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Digital Welcome Centre

	Author	Milan Zdravkovic University of Niš, Serbia
	Total duration	3 hours, including one 15 minute breaks
	Number of participants	minimum: 5, maximum: 20
	Target group	<ul style="list-style-type: none">• Administrative staff members working in the area of internationalisation and/or providing support to international PhD students, academics and researchers.• Higher education managers (leadership and management, coordinators, leaders, etc. at central and faculty levels) involved in the internationalisation of their institution.• Academic staff members working in the area of internationalisation and/or providing support to international PhD students, academics and researchers.• Research institutions managers and support staff interested in internationalisation of their institutions• Higher education staff engaged or interested in:<ul style="list-style-type: none">- internationalisation of higher education institutions,- international mobility of PhD students, academics and researchers,- support services for incoming researchers,- data collection,- data analysis,- digitalisation processes,- strategic management,- strategic planning.• Newly hired staff members of higher education institutions whose duties include support for international PhD students, academics and researchers.
	Training goals	Design a clear vision of data collection processes in the welcome centre (including designing a meta-model) in order to achieve awareness on the directions to digitalise the operations of the welcome centre and to motivate participants to master a variety of online collaboration tools.



Points to be covered

1. What makes a service centre digital?
From Excel spreadsheet data tracking to AI chatbots (EURAXESS Serbia Digital Assistant demonstration).
2. Which data to collect? Meta-model.
EU Research Careers data observatory indicators, MORE studies, EURAXESS Services data app.
3. How to use the collected data?
4. How to collect data?
What are Customer Relationship Management systems and how they work. Online CRM systems and how to implement them.



Training materials

1. [PowerPoint presentation](#)
2. [Handout 3. \(M2\) Motivation to collect and maintain data](#)
3. [Handout 4. \(M2\) What data are important for you?](#)

Suggestions for prospective trainers

The training cannot effectively develop all the skills necessary to implement and run a digital service centre. Rather, its goal is to provide background knowledge to engage in the project of digitalising an existing service centre. In this context, the trainer needs to highlight the motivational aspects of this project and its benefits as well as its difficulties and how to overcome them (but only in general, pinpointing the possible directions) and not go into specific details on how to use the applications presented in the training scenario as examples.

The trainer needs to know the specific requirements of the organisation/national system in which they deliver the training related to data collection and management practices. This knowledge is necessary for highlighting the relevant aspects of the training material while discarding the irrelevant ones. If possible, organisational and national examples should be used during the training.

For the purpose of [osTicket](#)¹ software demonstration, the trainer needs to set up their own account or use the demo version² - for example, one provided [here](#).

To present the [EURAXESS Services app](#)³, the trainer may follow the presentation. To show the demo version, it is necessary to be registered in the EURAXESS as a member of the organisation.

There are two group exercises planned in the training. To make group work effective, there should not be more than 3 groups of participants, with max 7 members in each. Each of the exercises includes two parts: group work and recapitulation. For the latter part, the group needs to select a rapporteur before the exercise starts. The rapporteur must be fluent in English, open and communicative, and exhibit the leadership skills and confidence needed to chair the group's discussions effectively. Each of the rapporteurs will present the summary of discussions within their group. The trainer will write down these highlights and include them on a slide within the presentation. The trainer may, if desired, take the opportunity to provide their comments on the overall summary by reflecting on their own experience and also by pointing out the common views shared across the groups.

Expected learning outcomes

With the completion of the training, the participant will:

1. Be aware of the opportunities to digitalise the operations of the welcome centre and the benefits gained by this digitalisation.
2. Be informed about all the relevant factors to decide on which data to collect and how to use this data in institutional decision-making processes.
3. Understand the effort needed for the implementation of the tools required for data collection.
4. Be able to select a set of indicators to be collected for the specific benefit of their organization.
5. Have gained basic skills in using online collaboration tools.
6. Create a new (or update an existing) data collection plan.
7. Be interested in improving the data collection process and implement the tools for increasing its efficiency/effectiveness (CRM as a best-case scenario, but other options are also acceptable).

