list of contacts with columns for First Name, Last Name, Role, Organization Name, Assigned To, and Action. The list shows 44 records, with the first five visible. The 'Assigned To' column for all visible records is 'NGI Italy (IT)'. The 'Action' column for each record contains 'edit' and a delete icon.

	First Name	Last Name	Role	Organization Name	Assigned To	Action
<input type="checkbox"/>	L.	Monaco		Fondazione Telethon	NGI Italy (IT)	edit
<input type="checkbox"/>	B. Parodi	P. Romano	Researcher	Istituto Nazionale Per La Ricerca Sul Ca...	NGI Italy (IT)	edit
<input type="checkbox"/>	L.	Milanesi		Centro Di Ricerca, Sviluppo E Studi Supe...	NGI Italy (IT)	edit
<input type="checkbox"/>	Lucia	Banci		Consorzio Interuniversitario Risonanze M...	NGI Italy (IT)	edit
<input type="checkbox"/>	Ivano	Bertini		Consorzio Interuniversitario Risonanze M...	NGI Italy (IT)	edit

- **Similar activities as for Organizations**

- Listing, Filtering, Sorting, Searching, Browsing, Creating, ...

Save Cancel

Contact Information

First Name	--None--	Contact Id	AUTO GEN ON SAVE
*Last Name		Organization Name	
Personal web page		Lead Source	--None--
Role		*Email	
*Assigned To	<input type="radio"/> User <input checked="" type="radio"/> Group NGI Portugal (PT)	Degree of Contact	--None--
Contact Status	--None--		

Projects List

☒ ESFRI
 ☐ ESFRI-Cluster
 ☐ INFRA
 ☐ National
 ☐ Other International

ESFRI Projects

-none-
 E-ELT
 NIM3-II
 CENDARI

Description Information

* Potential for EGI use	* Interest in e-Infrastructures
Description	

Save Cancel

Save Cancel

Contact Main Organization

Contact Information

<div>First Name <input type="text" value="--None--"/></div> <div>*Last Name <input type="text"/></div> <div>Personal web page <input type="text"/></div> <div>Role <input type="text"/></div> <div>*Assigned To <input type="radio"/> User <input checked="" type="radio"/> Group <input type="text" value="NGI Portugal (PT)"/></div> <div>Contact Status <input type="text" value="--None--"/></div>	<div>Contact Id <input type="text" value="AUTO GEN ON SAVE"/></div> <div>Organization Name <input type="text"/></div> <div>Lead Source <input type="text" value="--None--"/></div> <div>*Email <input type="text"/></div> <div>Degree of Contact <input type="text" value="--None--"/></div>
---	--

Projects List

☒ ESFRI
 ☐ ESFRI-Cluster
 ☐ INFRA
 ☐ National
 ☐ Other International

ESFRI Projects

Description Information

* Potential for EGI use

Description

* Interest in e-Infrastructures

Save Cancel

Associated Projects

Capture of Needs

- You have identified relevant Persons working under the “International Desktop Grid Federation”

Dr. Robert Lovas - XXX

- Deputy Head of the Laboratory of Parallel and Distributed Systems.
- IDGF-SP Project coordinator
- Tel.: +36 1 279 6064; Fax.: +36 1 329 786;
- robert.lovas@sztaki.mta.hu
- <http://www.sztaki.hu/people/008001982/>

- Use “Advanced Search” to check if the Person Contact exists
 - Use multiple conditions for double checking
- Introduce the Contact in the system
 - If it is not a contact under your control, change the “Assigned To”
 - Identify the contact’s using the “Organization Name” field
 - Identify the projects where the contact is working in using the “Project List” section
 - Capture the contact’s needs and objectives either in the “Description”, “Potential for EGI” or “Interest in e-infrastructure” fields

▼ Contact Information

First Name	Dr. Robert	Contact Id	CON177
Last Name	Lovas	Organization Name	Laboratory of Parallel and Distributed Systems
Personal web page	http://www.sztaki.hu/people/008001982	Lead Source	Other
Role	Project Coordinator in IDGF-SP Deputy Head of the Laboratory of Parallel and Distributed Systems	Email	robert.lovas@sztaki.mta.hu
Assigned To	NGI Hungary (HU)	Degree of Contact	--None--
Contact Status	Active	Created Time	20-03-2013 12:53:16
Modified Time	20-03-2013 12:53:16		

► Projects List

▼ Description Information

Potential for EGI use	Provides efficient software development tools and high-level services together with customizable scientific gateways based on workflows (P-GRADE Grid Portal, gUSE/WS-PGRADE) for harvesting the most wide-spread grid infrastructures based on gLite, Globus, BOINC, and offers easy-to-maintain middleware solutions (SZTAKI Desktop Grid) and technologies for inter-operability (3G-Bridge, DCI-Bridge) that enables cost-efficient alternative platforms for scientific and business applications	Interest in e-Infrastructures	Deputy Head of the Laboratory of Parallel and Distributed Systems
Description	Tel.: +36 1 279 6064; Fax.: +36 1 329 786;		

► Contact Image Information:

Actions

 [Send Mail](#)

 [Add Event](#)

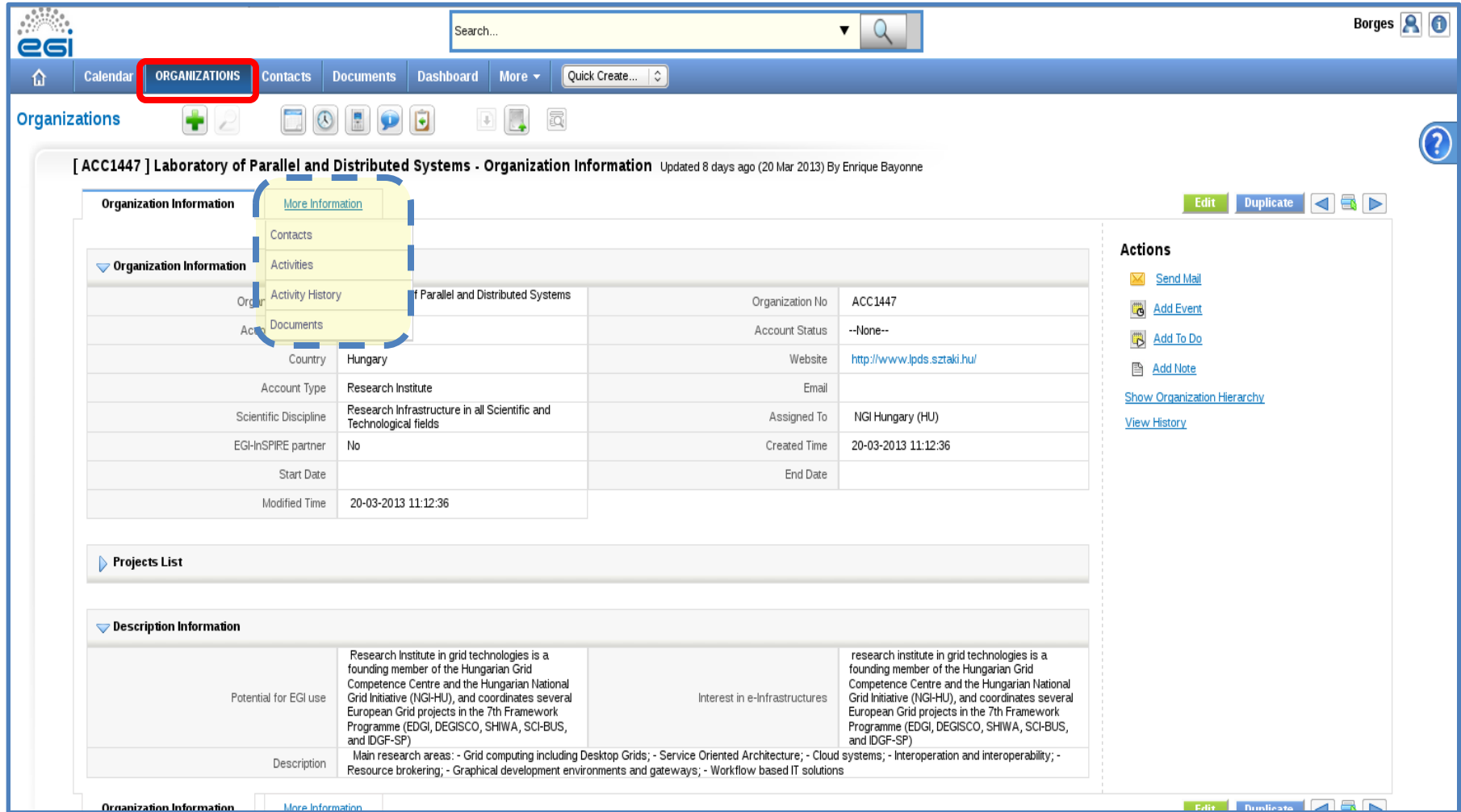
 [Add To Do](#)

 [Add Note](#)

[View History](#)

Select template to Mail Merge:

[Create Mail Merge templates](#)



The screenshot shows the EGI Organizations interface. The 'ORGANIZATIONS' tab is highlighted in the top navigation bar. The main content area displays the 'Organization Information' for 'ACC1447 Laboratory of Parallel and Distributed Systems'. A sidebar on the left shows a menu with 'More Information', 'Contacts', 'Activities', 'Activity History', and 'Documents'. The 'More Information' menu is currently open. The main table lists various details about the organization, including its name, account number, status, website, email, and creation date. A 'Projects List' section is visible below the main table. On the right, an 'Actions' panel provides options like 'Send Mail', 'Add Event', 'Add To Do', 'Add Note', 'Show Organization Hierarchy', and 'View History'.

