

esa-match

Training material

Management of the entity Profile and the Conversation Manager role

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Objective



- At the end of the course the user will be able to understand how to access and manage entity profile details in esa-match, along with how to assign and manage the Conversation Manager role.



Intended Users



- Users with ESA Corporate Authentication credentials and an active esa-star account, with an esa-match Responsible role.



Summary

- Management of the entity profile and conversation manager role
 - [Roles and Responsibilities](#)
 - [Managing entity Privacy Settings](#)
 - [Managing the entity Profile:](#)
 - [entity Details](#)
 - [Competences and Capabilities](#)
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 - [Displaying business unit/legal entity Information](#)
 - [Certifications](#)
 - [Assigning the esa-match Conversation Manager Role](#)

esa-match Roles and Responsibilities (1/2)



- For all entities entitled to have a profile in esa-match, the owner of the entity profile-management role is the **esa-match Responsible**. This role is:
 - ❖ Automatically assigned to the entity Information Administrator (EIA), in the case of legal entity registration approval, or to the business unit Information Administrator (BUIA), in the case of business unit approval
 - ❖ Assigned by the EIA/BUIA, to at least one user belonging to their own entity/business unit in esa-star Registration
 - ❖ Automatically revoked as soon as the entity/business unit status is no longer valid in esa-star Registration
- The esa-match Responsible role has the following rights:
 - ✓ Managing entity privacy settings
 - ✓ Editing their entity profile information, except for the information **automatically** retrieved from esa-star Registration
 - ✓ Nominating one or more esa-match Conversation Managers from the list of all users belonging to their entity with at least one relevant role
 - ✓ Managing the conversations in the Lounge Area
 - ✓ Replying to ESA communications
 - ✓ Managing the entity's ads and related messages/conversations in the Marketplace.



esa-match Roles and Responsibilities (2/2)



- The **esa-match Conversation Manager** is the role in charge of entity conversation and message management. The role is:
 - ❖ Managed by the esa-match Responsible in esa-match
 - ❖ Assignable only to an entity/business unit user registered in esa-star Registration

The esa-match Conversation Manager role has the following rights:

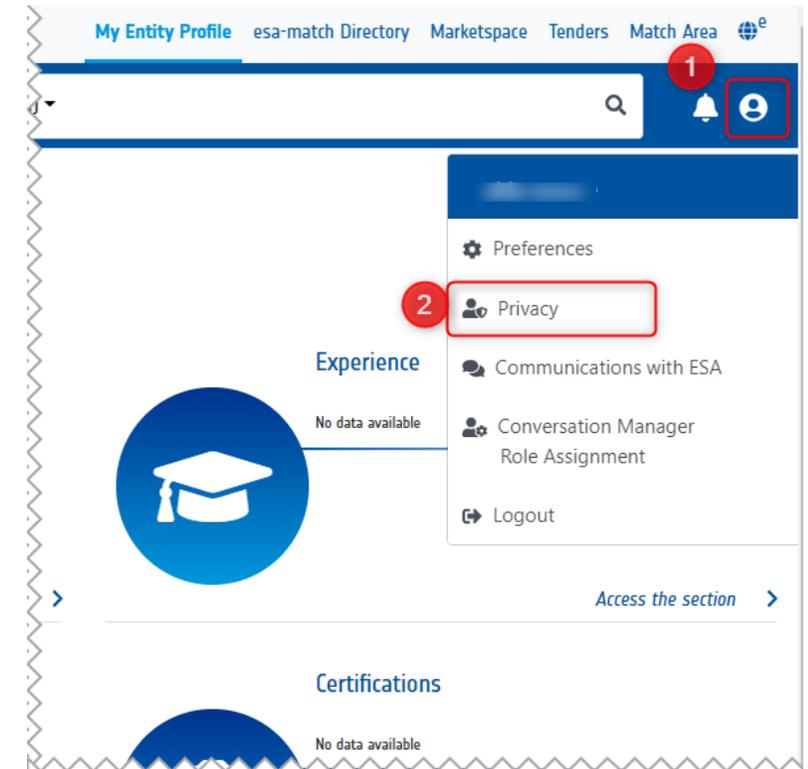
- ✓ Managing the conversations in the Lounge Area
- ✓ Replying to ESA communications
- ✓ Managing the entity's ads and related messages/conversations in the Marketspace.



Managing Entity Privacy Settings (1/2)

- If you are the esa-match Responsible you can specify your entity settings in terms of:
 - ❖ The visibility level of the information contained in your entity's profile
 - ❖ The activation of the Lounge Area*
- You can modify your choice at any time
- The esa-match Responsible of a business unit can decide to grant the rights to manage the business unit esa-match data to its parent legal entity. However, the esa-match Responsible of the legal entity is not granted access to the ESA communications and Lounge Area conversations of the business unit
- To set privacy options, click on your profile icon and select the "Privacy" option.

**By default the Lounge Area is not active. This means that your entity is not searchable if other entities wish to add yours to a conversation.*



Managing Entity Privacy Settings (2/2)

- There are three levels of visibility:
 - ❖ ESA
 - ❖ Registered users
 - ❖ Public
- When a new entity profile is created, the default settings shown in the image are applied to the data:

➤ Click on “Preview Public Site” to see how your entity profile will be shown to other users, based on the current privacy settings

➤ Click on “Save” to confirm your settings.

Managing the Entity Profile

- Only the esa-match Responsible of the relevant entity can manage the entity profile
- After logging in, you are automatically redirected to your entity profile
- You can also access your entity profile from other sections by clicking on “My entity Profile” at the top of the page.

The screenshot displays the 'My Entity Profile' page in the esa-match system. At the top, a navigation bar includes the 'My Entity Profile' link, which is highlighted with a red box and a red arrow. Below the navigation bar, the page is divided into several sections:

- Entity Information:** Includes fields for Entity Code (1000033783), Business Unit Code (8000038887), SME Status (No), LSI (No), and Nationality (IT-Italy).
- Financial Information:** Includes Employee Headcount (N/A), Total Asset (N/A), and Total Turnover (N/A).
- Address:** Lists the address as 'via della pace, 00170, rome, IT-Italy'.
- Competences & Capabilities:** Shows 'No data available' with a lightbulb icon.
- Experience:** Shows 'No data available' with a graduation cap icon.
- Business Units:** Lists 'esa-star Rel 3.0 - PO Entity 2 - BU 1' with a building icon.
- Certifications:** Shows 'No data available' with a ribbon icon.

Each section has a corresponding 'Access the section' or 'See All items' link. The sidebar on the left contains 'My Lounge Area' and 'My Entity Ads' buttons.

Managing the Entity Profile: Entity Details (1/4)

- The entity details section includes non-editable fields which are automatically taken from the esa-star Registration questionnaire. All of this data, except for the financial information and business unit/legal entity details, are considered to be public information

- Business unit/legal entity details are listed in a dedicated section (1)

➤ Click on “Edit Page” to edit the entity profile (2).

