



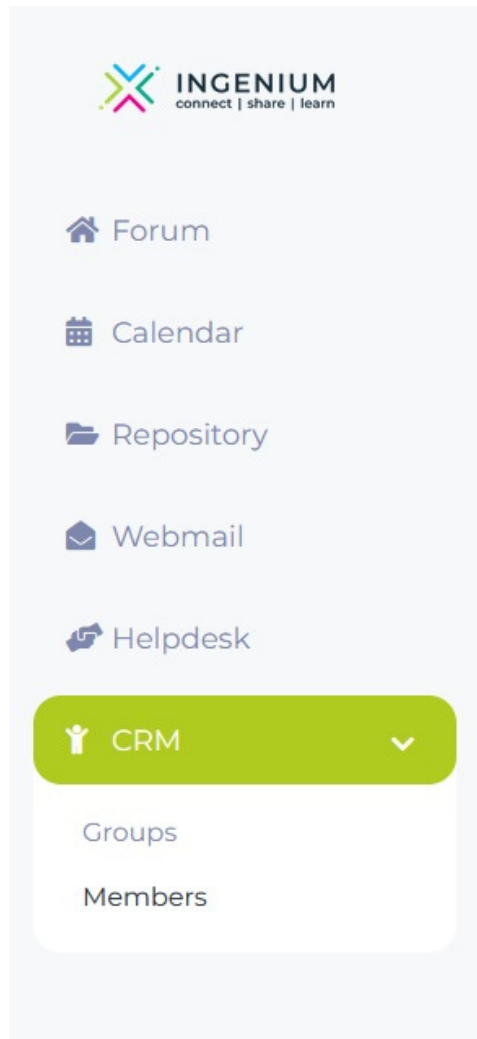
Intra-Alliance CRM Manual

This User Manual offers a concise, authoritative guide to participating in INGENIUM Intra-Alliance CRM, outlining essential functions for managing your profile.

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Main Page Menu



Accessing CRM Options

1. In the **left-hand side menu**, locate and click on the **CRM arrow**.
2. Once the CRM section expands, you will see two available options:
 - **Groups**
 - **Members**

CRM - Groups

Groups

All Groups 10

My Groups 9

Search Groups...

Role Filter

Last Active

WP4

active 6 months, 3 weeks ago

Private Group / 1 member

This is the group for WP4 Members

WP5

active 6 months, 3 weeks ago

Private Group / 1 member

This is the group for WP5 Members

WP7

active 6 months, 3 weeks ago

Private Group / 1 member

This is the group for WP7 Members

WP2

active 6 months, 3 weeks ago

Private Group / 2 members

This is the group for WP2 Members



Request Membership

WP3

active 6 months, 3 weeks ago

Private Group / 2 members

This is the group for WP3 Members

Leave Group



Within the menu, users can submit a request membership to join a specific **WP Group**. The **Work Package Moderator** reviews each request and either **approves** or **rejects** it.

Users also have the option to **leave the group** at any time.

CRM - Groups

The screenshot displays the CRM Groups interface. At the top, there are two tabs: "10" and "@ My Groups 9". Below the tabs is a search bar labeled "roups...". A table lists group members with columns for "Role", "Activity", and "Birth". The first row shows a member with email "nastasaki@uoc.gr", role "WP3", and activity "Active 5 minutes ago". The second row shows a member with role "WP3" and activity "Active 1 hour, 23 minutes ago". On the right side, a "Role Filter" dropdown menu is open, showing options: "All members", "Administrator", "Subscriber", "WP01", "WP2", "WP3" (highlighted), "WP4", and "WP5". A red arrow points down to the "Role Filter" dropdown. At the bottom, a user profile for "User1-1" is shown with role "WP3" and activity "Active 1 hour, 23 minutes ago". A red arrow points right to a "Private Message" button next to the user profile.

	Role	Activity	Birth
nastasaki@uoc.gr	WP3	Active 5 minutes ago	
	WP3	Active 1 hour, 23 minutes ago	

User1-1 WP3 Active 1 hour, 23 minutes ago Private Message

On the right-hand side, you will find the **Role Filter**. Using this, you can select a specific **WP Group** to view its members or send a **private message** to an individual member.

CRM - Groups

Groups

The screenshot displays the CRM Groups interface. At the top, there are two tabs: "All Groups" (with a count of 10) and "My Groups" (with a count of 9). Below the tabs is a search bar labeled "Search Groups...". On the right side, there are two filter dropdowns: "Role Filter" and "Most Members". The "Most Members" dropdown is open, showing four options: "Last Active", "Most Members", "Newly Created", and "Alphabetical". A red arrow points to the "Most Members" option in the dropdown. Below the filters, there are three group cards. The first card is for "WP3" (active 6 months, 3 weeks ago) and is a "Private Group / 2 members". A red arrow points to the "2 members" text. The second card is for "WP1" (active 6 months, 3 weeks ago) and is a "Private Group / 2 members". The third card is for "WP4" (active 6 months, 3 weeks ago) and is a "Private Group / 1 member". Each card has a "Leave Group" button at the bottom.