Organization Information

[ACC1447] Laboratory of Parallel and Distributed Systems - Organization Information Updated 8 days ago (20 Mar 2013) By Enrique Bayonne

[More Information](#)

Organization Information

Organization Name	Laboratory of Parallel and Distributed Systems	Organization No	ACC1447
Account Status	--None--	Website	http://www.lpds.sztaki.hu/
Country	Hungary	Email	
Account Type	Research Institute	Assigned To	NGI Hungary (HU)
Scientific Discipline	Research Infrastructure in all Scientific and Technological fields	Created Time	20-03-2013 11:12:36
EGI-InSPIRE partner	No	End Date	
Start Date			
Modified Time	20-03-2013 11:12:36		

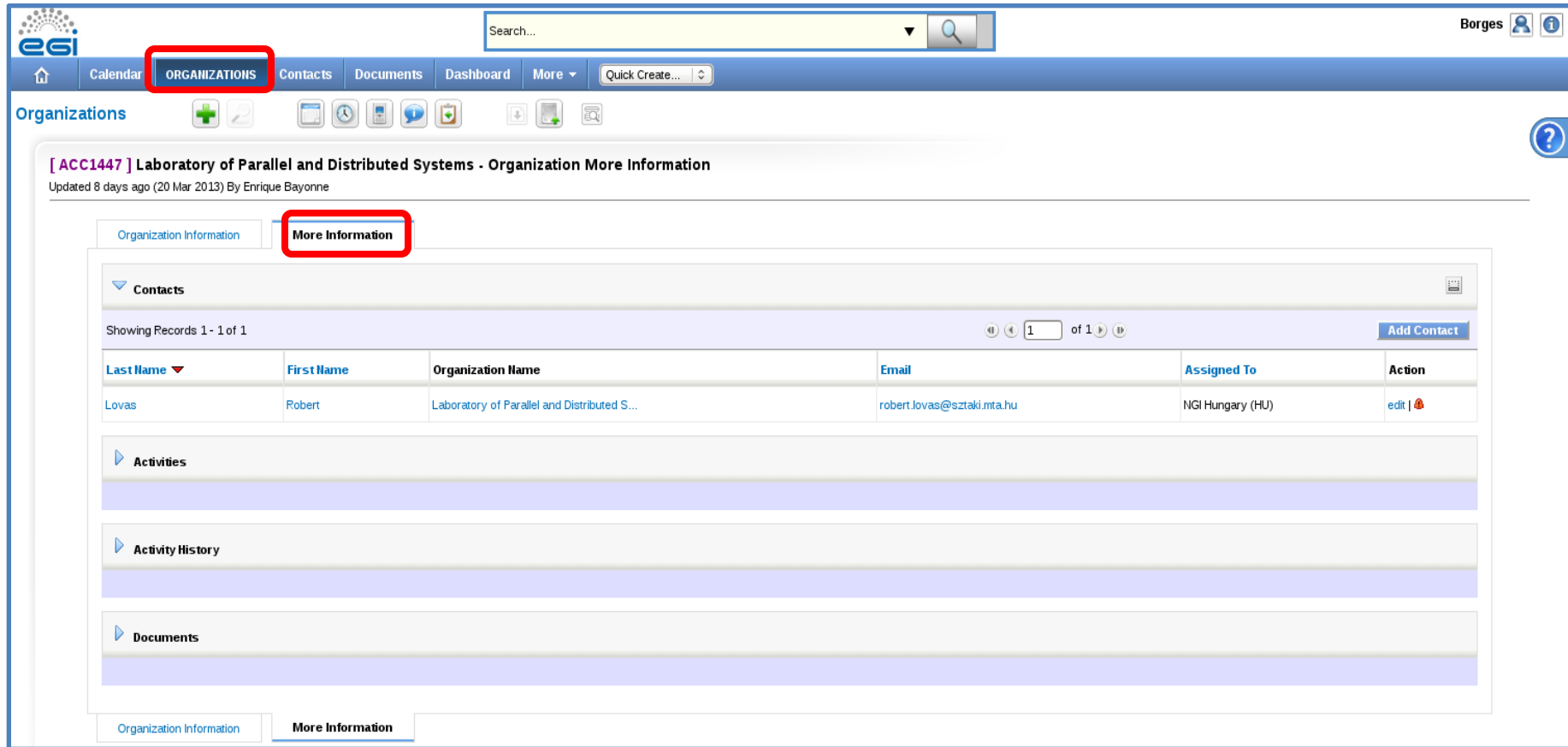
Projects List

Description Information

Potential for EGI use	Research Institute in grid technologies is a founding member of the Hungarian Grid Competence Centre and the Hungarian National Grid Initiative (NGI-HU), and coordinates several European Grid projects in the 7th Framework Programme (EDGI, DEGISCO, SHIWA, SCI-BUS, and IDGF-SP)	Interest in e-Infrastructures	research institute in grid technologies is a founding member of the Hungarian Grid Competence Centre and the Hungarian National Grid Initiative (NGI-HU), and coordinates several European Grid projects in the 7th Framework Programme (EDGI, DEGISCO, SHIWA, SCI-BUS, and IDGF-SP)
Description	Main research areas: - Grid computing including Desktop Grids; - Service Oriented Architecture; - Cloud systems; - Interoperation and interoperability; - Resource brokering; - Graphical development environments and gateways; - Workflow based IT solutions		

Actions

- [Send Mail](#)
- [Add Event](#)
- [Add To Do](#)
- [Add Note](#)
- [Show Organization Hierarchy](#)
- [View History](#)



[ACC1447] Laboratory of Parallel and Distributed Systems - Organization More Information
Updated 8 days ago (20 Mar 2013) By Enrique Bayonne

Organization Information **More Information**

Contacts

Showing Records 1 - 1 of 1

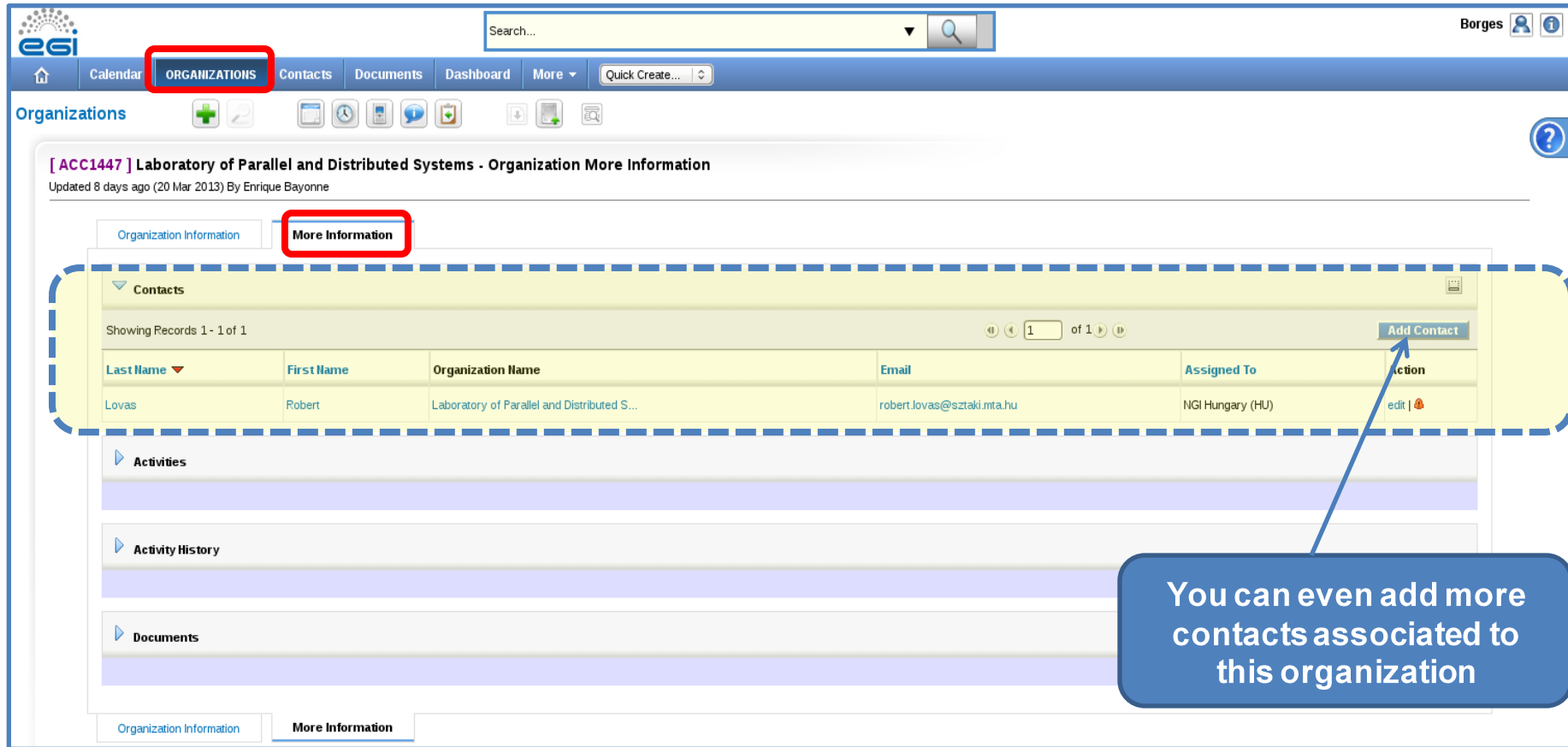
Last Name ▼	First Name	Organization Name	Email	Assigned To	Action
Lovas	Robert	Laboratory of Parallel and Distributed S...	robert.lovas@sztaki.mta.hu	NGI Hungary (HU)	edit 🔥

Activities

Activity History

Documents

Organization Information **More Information**



ORGANIZATIONS

More Information

[ACC1447] Laboratory of Parallel and Distributed Systems - Organization More Information
Updated 8 days ago (20 Mar 2013) By Enrique Bayonne

Organization Information **More Information**

Contacts

Showing Records 1 - 1 of 1

Last Name	First Name	Organization Name	Email	Assigned To	Action
Lovas	Robert	Laboratory of Parallel and Distributed S...	robert.lovass@szaki.mta.hu	NGI Hungary (HU)	edit