The screenshot displays the ESA Star interface for managing an entity profile. The header includes the ESA logo and 'esa-star esa-match'. The main content area is divided into several sections:

- Entity Name:** PO Entity 2 (highlighted with a yellow box and labeled 'Entity Name').
- Entity Information:** Entity Code: 1000033783, Business Unit Code: 8000038887, SME Status: No, LSI: No, Nationality: IT-Italy.
- Financial Information:** Employee Headcount: N/A, Total Asset: N/A, Total Turnover: N/A.
- Address:** via della pace, 00170, rome, IT-Italy.
- Business Units:** PO Entity 2 - BU 1 (highlighted with a green box and labeled '1').
- Competences & Capabilities:** No data available.
- Edit Page:** A button labeled 'Edit Page' (highlighted with a red box and labeled '2').
- Entity Website:** Represented by a globe icon (labeled 'Entity Website').
- Entity Email Address:** Represented by an envelope icon (labeled 'Entity Email Address').

Managing the Entity Profile: Entity Details (2/4)

■ In edit mode, you can:

- ❖ Change or remove the logo by selecting the relevant button
- ❖ Access the changelog
- ❖ Add new media file(s)*
- ❖ Download or remove a previously uploaded media file
- ❖ Edit the description, with various formatting options and features such as adding hyperlinks to the text
- ❖ Edit the social network information.

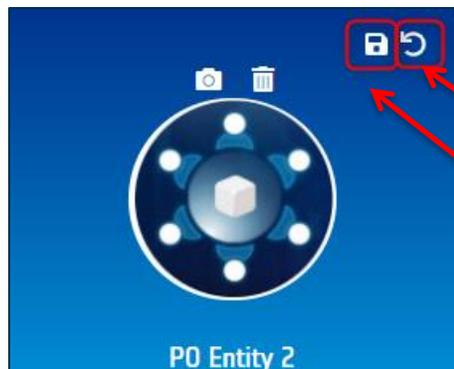
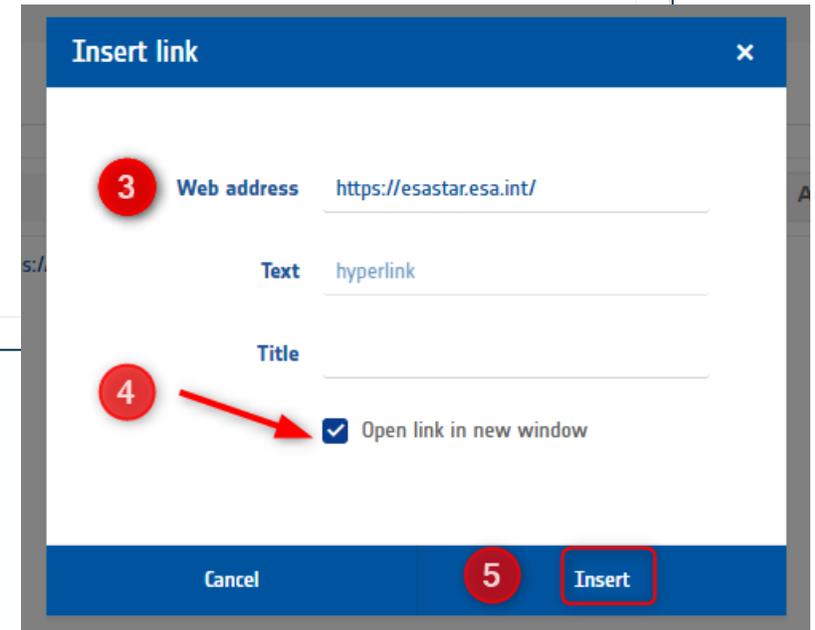
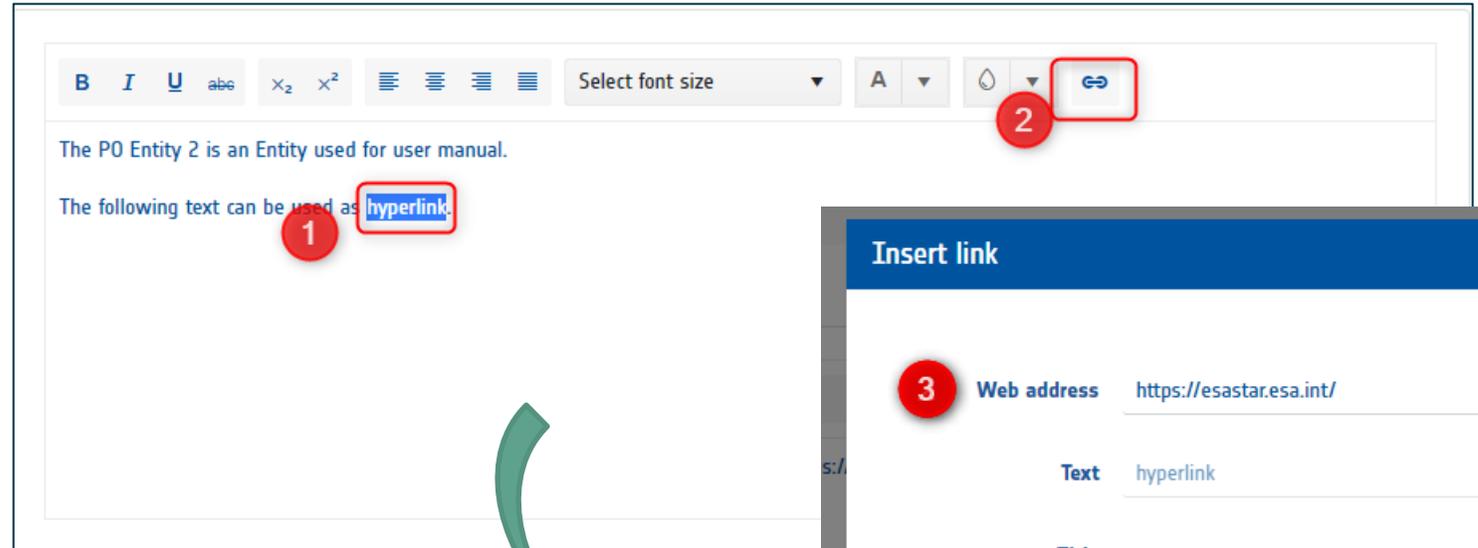
The screenshot shows the 'MY ENTITY PROFILE' edit page for 'PO Entity 2'. Red annotations highlight key features:

- "Change logo" and "Remove logo" buttons:** Located above the profile picture, with a camera icon and a trash icon.
- Changelog:** A button with a document icon next to the profile name.
- "Add Media" button:** A plus sign icon in the 'Media Management' section.
- "Download Media" and "Delete Media" buttons:** Download and trash icons next to the uploaded media file 'images esa-star.png'.
- Social Networks text box:** A red box around the social media links (website, Facebook, Twitter, etc.).
- Description text area:** A red box around the rich text editor containing the entity description.

**Videos and images uploaded in your entity profile, together with the entity description, are always visible to all users.*

Managing the Entity Profile: Entity Details (3/4)

- If you wish to add a hyperlink in the description field, you need to:
 1. Select the text where the hyperlink will appear
 2. Click on the hyperlink icon
 3. Add the web address
 4. If required, tick the box so that the hyperlink will open in a new window
 5. Click on “Insert” to confirm the creation of the hyperlink, or “Cancel” to discard it.



- Once you have completed the entity profile, you can save it or undo the changes and revert to the previous version.

