



INGENIUM
European University

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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Login Page



Intra-Alliance Platform

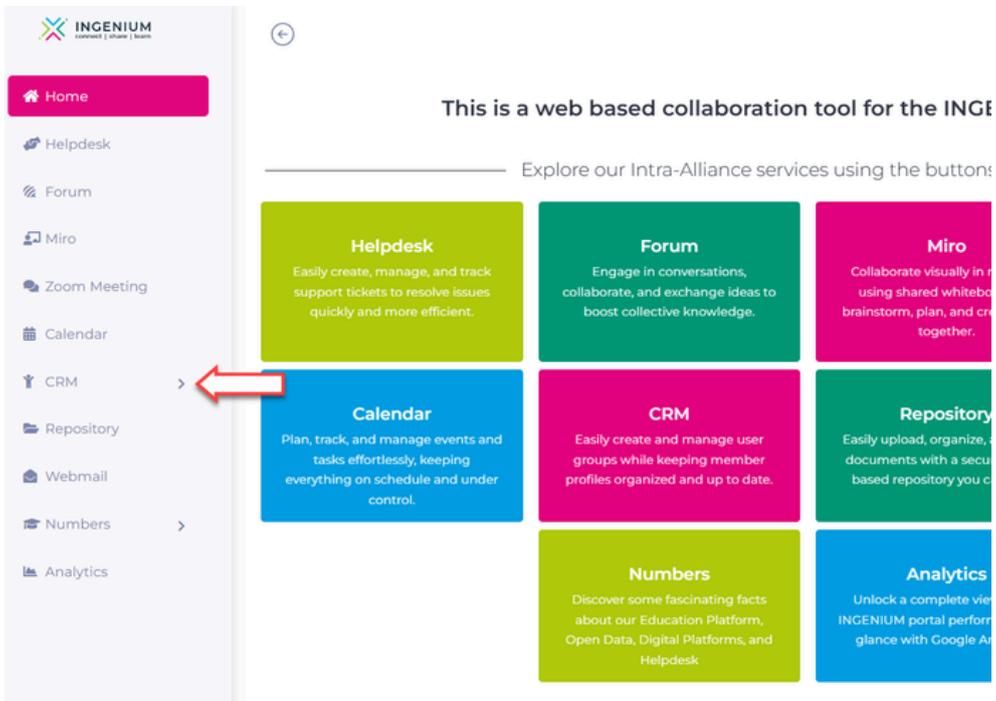
This communication platform facilitates internal communication within the Alliance. It offers features such as forums, email access, repository integration, helpdesk, and displays a calendar directly from the repository (view-only). Additionally, it includes CRM functionalities with information about partners and working groups and allows users to register for work package teams upon moderator approval.



On Intra Alliance's main page, click the '**Sign In**' button to go to the login page. Then, choose your **Institution** to log in, or sign in with your **local IEP account**.

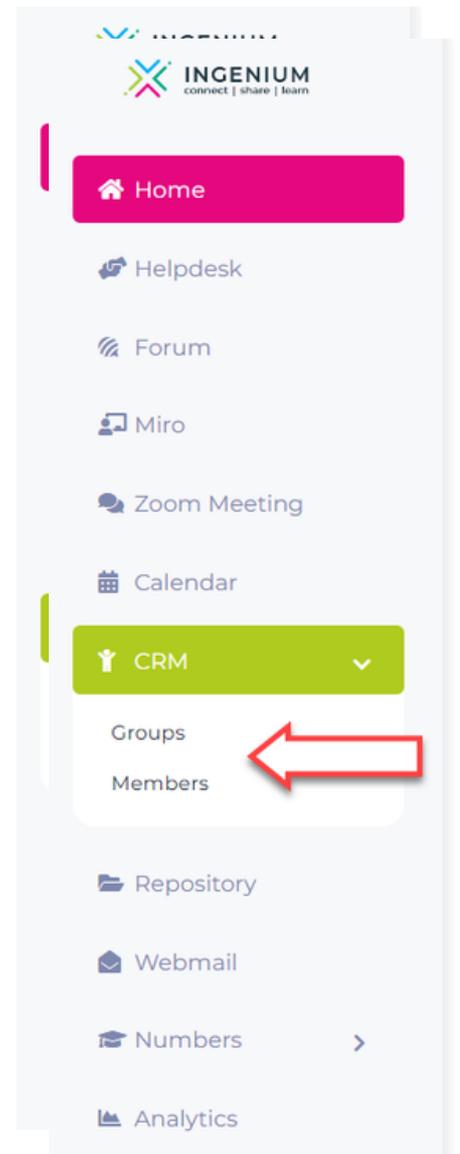
A screenshot of the login page for the Intra-Alliance Platform. At the top is the INGENIUM logo with the tagline 'connect | share | learn'. Below the logo is a message box stating 'SSO connectivity has been activated. To access the Intra-Alliance Platform, please sign in using your academic account via SSO. If your University is not listed, you may use the local account credentials that were sent to your email. If you have not received these credentials, please open a support ticket at helpdesk@ingenium-university.eu'. The form contains fields for 'Email Address' and 'Password' (with an eye icon for visibility). Below these is a 'Remember Me' checkbox. A blue 'Log In' button is present. Below the button is an 'OR' separator. A list of institutions is shown as blue buttons: 'University Of Crete', 'TUIASI', 'UdA', and 'UdA'. A red arrow points to the 'University Of Crete' button.

