

# Client Relationship Management webinar

G. Borges (LIP) / E. Bayonne (UPV)

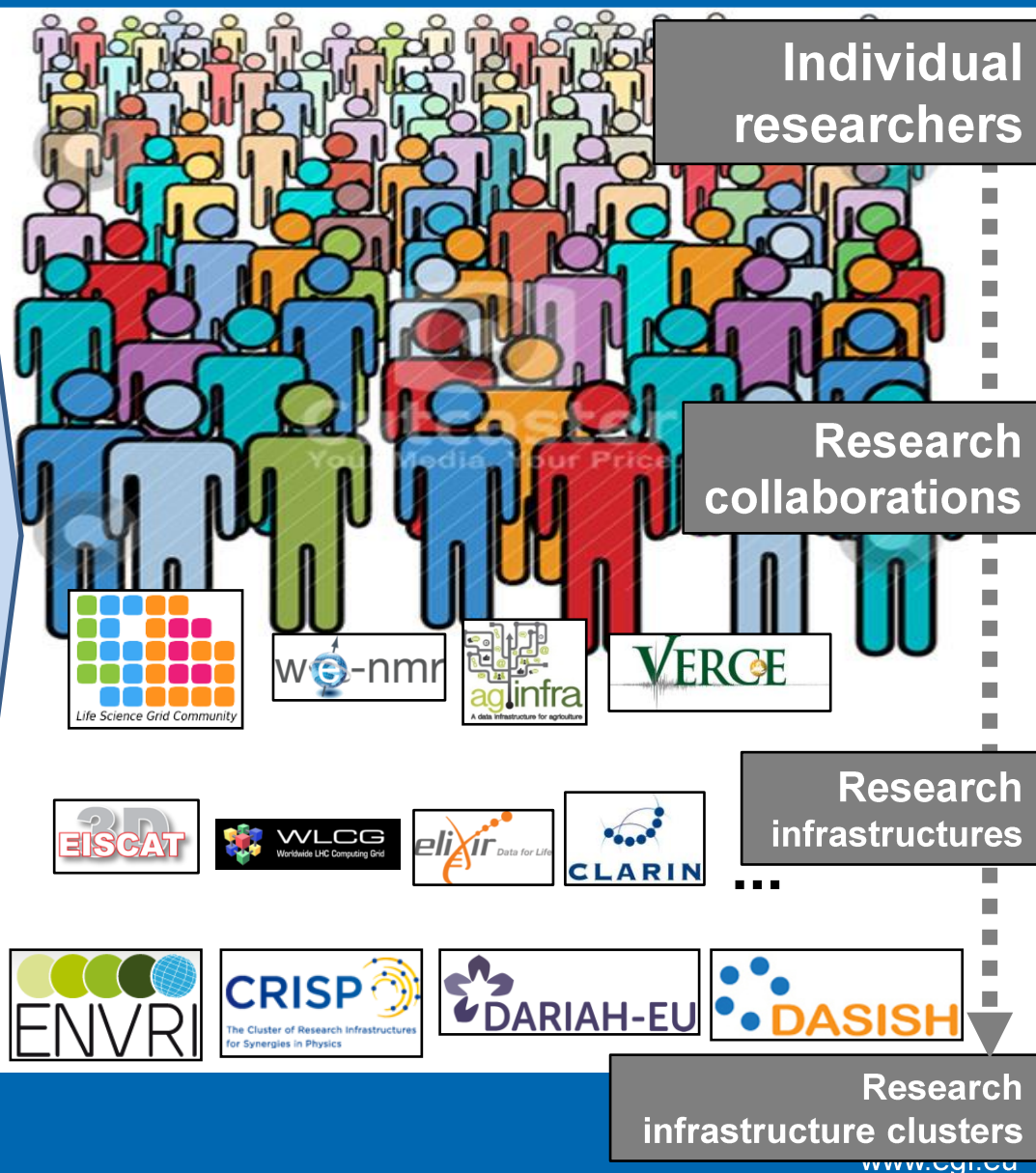
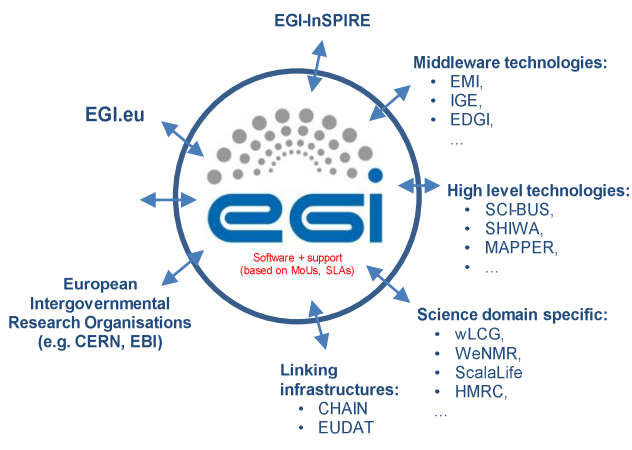
06<sup>th</sup> June 2013

- I. MOTIVATIONS**
- II. THE EGI CRM SYSTEM**
- III. DUTIES AND OBJECTIVES**
- IV. WORKING WITH CRM**
- V. RECALL TASKS**
- VI. AUXILIARY INFORMATION**

## I. MOTIVATIONS

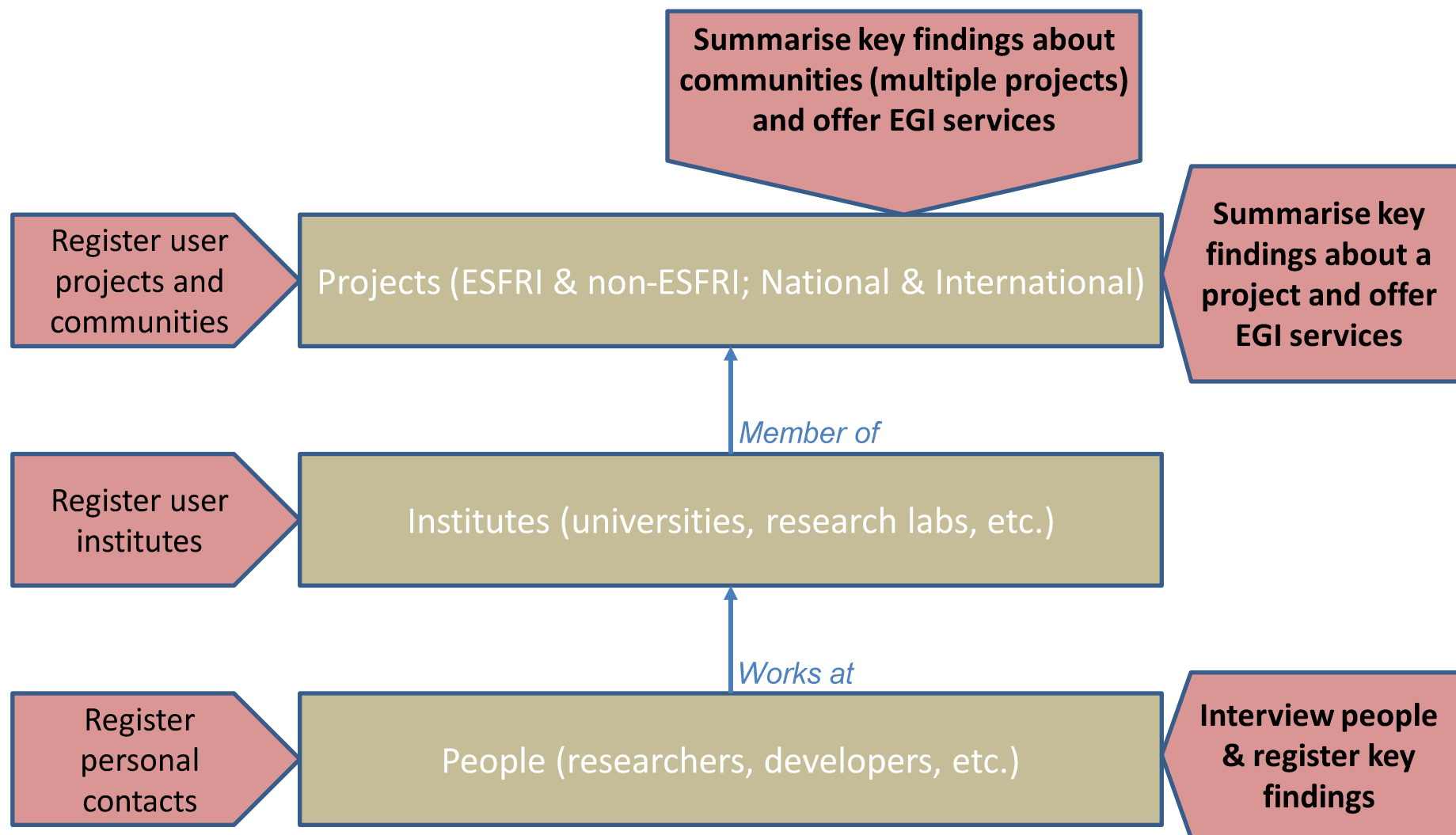


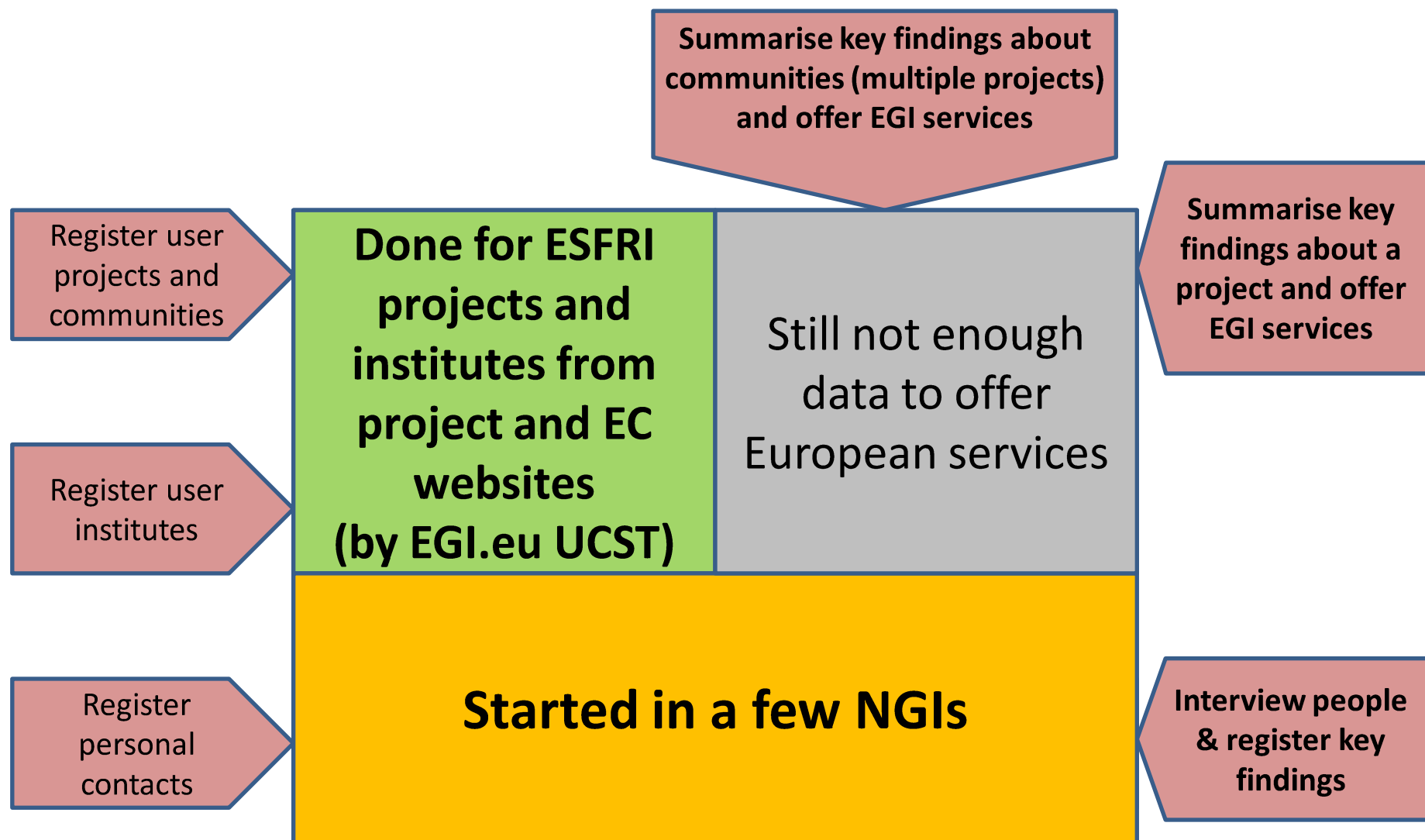
# MOTIVATIONS FOR AN EGI CRM



**EGI needs a tool to capture and monitor relationships  
between its stakeholders and potential user communities**

- EGI is distributed
  - NGIs, EGI.eu, projects
- Existing and new EGI user communities are distributed
  - Mostly driven by national and international projects
- EGI and its users are in continuous evolution
  - Discussions need to be reopened from time to time
- Conversations happen at different places, context and time
  - EGI partners should be able to see the big picture





- Situation:
  - 838 projects and institutes are in the system
    - These all potential users of EGI
    - But we need personal contacts & we need to talk to them!
  - Only 48 personal contacts are in the system
  - Only 25 out of these 48 have been interviewed  
(And even some of these interviews are poor)
- **We need your help:**
  - Choose projects/institutes of your national interest
  - Identify personal contacts for these projects/institutes
  - Interview the contacts about
    - Interest in e-infrastructures
    - Potential for EGI
  - Record the findings
- **This webinar shows you how to do it!**



## II. THE EGI CRM SYSTEM



*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, ...**ORGANIZATION**
  - Researchers, Principal Investigators, Project Spokespersons, Representatives of Research Infrastructures **PERSON CONTACT**

- 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 ORGANIZATIONS?
  - Store information about Research Projects being executed
    - Ex: INFRA, ESFRI, ESFRI-Cluster, National
  - Store information about the Institutions 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.