Managing the Entity Profile: Entity Details (4/4)

- Click on the page icon to access the changelog
- The filtering function is available for all fields

CHANGELOG - MY ENTITY PROFILE

Operation Type	Object Type	Object Name	Field	Old Value	New Value	Update Time	Update User
UPDATE	Company Profile		Description	The PO Entity 2 is an Entity used for user manual . The following text can be used as hyperlink.		13/11/2020 13:16:13	EMP_amoro
UPDATE	Company Profile		Facebook Link		http://www.facebook.com/POentity2	13/11/2020 13:16:13	EMP_amoro
UPDATE	Company Profile		Twitter Link		http://twitter.com/POEntity2	13/11/2020 13:16:13	EMP_amoro
UPDATE	Company Profile		NumVisitByComps		0	13/11/2020 12:55:33	EMP_amoro

1 - 4 of 4 items

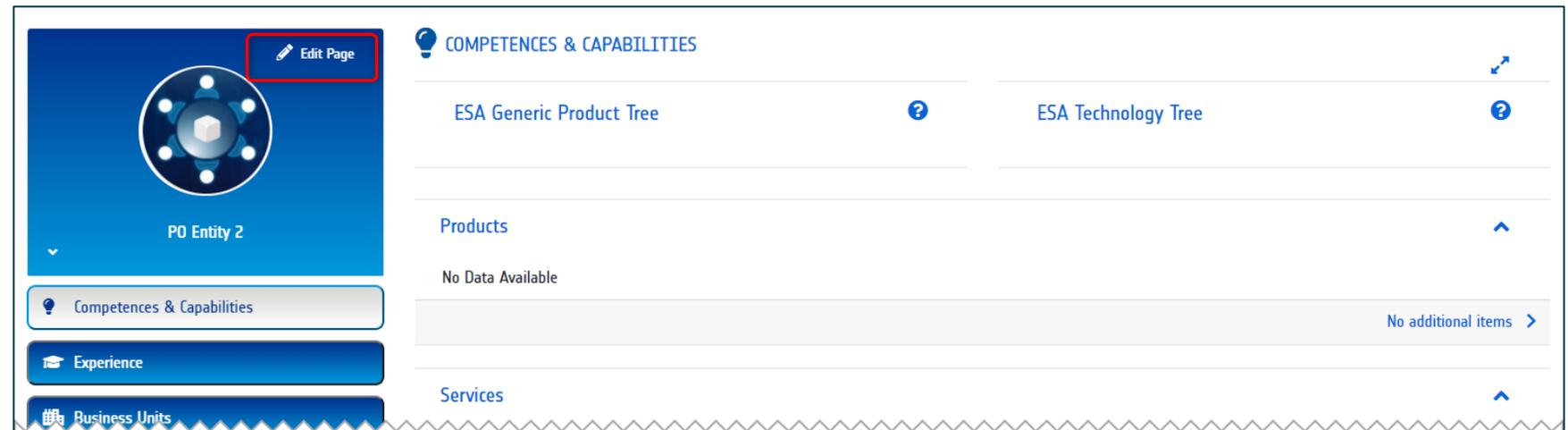
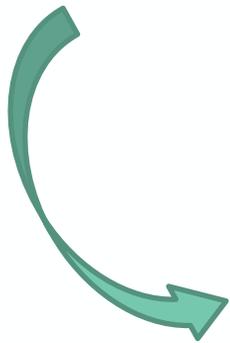
Export in Excel CLOSE

Note: A red box highlights the filter dropdown menu for the 'Field' column, showing options like 'Contains' and 'And'. A red arrow points from the 'Export in Excel' button to the text below.

- Click on “Export in Excel” to export the changelog information.

Managing the Entity Profile: Competences and Capabilities (1/10)

- To manage the information under Competences and Capabilities (the ESA Generic Product Tree, the ESA Technology Tree, Products, Services, and Testing & Manufacturing Facilities and Labs), open the relevant session by clicking on “Access the section” in the Competences & Capabilities box on the entity profile homepage
- Click on “Edit Page” in the Competences & Capabilities section.



Managing the Entity Profile: Competences and Capabilities (2/10)

- This section contains five sets of information
- By default, only three items appear in the ESA Generic Product Tree and the ESA Technology Tree. The items are shown in the same order as they are in the tree menu. For the other lists, the two most relevant items or the two most recently updated items are shown.

➤ To see the full list, click on the “” icon in the bottom-right corner of the relevant box

➤ Click on the “” icon to access the changelog for the section and export the changelog information to Excel.

The screenshot displays the 'COMPETENCES & CAPABILITIES' section of the ESA interface. On the left, a sidebar contains a navigation menu with options: 'Competences & Capabilities', 'Experience', 'Business Units', 'Certifications', 'My Lounge Area', and 'My Entity Ads'. The main content area features five expandable sections: 'ESA Generic Product Tree', 'ESA Technology Tree', 'Products', 'Services', and 'Testing & Manufacturing Facilities & Labs'. Each section currently displays 'No Data Available'. A red arrow points from the document icon in the top right of the main content area to the 'Export to Excel' icon in the left sidebar.

Managing the Entity Profile: Competences and Capabilities (3/10)

- During the registration process in esa-star Registration, the entity or business unit Information Administrator can edit the **ESA Generic Product Tree** and **ESA Technologies Tree** items. However, after the entity profile has been created, this information can only be managed in esa-match by the esa-match Responsible

- Click on the pencil icon. An interactive hierarchy tree appears for each item
- You can select or deselect multiple tree nodes at each level. If a lower node is selected, then any higher levels of the same branch are automatically flagged
- Click on "SAVE" to confirm your selection.



Generic Product Tree

Search ← Search for a specific node

Launchers ← Click to collapse

- 1-A - Avionics
- 1-B - Descent & Recovery
- 1-C - Electronics
- 1-D - Materials
 - 1-D-1 - Metallic
 - 1-D-2 - Non-metallic
 - 1-D-3 - Composite Materials
- 1-E - Mechanics ← Click to expand
- 1-F - Parts
- 1-G - Propulsion
- 1-H - Software
- 1-I - Structures
- 1-J - Thermal Control