Main Page Menu



Accessing CRM

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



CRM - Groups

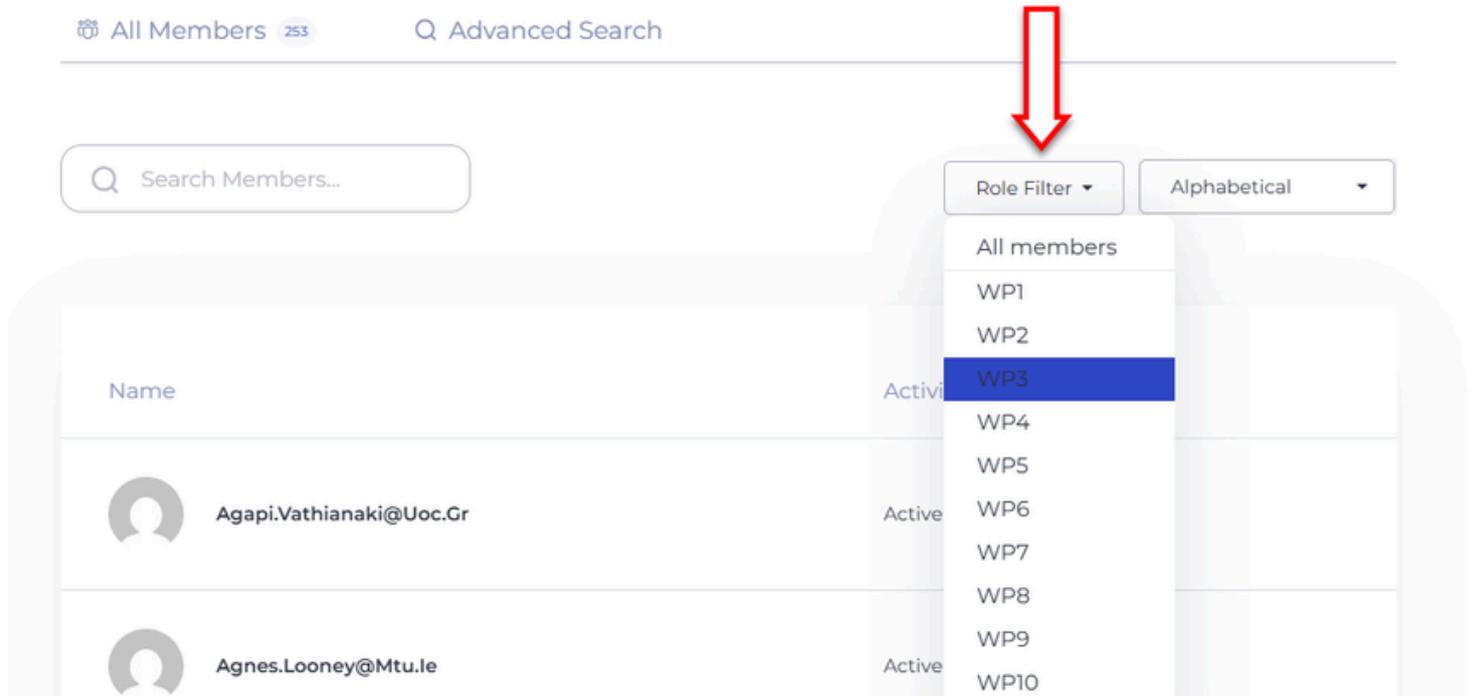
The screenshot displays the 'Groups' section of a CRM system. At the top, there are two tabs: 'All Groups' (with a count of 10) and 'My Groups' (with a count of 9). Below the tabs is a search bar labeled 'Search Groups...' and two filter buttons: 'Role Filter' and 'Last Active'. The main area shows a grid of group cards. Each card displays the group name, its activity status, membership type, and a description. Two red arrows point to the 'Leave Group' button on the 'WP7' card (active 9 seconds ago) and the 'Request Membership' button on the 'Rectors - Reps' card (active 23 hours, 42 minutes ago).

