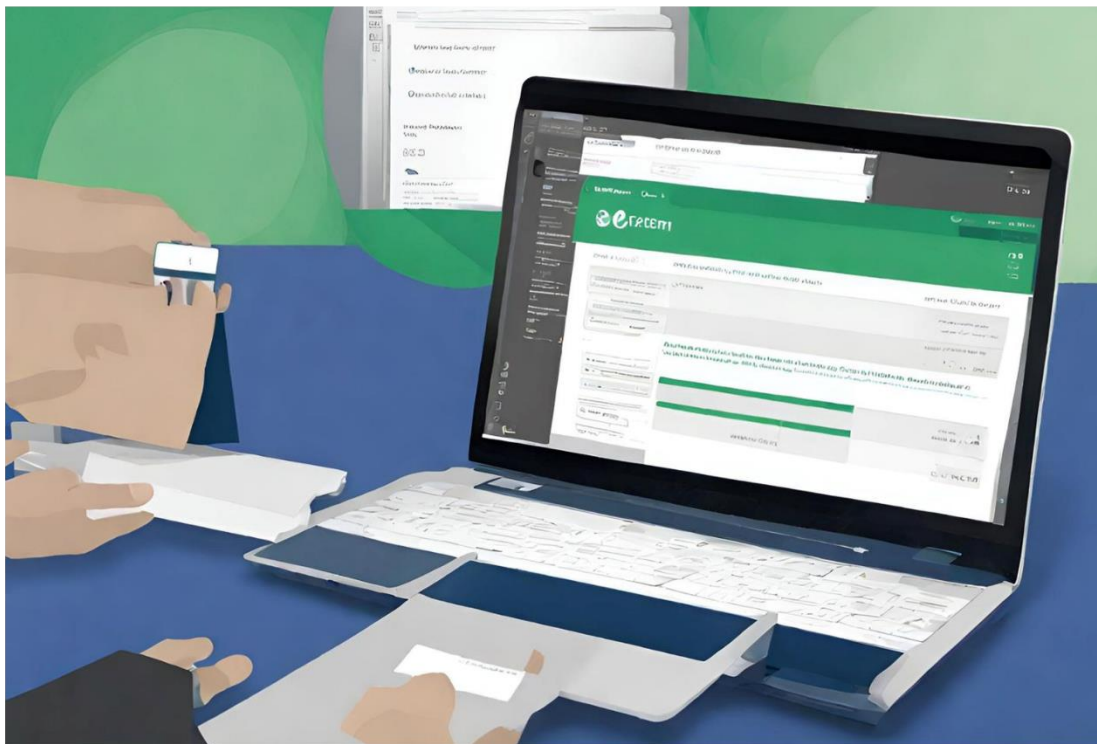# Suite CRM User Manual

for the needs of the 2024 data collection exercise

Clean Hydrogen Joint Undertaking

January 2024

Clean Hydrogen Joint Undertaking

Suite CRM Platform

USER MANUAL

Version 1.0

For support, contact us at:
TRUST@clean-hydrogen.europa.eu

This manual was prepared by Eworx S.A. for the Clean Hydrogen JU in the framework of the public procurement contract CleanHydrogen/OP/Contract 326.

TABLE OF CONTENTS

TABLE OF TABLES

1. Introduction

1.1. Purpose of the Manual

Welcome to the Suite CRM User Manual for the 2024 Data Collection. This guide has been created to assist project coordinators in utilising Suite CRM for the efficient and collaborative collection of project-related data. Suite CRM has been implemented to replace the traditional method of data gathering utilising Excel files (Project Fiches), offering a more streamlined and contemporary approach.

1.2. Target Audience

This manual is specifically designed for project coordinators who will act as users on the Suite CRM platform. As a project coordinator, you will play a vital role in updating and managing the fields related to your assigned projects. The information presented here is tailored to meet the needs of individuals engaged in project management and data collection within the Suite CRM environment.

1.3. System Overview

Suite CRM is a robust Customer Relationship Management (CRM) platform customised to Clean Hydrogen Joint Undertaking's unique needs. In our project-specific instance of Suite CRM, we have focused solely on modules relevant to project management and data collection. Each project coordinator will have access to their own projects, project targets (previous "Quantitative" tab on the excel file of Project Fiches), patents, scientific publications, and synergies. It is important to note that users are restricted to viewing and updating information related only to their assigned projects.

1.4. Suite CRM Terminology and Modules Overview

The modules in Suite CRM have been strategically designed to align with the tabs of the previous Excel files (Project Fiches), simplifying the transition for users and maintaining a sense of familiarity. As you navigate through the Suite CRM platform, you will interact with five distinct modules when updating or adding data:

1. **JU Projects:** This module corresponds to the "General Information" and "Qualitative" tabs of the previous Excel file. Information is now organised into different tabs within the "JU Projects" module for enhanced user convenience.

2. **Project Targets:** This module replaces the "Quantitative" tab of the previous Excel file. Each line from the Excel file is now represented by a single record under "Project Targets."

3. **Publications:** Corresponding to the "Scientific Publications" tab in the previous Excel file, this module organises each line from the Excel file into individual records under "Publications."

4. **Synergies:** This module takes the place of the "Synergies" tab from the previous Excel file. Similar to the other modules, each line from the Excel file is now represented by a single record under "Synergies."

5. **Patents:** The "Patents" tab from the previous Excel file finds its equivalent in this module. Each line in the Excel file is now represented by a single record under "Patents."

Within each project (JU Project), relevant targets, publications, synergies, and patents are displayed as subpanels at the bottom of the page, providing a comprehensive view of associated data. We will explore these subpanels in greater detail in the following sections of this manual.

Before we dive into the specifics of each module, let's familiarise ourselves with some key Suite CRM terminology and the concept of modules.

1.4.1 What are Modules?

In Suite CRM, a module is a self-contained unit that organises and manages specific types of information. Each module is designed to handle a particular aspect of your business processes. For example, the "JU Projects," "Project Targets," "Publications," "Patents," and "Synergies" mentioned earlier are all modules within Suite CRM.

1.4.2 Understanding Suite CRM Terminology

- **Records:** In Suite CRM, a record represents a single entry of data within a module. For instance, a single project, target, publication, patent, or synergy entry is considered a record.

- **Subpanels:** Subpanels are secondary panels located at the bottom of a module's page, displaying related information. For each project (JU Project), you

will find subpanels containing relevant targets, publications, synergies, and patents.

- **Dashboard:** The dashboard is a customisable visual interface that provides a snapshot of essential information.

Understanding these fundamental terms will enhance your navigation and interaction with Suite CRM. As we proceed with the manual, you'll gain a more in-depth understanding of how these concepts apply to the practical use of the platform.