Add Contact

Activities

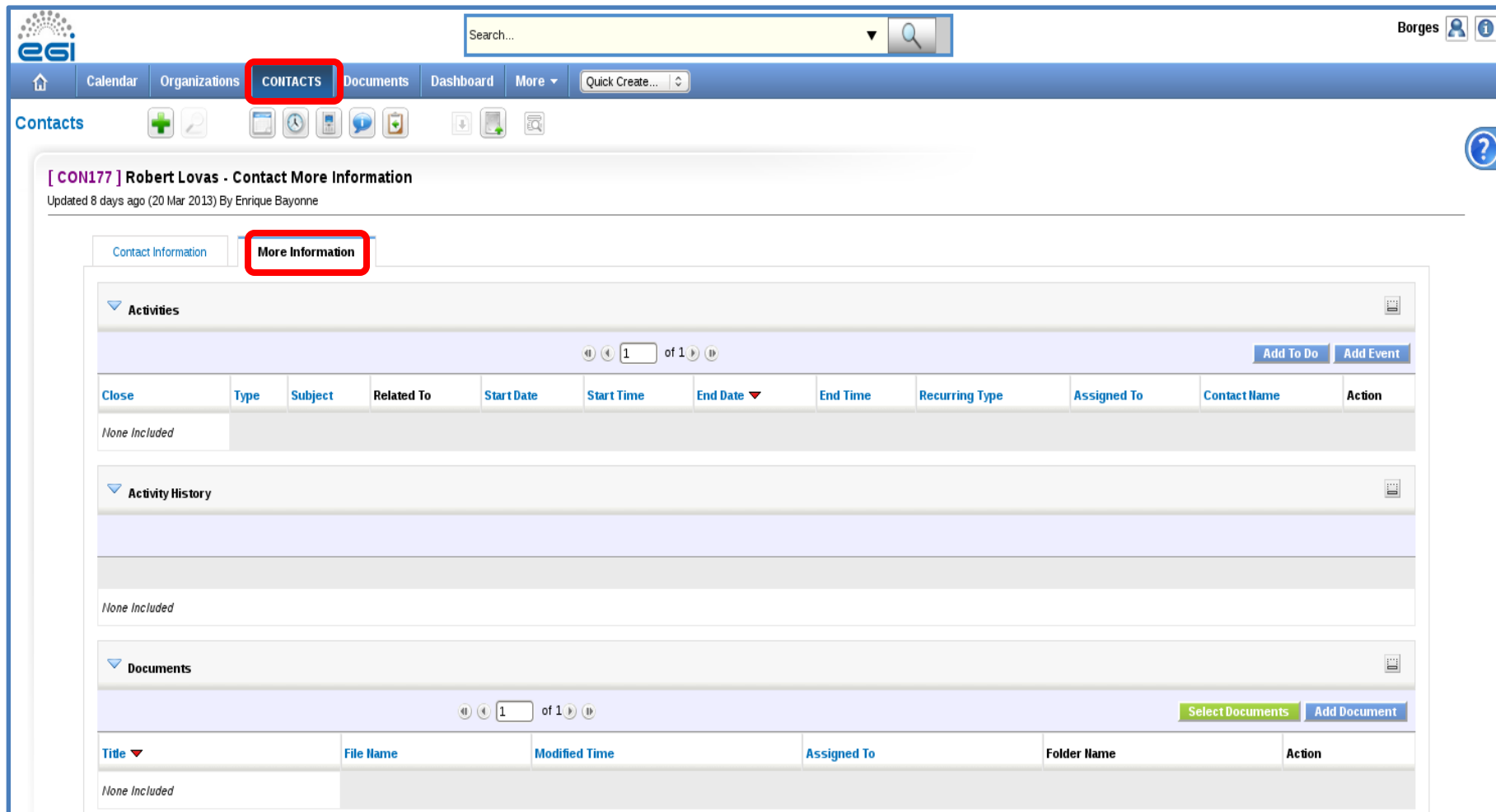
Activity History

Documents

Organization Information **More Information**

You can even add more contacts associated to this organization

- **The term Activities represents actions that should be executed in a given time frame by someone**
 - **ToDOs: Tasks**
 - **Events: Calls or Meetings**
 - **Activities can be assigned to users and groups**
- **The term Document represents a separate piece of information linked to an organization or account**
 - **Used to provide specialized and detailed information**



The screenshot shows the EGI web interface. At the top, there is a search bar and a navigation menu with tabs: Home, Calendar, Organizations, **CONTACTS** (highlighted with a red box), Documents, Dashboard, and More. Below the navigation bar, there is a sub-header for 'Contacts' with various icons. The main content area displays the details for contact [CON177] Robert Lovas, with a note that it was updated 8 days ago (20 Mar 2013) by Enrique Bayonne. Below this, there are two tabs: 'Contact Information' and **More Information** (highlighted with a red box). The 'More Information' tab is expanded, showing three sections: 'Activities', 'Activity History', and 'Documents'. Each section has a table with columns for various attributes. The 'Activities' table has columns: Close, Type, Subject, Related To, Start Date, Start Time, End Date, End Time, Recurring Type, Assigned To, Contact Name, and Action. The 'Activity History' and 'Documents' tables have columns: Title, File Name, Modified Time, Assigned To, Folder Name, and Action. All three tables currently show 'None Included'.

CONTACTS

[CON177] Robert Lovas - Contact More Information
Updated 8 days ago (20 Mar 2013) By Enrique Bayonne

Contact Information **More Information**

Activities

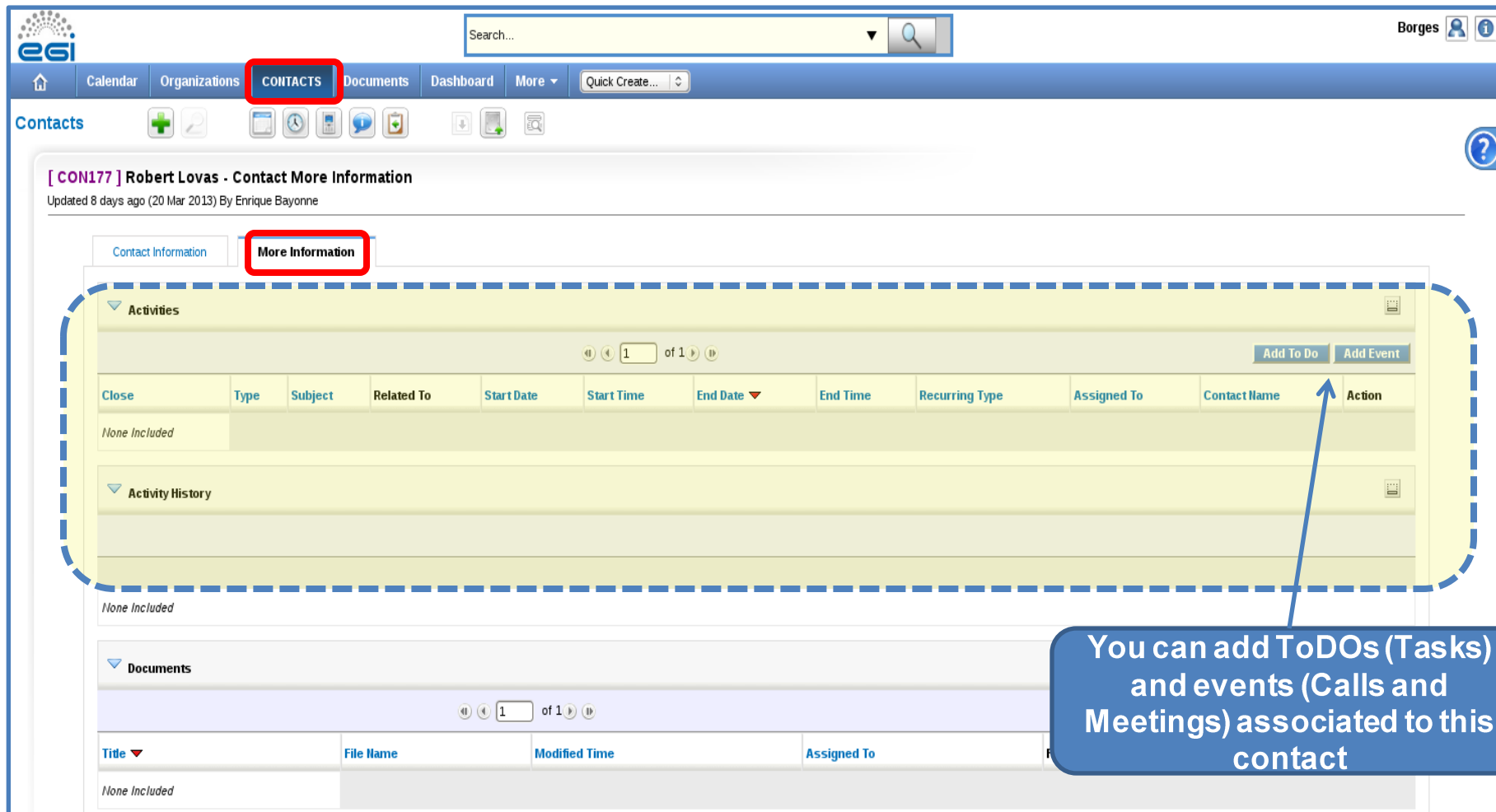
Close	Type	Subject	Related To	Start Date	Start Time	End Date	End Time	Recurring Type	Assigned To	Contact Name	Action
None Included											

Activity History

None Included											

Documents

Title	File Name	Modified Time	Assigned To	Folder Name	Action
None Included					



[CON177] Robert Lovas - Contact More Information
Updated 8 days ago (20 Mar 2013) By Enrique Bayonne

Contact Information **More Information**

Activities

1 of 1

Add To Do Add Event

Close	Type	Subject	Related To	Start Date	Start Time	End Date ▼	End Time	Recurring Type	Assigned To	Contact Name	Action
None Included											