- 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 contact (with no associated organizations) considered important for the project.

- What goals are we aiming for CONTACTS?
  - Store information about important Person Contacts, and 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.

# III. DUTIES AND OBJECTIVES





- CRM already contains:
  - A list of Projects and Scientific Collaborations
    - ESFRI and ESFRI-CLUSTER Projects
    - INFRA Projects
    - NATIONAL and OTHER INTERNATIONAL Projects
  - A list of Research Institutes (per NGI) working under one or more of the above projects
    - Universities, Laboratories, Companies, Non-profit Organizations...
  - A list of People (per NGI) working under the Research Institutions
    - Principal Investigators, Project Spokespersons, Representatives of Research Infrastructures, ...

- NILs are supposed to:
  - Go through the list of Research Institutions (ORGANIZATIONS) assigned to their NGIs, verify the information and complete the missing fields
    - Interest in e-Infrastructures
    - Potential for EGI
  - Find relevant Person CONTACTS working under the Research Institutes, and capture their...
    - Interest in e-infrastructures
    - Potential for EGI
  - Introduce new Projects, Research Institutes or Person Contact, even if they are under other NGI scope

## IV. WORKING WITH CRM



- Access & Login
  - The authentication is performed through EGI SSO
  - Access is not automatic. CRM Administrators must enable the access at request ([egicrm.helpdesk@lip.pt](mailto:egicrm.helpdesk@lip.pt))
    - All NILs should already have access
  - NILs can ask for the inclusion of other actors, forming a network of trust, by requesting the access
    - If you are a NGI staff, and you need access to EGI CRM, contact your NIL



