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.

Contents

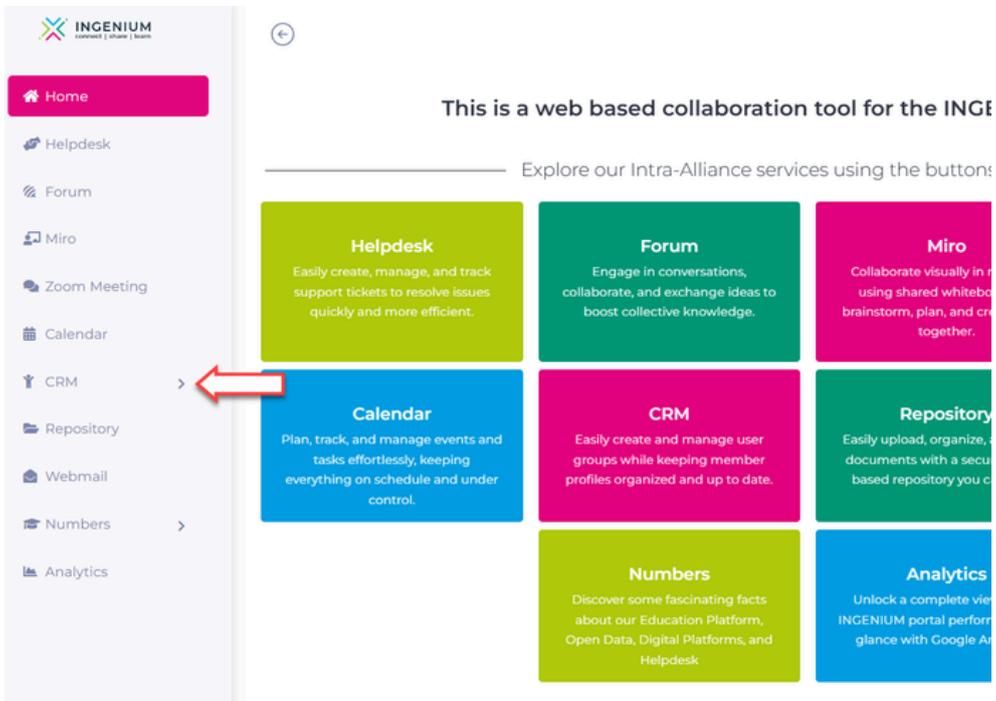![INGENIUM European University]

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.

Sign In

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**.
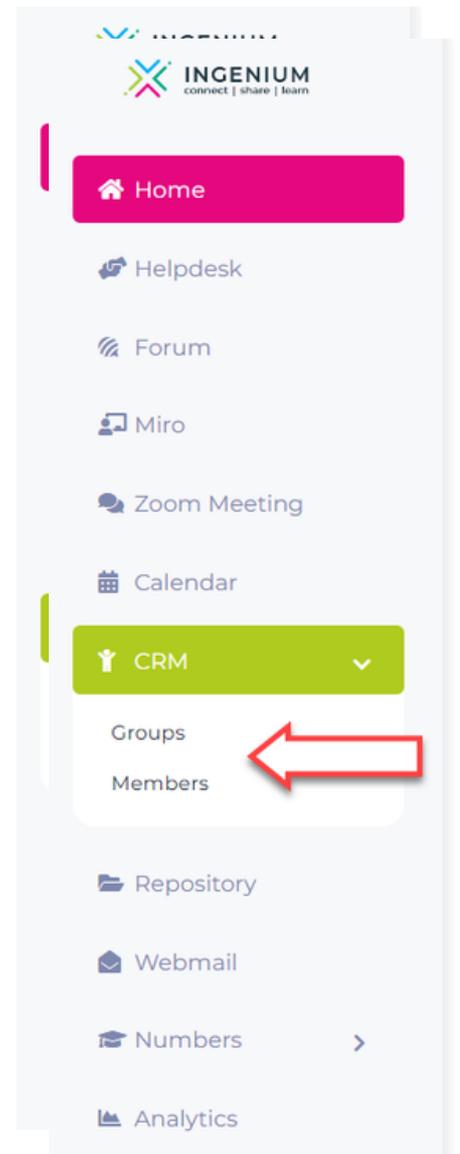
![INGENIUM connect | share | learn]