2 - Satellites & Probes

3 - Transportation & Re-entry Systems

4 - Ground Segment

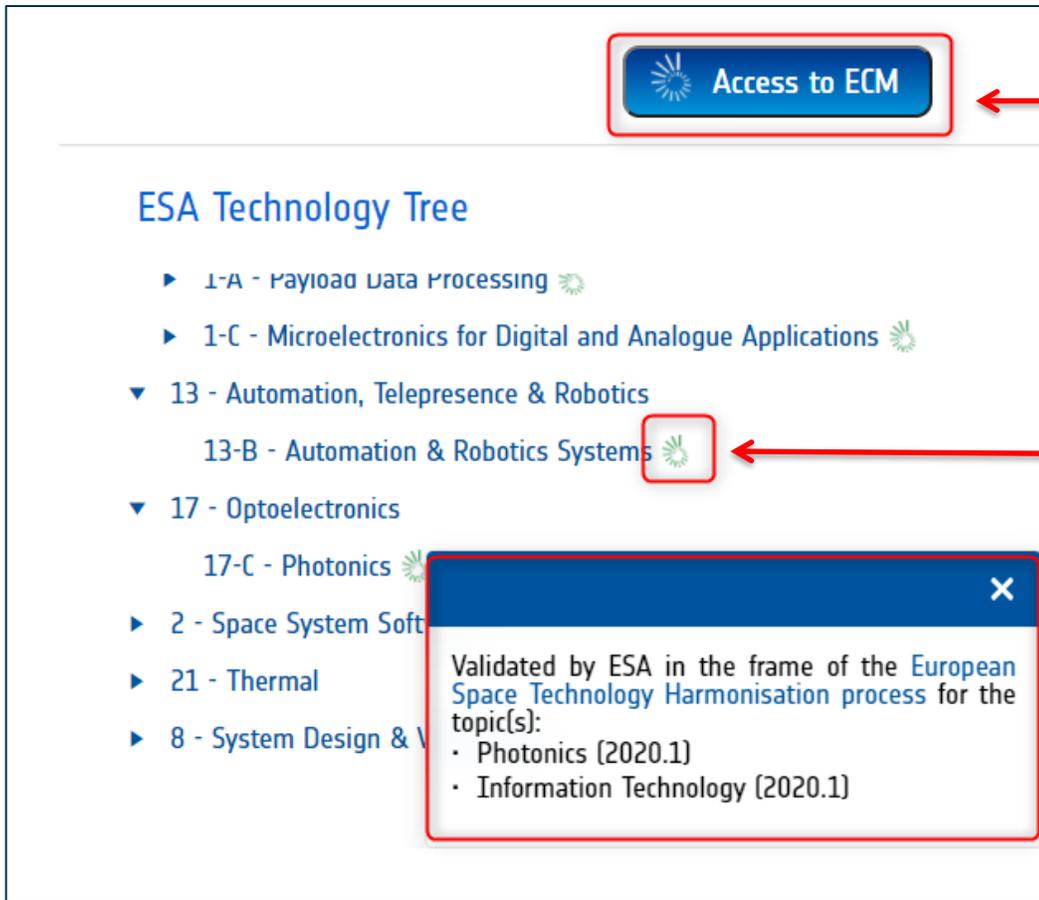
5 - Non Space Procurement/Services

Expand all in one click Collapse all in one click

SAVE CLOSE

Managing the Entity Profile: Competences and Capabilities (4/10)

- If your entity has been subject to the Harmonisation Cycles for the Technologies, the information for each harmonised subdomain is displayed in esa-match



The screenshot shows the 'ESA Technology Tree' with several subdomains. At the top right, there is a blue button labeled 'Access to ECM' with a gear icon. Below the tree, a tooltip is displayed over the '17-C - Photonics' item, containing the text: 'Validated by ESA in the frame of the European Space Technology Harmonisation process for the topic(s):' followed by a list: '• Photonics (2020.1)' and '• Information Technology (2020.1)'. Red arrows point from the text on the right to the 'Access to ECM' button and the ECM logo next to '13-B - Automation & Robotics Systems'.

- Click on “Access ECM” to access the “My entity” section in the ECM system. Here you can see all Harmonisation Cycle details for which your entity has been assessed
- Click on the ECM logo to access the Harmonisation Process details for each subdomain.

Managing the Entity Profile: Competences and Capabilities (5/10)

➤ Click on the “+” icon next to the **Products** list to add your products. In addition to the basic information, you can:



- ❖ Upload a product logo
 - ❖ Upload a specification file in pdf format
 - ❖ Pin the item to keep it at the top of the list in the section and/or to make sure it is always visible on the entity profile page
 - ❖ Add Media (images or videos)
- Click on “SAVE” to confirm or “CLOSE” to discard changes.



Add New Product:

 **Add product logo**

IDENTIFIER

NAME *

DESCRIPTION *

ESA GENERIC PRODUCTS TREE LINK

APPLICATIONS (THEMATIC AREA)

SPECIFICATIONS

File Name **Upload product specification file** 

Show item into the list **PIN TO LIST (max. 3)**

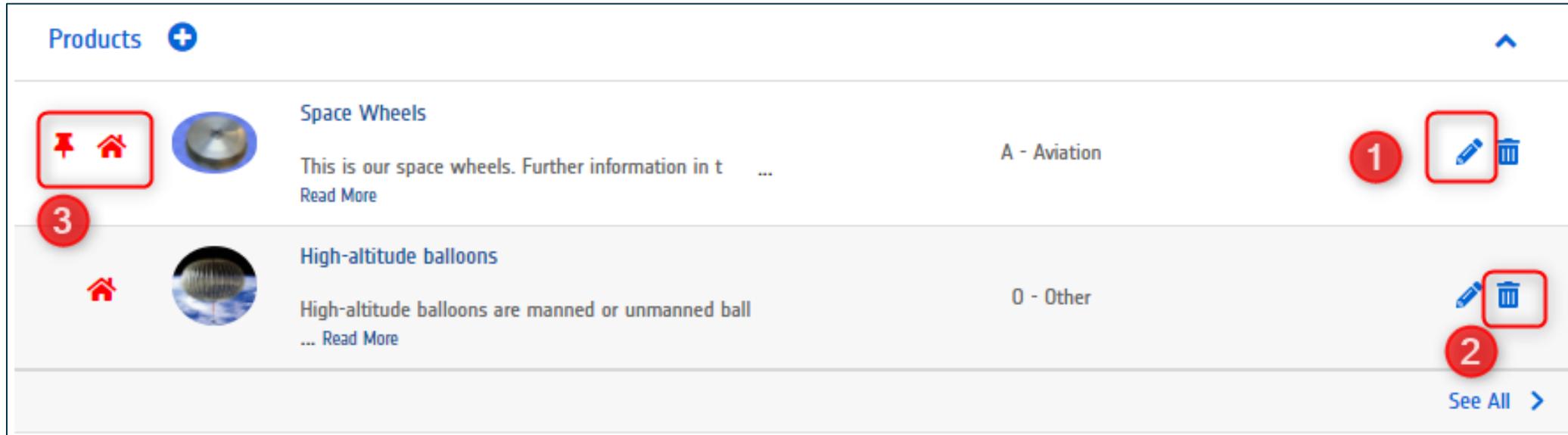
Show item into the Entity Profile homepage **PIN TO PROFILE PAGE (max. 3)**

Media Management  **Add images or video**

Managing the Entity Profile: Competences and Capabilities (6/10)

➤ With the profile in editing mode, you can:

1. Access and modify the fields by clicking on the pencil icon in each row
2. Delete an existing product by clicking on the bin icon in each row
3. Identify which items are pinned to the homepage (🏠) and the list (📌). Note that no more than three items can be pinned to the homepage in the Competences & Capabilities section.



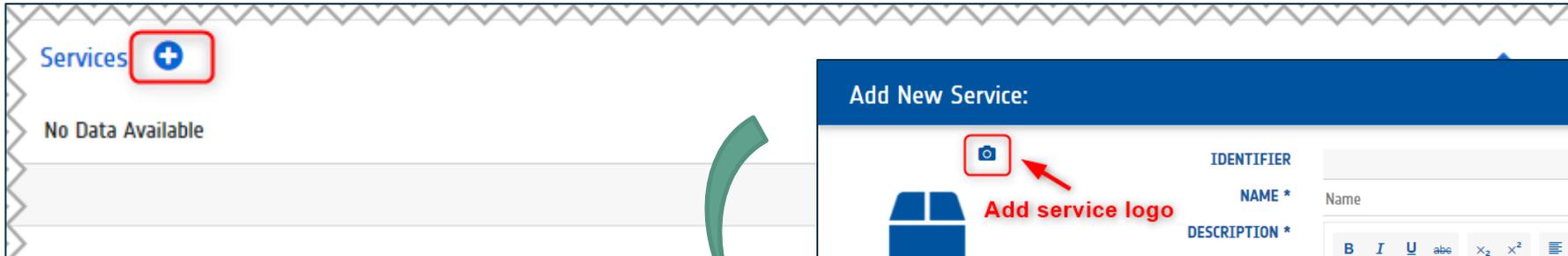
Products +

 		Space Wheels This is our space wheels. Further information in t ... Read More	A - Aviation	 
		High-altitude balloons High-altitude balloons are manned or unmanned ball Read More	O - Other	 

See All >

Managing the Entity Profile: Competences and Capabilities (7/10)

➤ Click on the “+” icon next to the **Services** list to add services. In addition to the basic information, you can:



- ❖ Upload the logo of the service
- ❖ Upload a specification file in pdf format
- ❖ Pin the item to keep it at the top of the list in the section and/or to make sure it is always visible on the entity profile page
- ❖ Add Media (images or videos)

➤ Click on “SAVE” to confirm or “CLOSE” to discard changes.