Activity History

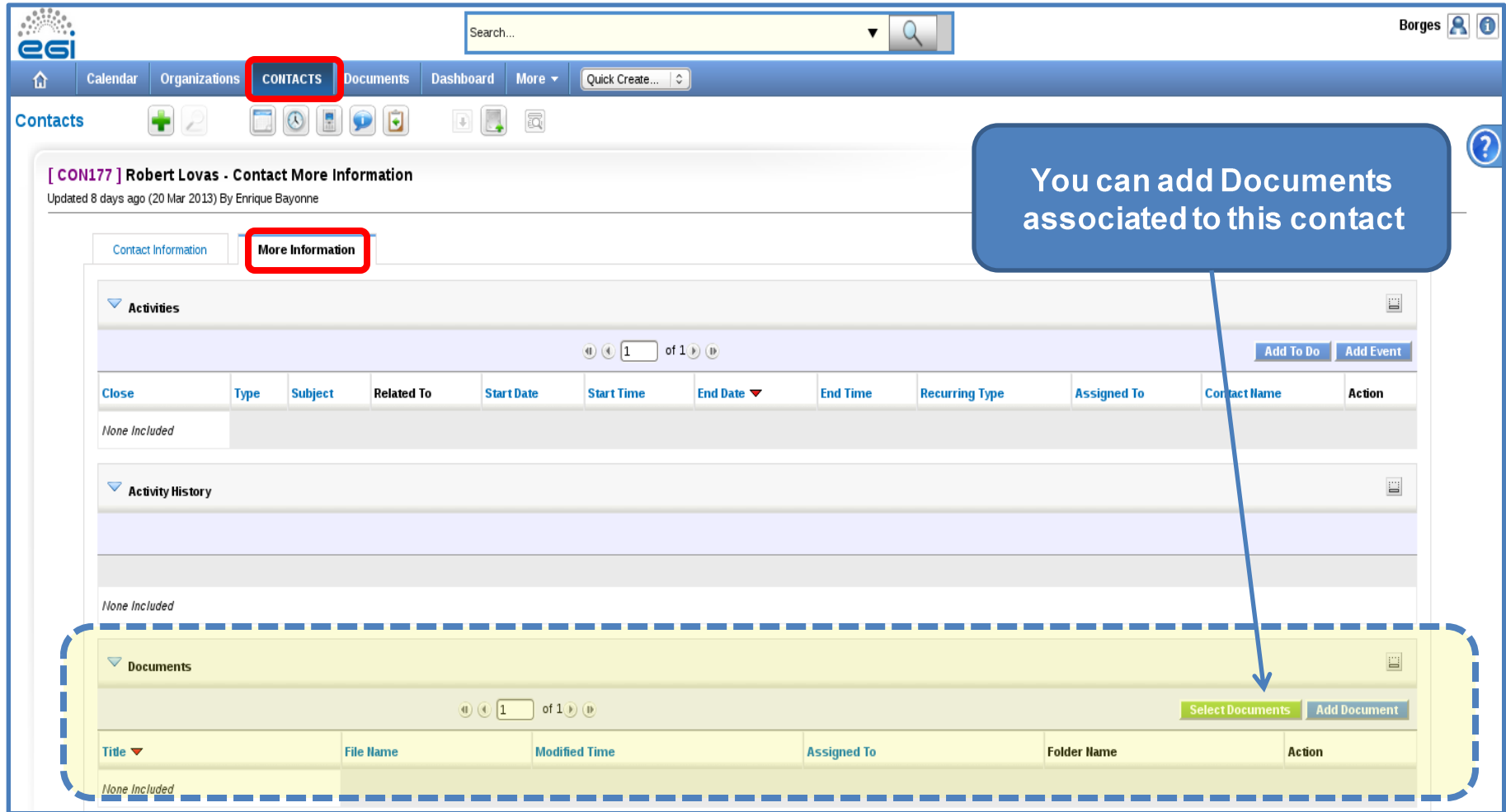
None Included

Documents

1 of 1

Title ▼	File Name	Modified Time	Assigned To
None Included			

You can add TODOs (Tasks) and events (Calls and Meetings) associated to this contact



[CON177] Robert Lovas - Contact More Information
Updated 8 days ago (20 Mar 2013) By Enrique Bayonne

Contacts: **CONTACTS** | Documents | Dashboard | More | Quick Create...

More Information

Activities

1 of 1

Add To Do | Add Event

Close	Type	Subject	Related To	Start Date	Start Time	End Date	End Time	Recurring Type	Assigned To	Contact Name	Action
None Included											

Activity History

None Included

Documents

1 of 1

Select Documents | Add Document

Title	File Name	Modified Time	Assigned To	Folder Name	Action
None Included					

You can add Documents associated to this contact

Calendar
All Events & Todos

Creating Event

Save
Cancel

Event Type

Meeting

Event Name

Call with Robert Loves

☐ Mark Public

Description

Call with Robert Loves. Goals:
- Define possible points of synergies with the International Desktop Grid Federation
- Define workflows of users

Location

Laboratory of Parallel and Distributed Systems headquarters

Status

Planned

Assigned To

☐ User
☒ Group

NGI Portugal (PT)

☒ Send Notification

Event starts at

03

00

PM

30-04-2013

Event ends on

04

00

PM

30-04-2013

Invite

Reminder

Repeat

Related To

- To invite, select the users from the "Available Users" list and click the "Add" button.
- To remove, select the users from the "Selected Users" list and the click "Remove" button.

Available Users

Administrator
Gergely Sipos
Joao Pina

Add >>
<< Remove


Selected Users

Joao Pina

Set-up a Call

EGInSPIRE RI-261323

52
www.egi.eu



Borges

[Calendar](#)
[Organizations](#)
[CONTACTS](#)
[Documents](#)
[Dashboard](#)
[More](#)

[Contacts](#)

[Contact Information](#)
[More Information](#)

Activities

Showing Records 1 - 3 of 3

1
of 1

Add To Do
Add Event

Close	Type	Subject	Related To	Start Date	Start Time	End Date	End Time	Recurring Type	Assigned To	Contact Name	Action
X	Task	R. Lovas Intelligence gathering	Laboratory of Parallel and Distributed S...	28-03-2013	15:25:00	23-04-2013	--		NGI Portugal (PT)	Robert Lovas	edit
X	Task	Request Dissemination Material	Laboratory of Parallel and Distributed S...	29-04-2013	15:30:00	29-04-2013	--		Borges	Robert Lovas	edit
X	Meeting	Call with Robert Loves	Laboratory of Parallel and Distributed S...	30-04-2013	15:00:00	30-04-2013	16:00:00		NGI Portugal (PT)	Robert Lovas	edit

Activity History


None Included



Documents

1
of 1












Select Documents
Add Document

Title	File Name	Modified Time	Assigned To	Folder Name	Action
-------	-----------	---------------	-------------	-------------	--------




Borges  

Calendar Organizations Contacts DOCUMENTS Dashboard More ▾ Quick Create... ▾

Documents












Creating New Document

Insert a Document



Basic Information

Save
Cancel

Basic Information

*Title

Folder Name

Document No

*Assigned To

☐ User
 ☒ Group

File Information

Download Type

Active

☒

File Name

Browse...

Maximum upload size is 3MB

Version

Description

B I U

X₂ X²

Source

Styles

Format

Font

Size

EGI Search... Borges

Calendar Organizations **CONTACTS** Documents Dashboard More Quick Create...

Contacts

[CON177] Robert Lovas - Contact More Information
Updated today (28 Mar 2013) By Borges

Contact Information **More Information**

Activities

Showing Records 1 - 2 of 2

Close	Type	Subject	Related To	Start Date	Start Time	End Date	End Time	Recurring Type	Assigned To	Contact Name	Action
X	Task	Request Dissemination Material	Laboratory of Parallel and Distributed S...	29-04-2013	15:30:00	29-04-2013	-		Borges	Robert Lovas	edit
X	Meeting	Call with Robert Loves	Laboratory of Parallel and Distributed S...	30-04-2013	15:00:00	30-04-2013	16:00:00		NGI Portugal (PT)	Robert Lovas	edit 🔥

Activity History


Type	Subject	Related To	Start Date & Time	End Date & Time	Status	Assigned To
Task	R. Lovas Intelligence gathering	Laboratory of Parallel and Distributed S...	28-03-2013 15:25:00	23-04-2013	Completed	NGI Portugal (PT)

Documents

Showing Records 1 - 1 of 1

Title	File Name	Modified Time	Assigned To	Folder Name	Action
R. Lovas Background information		28-03-2013 16:05:58	NGI Portugal (PT)	Default	edit 🔥

- You want to contact Robert Loves, and you want to prepare yourself for a meeting:
 - Schedule a meeting (Event) with R. Loves
 - Set a TODO to gather some background information regarding R. Loves activities
 - Set-up a TODO to ask for proper dissemination material
 - Prepare and upload a document with all the necessary information



Search...

Borges

[Home](#)
[Calendar](#)
[Organizations](#)
[CONTACTS](#)
[Documents](#)
[Dashboard](#)
[More](#)

Quick Create...

Contacts

+

+

+

+

+

+

+

+

+

+

+

+

+

+

+

+

?

CON177

Robert Lovas - Contact More Information

Updated today (28 Mar 2013) By Borges

Contact Information

More Information

Activities

Showing Records 1 - 3 of 3

1

of 1

Add To Do

Add Event

Close	Type	Subject	Related To	Start Date	Start Time	End Date	End Time	Recurring Type	Assigned To	Contact Name	Action
X	Task	R. Lovas Intelligence gathering	Laboratory of Parallel and Distributed S...	28-03-2013	15:25:00	23-04-2013	-		NGI Portugal (PT)	Robert Lovas	edit 🔔
X	Task	Request Dissemination Material	Laboratory of Parallel and Distributed S...	29-04-2013	15:30:00	29-04-2013	-		Borges	Robert Lovas	edit
X	Meeting	Call with Robert Loves	Laboratory of Parallel and Distributed S...	30-04-2013	15:00:00	30-04-2013	16:00:00		NGI Portugal (PT)	Robert Lovas	edit 🔔

Activity History

None Included

Documents

Showing Records 1 - 1 of 1


1

of 1



Select Documents

Add Document

Title	File Name	Modified Time	Assigned To	Folder Name	Action
R. Lovas Background information		28-03-2013 16:05:58	NGI Portugal (PT)	Default	edit 🔔



Search...