1.5. Access Limitations

- Users can only view and edit information related to their own projects, ensuring data confidentiality and integrity.
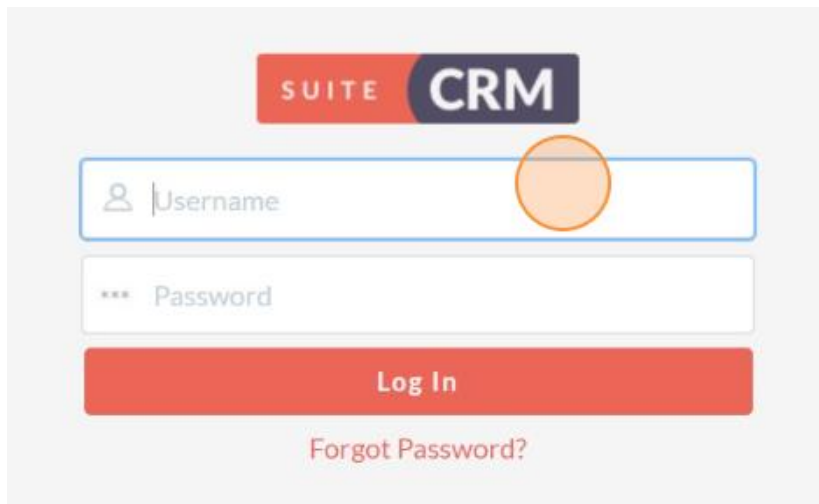- The platform focuses exclusively on project-related modules, eliminating unnecessary complexity.

In the following sections, we will guide you through the essential functionalities and features of Suite CRM, empowering you to efficiently manage your project data within this integrated and user-friendly environment.

2. Getting Started
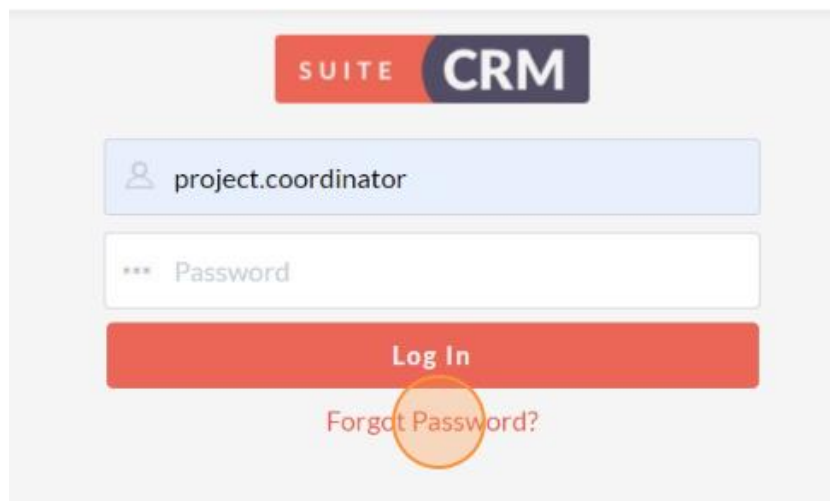
2.1. Logging In

To commence your journey with Suite CRM, start by accessing the login page https://crm.clean-hydrogen.europa.eu/#/Login using your designated web browser. On your first attempt, you will have to setup your own password. In order to do so:

1. Enter the username you were given (if you already have a TRUST account, it should be the same username).

2. Click on "Forgot Password".
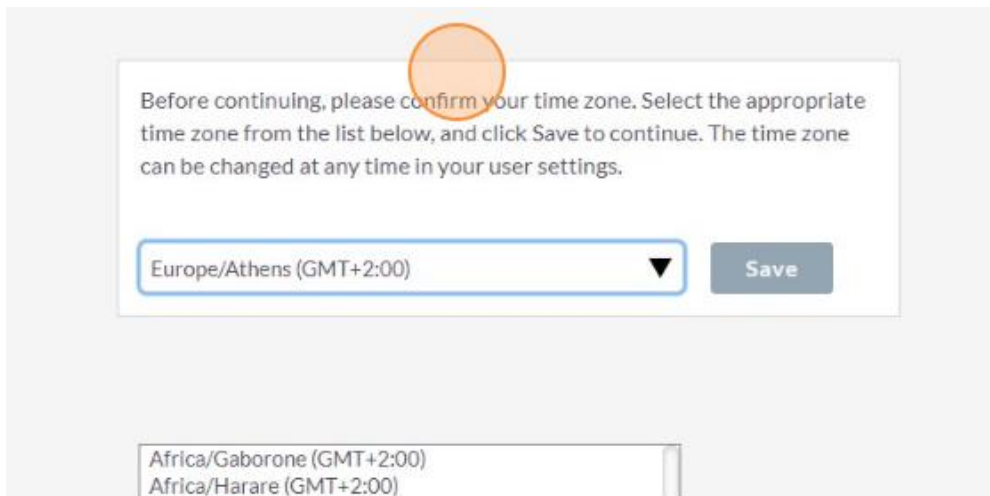
3. Enter your email address and click on "Reset Password".

4.   You will receive an email (*if not, please check your spam folder*) that will allow you to create a new password.
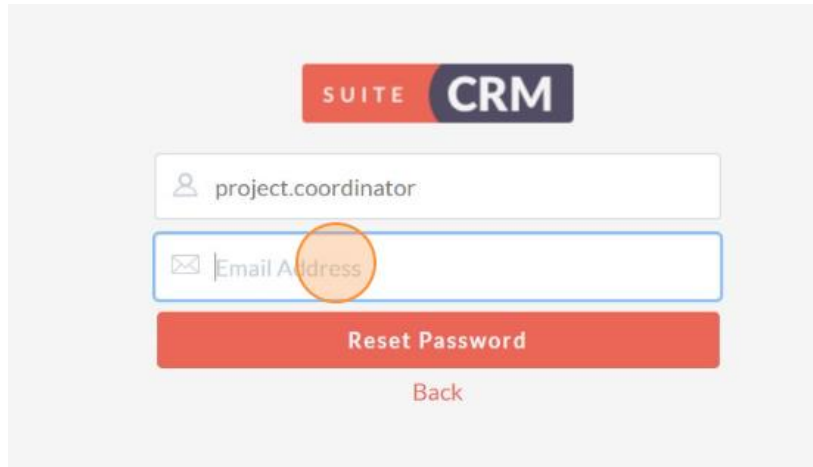
After successfully logging in, the system will ask you to confirm your time zone. Please select the time zone that applies to you from the drop-down list and click "Save".

Once the time zone is set, you will be directed to your dashboard.

Important Note: You will see an error message at the top of the screen:
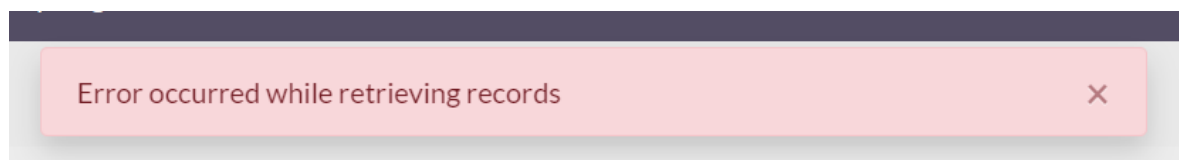
This is a bug of the system that we weren't able to fix yet, so **please ignore it**. It may reappear as you are navigating through the platform or working on your projects, but

you will be able to close it every time by clicking on the "X" of the pop-up window. Apologies for this inconvenience.