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

Email Address

Password

Remember Me

Log In

OR

University Of Crete

TUIASI

UdA

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:
   - **Groups**
   - **Members**

Groups
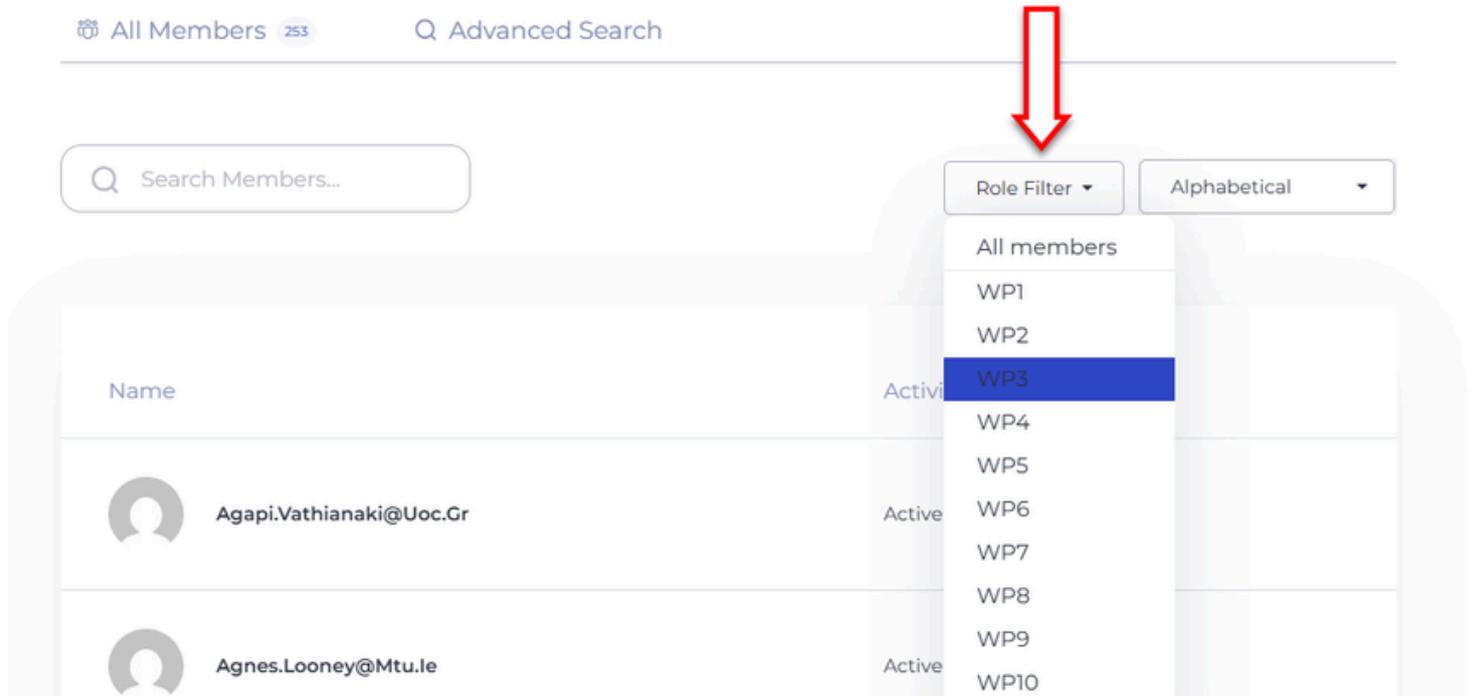
All Groups (10)   My Groups (9)

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

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

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

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

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

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

helpdesk@ingenium-university.eu

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