1. osTicket, www.eventiotic.com/osticket [access: 31.01.2023].

2. osTicket, *Demo version*, http://www.ostickethacks.com/demo/demo_info.php [access: 31.01.2023].

3. EURAXESS, *Service app*, <https://euraxess.eventiotic.com/services/users/login> [access: 31.01.2023].

Training scenario

Time	Most important content	Training materials	Guidelines for trainers	Desired outcome	<input checked="" type="checkbox"/>
5'	<p>Introduction</p> <p>Introduction of the training, trainer, objectives and content</p>	PowerPoint presentation	Introduction should be short, clear, and welcoming.	Participants are well informed with regard to the target outcomes and the expected content. Trust is established.	<input type="checkbox"/>
10'	<p>Participants' profiles</p> <p>Introducing participants by means of a short Slido poll with questions offering multiple answer options.</p> <p>The results of the poll is presented after each question.</p>	Slido poll	<p>Based on the results, the trainer should rearrange the seating to have combined competences/roles at each group/table.</p> <p>Questions for the poll:</p> <ol style="list-style-type: none"> How are you involved in assisting international PhD students, academics and researchers? Offered answers: <ul style="list-style-type: none"> I am not. Administrative staff assisting international PhD students, academics and researchers. Management of organization... How experienced you are in any aspect of assisting international PhD students, academics and researchers? Offered answers: <ul style="list-style-type: none"> I am not. Less than 2 years. 2-5 years. More than 5 years. What are your expectations from this training? Open question - the result should be a word cloud if possible. <p>If there is no possibility to re-arrange participants, or if the answers to those questions have already been acquired in training registration process, this slot may be used for establishing state of the art knowledge and attitude towards the topic of the module, by using the following questions.</p> <p style="text-align: right;"><i>see the following page</i></p>	<p>Trainer knows the profile of the participants so that they can refer to some of those profiles during the workshop and/or slightly customise oral presentation (in a real-time) to dominant profiles.</p> <p>Seating reorganization will ensure better results in the later exercises.</p>	<input type="checkbox"/>

Time	Most important content	Training materials	Guidelines for trainers	Desired outcome	<input checked="" type="checkbox"/>
			<ol style="list-style-type: none"> How did you learn how to do your job in assisting international PhD students, academics and researchers? Offered answers: <ul style="list-style-type: none"> I learnt it from my colleagues, this was the only way. There is a guidebook, but it is not covering every aspect. There is a guidebook and it covers everything I need to know. There is a guidebook, but sometimes it is too general and vague. How are you tracking your researchers' assistance cases? Offered answers: <ul style="list-style-type: none"> I am not. I am not, but I have everything in my email folders. I am using a simple Microsoft Office tool, such as Microsoft Excel. My higher education institution has a custom tool for tracking the cases, developed specifically for this purpose. We use an off-the-shelf tool. Do you think that custom IT tools can help you in doing your job easier and better? <ul style="list-style-type: none"> No. Yes, they can help save time. Yes, they can help provide a better-quality service. Yes, they can both help save time and provide a better-quality service. 		<input type="checkbox"/>
10'	<p>What does a service centre do?</p> <p>The trainer makes an introduction to the training by answering the following questions:</p> <ul style="list-style-type: none"> What is a service? To whom could the service be provided? How could one service be provided? Which service is provided? 	PowerPoint presentation	Highlight that the answers to the questions in the slides are provided based on the process of development of EURAXESS Services app ¹ - those are only examples of possible answers, and each organization should define their own answers.	The participants understand the “analogue” dimension of the welcome process. The agreement is achieved as to the meaning and wording for referring to key concepts.	<input type="checkbox"/>