2.2. Dashboard Overview

The dashboard serves as your central hub for monitoring and managing project activities. By default, you can see the "Activity Stream" dashlet, which will not be used in this data collection process, so feel free to remove it by simply clicking the "X" button on the top right corner of the dashlet.

Suite CRM empowers you to personalise your dashboard to suit your preferences and specific project management needs. <u>Adding dashlets is **not mandatory**, and you can always use the top menu to navigate through the modules.</u> To add dashlets related to the modules we discussed earlier (JU Projects, Project Targets, Publications, Patents, and Synergies), follow these steps:

1. Click on "Actions" at the top left corner, under the main menu. Then select the "Add Dashlets" option.

2. Under the "Modules" tab, select which modules you want to see as dashlets in your dashboard (e.g., My JU Projects, My Project Targets, My Publications, etc.).
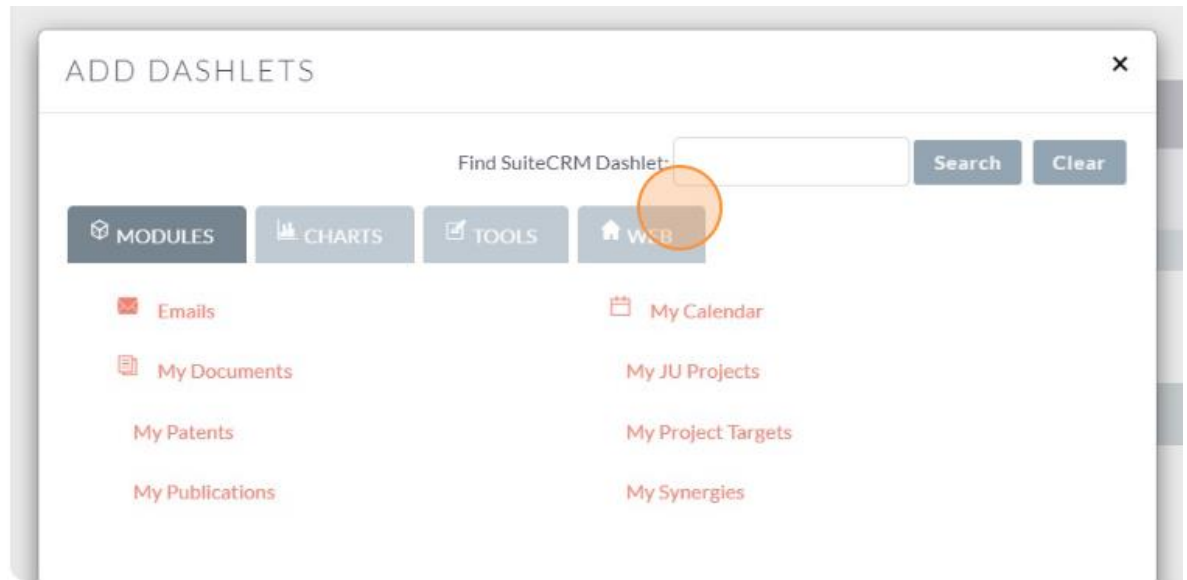
3. Rearrange Dashlets:

- Click and drag dashlets to rearrange them on your dashboard. Prioritise the placement of dashlets to align with the information you need at a glance.

4. Remove Unnecessary Dashlets:

- If you added dashlets that you no longer need, click the "X" button on the top right corner of the dashlet to remove it.

By customising your dashboard with relevant module dashlets, you can streamline your workflow and access project-specific information more efficiently. Experiment with different configurations to find the layout that best suits you.

2.3. Navigation

Navigating Suite CRM is designed to be intuitive, offering multiple ways to access the modules and information you need. **The top navigation menu is your primary tool** for moving through the various sections of the platform. Here's a brief guide on using the navigation menu:

1. Top Navigation Menu:

Located at the top of the Suite CRM interface, the navigation menu provides direct access to different modules. Click on the relevant module to open its list of records. By clicking each record, you can view or update project-related information.
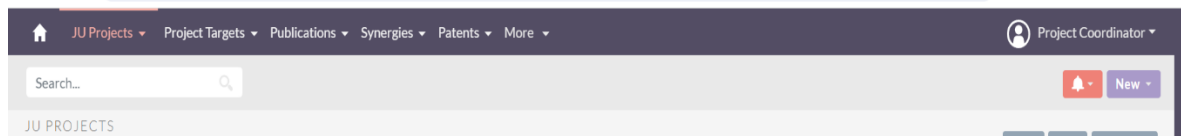
2. Module Tabs:

Once you enter a module, you'll find tabs that organise information within that module. For example, in the "JU Projects" module, you will find different tabs for "Project Overview", "Project Management", "Project Classification", etc:
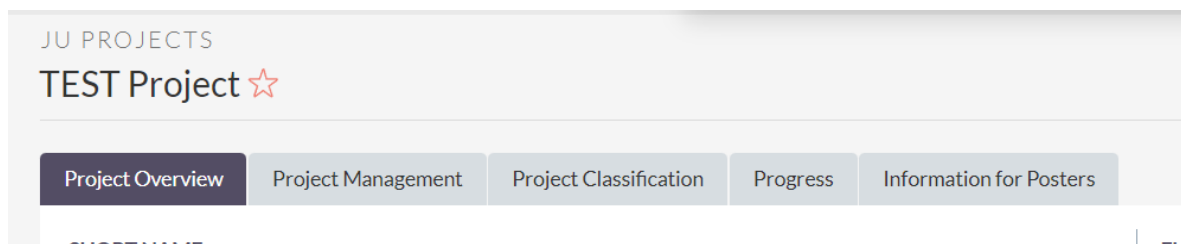
3. Subpanels:

As mentioned earlier, relevant information such as targets, publications, synergies, and patents associated with each project is displayed as subpanels at the bottom of the page.

You can select which subpanels you want to see below your project by selecting or unselecting them from the relevant section:

When selecting a subpanel for view, the box turns grey. Unselected subpanels are shown as white boxes.

4. **Quick Search:**

Please note that **the search functionality is currently disabled**. We apologise for any inconvenience. You can still navigate through modules using the top menu and explore records within each module.

Whether you prefer using the dashboard with customised dashlets or navigating directly through the top menu, Suite CRM offers flexibility to accommodate your preferred workflow. In the next sections, we will delve deeper into each module, providing step-by-step guidance on how to effectively use Suite CRM for your project data collection needs.

3. "JU Projects" Module

The "JU Projects" module in Suite CRM serves as the central hub for managing and updating information related to your projects. In this section, we will guide you through the essential tasks of viewing and editing projects within this module.