Borges  

CALENDAR

Organizations

Contacts











Documents

Dashboard

More ▾

Quick Create... ▾

Calendar

Search

Go to Advanced Search

Search for

In

Status ▾

Search Now

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Calendar

All Events & Todos

Showing Records 1 - 3 of 3

Filters :



All ▾


[Create Filter](#) | [Edit](#) | [Delete](#)

1

of 1

Change Owner

<input type="checkbox"/>	Status	Type	Subject	Related To	Start Date	End Date	Assigned To	Close	Action
<input type="checkbox"/>	Planned	Meeting	Call with Robert Loves	Laboratory of Parallel and Distributed S...	30-04-2013	30-04-2013	NGI Portugal (PT)	X	edit 
<input type="checkbox"/>	Completed	Task	R. Lovas Intelligence gathering	Laboratory of Parallel and Distributed S...	28-03-2013	23-04-2013	NGI Portugal (PT)		edit 
<input type="checkbox"/>	Not Started	Task	Request Dissimulation Material	Laboratory of Parallel and Distributed S...	29-04-2013	29-04-2013	Borges	X	edit



Borges

CALENDAR
Organizations
Contacts
Documents
Dashboard
More
Quick Create...

Calendar

Calendar
All Events & Todos

[6713] Call with Robert Loves - Event Information
Updated today (28 Mar 2013) By Borges

Edit
Duplicate

Event Information			
Event Type	Meeting	Visibility	Private
Event Name	Call with Robert Loves		
Description	Call with Robert Loves. Goals: - Define possible points of synergies with the International Desktop Grid Federation - Define workflows of users		
Location	Laboratory of Parallel and Distributed Systems headquarters		
Status	Planned	Assigned To	NGI Portugal (PT)
Priority	High	Send Notification	Yes
Created Time	28-03-2013 15:20:05	Modified Time	28-03-2013 15:20:05

Event starts at
 03:00pm
 30-04-2013


Event ends on
 04:00pm
 30-04-2013

Invite
Reminder
Repeat
Related to



Users Joao Pina


Actions
[View History](#)

**Event Record
(Meeting)**



Search...

Borges  


[Calendar](#)
[Organizations](#)
[Contacts](#)

DOCUMENTS

[Dashboard](#)
[More](#)

Quick Create...

Documents

Search

Go to Advanced Search

Search for

In

Document No

Search Now

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Filters

All

Create Filter

Edit





Delete

Add Folder

View Empty Folders



Default [This is a Default Folder]


Showing Records 1 - 2 of 2

<input type="checkbox"/>	Document No	Title	File Name	Modified Time	Assigned To	Download Type	Active	Action
<input type="checkbox"/>	DOC20	IDGF tutorial at EGI CF 2013	 https://indico.egi.eu/indico/sessionDisp...	27-03-2013 09:12:49	NGI Hungary (HU)	External	yes	edit 
<input type="checkbox"/>	DOC21	R. Lovas Background information		28-03-2013 16:18:55	NGI Portugal (PT)	Internal	yes	edit 

Fire simulation [Invitation Fire simulation experts & NGIs collab]

Showing Records 1 - 1 of 1

<input type="checkbox"/>	Document No	Title	File Name	Modified Time	Assigned To	Download Type	Active	Action
<input type="checkbox"/>	DOC17	Fire and smoke simulation - EGI research...	 Fire_and_smoke_simulation.pdf	15-11-2012 11:50:43	NGI Slovakia (SK)	Internal	yes	edit 



Borges

Calendar
Organizations
Contacts
DOCUMENTS
Dashboard
More

Documents

[DOC21] R. Lovas Background information - Document Information Updated today (28 Mar 2013) By Borges

Document Information

Basic Information				
Title	R. Lovas Background information		Folder Name	Default
Document No	DOC21		Assigned To	NGI Portugal (PT)
Created Time	28-03-2013 16:05:58		Modified Time	28-03-2013 16:18:55

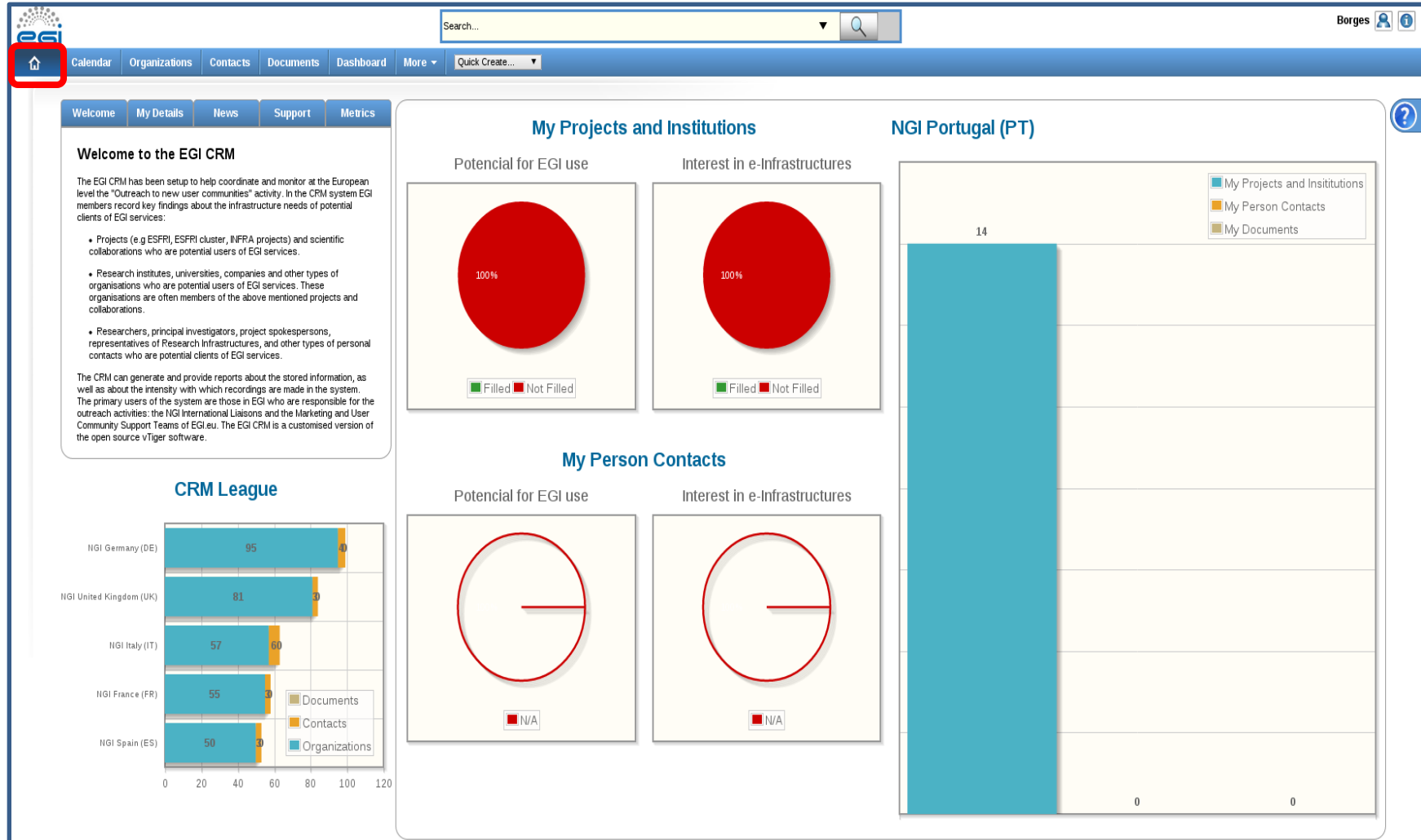
File Information			
Download Type	Internal	Active	yes
File Name		Size	0 B
File Type		Version	
Download Count			

Description	
	<p>From 1997 he has been involved in several national (ChemistryGrid, HAGRID, WEB2GRID), intergovernmental bilateral, and European research projects in the Framework Programmes 4-7 (FP4: WINPAR; FP5: CAST, FP6: GridCoord, EGEE-I-II, CancerGrid, CoreGrid; FP7: Enabling Desktop Grids for e-Science (EDGeS), ETICS-II, EGEE-III).</p> <p>In the HARNESS project (US/DoE) he worked as an exchange researcher at the Department of Math and Computer Science, Emory University (Georgia, Atlanta) in 2000. He has long-running experience in ICT collaborations with academic organizations, universities, and enterprises from various application areas of meteorology, biotechnology, computational chemistry, and telecommunication. He is a co-author or co-editor of more than 35 scientific papers and books on parallel software engineering and Grid computing particularly from design, debugging and application aspects. As lecturer and tutor, he gave more than 100 presentations and demonstrations on</p>