Add New Service:

IDENTIFIER

NAME * Name

DESCRIPTION *

SERVICE TYPE *

SPECIFICATIONS

File Name **Upload file**

NO **Show item into the Entity Profile homepage**

NO **Show item into the list** **PIN TO LIST (max. 3)**

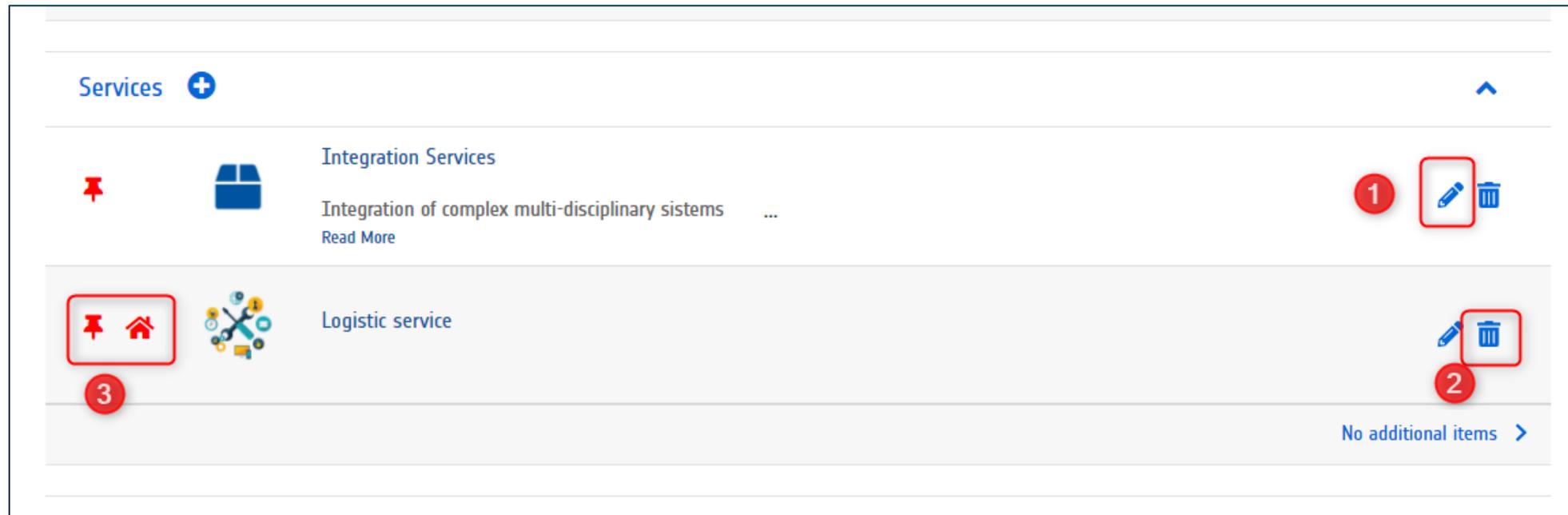
PIN TO PROFILE PAGE (max. 3)

Media Management **Add images and video** [Show Gallery](#)

SAVE **CLOSE**

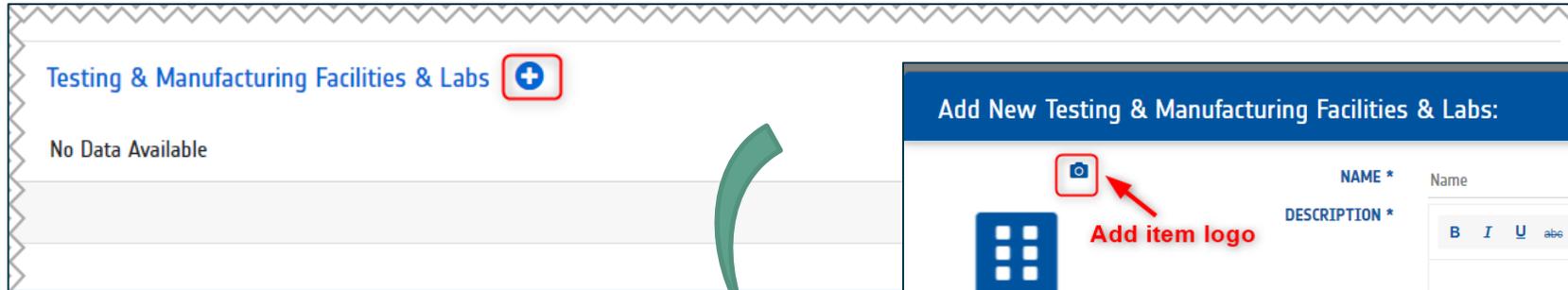
Managing the Entity Profile: Competences and Capabilities (8/10)

- With the profile in editing mode, you can:
 1. Access and modify the detail fields by clicking on the pencil icon in each row
 2. Delete an existing service by clicking on the bin icon available in each row
 3. Identify which items are pinned to the homepage (🏠) and the list (📌). Note that no more than three items can be pinned to the homepage of the Competences & Capabilities section.



Managing the Entity Profile: Competences and Capabilities (9/10)

- Click on the “+” icon next to the **Testing & Manufacturing Facilities and Labs** list to add your facilities. In addition to the basic information, you can:



- ❖ Upload a logo for the item
- ❖ Upload a specification file in pdf format
- ❖ Pin the item to keep it at the top of the list in the section and/or to make sure it is always visible on the entity profile page
- ❖ Add Media (images or videos)
- ❖ Note that the “B - Cleanroom” facility type includes additional fields to fill in

- Click on “SAVE” to confirm or “CLOSE” to discard changes.