Group Name	Activity Status	Membership Type	Description	Actions
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	
WP7	active 9 seconds ago	Private Group / 3 members	This is the group for WP7 Members	Leave Group
WP3	active 22 hours, 9 minutes ago	Private Group / 4 members	This is the group for WP3 Members	
Rectors - Reps	active 23 hours, 42 minutes ago	Private Group / 1 member	This is a Group for the Rectors - Representatives	Request Membership

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 is a header with "All Members 253" and "Advanced Search". Below this is a search bar labeled "Search Members...". On the right side, there are two dropdown menus: "Role Filter" and "Alphabetical". The "Role Filter" dropdown is open, showing a list of options: "All members", "WP1", "WP2", "WP3", "WP4", "WP5", "WP6", "WP7", "WP8", "WP9", and "WP10". The "WP3" option is highlighted in blue. A red arrow points to the "Role Filter" dropdown. Below the dropdown, a table of members is visible, with columns for "Name" and "Active". Two members are listed: "Agapi.Vathianaki@Uoc.Gr" and "Agnes.Looney@Mtu.le".

On the right-hand side, you will find the **Role Filter**. Using this, you can select a specific **WP Group** to view its members.

CRM - Groups

The screenshot displays the CRM Groups interface. At the top, there are two tabs: "All Groups" (with a count of 11) and "My Groups" (with a count of 1). Below the tabs is a search bar labeled "Search Groups...". To the right of the search bar is a "Role Filter" dropdown menu. Further right is a "Last Active" dropdown menu, which is currently open and showing four options: "Last Active" (highlighted in blue), "Most Members", "Newly Created", and "Alphabetical". A red arrow points down to the "Last Active" dropdown menu. Below the filters is a grid of group cards. The first row contains three cards: "WP3" (active 22 hours, 2 minutes ago), "Rectors – Reps" (active 23 hours, 36 minutes ago), and "WP10" (active 1 day, 2 hours ago). The second row contains three cards: "WP1" (active 2 weeks, 1 day ago), "WP5" (active 2 weeks, 4 days ago), and "WP8" (active 2 months, 1 week ago). Each card shows the group name, activity status, and a description. A red arrow points to the "Private Group / 4 members" text in the WP3 card.

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 displays the INGENIUM CRM interface. On the left, a sidebar contains navigation options: Home, Helpdesk, Forum, Miro, Zoom Meeting, Calendar, CRM (highlighted), Groups, Members (highlighted with a red arrow), Repository, Webmail, and Numbers. The main area is titled 'Members' and features a 'All Members' link with a count of 253, an 'Advanced Search' option, a search input field labeled 'Search Members...', a 'Role Filter' dropdown, and an 'Alphabetical' dropdown. Below these elements is a table listing members with columns for 'Name' and 'Activity'.

Name	Activity
 Adrian.Alexandrescu@Academic.Tuiasi.Ro	Not recently active
 Agapi.Vathianaki@Uoc.Gr	Active 5 days, 10 hours ago
 Agnes.Looney@Mtu.Ie	Active 2 weeks, 4 days ago

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
 - See the most recently active member
 - Identify groups with the most members
 - View newly created members
 - List all members in alphabetical order

Support

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

helpdesk@ingenium-university.eu



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