3.1. Viewing Your JU Projects

To access your existing projects within the "JU Projects" module, follow these steps:

1. **Navigate to the "JU Projects" Module**:

Use the top navigation menu to locate and click on the "JU Projects" module. Alternatively, you may already see and access your projects if you have added the relevant dashlet on your dashboard as described in section 2.2.
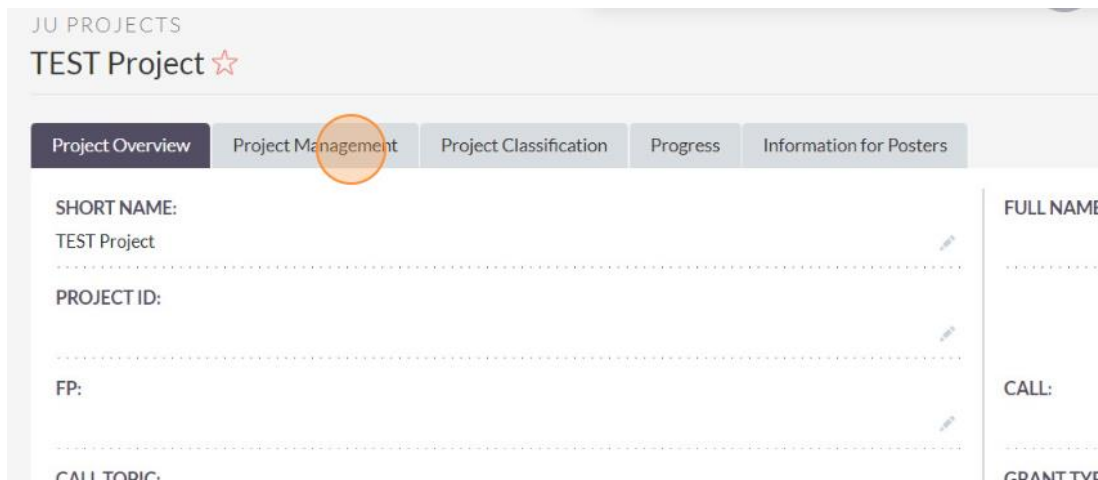
2. **View Your Projects:**

You will see a list of projects assigned to you. Click on the name of a project to view its details.
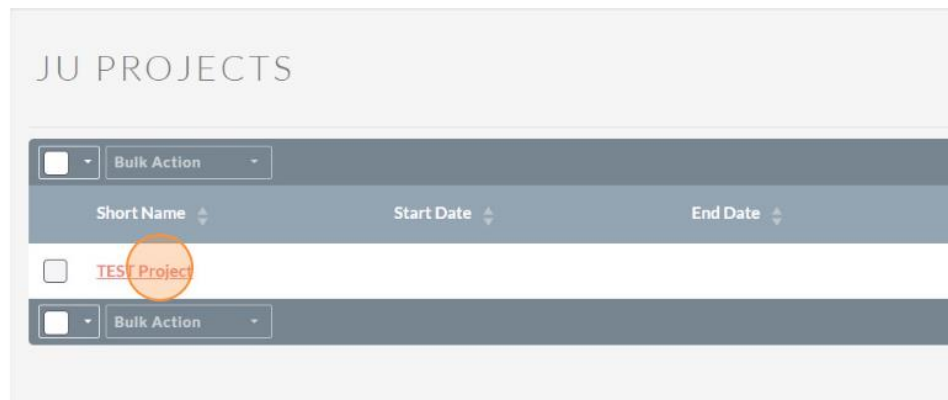
3. **Explore Project Information:**

Within the project details page, you can explore the various tabs and sections to view information related to the project.
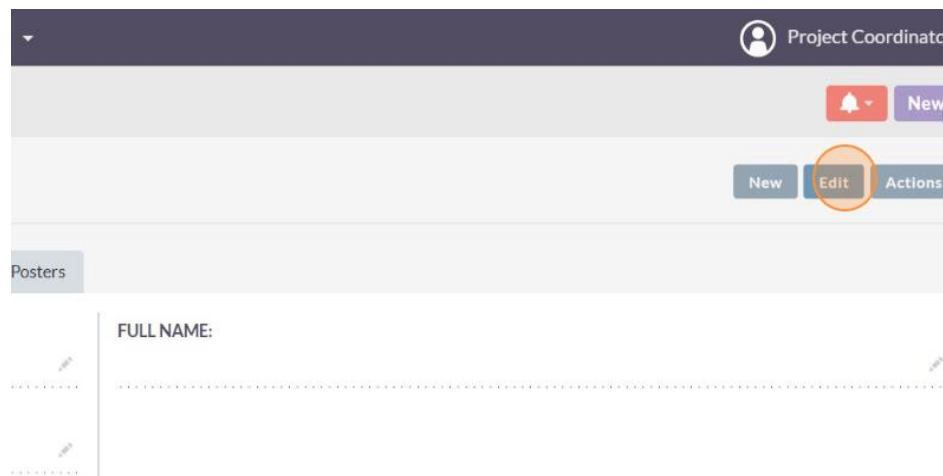
3.2.   Editing Your JU Project Information

To update or edit information within an existing JU Project assigned to you, follow these steps:

1. From your list of projects, select the one you want to edit, as described in section 3.2.

2. Access the Edit Form:

Within the project details page, click on the "Edit" button on the top right corner:
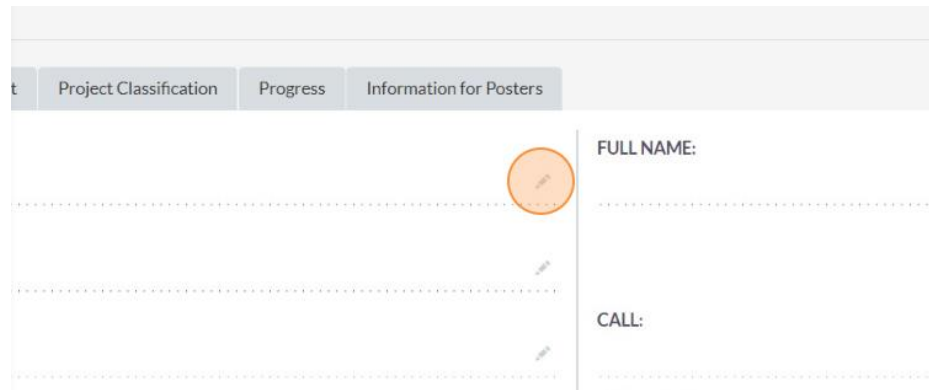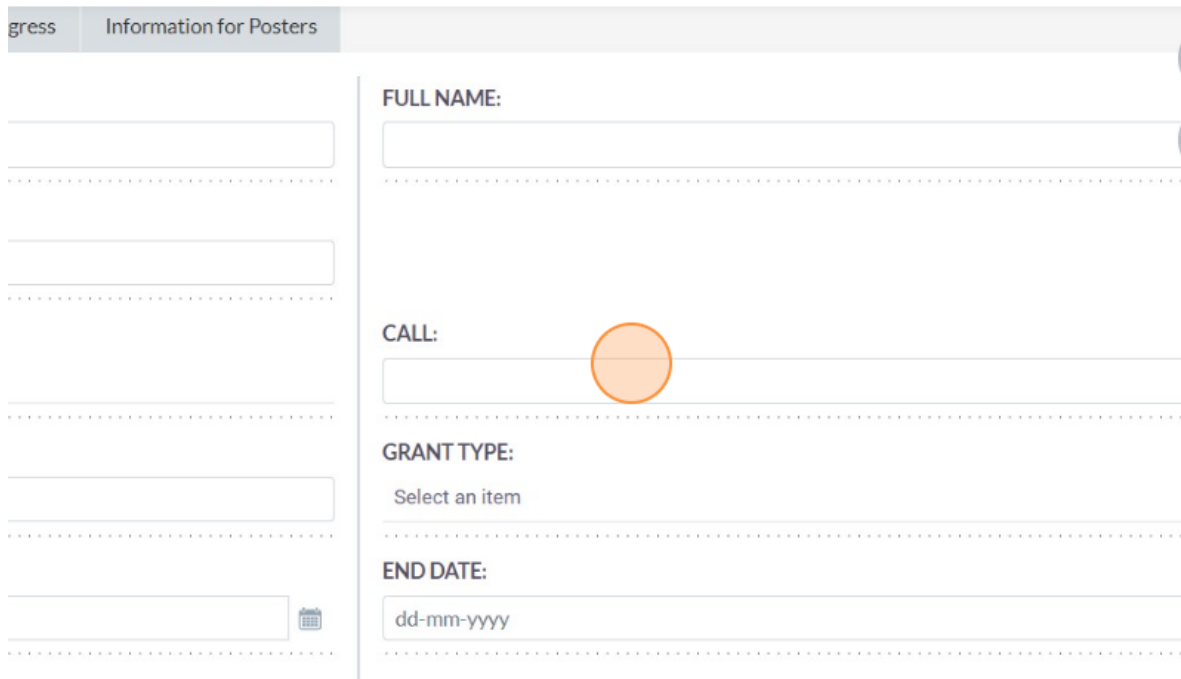
Alternatively, you can click on the "pen icon" next to the filed you want to edit:

3. Update Project Information:
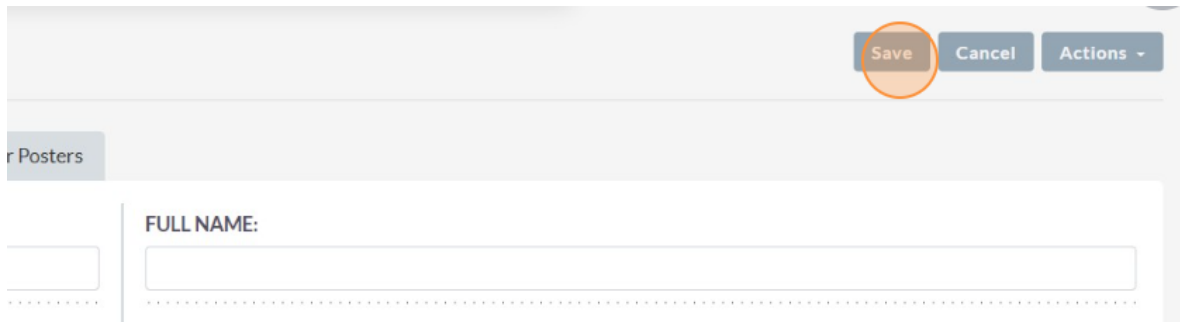
Make the necessary changes to the project information within the edit form.

Note: Some fields are mandatory. The system will inform you in case you forget to include one of those. Similarly, the system will inform you in case you give a false/not acceptable value in a field (e.g. wrong date format).

4. Save the Changes:

After making updates, click the "Save" button on the top right corner to save the changes to the project:

3.3. Fields of the "JU Projects" module

The following table contains the fields (information) you can find within the "JU Projects" module.

Table 1: Fields included in the "JU Projects" module.

Field	Tab	Field Type	Comments
Short Name	Project Overview	Short Text	
Full Name	Project Overview	Short Text	
Project ID	Project Overview	Short Text	
FP	Project Overview	Drop-down List	
Call	Project Overview	Short Text	
Call Topic	Project Overview	Short Text	
Grant Type	Project Overview	Drop-down List	
Start Date	Project Overview	Date	Date format: dd-mm-yyyy Alternatively, click the "calendar icon" and select the date from there.
End Date	Project Overview	Date	Date format: dd-mm-yyyy Alternatively, click the "calendar icon" and select the date from there.
Project Status	Project Overview	Drop-down List	
Project Total Costs	Project Overview	Currency	Select EUR under "Currency" Number formatting example: 5,000,000.50
Clean H2 Max. Contribution	Project Overview	Currency	Select EUR under "Currency" Number formatting example: 5,000,000.50

Abstract	Project Overview	Long Text	
Website	Project Overview	URL	Only one URL should be included.
CORDIS	Project Overview	URL	Only one URL should be included.
Project Officer	Project Management	Related	This field will only take values of existing users. **Please do not make any changes on this field.**
PC Username	Project Management	Related	This field should include your username. **Please do not make any changes on this field.**
Project Coordinator	Project Management	Related	This field should include your full name. **Please do not make any changes on this field. If you need to change this value for some reason, contact your PO.**
Coordinator Gender	Project Management	Drop-down List	
Coordinator Email	Project Management	URL	This field should include your valid email address.
Coordinating Beneficiary	Project Management	Short Text	
Coordinator Country	Project Management	Drop-down List	If you don't see your country please select "Other" and contact your PO in order to add your country on the list.
Other Beneficiaries	Project Management	Long Text	
SRIA Pillar	Project Classification	Drop-down List	
Is the project related to other SRIA pillars?	Project Classification	Drop-down List	Fill this info only if relevant.
Other related pillars	Project Classification	Drop-down List	Fill this info only if relevant.
Research Area	Project Classification	Drop-down List	
Application	Project Classification	Short Text	
Technology	Project Classification	Drop-down List	
Additional info (for classification)	Project Classification	Short Text	
TLR Start	Project Classification	Drop-down List	
TLR Target	Project Classification	Drop-down List	

TLR Achieved	Project Classification	Drop-down List	
Project context and general objectives	Progress	Long Text	
Work performed and main achievements and results	Progress	Long Text	
Progress beyond state of the art, expected results until end of the projects and potential impacts	Progress	Long Text	
Foreseen risks that materialised	Progress	Long Text	
Unforeseen risks	Progress	Long Text	
Major difficulties	Progress	Long Text	
Is this information confidential?	Progress	Checkbox	There are three (3) of these checkboxes, each one next to the sensitive information is referring to (Foreseen risks, Unforeseen risks and Major difficulties). **Checking any of those boxes means that the information is confidential.[1] This will need to be validated with your project officer. Please note that by no means will the relevant text be published anywhere as such or be shared with the public.**
Sustainability and circularity aspects managed / plan to	Progress	Long Text	