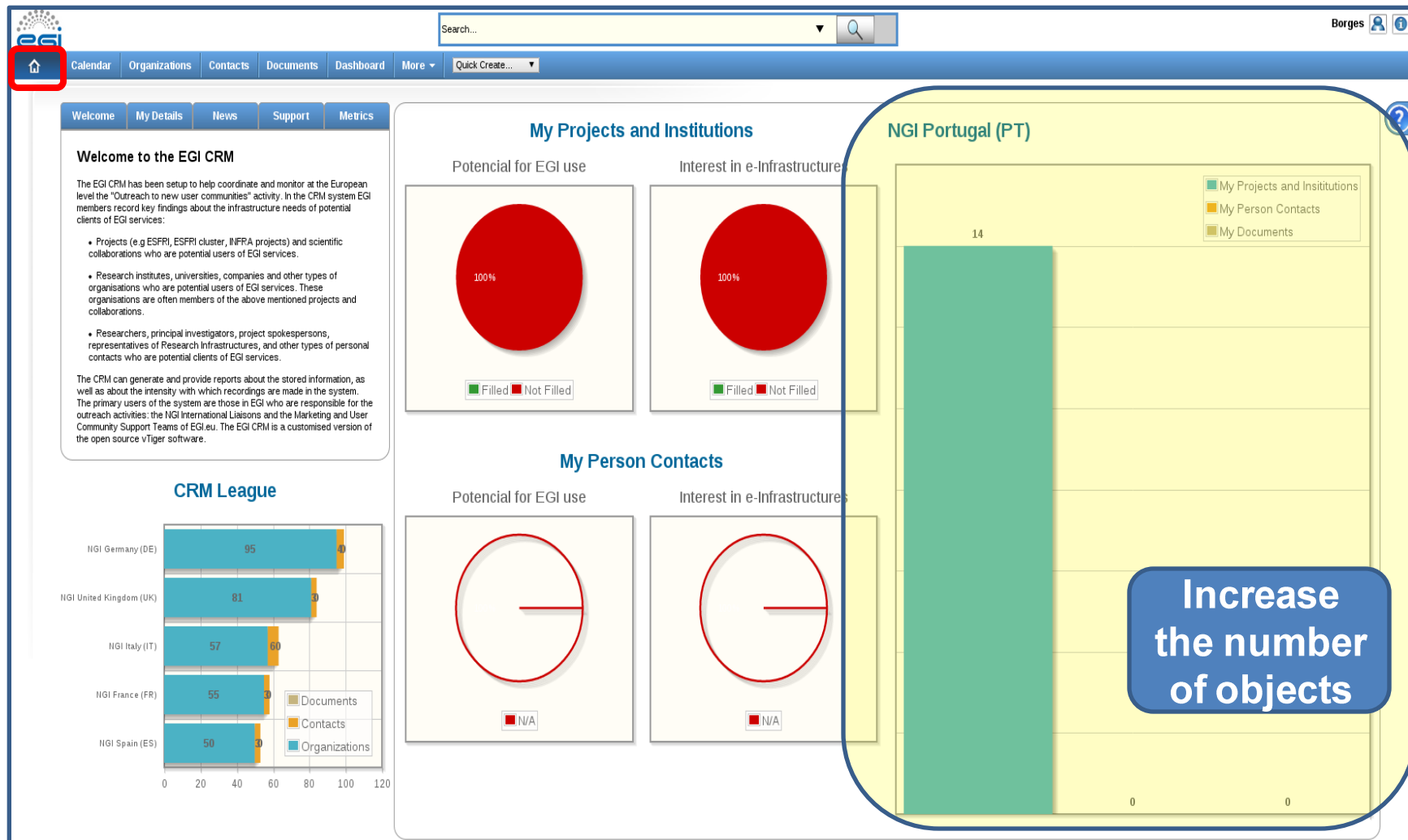
Actions

[View History](#)

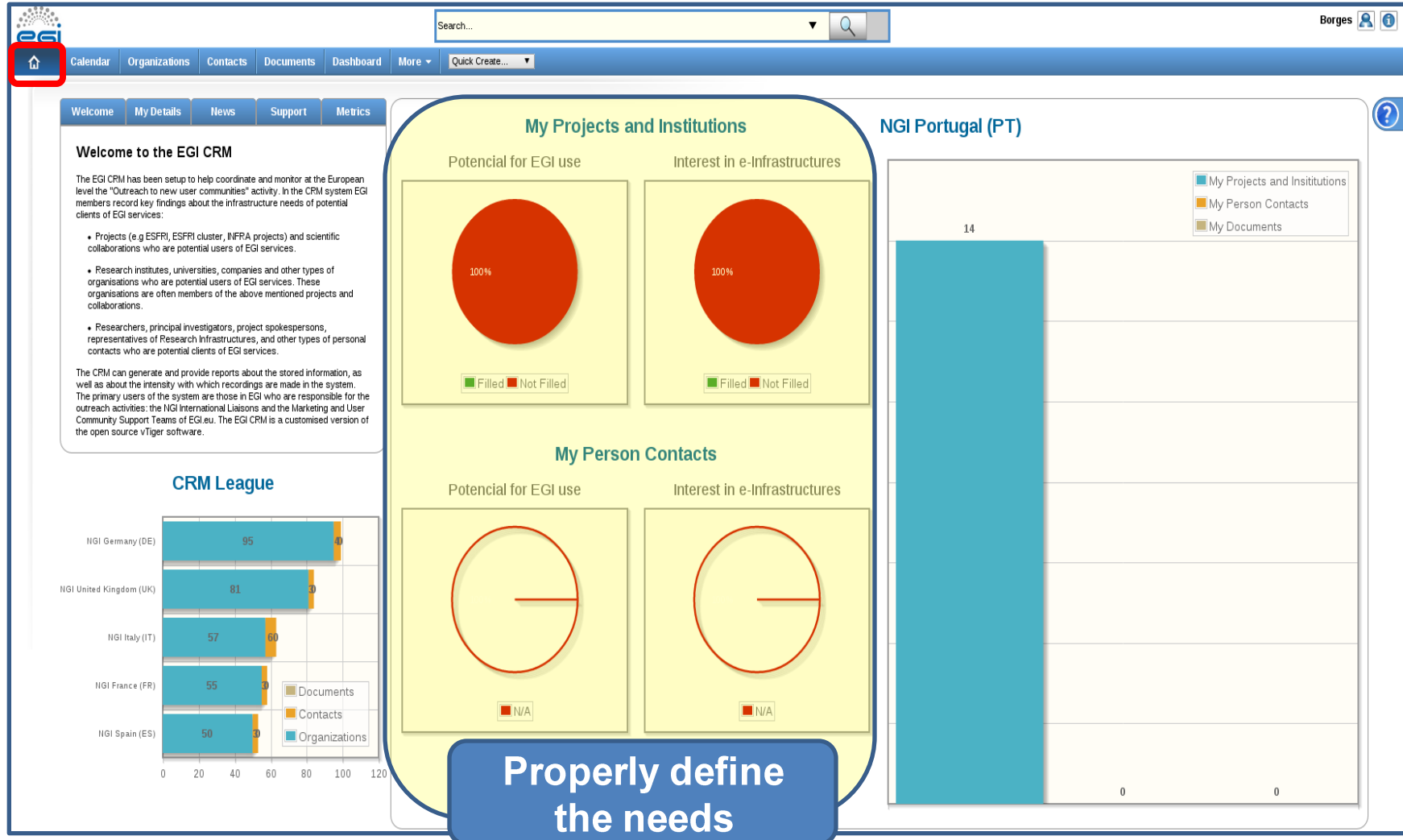
Document
Record



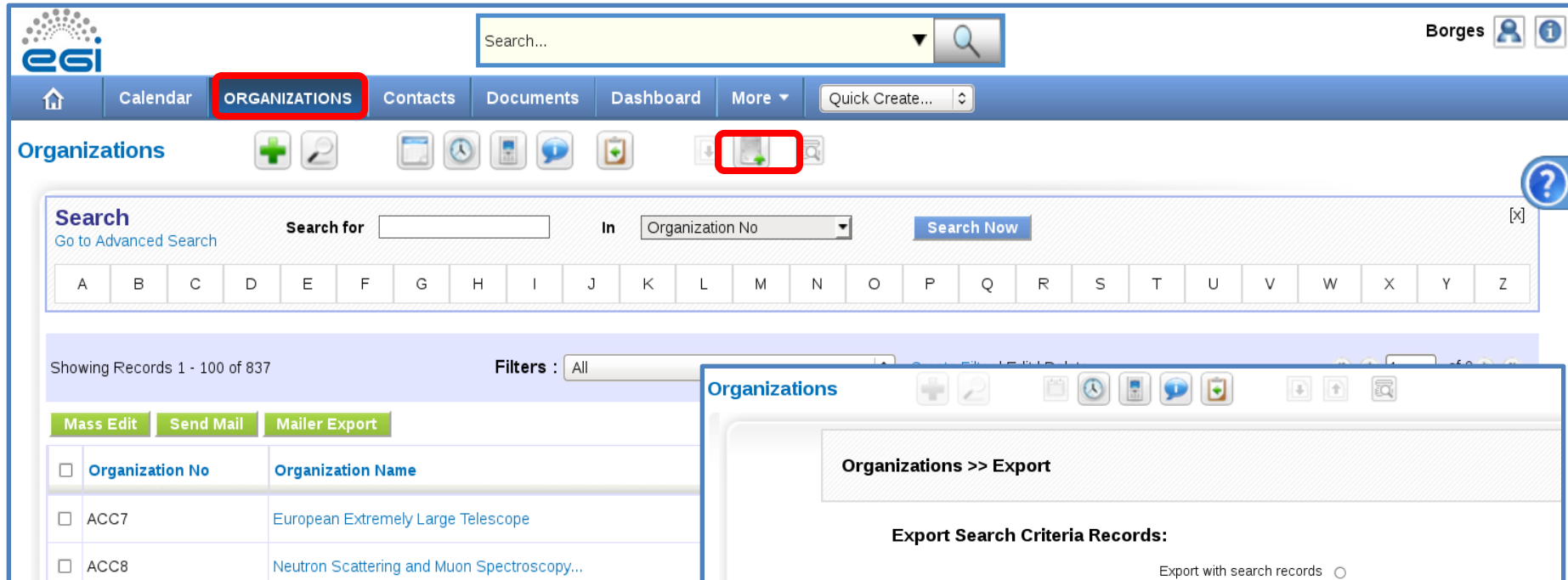
Your Goals – Increase number of objects



Your Goals – Properly define the needs



Advanced Usage



The screenshot shows the EGI Organizations web interface. The 'ORGANIZATIONS' tab is highlighted in the top navigation bar. Below the navigation bar, there is a search bar and a list of organizations. The 'Export' icon (a green plus sign) is highlighted with a red box. A modal window titled 'Organizations >> Export' is open, showing options for exporting search criteria records and records types.

Search
Go to Advanced Search

Search for In

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Showing Records 1 - 100 of 837 Filters : All

Mass Edit Send Mail Mailer Export

<input type="checkbox"/>	Organization No	Organization Name
<input type="checkbox"/>	ACC7	European Extremely Large Telescope
<input type="checkbox"/>	ACC8	Neutron Scattering and Muon Spectroscopy...