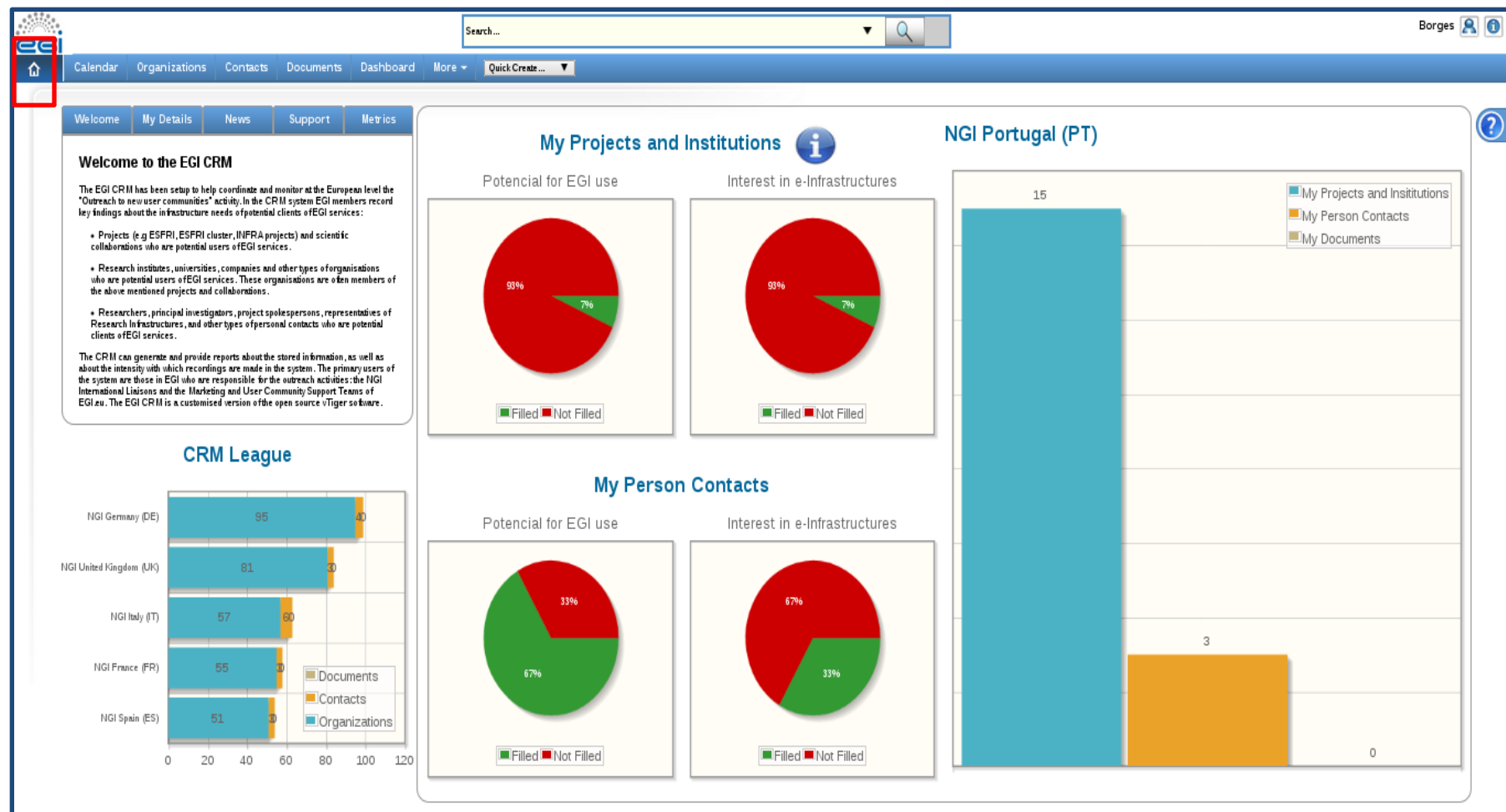
<https://crm.egi.eu>

User Name

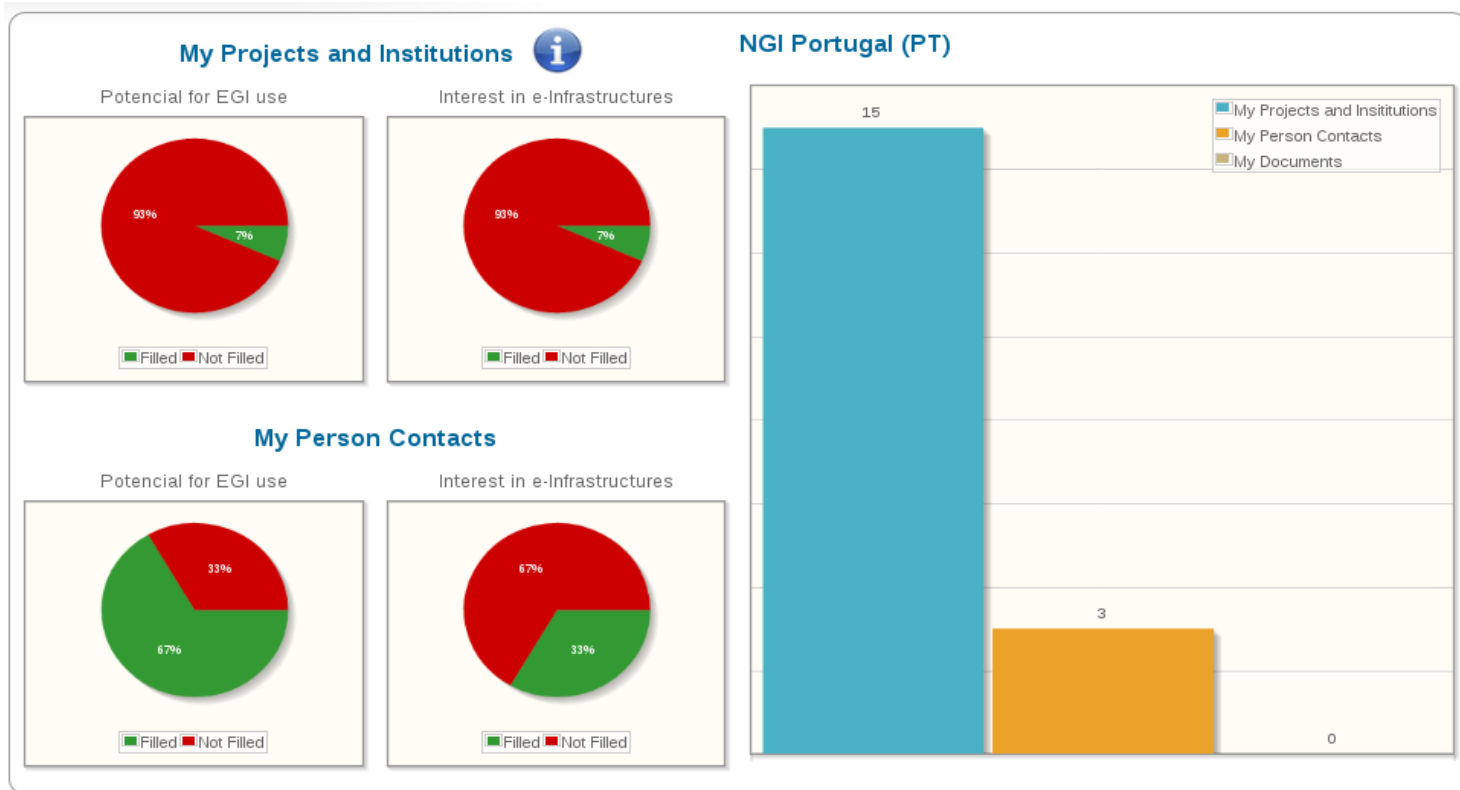
Password

Login

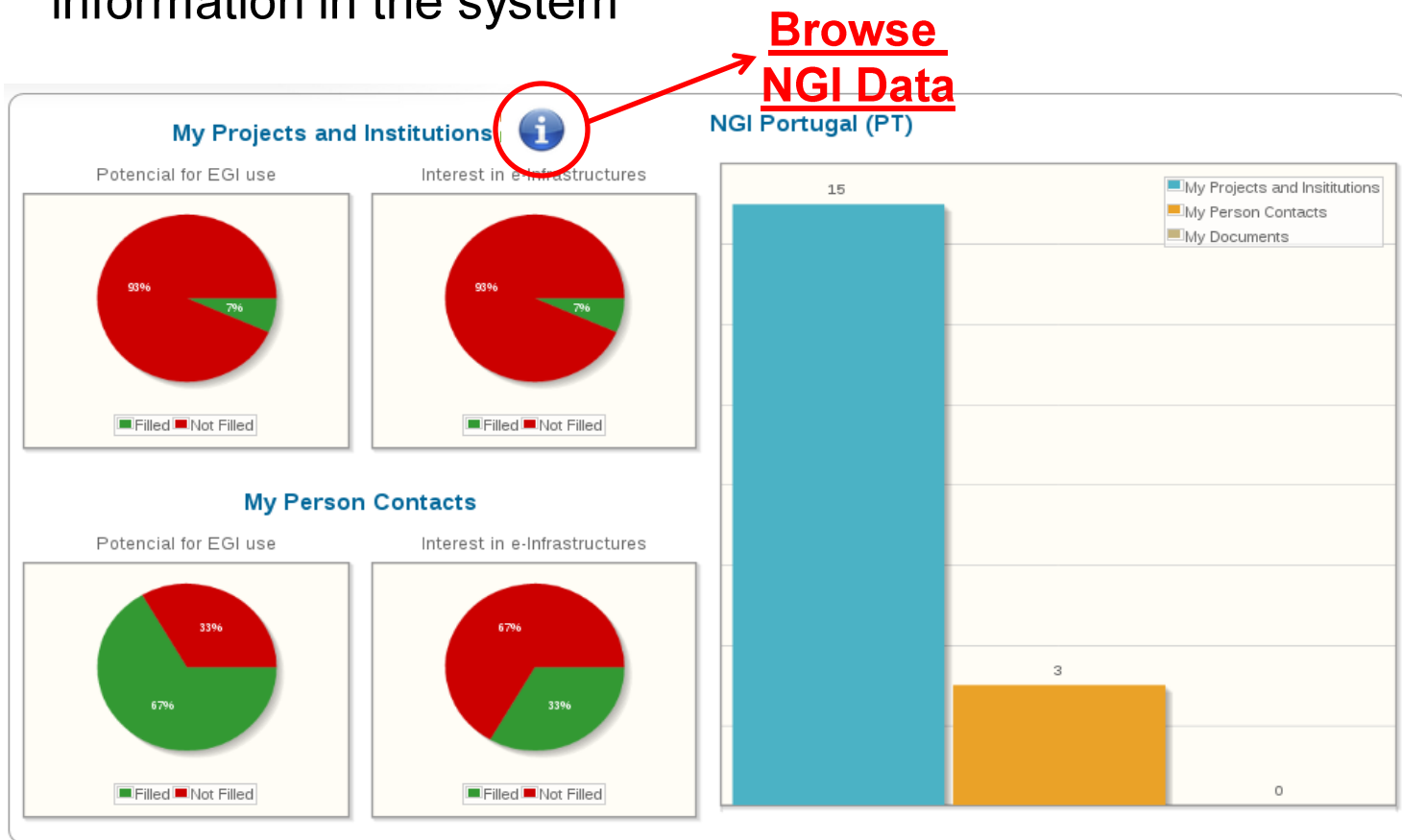
[User Manual](#) | [CRM contact](#) | [Read License](#) | © 2004 - 2013



- 15 Institutes and 3 Person Contacts assigned to NGI Portugal
  - 7% of the Institutes and 67% of the Contacts have complete information in the system




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## CRM Hierarchical View (NGI specific)

+ Projects

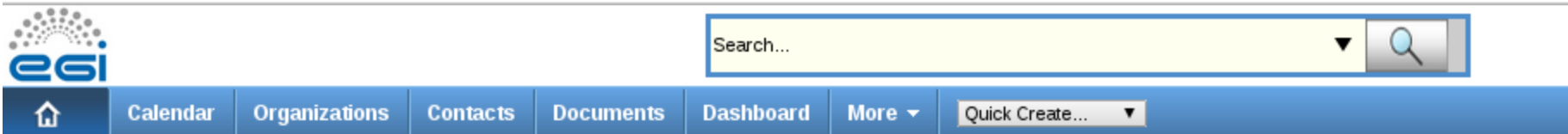


Search... 

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## CRM Hierarchical View (NGI specific)

- Projects
  - + ESFRI Project
  - + ESFRI-Cluster Project
  - + INFRA Project
  - + Other International Project
  - + National Project




## CRM Hierarchical View (NGI specific)

- Projects

- ESFRI Project

- + [Designing Trees for the future \(TREES4FUTURE\)](#) 
    - + [European Clinical Research Infrastructures Network - Integrating Activity \(ECRIN-IA\)](#) 
    - + [European Extremely Large Telescope \(E-ELT\)](#) 
    - + [EUropean Fleet of Airborne Research \(COPAL\)](#) 
    - + [European Marine Biological Resource Center \(EMBRC\)](#) 
    - + [European Multidisciplinary Seafloor Observation \(EMSO\)](#) 
    - + [European Plate Observing System \(EPOS\)](#) 
    - + [European Research Infrastructure on Highly Pathogenic Agents \(ERINHA\)](#) 
    - + [Extreme Light Infrastructure \(ELI\)](#) 
    - + [Global Ocean Observing in Infrastructure \(EURO-ARGO\)](#) 
    - + [Pan-European infrastructure for ocean and marine data management \(SeaDataNet II\)](#) 

**Only displays Projects  
for which there are NGI  
Research Institutes involved**

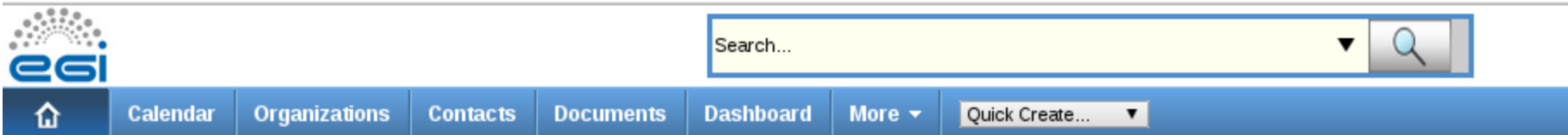


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    - [European Multidisciplinary Seafloor Observation \(EMSO\)](#) 
      - + [Fundacao Da Faculdade De Ciencias Da Universidade De Lisboa](#) 
      - + [Fundacao Para A Ciencia E A Tecnologia](#) 

**Institutes with no associated  
Data or Contacts are  
shown in “grey”**



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      - + [Fundacao Da Faculdade De Ciencias Da Universidade De Lisboa](#) 
      - [Fundacao Para A Ciencia E A Tecnologia](#) 


Display details and  
Contacts under a  
Research Institute



**Potencial for EGI:** FCT is the governmental body behind the Portuguese grid initiative

**Interest in e-Infrastructure:** FCT is the national funding agency providing support for multidisciplinary scientific projects. In the Web site, FCT functions are defined, with the following specific emphasis to infrastructures for scientific research: "To promote and support infra-structures for scientific research and technological development; To promote the diffusion of scientific and technological culture and knowledge, in particular when relevant for educational purposes in close collaboration with the agency Ciência Viva,"

- + [Seabra,Miguel](#) 



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**Links to the CRM records**

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+ [Seabra, Miguel](#) 

[ ACC212 ] Fundacao Da Faculdade De Ciencias Da Universidade De Lisboa - Organization Information Updated 226 days ago (18 Oct 2012) By Administrator

Organization Information

[More Information](#)

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Duplicate



## Organization Information

Organization Name	Fundacao Da Faculdade De Ciencias Da Universidade De Lisboa	Organization No	ACC212
Account Acronym		Account Status	--None--
Country	Portugal	Website	
Account Type	Research Institute	Email	
Scientific Discipline		Assigned To	NGI Portugal (PT)
Modified Time	18-10-2012 18:58:02	Created Time	21-03-2012 13:30:46
Start Date		End Date	
EGI-InSPIRE partner	No		

## Projects List

ESFRI Projects	EMSO, EURO-ARGO	ESFRI-Cluster Projects	-none-
INFRA Projects	-none-	National Projects	-none-
Other International Projects	-none-		

## Description Information

Potential for EGI use		Interest in e-Infrastructures	
Description			

## Actions

 [Send Mail](#)

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## Actions

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Description			

**Potential for EGI field empty!**  
**Interest for EGI field empty!**



[ ACC212 ] Fundacao Da Faculdade De Ciencias Da Universidade De Lisboa - Organization Information Updated 226 days ago (18 Oct 2012) By Administrator

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### Projects List









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INFRA Projects	-none-	National Projects	-none-
Other International Projects	-none-		

### Description Information

Potential for EGI use		Interest in e-Infrastructures	
Description			


Save Cancel

### Organization Information

*Organization Name  Fundacao Da Faculdade De Ciencias Da Universidade De Lisboa	Organization No ACC212
Account Acronym 	Account Status  --None--
Country Portugal	Website  www.fc.ul.pt/en/unidade/fundacao-da-faculdade-
* Account Type  Non-Profit Organization	Email
* Scientific Discipline  Other	*Assigned To  <div> <input type="radio"/> User <input checked="" type="radio"/> Group         </div>
* EGI-InSPIRE partner  No	NGI Portugal (PT)




### Projects List

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

ESFRI Projects 

ELI  
 ELIXIR  
 EMBRC  
 EMSO

### Description Information

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

Save Cancel

**Modify relevant fields  
and save**

# WORKING WITH CRM – VIEW THE MODIFIED RECORD

## Organization Information

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

Organization Name	Fundacao Da Faculdade De Ciencias Da Universidade De Lisboa	Organization No	ACC212
Account Acronym		Account Status	--None--
Country	Portugal	Website	<a href="http://www.fc.ul.pt/en/unidade/fundacao-da-faculdade-de-ciencias">http://www.fc.ul.pt/en/unidade/fundacao-da-faculdade-de-ciencias</a>
Account Type	Non-Profit Organization	Email	
Scientific Discipline	Other	Assigned To	NGI Portugal (PT)
Modified Time	01-06-2013 18:32:13	Created Time	21-03-2012 13:30:46
Start Date		End Date	

### Actions

 [Send Mail](#)
 [Add Event](#)
 [Add To Do](#)
 [Add Note](#)
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### Description Information

Potential for EGI use	Currently undefined. More investigation is needed in order to understand if this is the right body to contact or if one should contact the faculty or the individual research groups themselves.	Interest in e-Infrastructures	Currently undefined. More investigation is needed in order to understand if this is the right body to contact or if one should contact the faculty or the individual research groups themselves.
Description	This fundation is an umbrella for activities with origin in the Faculty of Ciencias of the University of Lisbon.		

# WORKING WITH CRM – ASSOCIATE A CONTACT

Organization Information
More Information

[Contacts](#)

[Activities](#)

[Activity History](#)

[Documents](#)

Organization Information			
Organization Name	Faculdade De Ciencias Da Universidade De Lisboa	Organization No	ACC212
Account Name		Account Status	--None--
Country	Portugal	Website	<a href="http://www.fc.ul.pt/en/unidade/fundação-da-faculdade-de-ciências">http://www.fc.ul.pt/en/unidade/fundação-da-faculdade-de-ciências</a>
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▼

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[View History](#)

Organization Information
More Information

▼
Contacts

1 of 1

Add Contact

Last Name ▼	First Name	Organization Name	Email	Assigned To	Action
None Included					

▶
Activities

▶
Activity History



▶
Documents

# WORKING WITH CRM – ASSOCIATE A CONTACT

Save

Cancel

## Contact Information

First Name	Dr. <input type="text" value="Ana Maria"/>	Contact Id	AUTO GEN ON SAVE
*Last Name	<input type="text" value="Afonso"/>	Main Organization	Fundacao Da Faculdade De  
Personal web page	<input type="text"/>	Lead Source	Internet
Role	Coordinator of the I&D service centre of the Fundacao da Faculdade de Ciencias da Universidade de Lisboa	*Email	ammartns@fc.ul.pt
*Assigned To	<input type="radio"/> User <input checked="" type="radio"/> Group <input type="text" value="NGI Portugal (PT)"/>	Degree of Contact	--None--
Contact Status	--None--		

**Edit fields  
and Save**

## Projects List

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

## Description Information

* Potential for EGI use	This is one of the persons at Faculdade de Ciencias who can work as a first contact to organize either events or conferences at the University. Should have a transversal knowledge of all the units and research groups it works with.	* Interest in e-Infrastructures	This is not the right person to contact regarding technologies and e-infrastructures.
Description	Coordinates a unit responsible for administrative and financial management of projects providing services to researchers at the Faculty of Sciences, University of Lisbon, or other institutions funded by different public sector entities and private, national or international. The unit also ensures the financial management of scientific events, such as conferences, workshops and courses. These events are intended mainly to promote the various scientific fields, as well as investing in the exchange of knowledge and the inherent interdisciplinary research activity.		