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[1] If the boxes remain unchecked, a useful point related to the progress of the project may be reported e.g. in the Programme Review Report if deemed important, for example reporting the difficulty of a demo project to source customers due to high cost or poor routes to market. Alternatively, this information could be used to create statistics of projects where similar risks materialized, for example related to permitting, hydrogen prices, supply chain, etc.

manage within the project			
Integration of project results into RCS (references)	Progress	Long Text	
Contribution to new/additional activities and fields not originally foreseen or targeted	Progress	Long Text	
Is an environmental LCA planned to be delivered by the project or has already been delivered? If yes, which is the relevant deliverable?	Progress	Long Text	
D&E plan last update (mm/yyyy)	Progress	Short Text	Use only the necessary information: month & year of the latest update (mm/yyyy).
Link/URL of database with project results	Progress	URL	Only one URL should be included.
Project and general objectives (for posters)	Information for Posters	Long Text	This information will be included on your project poster.
Non-quantitative objectives	Information for Posters	Long Text	This information will be included on your project poster.
Progress, main achievements and results (for posters)	Information for Posters	Long Text	This information will be included on your project poster.
Future steps and plans	Information for Posters	Long Text	This information will be included on your project poster.

3.4.   Not Seeing Your Projects?

If you do not see your projects listed or have any concerns, please contact TRUST@clean-hydrogen.europa.eu immediately for assistance, using as subject for your email the following:

 [CHJU Suite CRM] *Any other info you wish to share*.

Our team is ready to help resolve any issues and ensure you have the necessary access to your projects.

4. Other Modules

There are four (4) other main modules you will come across in the platform that you will need to either update or add new data:

1. Project Targets

2. Publications

3. Synergies

4. Patents

To view the existing records of each of the above modules, you can simply click the relative module on the main menu.

Filtering options:

In the list view of each module (upon clicking the module from the top menu), you can find a "Filter" option on the top right corner.

Filtering options are tailored for each module, with the "Project" filter appearing to all modules. Below an example of the "Project Targets" filtering options:
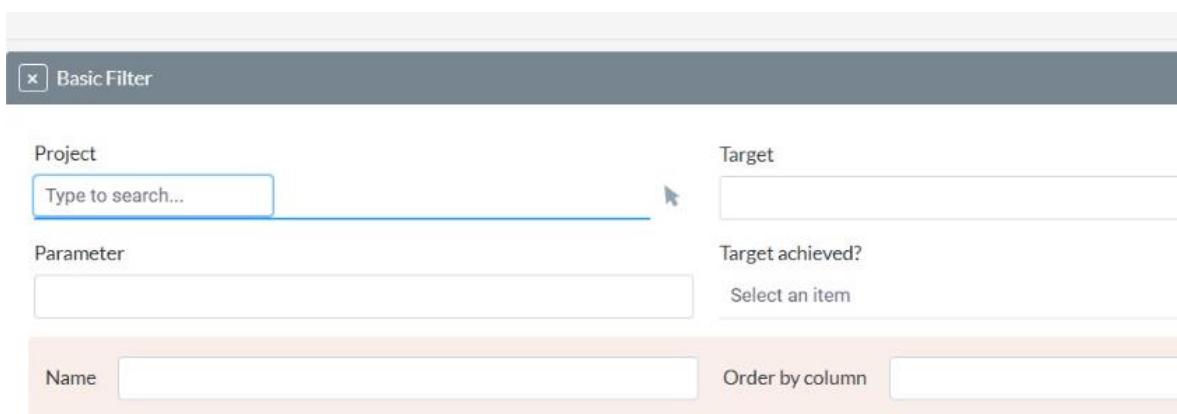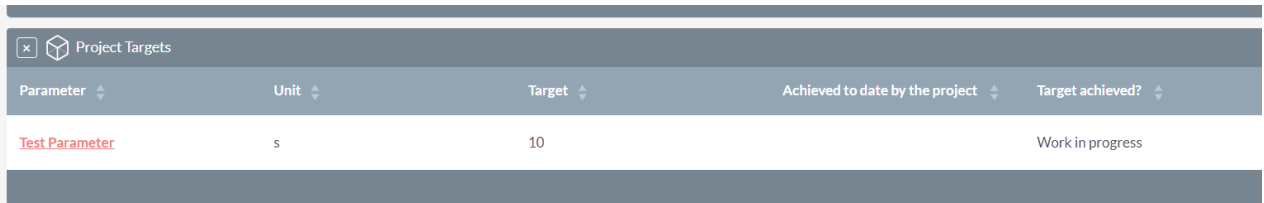
4.1. Editing records

To edit a record of the above-mentioned modules, follow these steps:

1. <u>Locate the record you want to edit.</u>
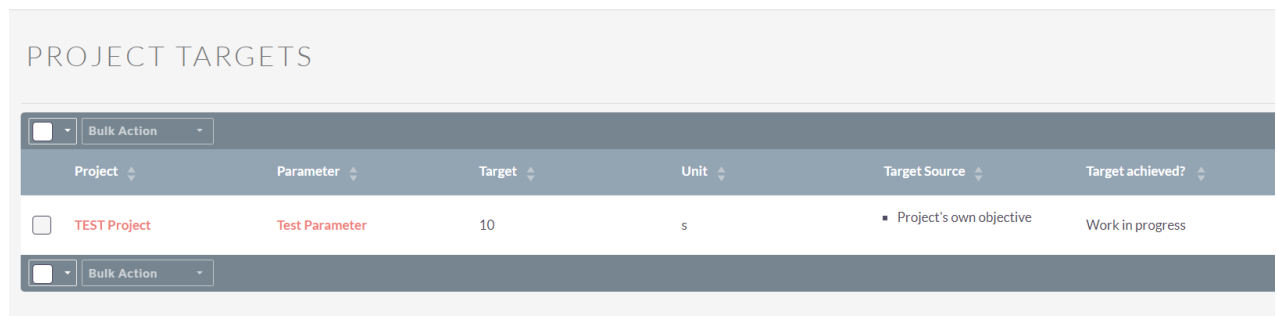
You can locate your record from:

i. the relative subpanel on the bottom of your project page;

☒ ⬡ Project Targets				
Parameter ⇅	Unit ⇅	Target ⇅	Achieved to date by the project ⇅	Target achieved? ⇅
Test Parameter	s	10		Work in progress

ii. the list of records of the same modules that appears upon clicking the module.

PROJECT TARGETS

☐ ▾ Bulk Action ▾					
Project ⇅	Parameter ⇅	Target ⇅	Unit ⇅	Target Source ⇅	Target achieved? ⇅
TEST Project	Test Parameter	10	s	▪ Project's own objective	Work in progress

☐ ▾ Bulk Action ▾

Once you locate the record you wish to update, **click on its name** to open it.

