



D1.2.3: CONTACT DATABASE

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1. EXECUTIVE SUMMARY

This report summarizes steps taken for keeping a contact database, in coordination with the contact database developed within META-NET and taking the contacts gathered during the MultilingualWeb project into account.

After analysing several tools, the open source system CiviCRM was chosen. As the next step data from the META-NET initiative was converted into the database format. The data encompasses contacts gathered in the projects CESAR, META-NORD, METANET4U und T4ME. The coordinator of META-NET gathered and aggregated this data. The total number of contacts is 4763.

2. INTRODUCTION: REQUIREMENTS GATHERING

Contacts can be handled in various ways: via simple spreadsheets or more or less complex “Customer Relationship Management” (CRM) systems. Hence, before choosing a tool, various requirements were gathered.

- The tool should allow a separation between individual contacts (= persons) and organizations. This is important since often people change employers, and organizations emerge or cease to exist. Distinct identifiers for persons and organizations provide the flexibility and sustainability of relations needed.
- It is important to be able to assign multiple groups and tags to one contact in the database. For example, a person may belong to several organizations or may be relevant to several fields of language technologies.
- Relations between organizations and contacts should be visualized in an easy to understand manner.
- The database software should allow for easy import and export. Import is needed to be able to handle existing contacts gathered in META-NET or related projects. Export needs to allow for using standardized formats like vCard.
- One usage scenario for the contact database is to send invitations for events. Hence, the system should allow for sending bulk emails.
- The system should support handling our database of META members and also be able to support membership drives.
- The system should be easy to customize.
- Management of users with different rights is needed since masses contact information inherently leads to privacy concerns.

Finally and in general, the tool needs to be easy to use and self-explanatory.

3. TOOLS ANALYSIS

The requirements analysis lead to the conclusion that our needs cannot be fulfilled with a simple, e. g. .spreadsheet based approach. Hence, after the requirements gathering and additional research, various CRM and related tools where examined.

- **addressBLUE** <http://www.bluesuite.de/addressblue/> is a web-based tool. It provides several add-ons like ballots or a mail server. It is used by Deutscher Brauer Bund e.V. , Verband Forschender Arzneimittelhersteller etc.
- **FileMaker** <http://www.filemaker.de/> is a database which encompasses a template for contact management. It is used by United Airlines, GEMA etc.
- **Daylite** <http://www.marketcircle.com/daylite/> is also a web-based tool. It allows for separating companies and individuals and offers some customization possibilities. The tool is used by European Business Ecademy, Consinion etc.
- **ProKox** <http://www.prokox.de/> is also a web-based tool. It allows allocating groups and user management.
- **Microsoft Excel**. A lot of legacy data from META-NET and other projects is available as Excel sheets.
- **SugarCRM** <http://www.sugarcrm.com/> is an open source CRM tool. It is used by Zurich Insurance Group, Avis Scandinavia etc.
- **KVDB** is the DFKI internal contact database. This tool is implemented in the DFKI intranet. It has been in use for a long time and represents a central contact management system.
- **CiviCRM** <http://civicrm.org/> is an open source CRM system targeting mainly non-profit or other civic-sector organizations.

- **vtiger CRM** <http://www.vtiger.de/> is also an open source CRM. A company provides professional but fee-based support.

Table 1 summarizes the advantages and disadvantages of the tools.

Name	Advantages	Disadvantages
addressBLUE	Web based; modularized	No clear pricing information
FileMaker	Customized bulk mail	Price
Daylite	Synchronization with smart phones; customized bulk mail	Regular usage fee
ProKox	Web based	No clear pricing information
Microsoft Excel	Price; easy to use	Large amount of data hard to handle consistently; no automatic backup; no easy to use contact search facilities
SugarCRM	Open source; import from Excel possible	Technical support low
KVDB	Long-term in use; well documented	DFKI external usage not allowed
CiviCRM	Open source; feature set matches requirements well	Support requires involvement with CiviCRM "community" or fee-based consultancies
vtiger CRM	Open source	Support is fee-based

Table 1: Overview of CRM tools

3.1. Evaluation and Results

Many of the tools are not free of charge. Since the solution should be easy to maintain after the end of the MultilingualWeb-LT (LT-Web) project and there is no dedicated budget for the contact database, this is a hard criterion. In addition, many tools provide functionality not needed for a contact database.

The general agreement was to choose an open source solution. In addition to the tools mentioned above, "PHP Addressbook" <http://sourceforge.net/projects/php-addressbook/> and "iAddressbook" <http://iaddressbook.org/> were examined. After a short period of testing and using the online demos, it was clear that both tools lack vital features like assigning tags and groups or displaying relationships between companies.

This is why more complex CRM tools were considered and examined: SugarCRM, vTiger and civiCRM. Their online demos were tested and discussed at a meeting, followed by trial accounts and tests with small amounts of contact data. To assess their suitability an evaluation sheet was created.

3.2. Choosing a System

After extensive testing, CivicCRM turned out to be the best solution. CivicCRM requires the Drupal system, which is easy to set up. CivicCRM displays relationships between entries well and allows differentiating

companies and individuals.

It is also possible to find duplicates via various matching algorithms; enhanced users may customize these.

To test the matching functionality, contacts from different sources were uploaded into CiviCRM. It was then checked whether the tool could detect similar or even equal entries, which it did.

4. DATA CONVERSION

Existing entries from the META-NET contact database were imported into CiviCRM. CiviCRM allows for exporting Excel sheets with various options, including a clean-up (e.g., detection of duplicates). In this way the conversion process could be automated and manual clean-up was not required.