Save

Cancel

Organization Information
More Information

Contacts

Showing Records 1 - 1 of 1
1 of 1
Add Contact

Last Name ▼	First Name	Organization Name	Email	Assigned To	Action
Afonso	Ana Maria	Fundacao Da Faculdade De Ciencias Da Uni...	ammartns@fc.ul.pt	NGI Portugal (PT)	edit   📄

Activities

Activity History

Documents



## CRM Hierarchical View (NGI specific)

### – Projects

#### – ESFRI Project

- + [Designing Trees for the future \(TREES4FUTURE\)](#) 
- + [European Clinical Research Infrastructures Network - Integrating Activity \(ECRIN-IA\)](#) 
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- + [European Marine Biological Resource Center \(EMBRC\)](#) 
- [European Multidisciplinary Seafloor Observation \(EMSO\)](#) 
- + [Fundacao Para A Ciencia E A Tecnologia](#) 
- [Fundacao Da Faculdade De Ciencias Da Universidade De Lisboa](#) 

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#### – [Afonso, Ana Maria](#)

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+ [Fundacao Para A Ciencia E A Tecnologia](#) 

– [Fundacao Da Faculdade De Ciencias Da Universidade De Lisboa](#) 

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**View Contact  
CRM Record**

Contact Information

More Information

Edit

Duplicate

◀

▶

▼ Contact Information

First Name	Dr. Ana Maria	Contact Id	CON181
Last Name	Afonso	Main Organization	<a href="#">Fundacao Da Faculdade De Ciencias Da Universidade De Lisboa</a>
Personal web page		Lead Source	Internet
Role	Coordinator of the I&D service centre of the Fundacao da Faculdade de Ciencias da Universidade de Lisboa	Email	<a href="mailto:ammartns@fc.ul.pt">ammartns@fc.ul.pt</a>
Assigned To	NGI Portugal (PT)	Degree of Contact	--None--
Contact Status	--None--	Created Time	01-06-2013 19:31:05
Modified Time	01-06-2013 19:31:05		

► Projects List

▼ Description Information

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Actions

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📌

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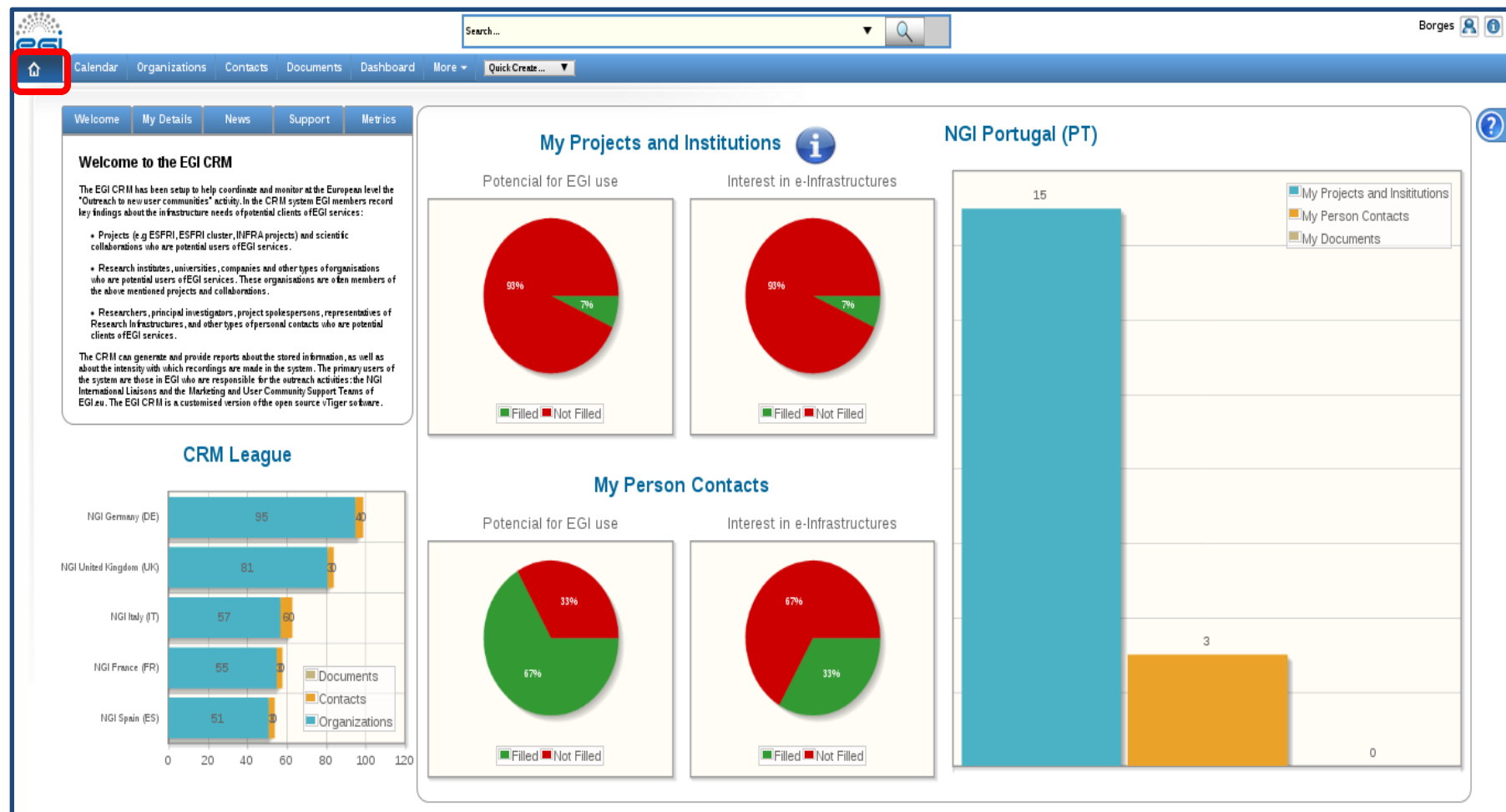
📝

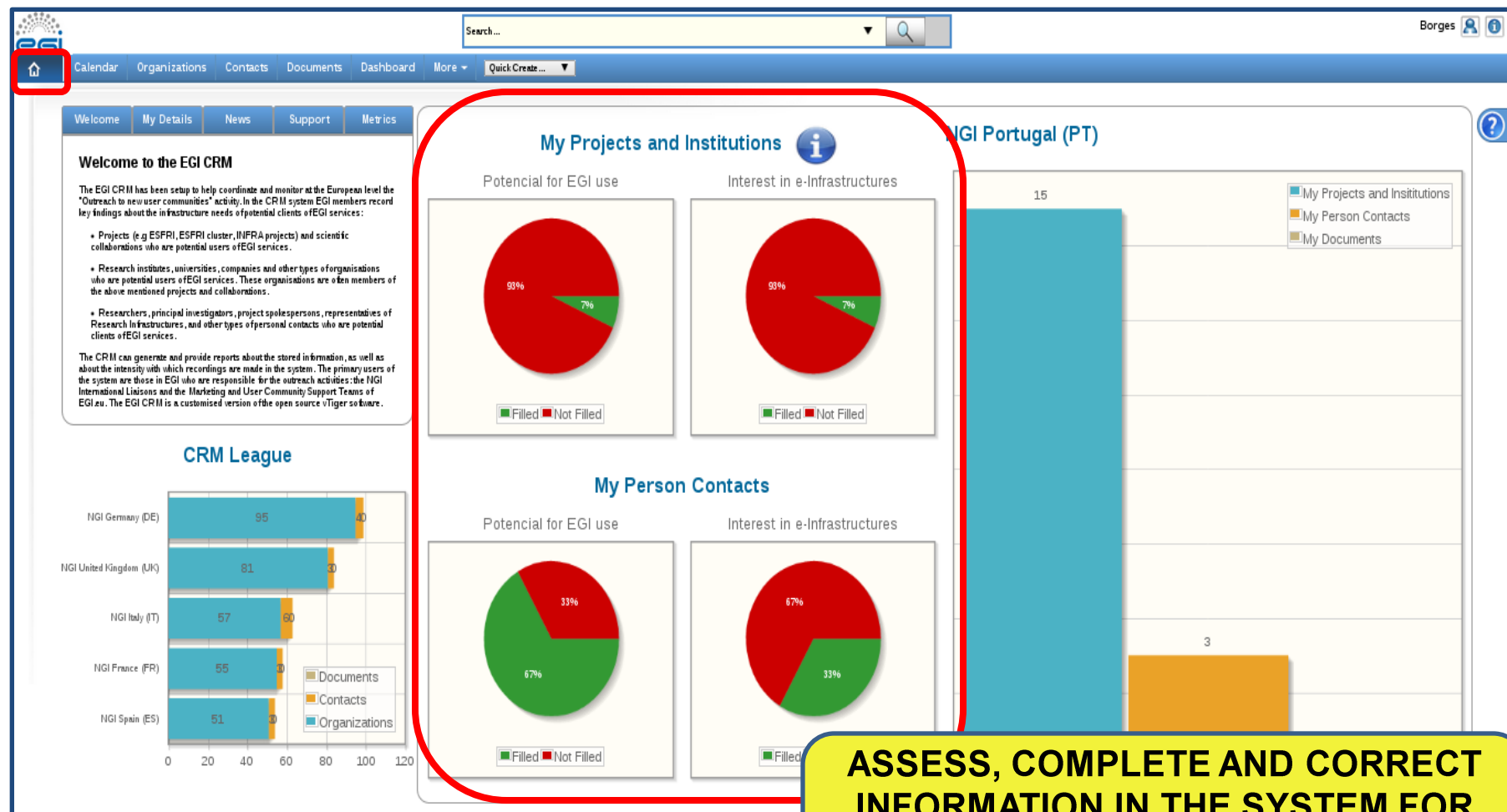
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[View History](#)