> The names of each module are found, respectively, under those fields:
> - **Project Targets:** Name of Target = **Parameter**
> - **Publication:** Name of Publication = **Title**
> - **Synergies:** Name of Synergy = **Synergy Name**
> - **Patents:** Name of the Patent = **Official Title of Application**

2. <u>Edit the record.</u>

You can edit the record by:

i. clicking the "Edit" button in the top right corner;

ii. clicking the "pen icon" next to the field you wish to update.
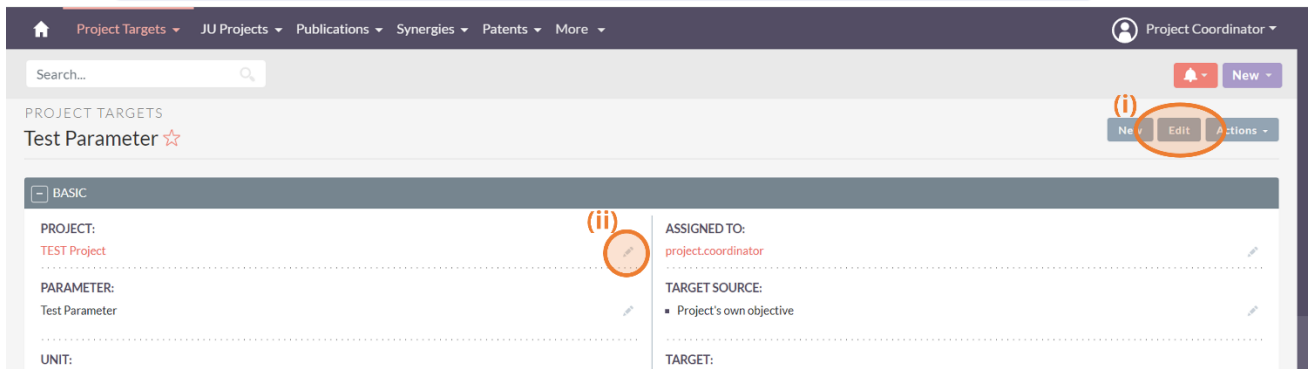
Important Note: In order for you to be able to view records, those records are assigned to you. That's why you will come across your username in each record you will open. Please, don't update the fields "Assigned to" to any of the records, because you will no longer be able to view them.
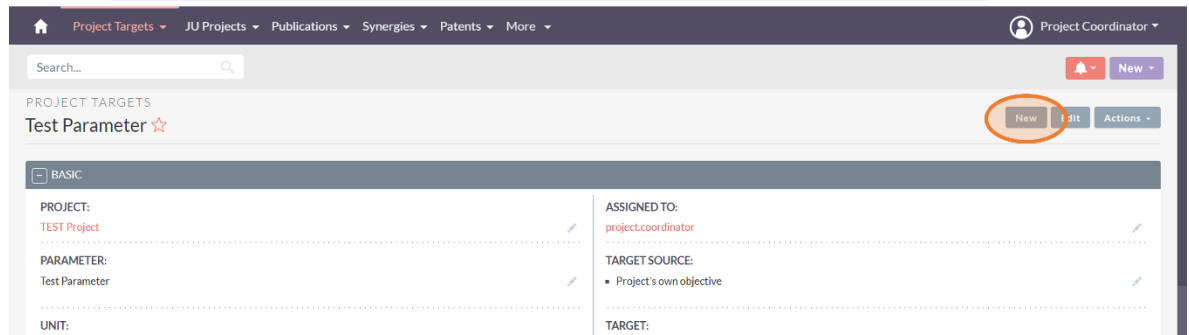
4.2. Adding New Records

To add a new record on any of the above-mentioned modules, follow these steps:

1. Click on the module you want to add a record to from the main menu.
2. On the top right corner, click on the "New" button.
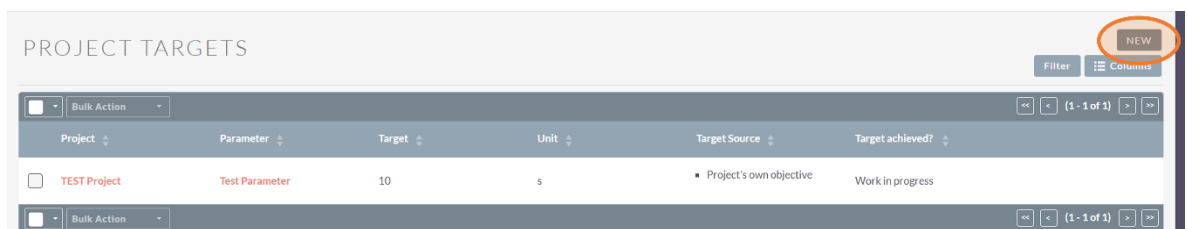
The "New" button is also available on the record view (while you are looking on another record).

3. <u>Complete the information within the module's form.</u>

Fill in any required fields such as target name, target type, and target value. Provide additional details to ensure accurate tracking of project milestones.

4. <u>Save the record.</u>

Once you've entered all the necessary information, click the "Save" button on the top right corner to create the new record.

IMPORTANT INFORMATION

As mentioned before, for you to able to see your records, you are assigned to them within the system. When creating new records, you should be extra careful of:

! Do not edit the field "Assigned to". The system sets by default the creator of the record – therefore yourself – as assignee; no need for any extra actions.

! Always complete the "Project" field. If you don't, your record won't be connected to any project.

Congratulations! You have successfully added a new record on the platform.

4.3. Fields of the "Project Targets" module

Table 2: Fields included in the "Project Targets" module.

Field	Tab	Field Type	Comments
Project	Basic	Relative	**Always fill in this field or else your record will not be connected to your project.** When starting to type your project name (short name), suggestions will appear for you to select the correct project.
Assigned To	Basic	Relative	This field should include your username. **Please do not make any changes on this field.**
Parameter	Basic	Short Text	Mandatory field. This will be the name of your target record.
Target Source	Basic	Multiple Selection	
Unit	Basic	Short Text	Mandatory field.
Target	Basic	Short Text	Mandatory field.
Target Achieved?	Basic	Drop-down List	Mandatory field.
Achieved to date by the project	Basic	Short Text	
SOA result achieved to date (by others)	Basic	Short Text	
Year for reported SOA result	Basic	Short Text	
Full reference for SOA (please provide at least a name for a group / project)	Basic	Long Text	
Comments	Basic	Long Text	
If your achieved values are inferior to the MAWP/AWP targets, please provide an explanation.	Basic	Long Text	

If your achieved values are inferior to the international SOA, please provide an explanation.	Basic	Long Text	
Is the target reported in trust?	Basic	Drop-down List	
Is the target reported in deliverables?	Basic	Drop-down List	
Related deliverables	Basic	Long Text	

4.4. Fields of the "Publications" module

Table 3: Fields included in the "Publications" module.