1. EURAXESS, *Services app*, <https://euraxess.eventiotic.com/services/users/login> [access: 31.01.2023].



Time	Most important content	Training materials	Guidelines for trainers	Desired outcome	<input checked="" type="checkbox"/>
20'	<p>What makes a service centre digital?</p> <p>The trainer provides:</p> <ul style="list-style-type: none"> • Benefits of digitalisation. • Process, data and tools for digital service centre. • Demonstration of EURAXESS Serbia chat. • osTicket - demonstration of ticketing system. • Customer Relationship Management (CRM) systems. 	<p>PowerPoint presentation</p> <p>Demonstration of EURAXESS Serbia digital assistant² - chatbot</p> <p>Demonstration of osTicket³</p>	<p>To demonstrate EURAXESS Serbia digital assistant - chatbot⁴, the trainer visit: www.euraxess.rs.</p> <p>The questions that should be asked to the chatbot:</p> <ol style="list-style-type: none"> 1. How can I get a work permit in Serbia? 2. I am chemist. Where I can find a job? <p>The trainer follows the conversation. It is necessary to explain that the questions asked by the bot in this case are related to determining the researchers' career stage (R1-R4).</p> <p>The trainer demonstrate osTicket using the demo version⁵.</p>	<p>The participants are aware of the possibilities to improve and benefit from the digitalisation process. Increased interest and engagement.</p>	<input type="checkbox"/>
10'	<p>Why data?</p> <p>Trainer presents the rationale for data collection, motivation to collect and manage data.</p>	<p>PowerPoint presentation</p>	<p>This part is an introduction to the subsequent group exercise.</p>	<p>The participants are aware of the possibilities to improve and benefits from the data collection process.</p>	<input type="checkbox"/>

2. EURAXESS Serbia, www.euraxess.rs [access: 31.01.2023].

3. osTicket, www.eventiatic.com/osticket [access: 31.01.2023].

4. EURAXESS Serbia, *Digital Assistant*, www.euraxess.rs [access: 31.01.2023].

5. osTicket, *Demo version*, http://www.ostickethacks.com/demo/demo_info.php [access: 31.01.2023].

Time	Most important content	Training materials	Guidelines for trainers	Desired outcome	
35'	<p>Exercise: Why is data important to you?</p> <p>Instruction:</p> <p>Taking into consideration information in the handout, please discuss in the group the following questions:</p> <ol style="list-style-type: none"> 1. Why is data important to you? 2. How can data be used/reused and for which purposes? <p>Each group should appoint a rapporteur, who presents the overall summary.</p>	<p>PowerPoint presentation for introducing the exercise</p> <p>Handout 3. (M2) Motivation to collect and maintain data</p>	<p>Trainer delivers handouts and divides participants into groups. Each group should first select a rapporteur who will also be in charge of coordinating discussion and keeping it focused.</p> <p>While the rapporteurs present their summaries, the trainer should work on the overall summary in the following slide and then shortly present this summary.</p> <p>Groupwork open discussion with reporting. 20 minutes of discussion, with 15 minutes for reporting and recapitulation by the trainer.</p> <p>The presentation includes the example of summary: the findings of the first exercise on motivation and usability of data, as presented by the trainer. It may be skipped during presentation or presented to the participants for comparison.</p>	The participants start to build mind maps in which previously presented concepts are now mapped to their own existing situations, needs and problems.	
15'	Break				

Time	Most important content	Training materials	Guidelines for trainers	Desired outcome	<input checked="" type="checkbox"/>
10'	<p>European Commission initiatives on researchers' data collection</p> <p>The second part of the training is focused on building data structures. The trainer presents the European Commission initiatives:</p> <ul style="list-style-type: none"> • EURAXESS bi-annual reporting tool⁶, • Researchers' Career Observatory⁷, • MORE4 study⁸, <p>which need to be taken into account in building an institution's own data structures.</p>	PowerPoint presentation	<p>Trainer should highlight what data are considered by European Commission as the most important to collect.</p> <p>Moreover, it is important to stress that all the referenced initiatives imply huge investments in data collection by the European Commission.</p>	Participants are made aware of the importance of data collection and its potential impact on the research policy.	<input type="checkbox"/>
15'	<p>Data collection. The case of EURAXESS Services app</p> <p>The trainer presents the case of EURAXESS Services app⁹ with demonstration of the actual app.</p>	<p>PowerPoint presentation</p> <p>Demonstration of EURAXESS Services app</p>	In this part, the trainer is also encouraged to present national tools, if such exists.	Participants fully understand the data collection and management process.	<input type="checkbox"/>
10'	<p>Designing the data collection app</p> <p>The trainer presents the data model outline and guidelines for its detailed definition.</p>	PowerPoint presentation	When building a data model. it is important to refer to the participants' experience.	Participants know how to consider the needs and requirements related to implementing digital data collection processes.	<input type="checkbox"/>