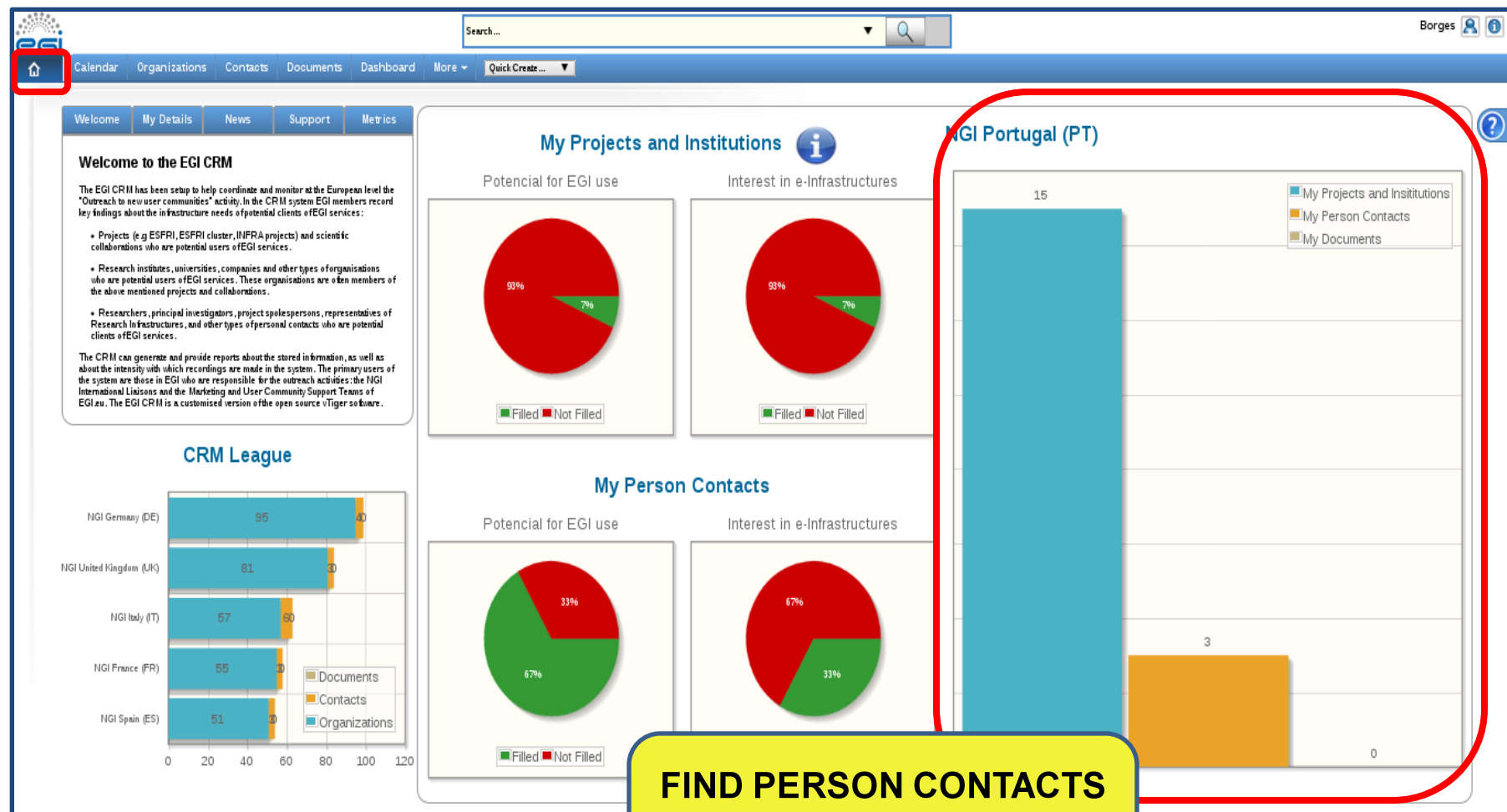
# V. RECALL TASKS



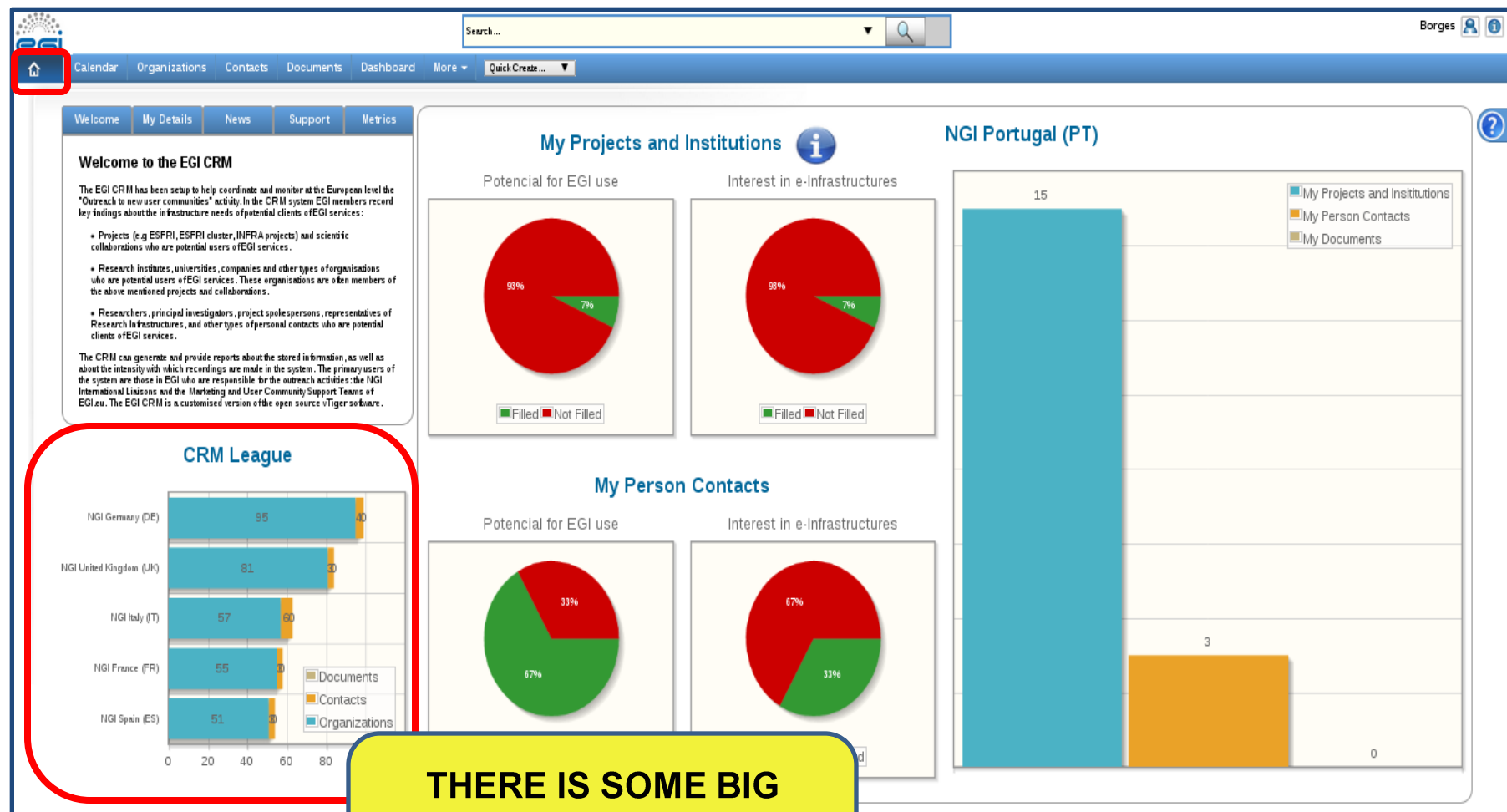




**ASSESS, COMPLETE AND CORRECT  
INFORMATION IN THE SYSTEM FOR  
ORGANIZATIONS AND CONTACTS  
UNDER YOUR NGI**



**FIND PERSON CONTACTS  
FOR THE INSTITUTES  
UNDER YOUR NGI**

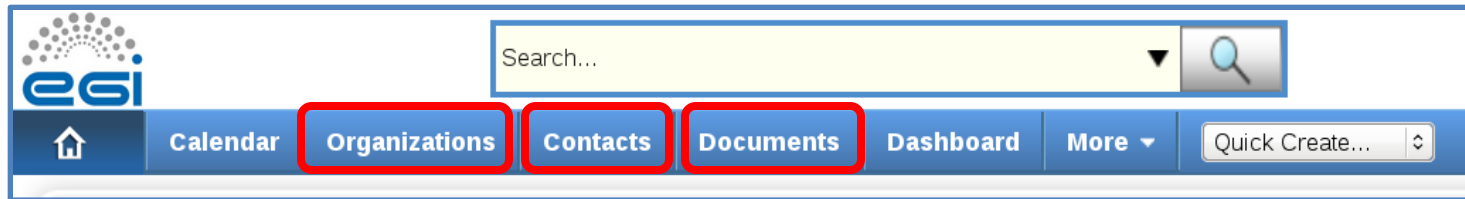


**THERE IS SOME BIG  
POTENTIAL FOR TOP  
NGIS**


- Auxiliary information in the next slides (for references)
  - ORGANIZATIONS and CONTACTS modules (accessible via TOP-MENU) provide a full view (integrated over all NGIs)
    - Check in how to create ORGANIZATIONS and CONTACTS from scratch
    - Check how to list, browse, sort and search ORGANIZATIONS and CONTACTS
  - Check how to EXPORT DATA and how to access CRM METRICS
  - Check our WIKI (<https://wiki.egi.eu/wiki/CRM>) and ask for support via [egicrm.helpdesk@lip.pt](mailto:egicrm.helpdesk@lip.pt)



# IV. AUXILIARY INFORMATION FOR WORKING WITH CRM



- 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



Borges

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

## Organizations

### Search

Go to Advanced Search

Search for  In  [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

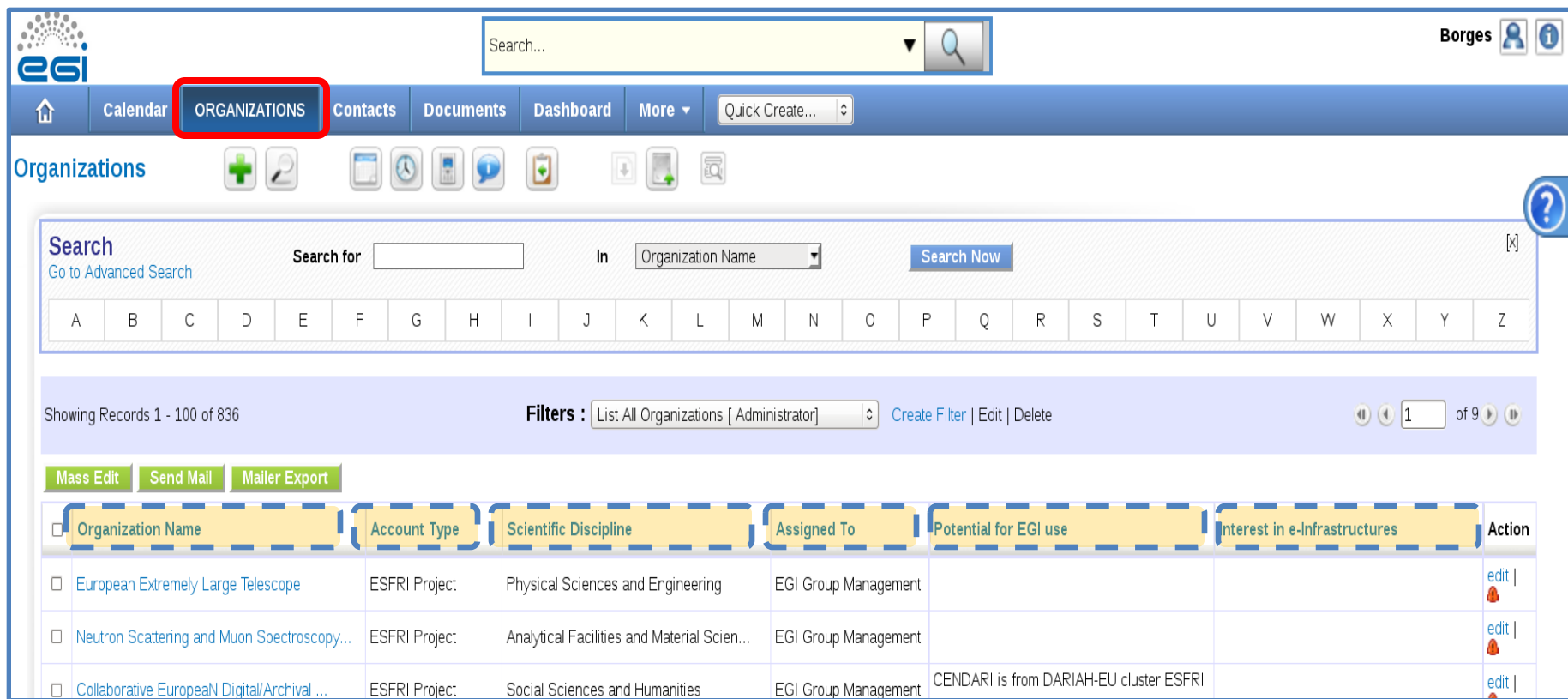
Showing Records 1 - 100 of 836

Filters :  [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"/>	<a href="#">European Extremely Large Telescope</a>	ESFRI Project	Physical Sciences and Engineering	EGI Group Management			<a href="#">edit</a>
<input type="checkbox"/>	<a href="#">Neutron Scattering and Muon Spectroscopy...</a>	ESFRI Project	Analytical Facilities and Material Scien...	EGI Group Management			<a href="#">edit</a>
<input type="checkbox"/>	<a href="#">Collaborative European Digital/Archival ...</a>	ESFRI Project	Social Sciences and Humanities	EGI Group Management	CENDARI is from DARIAH-EU cluster ESFRI		<a href="#">edit</a>



**Search**  
Go to Advanced Search

Search for  In  [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 :**  [Create Filter](#) | [Edit](#) | [Delete](#)

[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"/>	<a href="#">European Extremely Large Telescope</a>	ESFRI Project	Physical Sciences and Engineering	EGI Group Management			<a href="#">edit</a>
<input type="checkbox"/>	<a href="#">Neutron Scattering and Muon Spectroscopy...</a>	ESFRI Project	Analytical Facilities and Material Scien...	EGI Group Management			<a href="#">edit</a>
<input type="checkbox"/>	<a href="#">Collaborative European Digital/Archival ...</a>	ESFRI Project	Social Sciences and Humanities	EGI Group Management	CENDARI is from DARIAH-EU cluster ESFRI		<a href="#">edit</a>