On the **right-hand side**, there is an additional **filter** that allows you to:

- See the **Last Active** member
- Which WP Group has the **Most Members**
- View **Newly Created** members
- List all members in **Alphabetical** order

CRM - Members

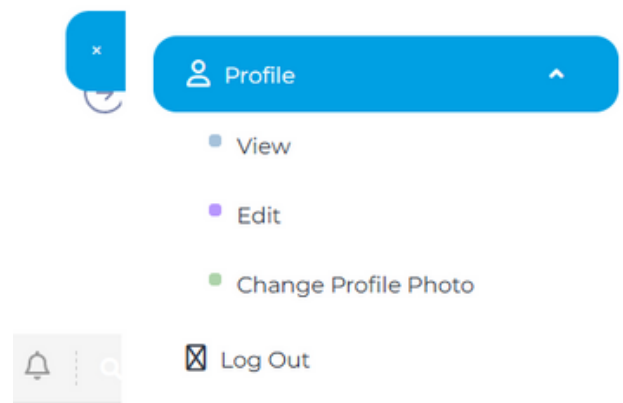
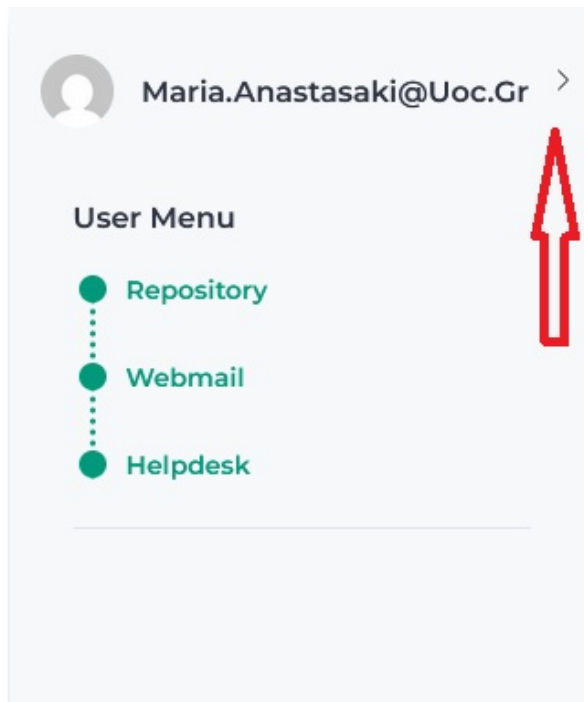
The screenshot shows the CRM interface. On the left is a sidebar with a menu: Forum, Calendar, Repository, Webmail, Helpdesk, CRM (highlighted in green), Groups, and Members (highlighted with a red arrow). The main area is titled 'Members' and has a red arrow pointing to the 'All Members' tab (247). Below the tabs is a search bar 'Search Members...' with a red arrow pointing to it. To the right of the search bar are two filters: 'Role Filter' and 'Alphabetical' (highlighted with a red arrow). Below the filters is a table of members with columns: Name, Role, Activity, Birthday, and Friendship. The first member is Adrian.Alexandrescu@Academic.Tuiasi.Ro, role WP5, activity 'Not recently active', and a red arrow points to the 'Private Message' link in the Friendship column. The second member is Agapi.Vathianaki@Uoc.Gr, role WP3, activity 'Active 1 week, 2 days ago', and a 'Private Message' link is also present.

Name	Role	Activity	Birthday	Friendship
Adrian.Alexandrescu@Academic.Tuiasi.Ro	WP5	Not recently active		Private Message
Agapi.Vathianaki@Uoc.Gr	WP3	Active 1 week, 2 days ago		Private Message

In the **Members menu**, you will see a list of **All Members**.
You can:

- Search for a specific member.
- Use the filters on the right-hand side to:
 - Select a specific WP Group to view its members
 - Send a private message to an individual member
 - See the most recently active member
 - Identify groups with the most members
 - View newly created members
 - List all members in alphabetical order

