Crowdhelix
COLLABORATION INTELLIGENCE

HOW TO POST AN OPPORTUNITY - ALL YOU NEED TO KNOW

OPPORTUNITIES ARE OPEN TO COLLABORATORS WITH RELEVANT EXPERTISE FROM:

- Any country (international).

- Any type of **Organisation** (intersectoral).

- Any discipline (interdisciplinary).

- An **Opportunity**, depending on its visibility settings, can be viewed by users representing organisations in the Crowdhelix Network, the **Extended Network**, or the general public.

- Crowdhelix users are emailed Opportunity notifications based on their notification preferences.

- The Crowdhelix team facilitates the process of finding prospective collaborators by selecting and directly contacting individuals from across the Crowdhelix Network and beyond.

- Opportunities can be responded to using the **Comment** or **Direct Message** features, and somecan be shared with **Trusted Collaborators** outside the Crowdhelix Network.

⚠ If you represent an organisation that is not currently a member of the Crowdhelix Network, you will not be able to post an opportunity on the Crowdhelix platform. Ifyou would like to post an opportunity, and gain access to the full features of Crowdhelix, please contact the team to discuss options. ⚠

• Post an **Opportunity** from the main page of the platform by clicking Opportunities in the navigation bar at the top of the page. You can do this when you are logged in to Crowdhelix as a representative of an **Organisation** that is a member of the **Crowdhelix Network.**

• Click **New Post** in the top right corner of the page.

• If you have already started work on an opportunity, clicking **New Post** will return you to your draft post to continue working on it.

• If you do not wish to continue working on your draft opportunity, click **Discard.** This action cannot be undone.

• The right hand side of the screen will update to show a live preview of the draft opportunity you are working on.

OPPORTUNITY TYPES

FUTURE AND EXISTING PROJECTS

1 When you create an Opportunity, you can specify whether it relates to a future project or a funding proposal, or an existing project.

2 If you click **Future project**, you will have the option to target a specific **Horizon Europe** funding call, select the roles you would be willing to take in the collaboration, and specify the expertise you're seeking from potential collaborators.

3 If you click **Existing project**, you can select the type of collaborator you'reseeking, as well as their expertise. You can also add details of the existing project, including its website (if any) and its Horizon 2020/Horizon Europe Grant Agreement number (if relevant).

FUTURE AND EXISTING PROJECTS

4 Next, select the **Organisation** you want your opportunity to be associated with by clicking your **chosen organisation's name** on the list. Your organisation's name will show on the Opportunity and on your organisation's profile page. Your organisation's **Leader** and **Administrators** can view, and if necessary remove, your Opportunity using the organisation's settings page.

GROUP

5 If you are a member of a **Group** under your selected organisation, you can associate your Opportunity by clicking **your chosen group's name** on the list. Your group's name will be displayed on the Opportunity, and it will appear on your organisation's profile page. Your group's **Leader** and **Administrators** will also be able to view, and if necessary remove, your Opportunity using the group's settings page.

HELIXES

6 You can choose between one and three **Helix** communities to post youropportunity within. The opportunity will appear on the detail page for all of the Helixes you have chosen, and your selection will also influence which users receive an email notification of your opportunity. Click **+ Add Helix** to begin the process.

Select between one and three Helixes from the list by clicking **each Helix name.** As you select, the system will also recommend additional Helixes that may be relevant to your opportunity.

When you have finished selecting your Helixes, click **Done** to save your choices.

TITLES

7 Type in a title for your opportunity that will make it as easy as possible for other Crowdhelix users to understand the type of collaborator you are seeking, and the type of collaboration you are hoping to initiate.

COLLABORATOR ROLES (FUTURE PROJECT/PROPOSAL ONLY)

8 To make it clear to other users how you wish to participate in a future project or funding proposal, you can choose to indicate the roles you would be willing to take by clicking any of the role types that apply:

- Coordinator;
- Work Package Leader;
- Consortium Partner;
- Individual Expert.

COLLABORATOR ROLES (EXISTING PROJECT ONLY)

9

If your opportunity relates to an existing project, you can choose up to three options from a longer list of various types of collaborator that you may be seeking. If you can't find an exact match, choose the closest option available, and the Crowdhelix team will add a new entry to the list as part of the approval process.

EXPERTISE SOUGHT

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Next, you can specify the types of expertise that would help you target the opportunity you are posting. This step is important because it allows other users to understand whether their expertise would be a suitable match for your collaboration opportunity.