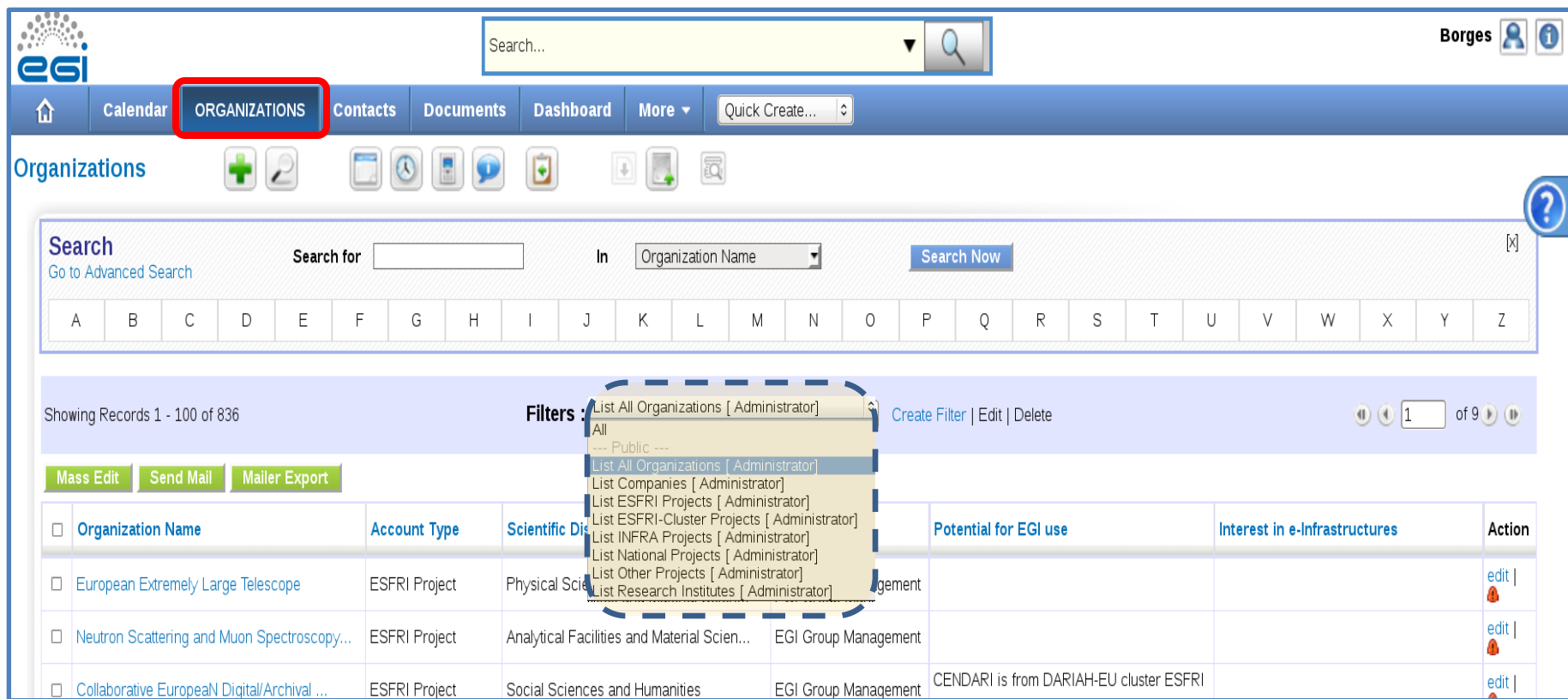
Full name

Type

Domain

Owner

Potential Snapshot



The screenshot shows the EGI CRM interface. The top navigation bar includes links for Home, Calendar, **ORGANIZATIONS** (highlighted with a red box), Contacts, Documents, Dashboard, and More. A search bar is located at the top right, and a user profile for 'Borges' is visible.

The main content area is titled 'Organizations'. It features a search section with a 'Search for' field, a dropdown for 'In' (set to 'Organization Name'), and a 'Search Now' button. Below the search bar is a grid of letters A-Z for filtering.

The table displays a list of organizations. The first three rows are visible:

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

A 'Filters' dropdown menu is open, showing a list of filter options: 'All', 'Public', '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]'.

## All Organizations

ESFRI

ESFRI  
Cluster

INFRA

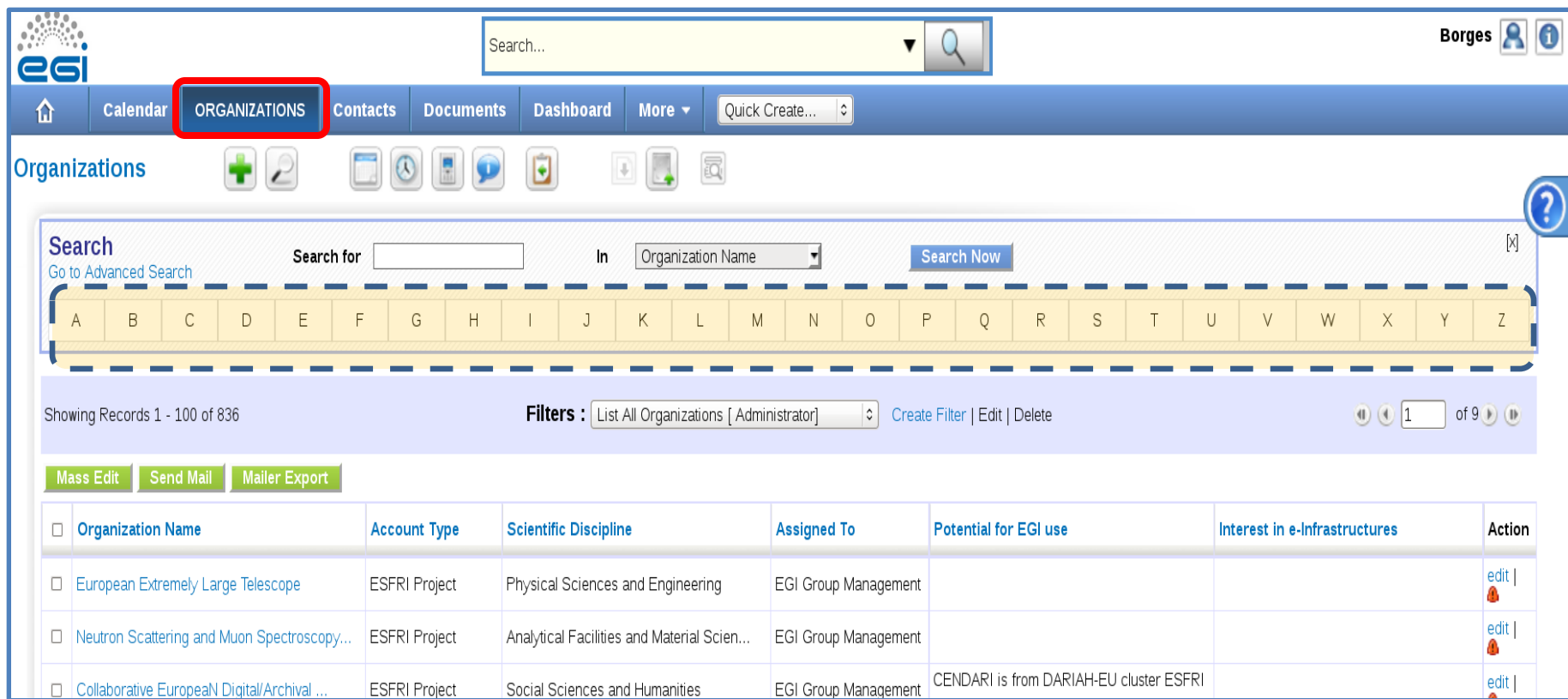
National

Other

Research  
Institution

Company

Non-Profit  
Organization



**Search**  
Go to Advanced Search


Search for  In




Showing Records 1 - 100 of 836

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











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

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](#)

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	<a href="http://www.discoverthecosmos.eu/">http://www.discoverthecosmos.eu/</a>
Account Type	INFRA Project	Email	
Scientific Discipline	Other	Assigned To	<a href="#">EGI Group Management</a>
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:

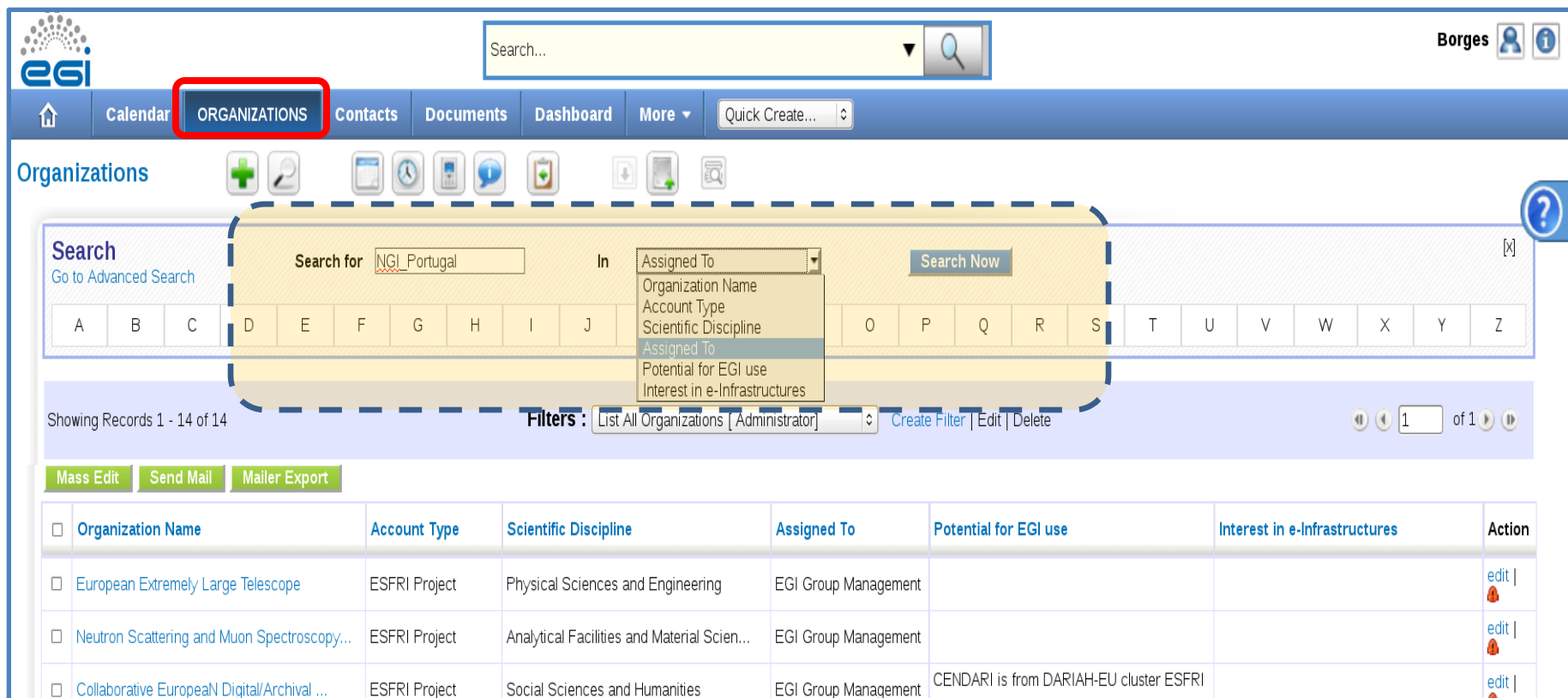
Create Mail Merge templates

**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 <a href="http://cordis.europa.eu/search/index.cfm?fuseaction=proj.document&amp;PJ_RCN=12361810">http://cordis.europa.eu/search/index.cfm?fuseaction=proj.document&amp;PJ_RCN=12361810</a></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>		

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



**Search**  
Go to Advanced Search

Search for  In Assigned To Search Now

Assigned To  
Organization Name  
Account Type  
Scientific Discipline  
Assigned To  
Potential for EGI use  
Interest in e-Infrastructures