Field	Tab	Field Type	Comments
Project	Basic	Relative	**Always fill in this field or else your record will not be connected to your project.** When starting to type your project name (short name), suggestions will appear for you to select the correct project.
Assigned To	Basic	Relative	This field should include your username. **Please do not make any changes on this field.**
Title	Basic	Short Text	Mandatory field. This will be the name of your publication record.
Authors	Basic	Short Text	
Title of the journal/proc./book	Basic	Short Text	
Number, date or freq. of the journal/proc./book	Basic	Short Text	
Type	Basic	Drop-down List	
Year	Basic	Short Text	
Is peer-reviewed?	Basic	Checkbox	Check if yes.
Is open access?	Basic	Checkbox	Check if yes.
Type of open access	Basic	Drop-down List	

DOI	Basic	URL	Only one URL should be included.
Repository link	Basic	URL	Only one URL should be included.
OPENair link	Basic	URL	Only one URL should be included.
Open Research Europe link	Basic	URL	Only one URL should be included.
Comments by the project	Basic	Long Text	
Comments by the project officer	Basic	Long Text	**This field is to be completed from the PO, if needed.**

4.5. Fields of the "Synergies" module

Table 4: Fields included in the "Synergies" module.

Field	Tab	Field Type	Comments
Project	Basic	Relative	**Always fill in this field or else your record will not be connected to your project.** When starting to type your project name (short name), suggestions will appear for you to select the correct project.
Assigned To	Basic	Relative	This field should include your username. **Please do not make any changes on this field.**
Type of Synergy	Basic	Short Text	Mandatory field.
Synergy Name	Basic	Short Text	Mandatory field. This will be the name of your synergy record.
Description	Basic	Long Text	
EU Programme	Additional information required (if relevant)	Short Text	Fill only if relevant.
Budget of complementary funding (in million EUR)	Additional information required (if relevant)	Currency	Fill only if relevant.

4.6.   Fields of the "Patents" module

**Table 5:** Fields included in the "Patents" module.

Field	Tab	Field Type	Comments
Project	Basic	Relative	**Always fill in this field or else your record will not be connected to your project.** When starting to type your project name (short name), suggestions will appear for you to select the correct project.
Assigned To	Basic	Relative	This field should include your username. **Please do not make any changes on this field.**
Official title of application	Basic	Short Text	Mandatory field. This will be the name of your patent record.
Patent Office	Basic	Short Text	
Applicant name	Basic	Short Text	
Patent application PIC	Basic	Short Text	
Application ID	Basic	Short Text	
Date of the application	Basic	Date	Date format: dd-mm-yyyy Alternatively, click the "calendar icon" and select the date from there.
Status	Basic	Drop-down List	
IPR protection awarded	Basic	Checkbox	Check if yes.
Patent award prefix	Basic	Short Text	
Award publication number	Basic	Short Text	

5. Best Practices and Tips

In this chapter, we present essential best practices to help you navigate and use Suite CRM efficiently. Additionally, you'll find valuable tips addressing common challenges and enhancing your overall experience with the platform.

5.1. Troubleshooting Bulk Actions (Export)

Issue: Sometimes exporting data through the "Bulk Action" button on the list views of the modules seems to not function. Try refreshing the page and attempt the action again. This can resolve temporary glitches in the system.
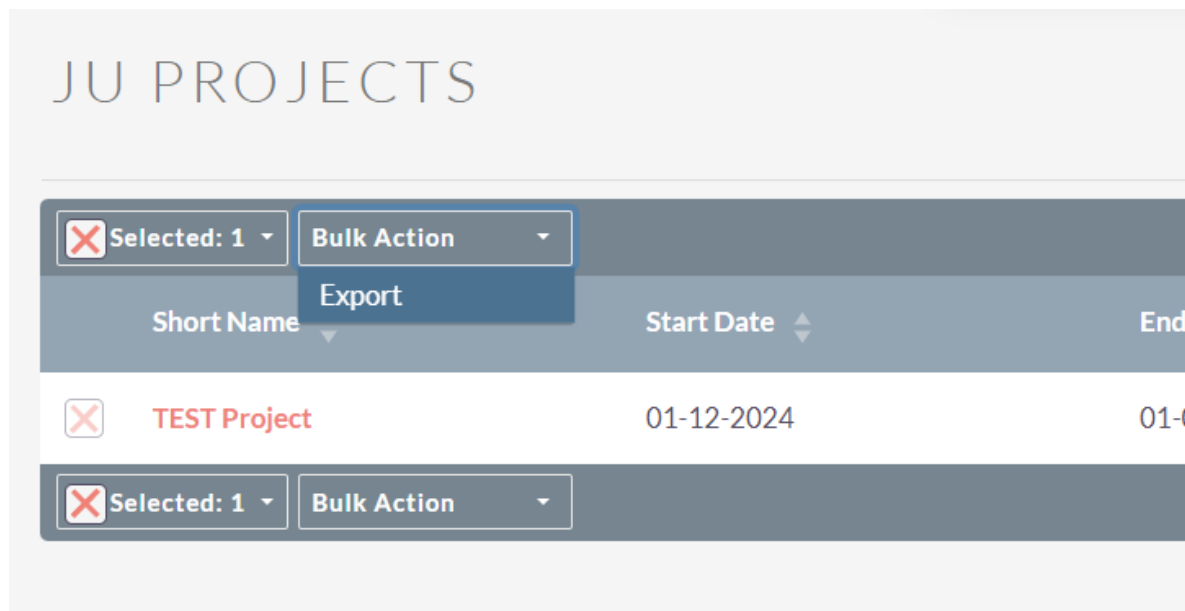
5.2. Browser Compatibility

Tip: Ensure you are using a compatible browser for the best user experience. Suite CRM is optimally supported on modern browsers like Google Chrome, Mozilla Firefox, Safari or Microsoft Edge.

5.3. Clearing Browser Cache

Tip: If you notice any unusual behavior or if the platform seems sluggish, consider clearing your browser cache. This can help eliminate cached data that might be causing issues.

5.4.   Session Timeout

Tip: Suite CRM sessions have a timeout limit for security reasons. If you're inactive for an extended period, you may need to log in again. Save your work regularly to avoid data loss.

5.5.   Check Internet Connection

Tip: Ensure a stable internet connection for optimal performance. Unstable connections can lead to delays or interruptions in data processing.

5.6.   Contact Support for Technical Issues

Tip: If you encounter persistent technical issues or errors, contact our support team at TRUST@clean-hydrogen.europa.eu. Provide detailed information and screenshots, if feasible, about the problem for a faster resolution.

5.7.   Customising Dashboards

Tip: Experiment with customising your dashboard to suit your preferences. Add relevant dashlets and rearrange them to streamline your workflow.

5.8.   Regularly Save Your Work

Tip: Whether you're adding new records or editing existing ones, save your work regularly to avoid losing changes, especially during longer editing sessions.

5.9.   Avoid Creating New JU Projects

Important Tip: While users are technically allowed to create new JU projects, we strongly advise against it. All existing projects and records have been meticulously entered into the platform. Creating new projects may lead to redundancy and inconsistencies. Use the platform primarily to update and manage existing projects assigned to you. If you believe a new project is necessary, please contact your Project Officer for guidance and coordination.