Organizations >> Export

Export Search Criteria Records:

Export with search records ☐

Export without search records ☒

Export Records Types:

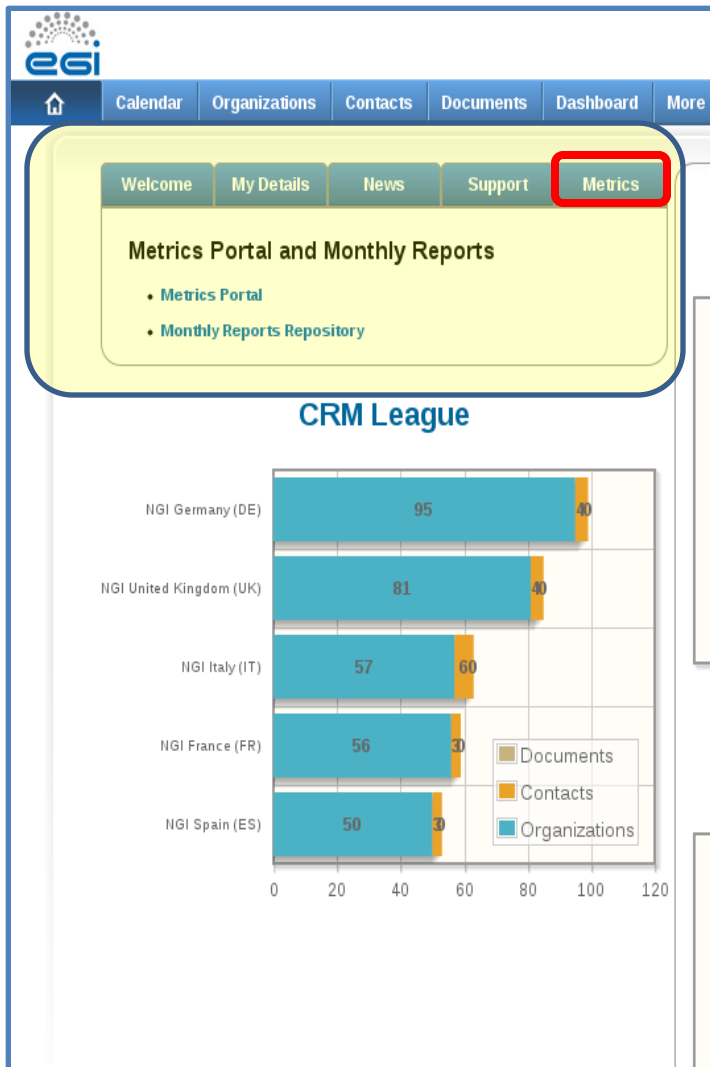
Export all data ☒

Export data in current page ☐

Export selected records ☐

Export data as csv:

- All data
- All data based on selection
- All data from a search




• Metrics Portal

- Activity Work performed by users from CRM groups
 - A user may insert records that are then assigned to a different group wrt his own group
- Number of objects assigned to CRM groups

• Monthly Reports Repository

- Repository for monthly CRM metrics snapshot
- Broadcasted via NIL dispatch


CRM Metrics Portal

Choose an Option ▼

Start Date
(YYYY-MM-DD)

End Date
(YYYY-MM-DD)

Show Stats

For NGI monthly activity reports (in pdf format) go to [CRM Monthly Reports](#)

Activity Work performed by NGIs / EGI Groups or Users

Activity Work performed by NGIs / EGI Group Members
From: 2012-10-20 00:00:00
To: 2013-04-03 23:59:59

Legend
Created By: Total number of Projects and Institutions, Person Contacts and Interviews inserted by NGIs / Group members during the selected time period
Changed By: Total number of Projects and Institutions, Person Contacts and Interviews modified by NGIs / Group members (after creation) during the selected time period
Deleted By: Total number of Projects and Institutions, Person Contacts and Interviews deleted by NGIs / Group members (after creation) during the selected time period
PotEGI New Edit By: Total number of edits (transition from empty to non-empty) of the Potential for EGI (PotEGI) field of Projects and Institutions, and Person Contacts, performed by NGIs / Group members during the selected time period
lel New Edit By: Total number of edits (transition from empty to non-empty) of the Interest in e-Infrastructures (lel) of Projects and Institutions, and Person Contacts, performed by NGIs / Group members during the selected time period
PotEGI Cleared By: Total number of clears (transition from non-empty to empty) of the Potential for EGI (PotEGI) field of Projects and Institutions, and Person Contacts, performed by NGIs / Group members during the selected time period
lel Cleared By: Total number of clears (transition from non-empty to empty) of the Interest in e-Infrastructures (lel) of Projects and Institutions, and Person Contacts, performed by NGIs / Group members during the selected time period

Show columns	<input checked="" type="checkbox"/> Projects and Institutions	<input checked="" type="checkbox"/> Person Contacts	<input checked="" type="checkbox"/> Interviews									
	Projects and Institutions			Person Contacts			Interviews					
							Documents			Projects and Institutions		
Group	Created By	Changed By	Deleted By	Created By	Changed By	Deleted By	Created By	Changed By	Deleted By	PotEGI New Edit By	PotEGI Cleared By	lel New Edit By
Administrator	-	-	-	-	-	-	-	-	1	-	-	-
EGI Administrative	-	-	-	-	-	-	-	-	-	-	-	-



CRM Monthly Reports

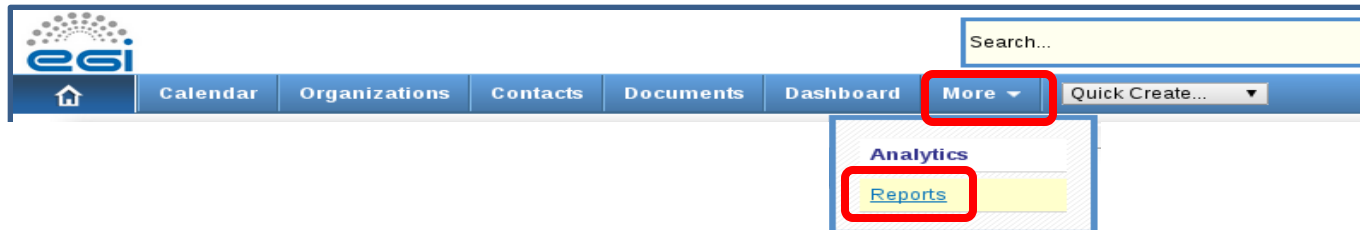
For online customized reports go to [CRM Metrics Portal](#)

2013

- ◊ [March](#)
- ◊ [February](#)
- ◊ [January](#)

2012

- ◊ [December](#)
- ◊ [November](#)



Search...

Borges

Calendar Organizations Contacts Documents Dashboard **REPORTS** More Quick Create...

Reports

Organization and Contact Reports - Organization and Contact Reports

#	Report Name	Description	Tools
1	Contacts by Organizations	Contacts related to Organizations	
2	Contacts without Organizations	Contacts not related to Organizations	
3	Accounts without Contacts	Accounts without associated Contacts	
4	Accounts not contacted	Accounts whose associated Contacts were still not contacted	
5	Documents per Account	Documents per Account	
6	Documents per Contact	Documents per Contact	
7	Accounts contacted	Accounts whose associated Contacts were contacted	
8	New Accounts (last 30 days)	New Accounts (last 30 days)	
9	Modified Accounts (last 30 days)	Modified Accounts (last 30 days)	
10	New Contacts (last 30 days)	New Contacts (last 30 days)	
11	Modified Contacts (last 30 days)	Modified Contacts (last 30 days)	
12	New Documents (last 30 days)	New Documents (last 30 days)	
13	EGI-INSPIRE partners project mapping	List of EGI-INSPIRE and ESFPI partners	
14	Report EGI related fields not empty	Reports the account entries where EGI related fields are not empty	
15	Total number of contacts per country	Total number of contacts per country	
16	Institutes per Country		

Activity Reports - Activity Reports

#	Report Name	Description	Tools
1	Last Month Activities	Last Month Activities	
2	This Month Activities	This Month Activities	

Argentina

Create Report...

Rename Folder Delete Folder

Report Name	Description	Tools
Institutes in Argentina		

Australia

Create Report...

Rename Folder Delete Folder

Report Name	Description	Tools
Institutes in Australia		

Austria

Create Report...

Rename Folder Delete Folder


Report Name	Description	Tools
Institutes in Austria		

Belgium

Create Report...

Rename Folder Delete Folder

Report Name	Description	Tools
Institutes in Belgium		



Search...

Home

Calendar

Organizations

Contacts

Documents

Dashboard

REPORTS

More

Quick Create...

Reports

Organization and Contact Reports - Organization and Contact Reports

#	Report Name	Description	Tools
1	Contacts by Organizations	Contacts related to Organizations	
2	Contacts without Organizations	Contacts not related to Organizations	
3	Accounts without Contacts	Accounts without associated Contacts	
4	Accounts not contacted	Accounts whose associated Contacts were still not contacted	
5	Documents per Account	Documents per Account	
6	Documents per Contact	Documents per Contact	
7	Accounts contacted	Accounts whose associated Contacts were contacted	
8	New Accounts (last 30 days)	New Accounts (last 30 days)	
9	Modified Accounts (last 30 days)	Modified Accounts (last 30 days)	
10	New Contacts (last 30 days)	New Contacts (last 30 days)	
11	Modified Contacts (last 30 days)	Modified Contacts (last 30 days)	
12	New Documents (last 30 days)	New Documents (last 30 days)	
13	EGI-INSPIRE partners project mapping	List of EGI-INSPIRE and ESFPI partners	
14	Report EGI related fields not empty	Reports the account entries where EGI related fields are not empty	
15	Total number of contacts per country	Total number of contacts per country	
16	Institutes per Country		

Activity Reports - Activity Reports

#	Report Name	Tools
1	Last Month Activities	
2	This Month Activities	

Argentina

Create Report...

Rename Folder

Delete Folder

<input type="checkbox"/>	Report Name	Description	Tools
	Institutes in Argentina		

Australia

Create Report...