Showing Records 1 - 14 of 14

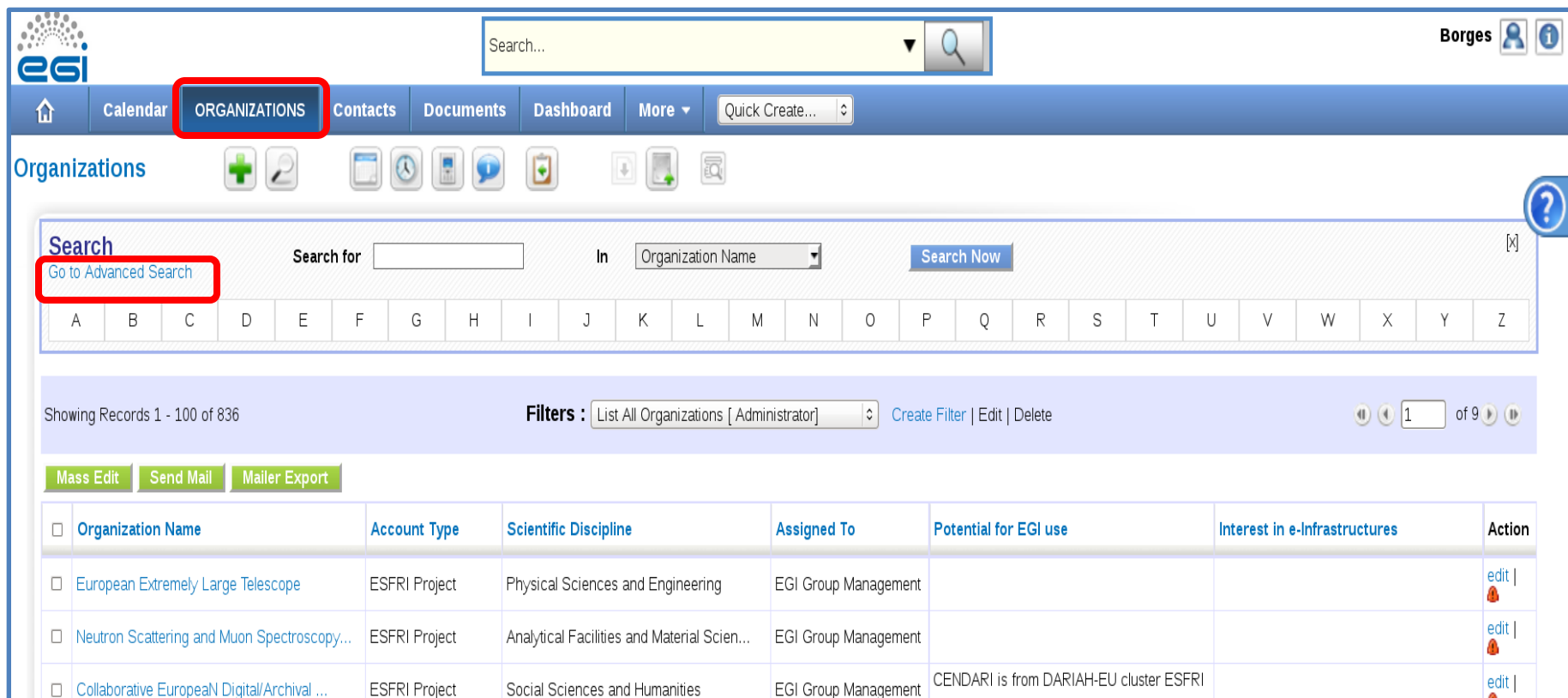
Filters: List All Organizations [ Administrator ] Create Filter | Edit | Delete

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

**Basic Search using one of the  
“main” Organization fields**






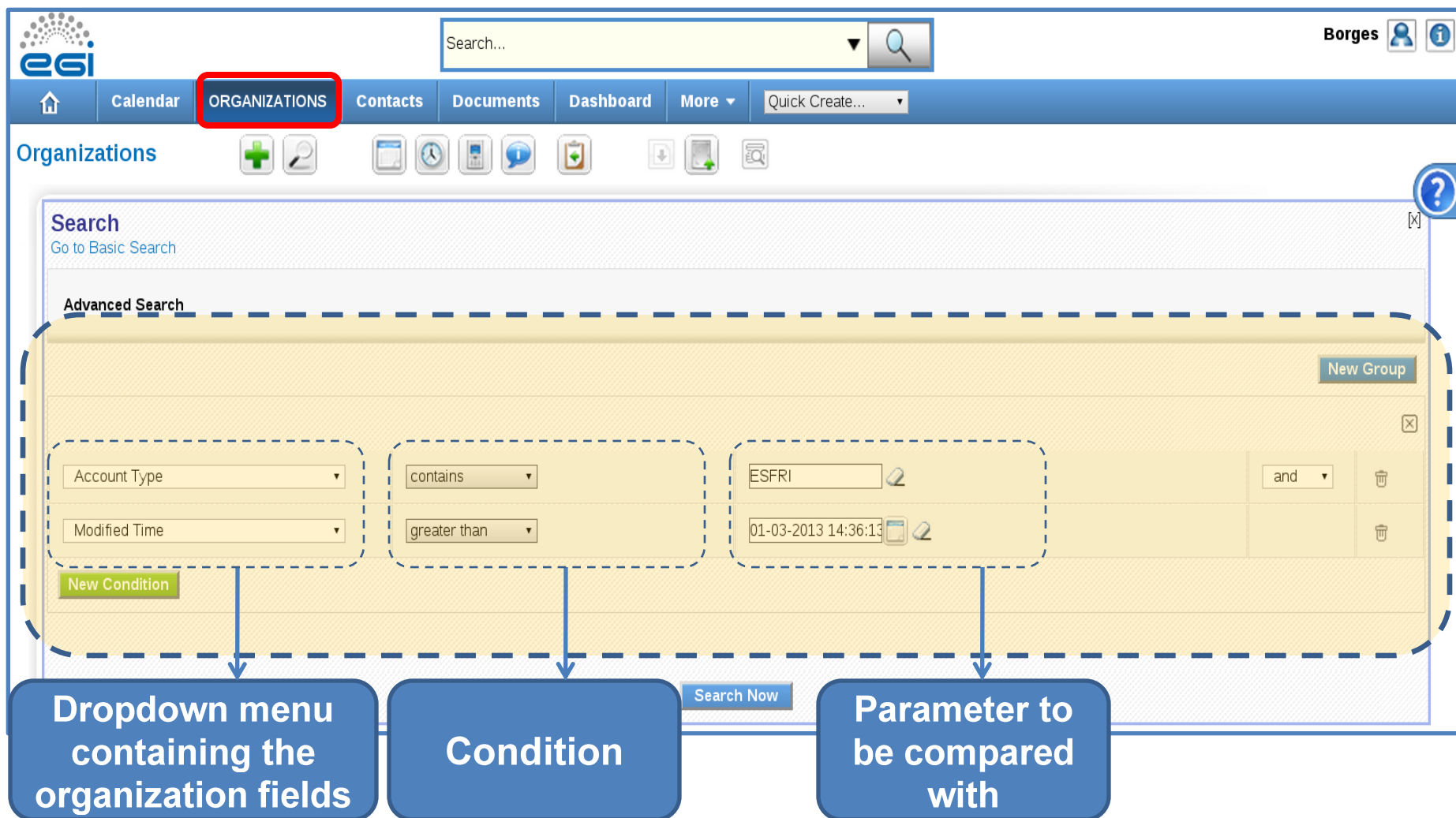


The screenshot shows the EGI CRM interface for advanced organization search. The top navigation bar includes links for Home, Calendar, **ORGANIZATIONS** (highlighted with a red box), Contacts, Documents, Dashboard, and More. A search bar is located at the top right, and a user profile for 'Borges' is visible.

Below the navigation bar, the 'Organizations' section is active. It features a search bar with the text 'Search for' and a dropdown menu set to 'Organization Name'. A 'Search Now' button is present. A red box highlights the 'Go to Advanced Search' link. Below the search bar is a row of letters from A to Z for filtering.

The results section shows 'Showing Records 1 - 100 of 836'. A filter dropdown is set to 'List All Organizations [Administrator]'. Below the filter are buttons for 'Mass Edit', 'Send Mail', and '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"/>	<a href="#">European Extremely Large Telescope</a>	ESFRI Project	Physical Sciences and Engineering	EGI Group Management			<a href="#">edit</a>   
<input type="checkbox"/>	<a href="#">Neutron Scattering and Muon Spectroscopy...</a>	ESFRI Project	Analytical Facilities and Material Scien...	EGI Group Management			<a href="#">edit</a>   
<input type="checkbox"/>	<a href="#">Collaborative EuropeaN Digital/Archival ...</a>	ESFRI Project	Social Sciences and Humanities	EGI Group Management	CENDARI is from DARIAH-EU cluster ESFRI		<a href="#">edit</a>   



**Search**  
Go to Basic Search

**Advanced Search**

New Group

Account Type (dropdown) contains ESFRI and

Modified Time (dropdown) greater than 01-03-2013 14:36:13

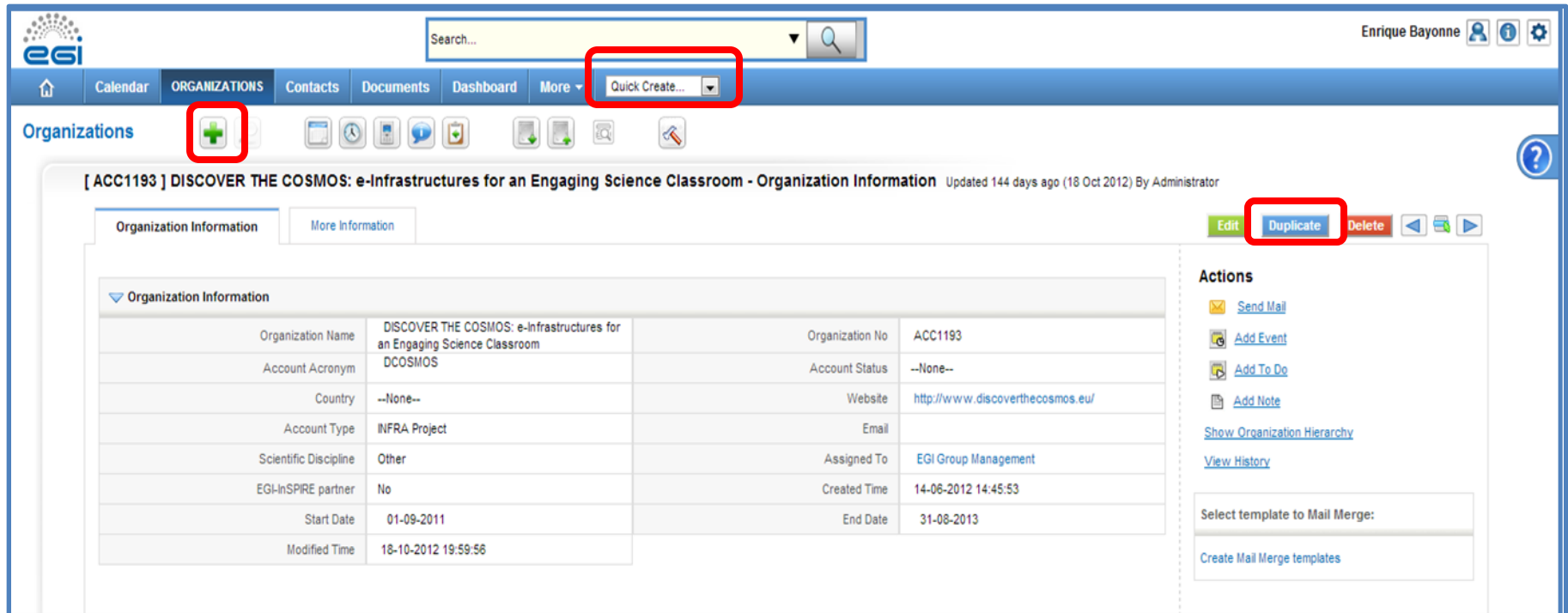
New Condition

Search Now

**Dropdown menu containing the organization fields**

**Condition**

**Parameter to be compared with**



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: 95%;" type="text"/>
Account Acronym 	<input style="width: 95%;" type="text"/>
Country	--None-- ▾
*Account Type 	--None-- ▾
Scientific Discipline 	--None-- ▾

Organization No	AUTO GEN ON SAVE
Account Status 	--None-- ▾
Website	<input style="width: 95%;" type="text"/>
Email	<input style="width: 95%;" 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	User <input type="radio"/> Group <input checked="" type="radio"/> 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

