

Overview of Crowdhelix

- We have designed <u>Crowdhelix</u> to help researchers from academic institutions and companies collaborate on research and innovation projects.
- You can use Crowdhelix to post **collaboration opportunities**, perform **searches** for expertise, and display your own expertise by updating your **profile**.
- Your organisation also has its own profile, which is maintained by its nominated "**Organisation Leader**" (usually a research coordinator or European officer). Your individual profile is linked to your organisation's.

Accessing Crowdhelix

- Once your organisation joins Crowdhelix, if you have not been directly invited by your Organisation's "Leader", as an employee you can <u>sign-up</u> to the platform. On the signup screen you will be asked to select your organisation.
- If you sign up with your work email address your request to join should be **automatically accepted**. Otherwise, the Crowdhelix team, or your organisation's "Leader", will accept your request within 24 hours.

Posting Opportunities

- <u>Posting opportunities</u> for collaboration is the main purpose of Crowdhelix. Opportunities should ideally be open to organisations from any country, and are usually related to some form of funding (such as an EU "Horizon 2020" call). You can provide a link and identification code to the funding call topic, if there is one.
- Opportunities can be posted in up to three "**Helixes**", which are category labels that describe the general theme of your opportunity, for example "Health", "Climate", or "Materials".
- You can also specify if you are targeting a particular Horizon 2020 funding call.
- You can also include any number of **Keywords** to describe the type of expertise you are looking for. Keywords are important, as they are searchable by other users, and they will also be the main information displayed on the **email notification** to other users about your opportunity.
- Once you post your opportunity, it will be sent to the Crowdhelix team for approval, or editing if necessary.
- Once approved, notifications will be sent, and any user can then reply by **commenting** on your opportunity.
- Opportunities that you post on the platform can be open to different tiers of network members. You can set your post to be available publicly, to "trusted collaborators" (organisations that are not yet members of Crowdhelix but could contribute to your consortium) or network members only. Non-members will not see the post unless it is referred directly to them. This can be done using the referral button, which is shown at the bottom right of each post once you click through. Non-members have limited engagement with posts referred to them, thus ensuring the integrity of the platform's user base.

Profile & Notifications

- We encourage you to complete your <u>profile</u>, to allow other users to find you based on your expertise. You can also show links to previous collaborative projects you have worked on, in the section "Collaboration History".
- If your profile is 100% complete, your photo will also be accompanied by a "**completion badge**", so other users know your information is complete, and you have described your expertise and experience.
- On your profile page you can also set different **email notification** settings for each Helix. For example, if you are only interested in opportunities in "Health" and "Digital" you can unsubscribe from all of the other Helixes and stop receiving emails completely, or receive only daily or weekly "digest" email notifications about them.

Searching & Messaging

- At the top of the Helixes page you can also search for either **posts**, **experts**, and **organisations** by name or by keyword.
- You can send private **messages** to other users by clicking the "Message" button on their profile. If you want to contact an organisation, you can find its main contact person ("Super User") on the organisation's profile.

Getting Help

- We're always very happy to help! Just email hello@crowdhelix.com or message us on Twitter.
- Thank you for your time! We hope you find the platform useful, and really appreciate your using it.

- The Crowdhelix Team