6. EURAXESS bi-annual reporting tool is available for EURAXESS members only.

7. European Commission, Outcome of proceedings: *Deepening the European Research Area: Providing researchers with attractive and sustainable careers and working conditions and making brain circulation a reality*, online 28.05.2021, <https://www.consilium.europa.eu/media/49980/st09138-en21.pdf> [access: 31.01.2023].

8. Mobility Patterns and Career Paths of EU Researchers (MORE4), <https://www.more4.eu/> [access: 31.01.2023].

9. EURAXESS, *Service app*, <https://euraxess.eventiotic.com/services/users/login> [access: 31.01.2023].

Time	Most important content	Training materials	Guidelines for trainers	Desired outcome	<input checked="" type="checkbox"/>
30'	<p>Exercise: What data are important for you?</p> <p>Instruction:</p> <p>Create a list of types of data you would like to collect.</p> <p>Why is each specific type chosen? How will you or someone else (who?) use/reuse the data?</p> <p>Handout can be used to consult previous information on data collection.</p> <p>Each group should appoint a rapporteur, who will present the overall summary.</p>	<p>PowerPoint presentation for introducing the exercise.</p> <p><u>Handout 4. (M2) What data are important for you?</u></p>	<p>Trainer delivers handouts and divides participants into groups.</p> <p>The participants are invited to think of finding only the data which can be of use for a specific purpose (what is that purpose?) by the institution.</p> <p>Group discussion is encouraged. Each group should first select a rapporteur who will also be in charge of coordinating discussion and keeping it focused.</p> <p>While the rapporteurs present their summaries, the trainer should work on the overall summary in the following slide and then shortly present this summary.</p> <p>Groupwork open discussion with reporting. 20' of discussion, with 20' for reporting and recapitulation by the trainer.</p> <p>The presentation includes the example of summary: the findings of the second exercise on data structures, as presented by the trainer. It may be skipped during presentation or presented to the participants for comparison.</p>	<p>The participants continue to build mind maps in which previously presented concepts are mapped to their own existing situations, needs and problems. In addition, now they clearly recognise the specific requirements for data to be collected and used in a wider context.</p>	<input type="checkbox"/>
10'	<p>Conclusions</p> <p>The trainer recapitulates the training and ask participants to share their reflections.</p> <p>Plenary discussion:</p> <p>How would you use this knowledge in your everyday work?</p>	<p>PowerPoint presentation</p>	<p>Trainer wraps up the training.</p>	<p>Conclusions and takeaways will help participants to use the newly acquired knowledge in their everyday work.</p>	<input type="checkbox"/>

References

1. EURAXESS Serbia, *Digital Assistant*, www.euraxess.rs.
2. EURAXESS Serbia, www.euraxess.rs.
3. EURAXESS, *Service app*, <https://euraxess.eventiotic.com/services/users/login>.
4. European Commission, Outcome of proceedings, *Deepening the European Research Area: Providing researchers with attractive and sustainable careers and working conditions and making brain circulation a reality*, online 28.05.2021, <https://www.consilium.europa.eu/media/49980/st09138-en21.pdf>.
5. Mobility Patterns and Career Paths of EU Researchers (MORE4), <https://www.more-4.eu/>.
6. MORE4 online database, <https://www.more-4.eu/indicator-tool>.
7. Open source CRM systems:
 - a. SUITE CRM, <https://suitecrm.com/>.
 - b. X2ENGINE CRM, <https://x2crm.com/>.
 - c. odoo, <https://www.odoo.com/app/crm>.
 - d. vtiger, <https://www.vtiger.com/pl/>.
 - e. EspoCRM, <https://www.espocrm.com/>.
 - f. CiviCRM, <https://civicrm.org/>.
 - g. Oro, <https://oroinc.com/>.
8. osTicket, *Demo version*, http://www.ostickethacks.com/demo/demo_info.php.
9. osTicket, www.eventiotic.com/osticket.
10. Slido poll, <https://www.slido.com/>.
11. Wikipedia, *Customer Relationship Management (CRM) systems*, https://en.wikipedia.org/wiki/Customer_relationship_management.