To add a keyword, begin typing it in the box. A list of matching keywords that already appear in the Crowdhelix database appears as you type. If you can see your intended keyword in the list, you can add it to the profile by clicking the keyword, or by pressing enter if it appears at the top of the list. If your intended keyword does not appear, you can instead press **enter** once you have finished typing it.

PROJECT DETAILS (EXISTING PROJECT)

If you are posting an opportunity relating to a project that is already being implemented, you can choose to add details of it to your opportunity. This will allow other users to click a link on your opportunity and view the project's website (if it has one), or its page on the EU's 'CORDIS' database of funded projects (if it does not, and the project is funded by Horizon 2020 or **Horizon Europe**).

To add a project to your opportunity, click the box **Select a project**, and then begin typing its short name or acronym. If it appears in the list, click the **project's name** to add it to your opportunity.

If the project does not appear on the list, click **Create a new one** to add it to the Crowdhelix project database. Once created it will be automatically added to your opportunity. In the box that appears you can add:

Click **Create** to create the new project and add it to your opportunity.

If the project you add to your opportunity has a Horizon 2020 or Horizon Europe Grant Agreement number, a funding acknowledgement statement and EU flag will automatically be added to the opportunity, and will be visible on the platform as well as on all instant email notifications sent to other users.

DESCRIPTION

The large box labelled "Describe your collaboration opportunity" is the most important part of creating a successful collaboration opportunity on Crowdhelix. By **typing into this box** you can provide full details of your opportunity, and the type of collaborator you are seeking.

Crowdhelix's intelligent recommender system will use your text included in this box to generate suggestions for suitable prospective collaborators, by comparing the text with Crowdhelix's database of the expertise of its users.

For best results, please also specify what you hope to achieve from the collaboration (e.g. a project proposal) and be clear about what expertise you're seeking, so that potential collaborators know whether they're suitable. This will also mean that Crowdhelix's intelligent recommender system will be better able to match your opportunity with appropriate collaborators.

VISIBILITY SETTINGS

Next, you can choose how widely you wish your opportunity can be viewed and shared by users of the Crowdhelix platform, and even the general public. To choose your preferred visibility setting, click the **box entitled Visibility.**

Click your **preferred visibility setting** from the list that appears. For details about how each of the settings function in practice on the platform, please click the subtitles below.

HOW EACH OF THE SETTINGS FUNCTION ON THE PLATFORM

NETWORK

Your opportunity will be visible to representatives of organisations that are members of the Crowdhelix Network only.

PUBLIC

Public opportunities are fully visible on the front page of the Crowdhelix website, including your name, affiliation, photograph and post details. This information will also be shared on Crowdhelix's social media profiles in order to maximise your opportunities's reach. Opportunities are also available to the Extended Network.

Only Crowdhelix users will be able to respond to you directly on the platform. Any interest from outside the extended network will be reviewed and sent to you by one of the Crowdhelix team.

EXTENDED NETWORK

By choosing to post your opportunity to the Extended Network, you can increase the chances of reaching a suitable collaborator without making your post Public. Your opportunity will be visible to Crowdhelix Network members. However, users will also be able to share your opportunity with people they trust who may not be from within the network.

The accounts of users from the **Extended Network,** who represent organisations that are not a member of the **Crowdhelix Network**, ****are subject to certain restrictions, to ensure that the network can maintain its position as a trusted community based on excellence:

• They must represent an **Organisation** that carries out recognisable research and/or innovation activities;

• If they have been invited to Crowdhelix by an existing user as their Trusted Collaborator, each of their profiles will include a link to the other;

• They are unable to post **Opportunities;**

• They are unable to start **Direct Message** conversations (but may respond to messages they receive);

• They are allowed to **Comment** on **Opportunities;**

• They are allowed to view all opportunities that are posted using the **Extended Network** and public visibility options.

INCLUDING AN ATTACHMENT

Finally, you can include an attachment of up to 5 MB by clicking **Choose file**. Select an appropriate file from your computer to attach it to your opportunity. To remove the attachment, click **Remove**.

SUBMITTING YOUR OPPORTUNITY

Once you have finished drafting your opportunity, click Submit for approval to send it to Crowdhelix's team of community managers for review and approval. This will be completed within two working days, and a member of the team will get in touch with you if necessary, for example if there is information missing that could improve the quality and effectiveness of your opportunity.

Email notifications of your opportunity will be sent to those users who have been identified by Crowdhelix's intelligent recommender to be suitable potential collaborators.
In some cases other users will also be notified based on their Helixes of interest.

After posting an opportunity, check that your collaborator profile is up to date so that prospective collaborators can learn about your expertise and affiliations.