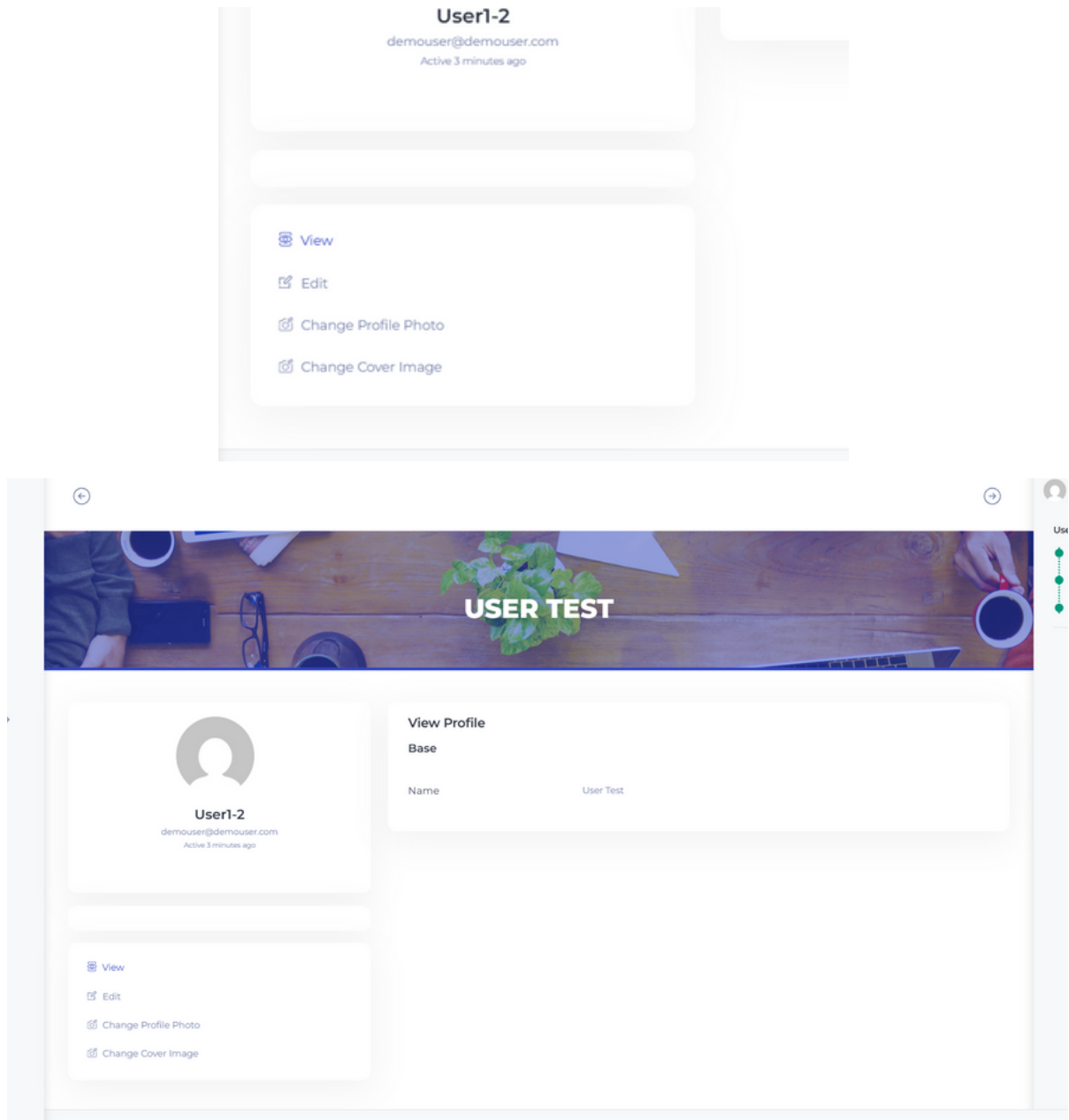
Profile Page Menu



On the **right-hand side** menu, you can see your **username**. By clicking the **arrow** next to it, you can:

- **View** your profile
- **Edit** your profile information
- **Change your profile picture**
- **Log out** of the system

View Profile



On this page, the user's profile is displayed.

Within this page, the user can update their profile information and to change or upload a photograph for both their profile and their cover image.

Edit Profile

Edit Profile

Name (Required)

User Test

This Field May Be Seen By: **Everyone**

Birthday

Day

Month

Year

This Field May Be Seen By: **Everyone** [Change](#)

The user may modify their Name, Date of Birth, Address, and Location.

By selecting Save Changes, the updated information is stored.

Change Profile Photo

Change Profile Photo

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Your profile photo will be used on your profile and throughout the site. If there is a [Gravatar](#) associated with your account, you can use that, or you can upload an image from your computer.

Upload

Take Photo

Drop your file here

Select Your File

The user may update their profile photograph either by uploading a new image or by capturing one directly through the computer's webcam.

Change Cover Image

Change Cover Image



Your Cover Image will be used to customize the header of your profile.

Drop your file here

Select Your File

For better results, make sure to upload an image that is larger than 1000px wide, and 400px tall.

The user may update their cover image by uploading a new image.

Support

If you have any questions about INGENIUM Intra-Alliance, please contact us at:

helpdesk@ingenium-university.eu



ingenium-university.eu/intra-alliance