Add New Testing & Manufacturing Facilities & Labs:

NAME * Name

DESCRIPTION *

CITY City

COUNTRY *

TYPE *

SPECIFICATION File Name **Upload file**

NO NO

Show item into the list → **PIN TO LIST (max. 3)**

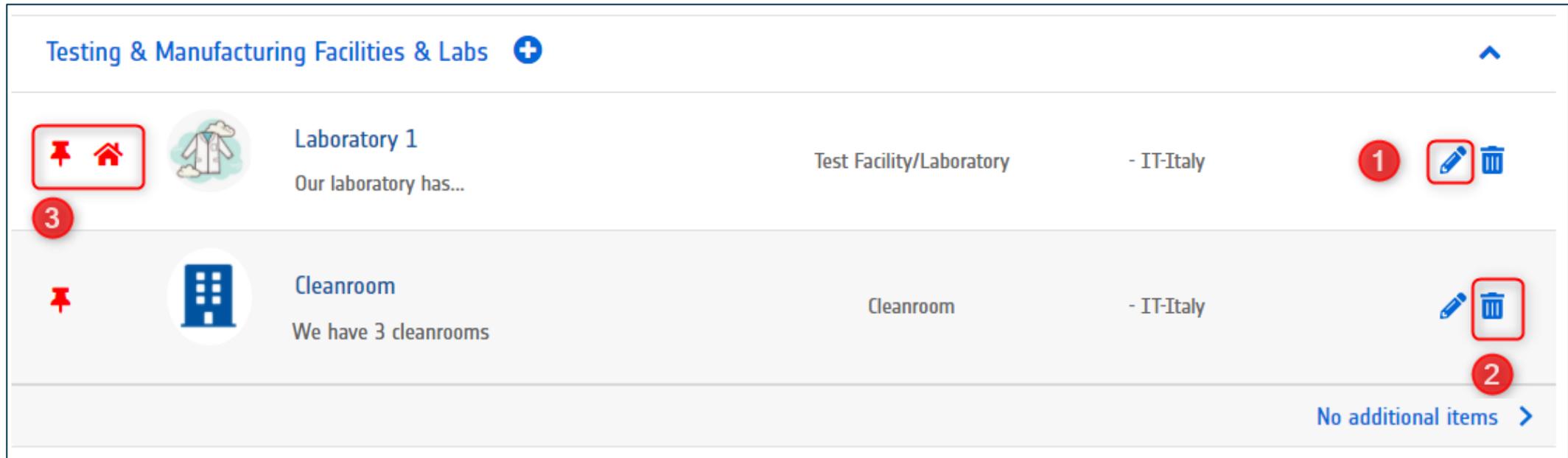
Show item into the Entity Profile homepage ← **PIN TO PROFILE PAGE (max. 3)**

Media Management + **Add images and video**

SAVE **CLOSE**

Managing the Entity Profile: Competences and Capabilities (10/10)

- With the profile in editing mode, you can:
 1. Access and modify the detail fields by clicking on the pencil icon in each row
 2. Delete an existing item by clicking on the bin icon in each row
 3. Identify which items are pinned to the homepage (🏠) and the list (📌). Note that no more than three items can be pinned to the homepage of the Competences & Capabilities section.



Testing & Manufacturing Facilities & Labs +

 	 Laboratory 1 Our laboratory has...	Test Facility/Laboratory	- IT-Italy	 
	 Cleanroom We have 3 cleanrooms	Cleanroom	- IT-Italy	 

No additional items >

Managing the Entity Profile: Experience (1/5)

- The **Experience** section enables you to list both the ESA contracts that your entity is or has been involved in, and other activities. To open the Experience section, click on “Access the section” in the Experience box of the entity profile homepage.
- Then click on “Edit Page” in the Experience section.

The image shows two screenshots of the ESA entity profile interface. The top screenshot shows the 'Experience' section on the entity profile homepage, featuring a blue circular icon with a graduation cap, the text 'Experience', 'No data available', and a red-bordered button labeled 'Access the section >'. A green arrow points from this button to the bottom screenshot. The bottom screenshot shows the 'EXPERIENCE' section page, which includes an 'Edit Page' button, a navigation menu with 'Experience' selected, and two data sections: 'Involvement in ESA Contracts (selection)' and 'Other Projects', both displaying 'No Data Available' and a 'No additional items >' link.

Managing the Entity Profile: Experience (2/5)



- The section contains 2 sub-sections, “Involvement in ESA Contracts (selection)” and “Other Projects”
- By default, only the three most recently updated items are shown. However, if you pin items to the top of the list (see next slide), they will appear here. To see the full list, click on the “See All” link in the bottom-right corner of the relevant box

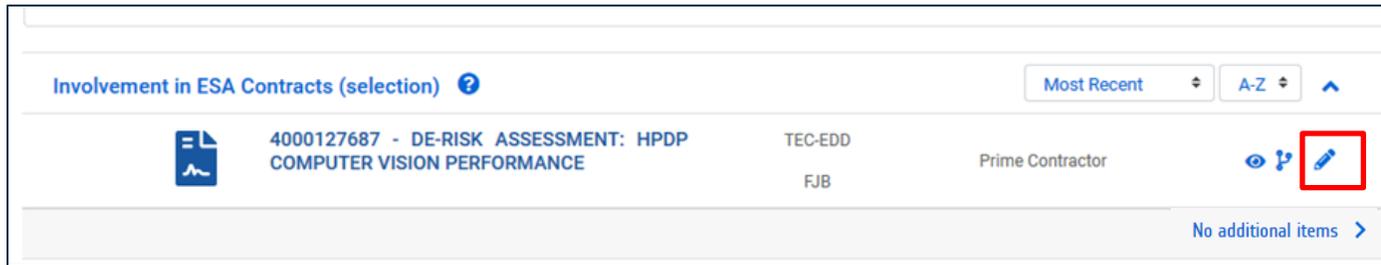
➤ Click on the “📄” icon to access the changelog for the section and export the information to Excel.

Other Projects	
Study 2	Non Space
Study 2 Description	
Project 2	Non Space AVIONICS
Project 2 Description	
Study 1	Space ESA
Study 1 Description	



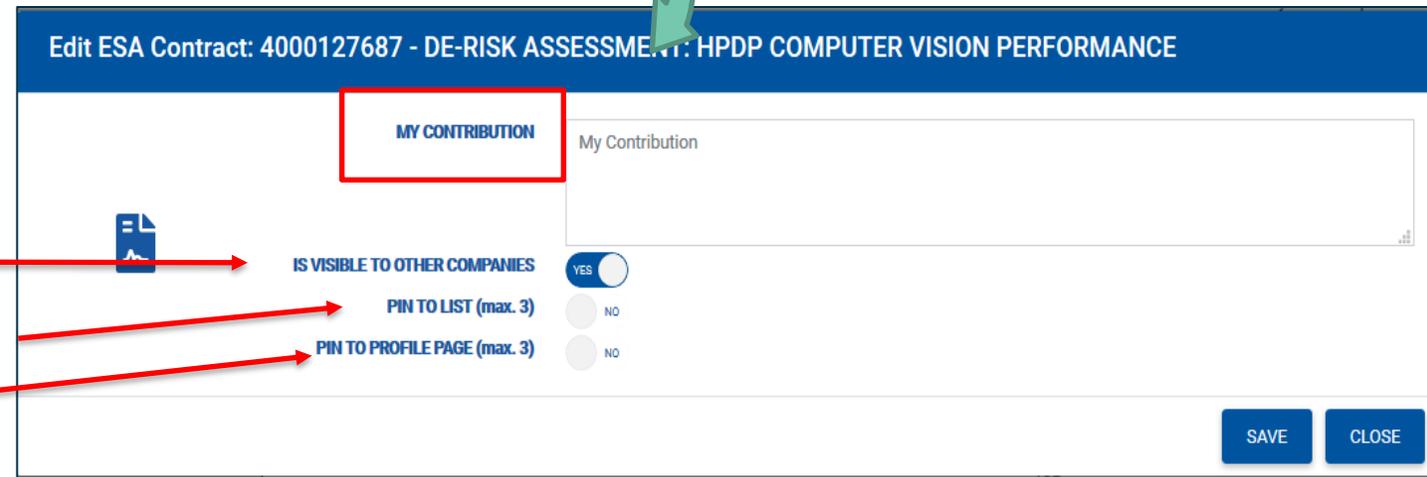
Managing the Entity Profile: Experience (3/5)