Handout 3. Motivation to collect and maintain data

1. Why is data important to you?

2. How can data be used/reused and for which purposes?

Examples of motivation to collect and maintain data

Impact on policy development	<ul style="list-style-type: none"> • For the Research Performing Organisations (RPOs), input for strategic documents and action plans • For the national ministry or funding agency, justification of national researchers' mobility policies • For the European Commission (EURAXESS), policy development
Office productivity	<ul style="list-style-type: none"> • Tracking contacts with international PhD students, academics and researchers • Tracking process quality - continuous improvement • Internal review, for example, for tracking the needs with regard to competence development and/or resource allocation/reallocation
Promotion and strengthening capacity	<ul style="list-style-type: none"> • Promotion of Welcome Office • Body of evidence that could be used in fund raising
When building a meta-model, every choice of indicator should be justified	<ul style="list-style-type: none"> • Data collection and management is labour- and resource-intensive, both for the institution and for international PhD students, academics and researchers • It is best practice not to collect data that are not useful (either for immediate purposes or for anticipated purposes)

Handout 4. What data are important for you?

Create a list of types of data you would like to collect.

You can use one or more data types/indicators for staff, researcher, program and service.

Then, explain your motivation to choose these specific indicators and how the data will be used/reused by you or your co-workers.

For example, an indicator of service that a staff member may want to collect is “number of hours (time) spent on responding to an individual request”.

In this case, the justification is: “I need this information because I would like to assess the volume of engagement of welcome centre staff in resolving different issues so that I can submit an evidence-based request for reinforcement.”

Example:

Concept	Type/Indicator	Justification
SERVICE	TIME	TO ASSESS THE VOLUME OF ENGAGEMENT OF WELCOME CENTRE STAFF IN RESOLVING DIFFERENT ISSUE

Concept	Type/Indicator	Justification
Program		
Staff		
Researcher		
Service		

Handout 4. What data are important for you?

TYPE OF DATA covered by MORE4

- Researcher
 - Marital status, family status, age, dual career
- Type of mobility
 - Short/long term, duration, type of contract, hosting organisation type, career stage
- Motivation for mobility
 - Science-related: funding/positions availability, access to research facilities/equipment, working with leading experts, quality of education/training, research autonomy, international networking, teaching/research balance
 - Non-science related: remuneration, job security, social security, culture, personal/family reasons, pension plan
- Barriers for mobility
 - Professional, administrative, personal, practical
- Effects of mobility
 - On research output, on networking opportunities, on career-related aspects, on personal aspects, on financial aspects

TOPICS covered by MORE4

- Researchers' socio-demographics
- Education, PhD and doctoral training
- Working conditions
- Career paths
- Geographical mobility (long and short term): stock, flows, motives, barriers and effects
- Collaboration and virtual mobility
- Interdisciplinary mobility
- Intersectoral mobility

LIST OF CUSTOM FIELDS in EURAXESS Services app

- Researcher's profile
- Gender
- Country of origin
- Destination country
- Nationality of the mobile researcher
- Type of funding
- Type of organisation that requested the assistance (in case that service is provided to 'Support staff')
- Research field
- Starting date of the stay for mobile researchers
- End date of the stay for mobile researchers
- Service provision period - start, end date

Data Model