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 Name

Account Acronym

Country

\*Account Type

Scientific Discipline

Organization No

Account Status

Website

Email

\*Assigned To

Description Information

\*Potential for EGI use

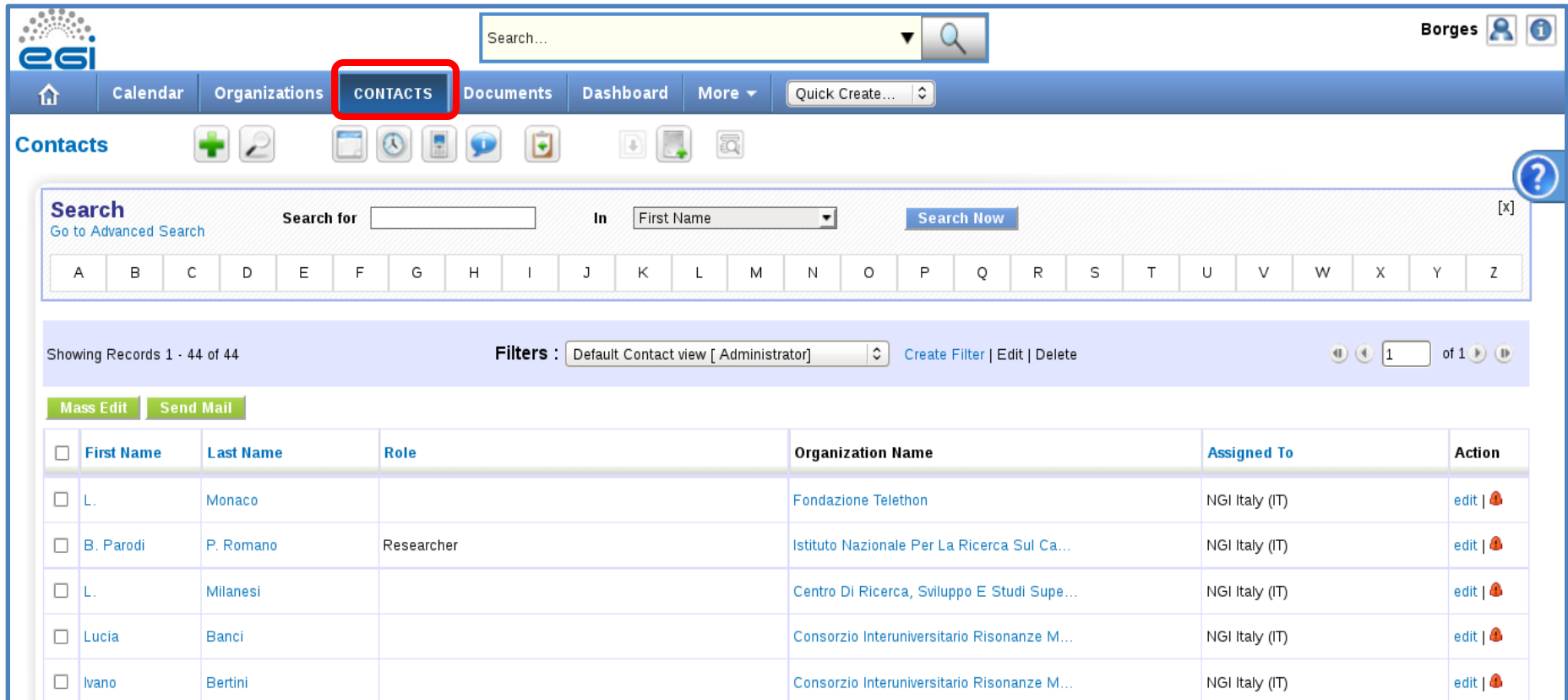
\*Interest in e-Infrastructures

Description

Capture of Needs

Save

Cancel



The screenshot shows the ESI CRM interface with the 'CONTACTS' tab highlighted in a red box. The interface includes a search bar at the top, a navigation menu with 'Calendar', 'Organizations', 'CONTACTS', 'Documents', 'Dashboard', and 'More'. Below the navigation menu, there are icons for various contact-related actions. The main content area features a search section with a 'Search for' field, a dropdown for 'In' (set to 'First Name'), and a 'Search Now' button. Below the search section is a list of records with columns: First Name, Last Name, Role, Organization Name, Assigned To, and Action. The records are filtered to show 1 of 44 records.

**Search**  
Go to Advanced Search

Search for  In  [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 - 44 of 44 Filters :  [Create Filter](#) | [Edit](#) | [Delete](#) 1 of 1

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

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

- Similar activities as for Organizations
  - Listing, Filtering, Sorting, Searching, Browsing, Creating, ...

Save Cancel

### Contact Information

First Name	Contact Id
--None--	AUTO GEN ON SAVE
*Last Name	Organization Name ?
Personal web page	Lead Source ?
Role ?	*Email
*Assigned To ?	Degree of Contact ?
Contact Status ?	

☐ User
 ☒ Group

NGI Portugal (PT)

--None--

--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 <span>?</span> <span>--None--</span> <input type="text"/></div> <div>*Last Name <span>?</span> <input type="text"/></div> <div>Personal web page <span>?</span> <input type="text"/></div> <div>Role <span>?</span> <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div></div> <div>*Assigned To <span>?</span> <div> <input type="radio"/> User <input checked="" type="radio"/> Group         <div>NGI Portugal (PT) <span>?</span></div> </div></div> <div>Contact Status <span>?</span> <span>--None--</span> <span>?</span></div>	<div>Contact Id <span>?</span> <span>AUTO GEN ON SAVE</span></div> <div>Organization Name <span>?</span> <div style="border: 1px solid #ccc; padding: 2px;"> <span style="border: 1px dashed #000; display: inline-block; width: 100%; height: 1.2em;"></span> </div> <span>?</span></div> <div>Lead Source <span>?</span> <span>--None--</span> <span>?</span></div> <div>*Email <span>?</span> <input type="text"/></div> <div>Degree of Contact <span>?</span> <span>--None--</span> <span>?</span></div>
--	--

**Projects List**

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

ESFRI Projects ?

-none-  
 E-ELT  
 NIM3-II  
 CENDARI

**Description Information**

\*Potential for EGI use ?

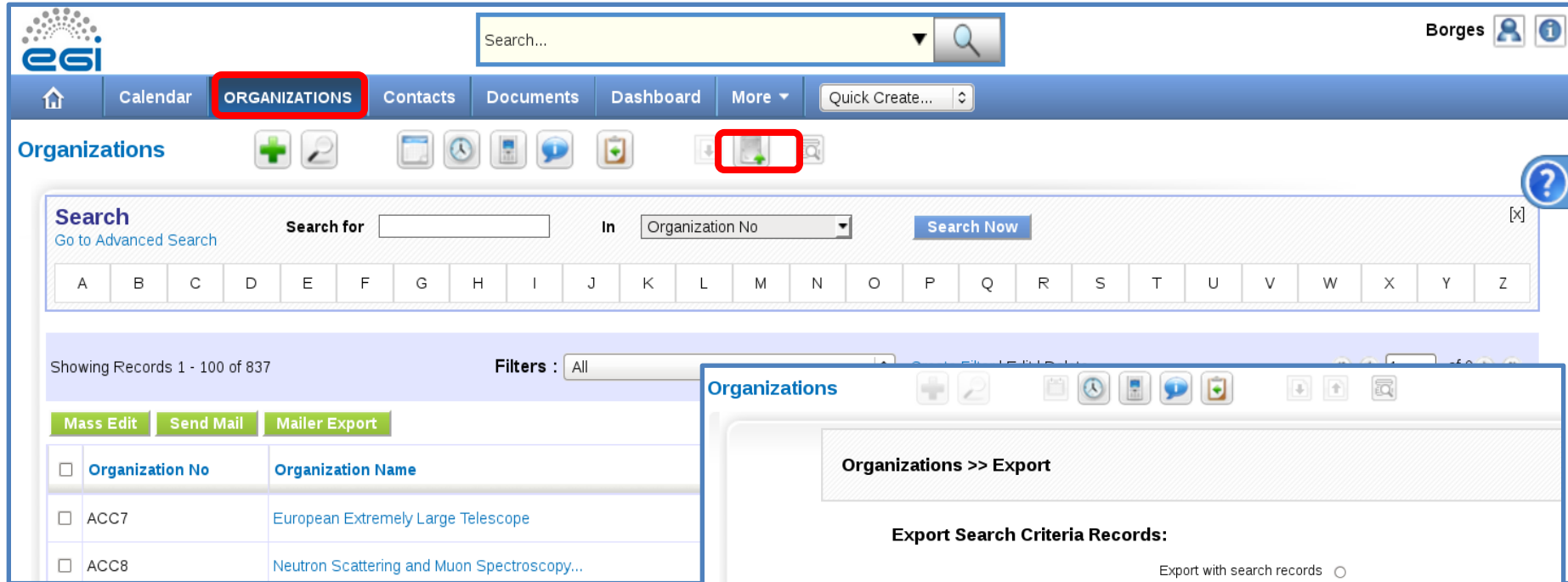
\*Interest in e-Infrastructures ?

Description ?

Save Cancel

**Associated Projects**

**Capture of Needs**



Search...

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

Organizations

Search for [ ] In Organization No Search Now

Go to Advanced Search

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

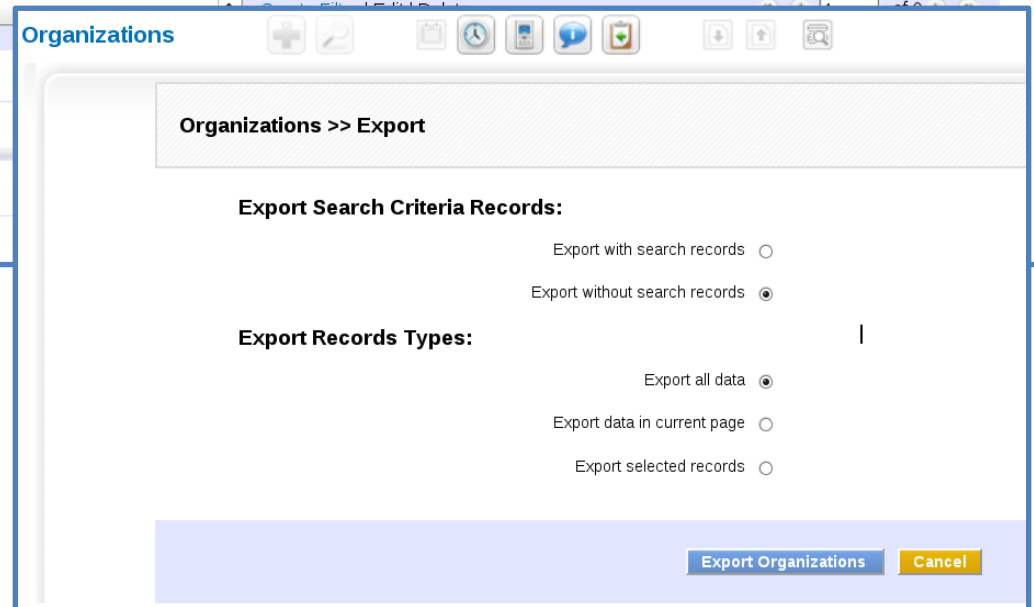
Showing Records 1 - 100 of 837 Filters : All

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...

## Export data as csv:

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



Organizations >> Export

Export Search Criteria Records:

Export with search records ☐

Export without search records ☒

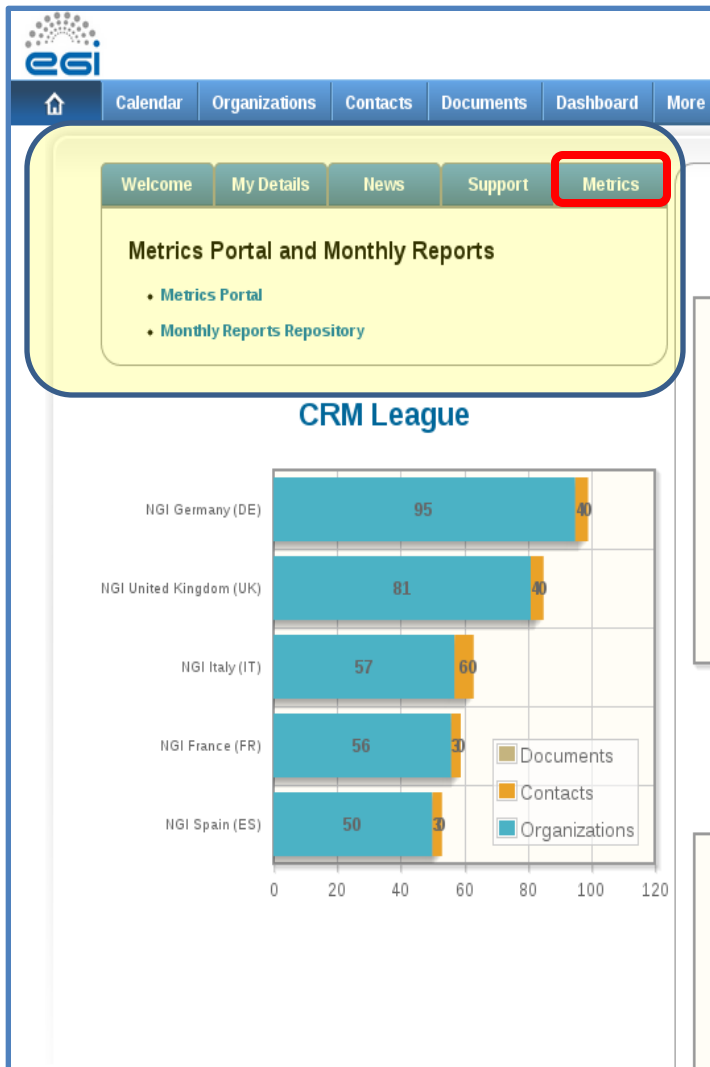
Export Records Types:

Export all data ☒


Export data in current page ☐

Export selected records ☐

Export Organizations Cancel



- 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)* field 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)* field 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](#)