- The **Involvement in ESA Contracts (selection)** list contains the ESA contracts which your entity is or has been involved in as Prime Contractor or Subcontractor. The information is retrieved directly from the ESA system
- The information from the ESA system cannot be edited but you can provide further details by clicking on the pencil icon



- You can:

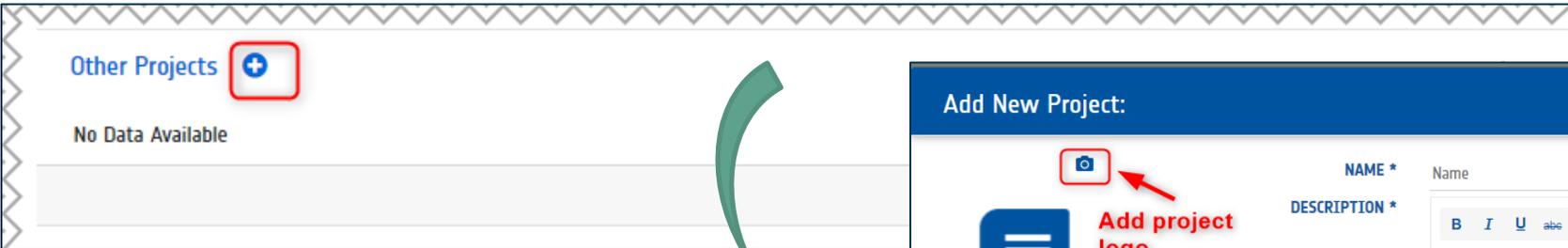
- ❖ Add details in the “My Contribution” text field
- ❖ Select whether the contract will be visible publicly (for a maximum of 10 ESA contracts in this section of the profile)
- ❖ Pin the item to keep it at the top of the list in the section and/or to make sure it is always visible on the entity profile page



- Click on **SAVE** to confirm or **CLOSE** to discard changes.

Managing the Entity Profile: Experience (4/5)

➤ Click on the “+” icon next to the **Other Projects** list to add information about activities which your entity is or has been involved in but which are not available in the ESA Contracts sub-section (e.g. if your entity has been an indirect supplier in an ESA contract). In addition to the basic information, you can:



- ❖ Upload the project logo
 - ❖ Pin the item to keep it at the top of the list in the section and/or to make sure it is always visible on the entity profile page
 - ❖ Add Media (images or videos)
- Click on **SAVE** to confirm or **CLOSE** to discard changes.

Managing the Entity Profile: Experience (5/5)



- With the profile in editing mode, you can:
 - Access and modify the detail fields by clicking on the pencil icon in each row
 - Delete an existing item by clicking on the bin icon available in each row
 - Identify which items are pinned to the homepage (🏠) and the list (📌). Note that no more than three items can be pinned to the homepage of the Experience section.

Other Projects +

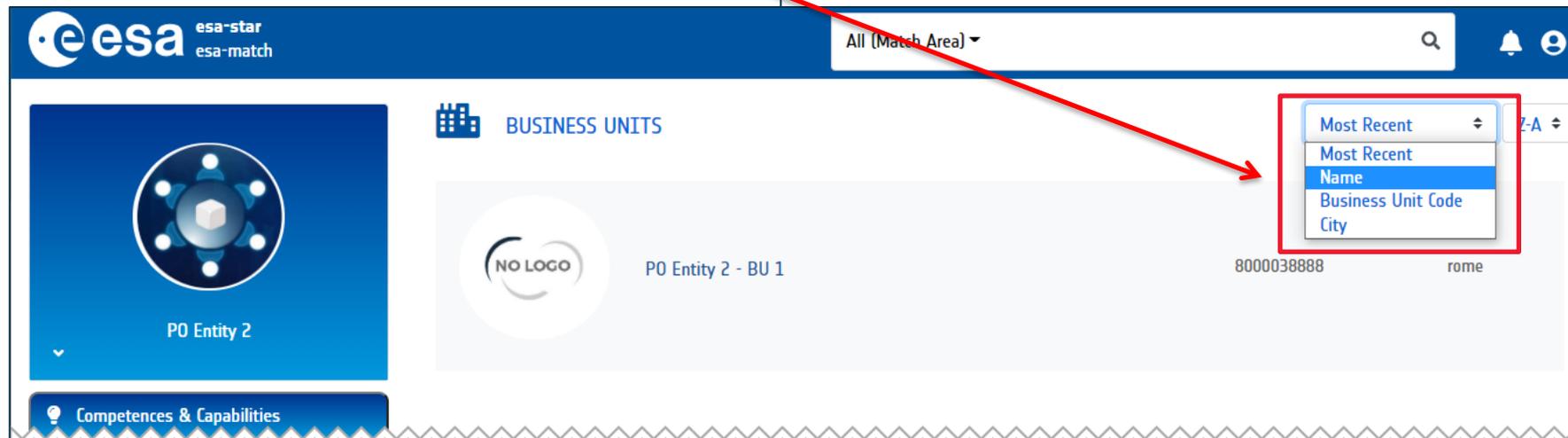
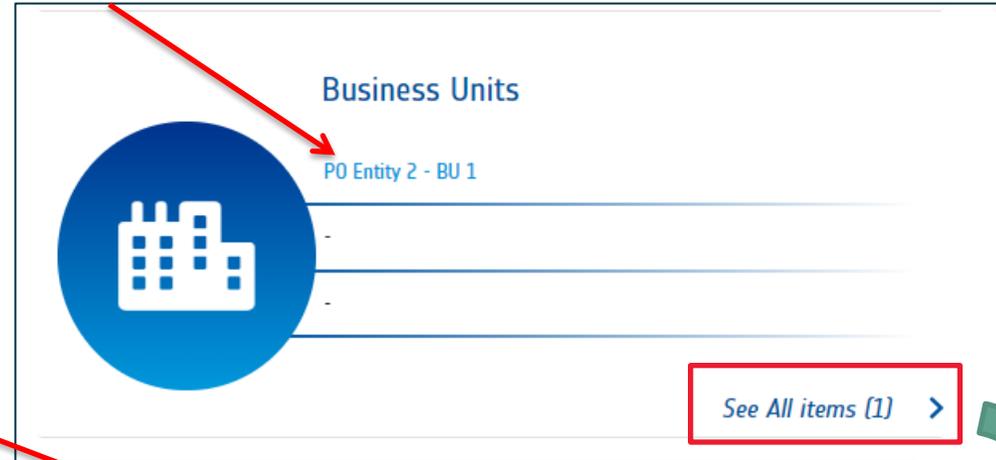
 		Earth Observation applications This research activity is aimed to...	Space	JRC	 
 		CCNs Management This project was related to the implementation of ... Read More	Space	ESA	 