Rename Folder

Delete Folder

<input type="checkbox"/>	Report Name	Description	Tools
	Institutes in Australia		

Austria

Create Report...

Rename Folder

Delete Folder

<input type="checkbox"/>	Report Name	Description	Tools
	Institutes in Austria		

Belgium

Create Report...

Rename Folder


Delete Folder

<input type="checkbox"/>	Report Name	Description	Tools
	Institutes in Belgium		

Set of general reports



Set of customized reports per group



[Home](#)
[Calendar](#)
[Organizations](#)
[Contacts](#)
[Documents](#)
[Dashboard](#)
[REPORTS](#)
[More](#)
[Quick Create...](#)

Institutes in Portugal
[<Back to Reports](#)

Advanced Filters


Country: equals

[New Condition](#)

[Generate Now](#)
[Save](#)

Select Another Report:

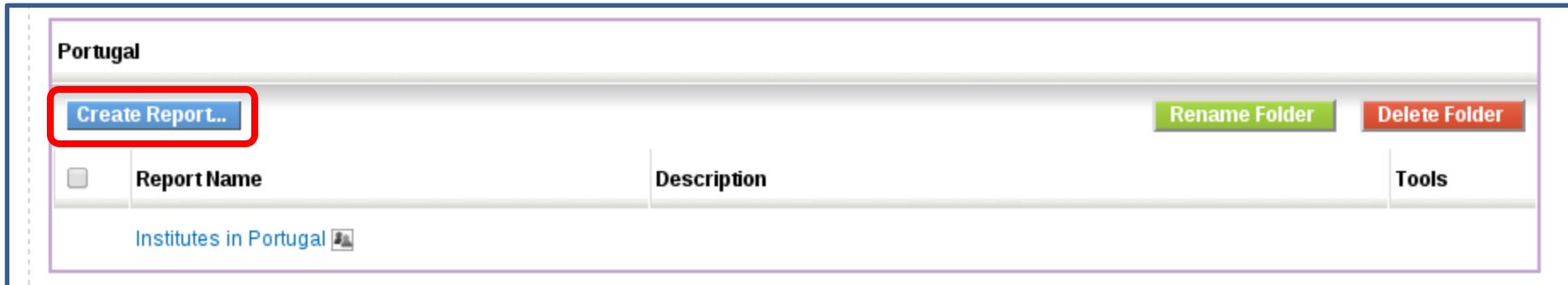
- Export Report as XLS
- Export Report as PDF




Institutes in Portugal

Organizations Organization Name	Organizations Account Type	Organizations Assigned To	ACTION
Instituto Nacional De Saude Dr. Ricardo Jorge	Research Institute	NGI Portugal (PT)	View Details
Fundacao Calouste Gulbenkian	Research Institute	NGI Portugal (PT)	View Details
Navegar Foundation – Centro Multimeios Espinho	Research Institute	NGI Portugal (PT)	View Details
Fundacao Da Faculdade De Ciencias Da Universidade De Lisboa	Research Institute	NGI Portugal (PT)	View Details
Fundacao Para A Ciencia E A Tecnologia	Research Institute	NGI Portugal (PT)	View Details
Instituto Superior Tecnico	Research Institute	NGI Portugal (PT)	View Details
Instituto De Tecnologia Quimica E Biologica - Universidade Nova De Lisboa	Research Institute	NGI Portugal (PT)	View Details
Universidade Nova De Lisboa	Research Institute	NGI Portugal (PT)	View Details
Instituto Hidrografico	Research Institute	NGI Portugal (PT)	View Details
Instituto De Investigacao Cientifica Tropical	Research Institute	NGI Portugal (PT)	View Details
Centro De Ciencias Do Mar Do Algarve	Research Institute	NGI Portugal (PT)	View Details

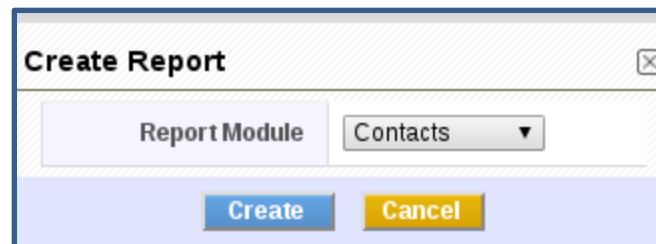
- Create your own Report
 - Non-Contacted Persons in your Country / NGI



Report Name	Description	Tools
Institutes in Portugal 		

Report Module: Contacts

(we want to display information regarding Contacts)



Create Report

Report Module: Contacts ▼

Create Cancel

1. Report Details

Create Report**Custom Reports**

1. Report Details
2. Related Module
3. Report Type
4. Select Columns
5. Specify Grouping
6. Calculations
7. Filters
8. Sharing
9. Schedule Email

Report Details
Type the Name & Description for the report

Report Name :

Report Folder :

Description:

List of Persons Contacts tagged in CRM still not contacted

2. Related Module: *(You may create reports that crosscheck information from 1 or 2 modules)*

Create Report

Custom Reports

1. Report Details

2. Related Module

3. Report Type

4. Select Columns

5. Specify Grouping

6. Calculations

7. Filters

8. Sharing

9. Schedule Email

Related Module
Select Related Module for Report

Select Related Module:

☐ Calendar
☐ Organizations
☐ Documents
☐ Opportunities
☐ Service Contracts
☐ Projects

< Back

Next >

Cancel

3. Report Type: Choose “Summary Report”

4. Select Columns *(select the data you want the report to display)*

Create Report

1. Report Details
2. Related Module
3. Report Type
- 4. Select Columns**
5. Specify Grouping
6. Calculations
7. Filters
8. Sharing
9. Schedule Email

Custom Reports

Select Columns

Select columns to generate reports

Available Fields

- Assigned To
- Degree of Contact
- Contact Status
- Created Time
- Modified Time
- Last Modified By
- Contacts Description Information**
- Potential for EGI use
- Interest in e-Infrastructures
- Description
- Contacts Projects List**
- ESFRI Projects
- ESFRI-Cluster Projects
- INFRA Projects
- National Projects
- Other International Projects

Add >

Selected Fields

- First Name
- Last Name
- Organization Name
- Role
- Email
- Degree of Contact
- Assigned To
- Potential for EGI use
- Interest in e-Infrastructures
- Description
- ESFRI Projects
- ESFRI-Cluster Projects
- INFRA Projects
- National Projects
- Other International Projects

< Back

Next >

Cancel

5. Specify Grouping *(select how the data will be grouped)*

Create Report

1. Report Details
2. Related Module
3. Report Type
4. Select Columns
- 5. Specify Grouping**
6. Calculations
7. Filters
8. Sharing
9. Schedule Email

Custom Reports

Specify Grouping

Select columns to group reports

Summarize information by:

Last Name ▼

Sort Order:

Ascending ▼

and then by:

First Name ▼

Sort Order:

Ascending ▼

and finally by:

Organization Name ▼

Sort Order:

Ascending ▼

< Back

Next >

Cancel

6. Calculations *(not applicable to this report)*

7. Filters

Create Report

- 1. Report Details
- 2. Related Module
- 3. Report Type
- 4. Select Columns
- 5. Specify Grouping
- 6. Calculations
- 7. Filters**
- 8. Sharing
- 9. Schedule Email

Custom Reports

Filters

Select Filters to Streamline Report Data

[Show Standard Filters](#)

Advanced Filters

[New Group](#)

Assigned To	contains	Portugal	and	
Degree of Contact	equals	No contact		

[New Condition](#)

< Back Next > Cancel

8. Sharing *(select public, private or share with the groups/users you want)*

9. Schedule Email *(to send the report to selected recipients)*

Create Report
Custom Reports

1. Report Details
2. Related Module
3. Report Type
4. Select Columns
5. Specify Grouping
6. Calculations
7. Filters
8. Sharing
- 9. Schedule Email**

Schedule Email

Schedule Report to be sent to the selected Recipients at regular intervals through email

☒ **Schedule Report**

Frequency

Monthly ▼ Day: 1 ▼ Time: hh:mm (24 hour format)

Report Format:

Select: PDF ▼

Recipients

Select:

Users ▼

User:: Administrator
User:: Gergely Sipos
User:: Borges
User:: Joao Pina
User:: gergely
User:: jorge
User:: cnmanuel
User:: Ivana Krenkova
User:: Genevieve Romier

>>

<<

Selected Recipients


User:: Borges

Use Case IV

Portugal

Create Report...
Rename Folder
Delete Folder

Report Name	Description	Tools
Institutes in Portugal		
Persons in Portugal (not contacted)	List of Persons Contacts tagged in CRM still not contacted	


Search...
Borges

Calendar
Organizations
Contacts
Documents
Dashboard
REPORTS
More
Quick Create...

Persons in Portugal (not contacted)
Customize Report

Back to Reports
Select Another Report:
Persons in Portugal (not contacted)

Advanced Filters

Assigned To
contains
Portugal
and
Degree of Contact
equals
No contact

New Condition
Generate Now
Save

Persons in Portugal (not contacted)
Total : 1 Records

Last Name	First Name	Organization Name	Role	Email	Degree of Contact	Assigned To	Potential for EGI use	Interest in e-Infrastructures	ESFRI Projects	ESFRI-Cluster Projects	INFRA Projects	National Projects	Other International Projects	ACTION
Gaspar	Barreira	-	LIP Director	gaspar@lip.pt	No contact	NGI Portugal (PT)	This researcher is the ESFRI representative in Portugal. It is a valuable contact to start interacting with for understanding which Portuguese communities are involved in ESFRI projects, and what are their requirements. May be a potential source of new users if EGI once the communities are identified, their requirements gathered and understood and if EGI is able to fulfill them.	This researcher is the ESFRI representative in Portugal. It is a valuable contact to start interacting with for understanding which Portuguese communities are involved in ESFRI projects, and what are their requirements. May be a potential source of new users if EGI once the communities are identified, their requirements gathered and understood and if EGI is able to fulfill them.	-none-	-none-	-none-	-none-	-none-	View Details