No additional items >



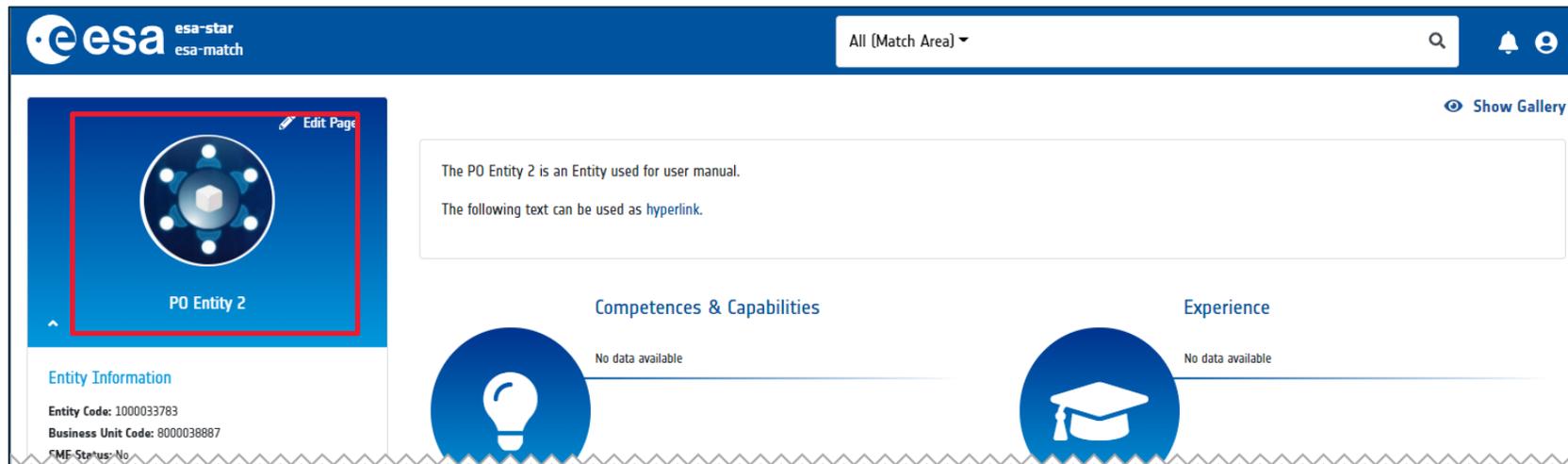
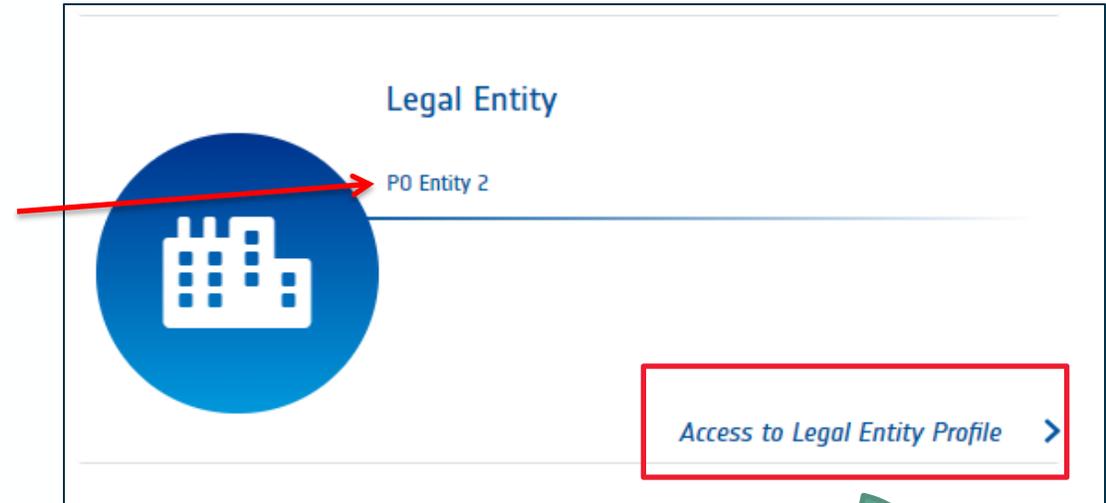
Managing the Entity Profile: Display Business Unit Information

- On the Legal Entity Profile home page, the list of the three most recently updated business units of the legal entity is shown inside the relevant box
- To access the associated entity profile, click on the name of the business unit
- To access the full list, click on “See All Items”:
 - ❖ The list contains the BU logo, name, BU code and city
 - ❖ The list can be sorted.



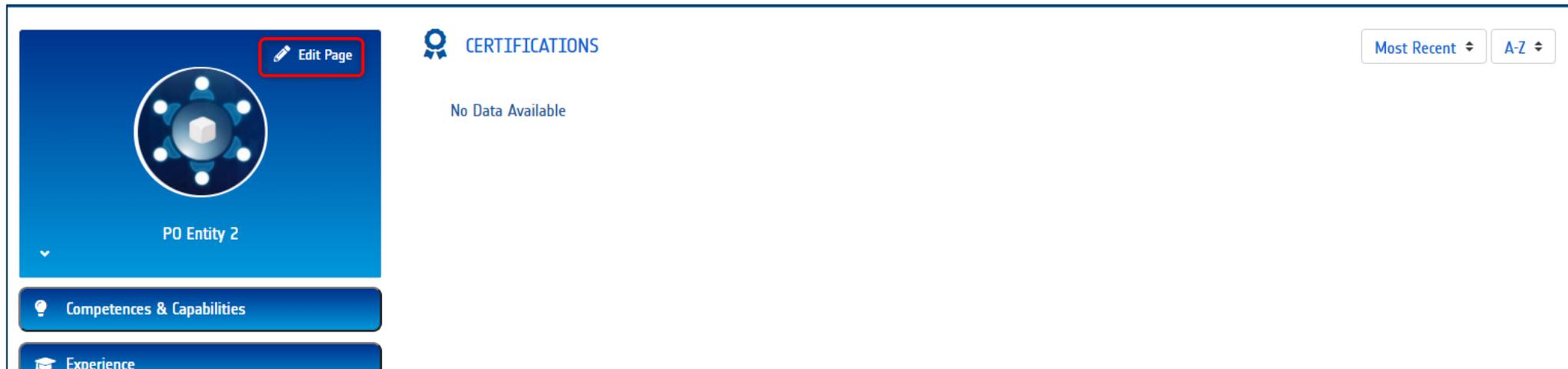
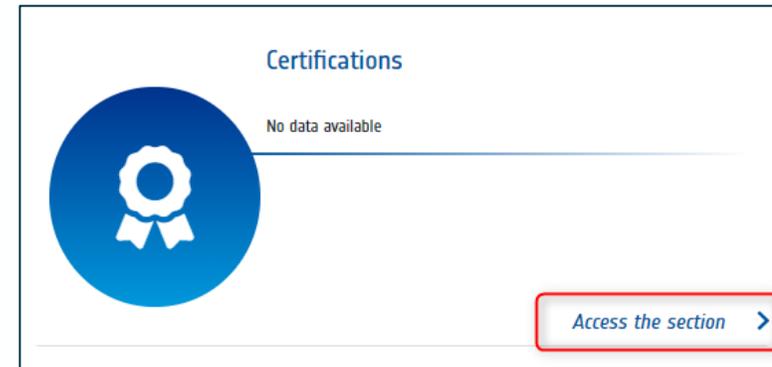
Managing the Entity Profile: Display legal Entity Information

- On the Business Unit Profile home page, the information about the legal entity it belongs to is shown inside the relevant box
- To access the related entity profile, click on the name of the legal entity or “Access to Legal Entity Profile”.



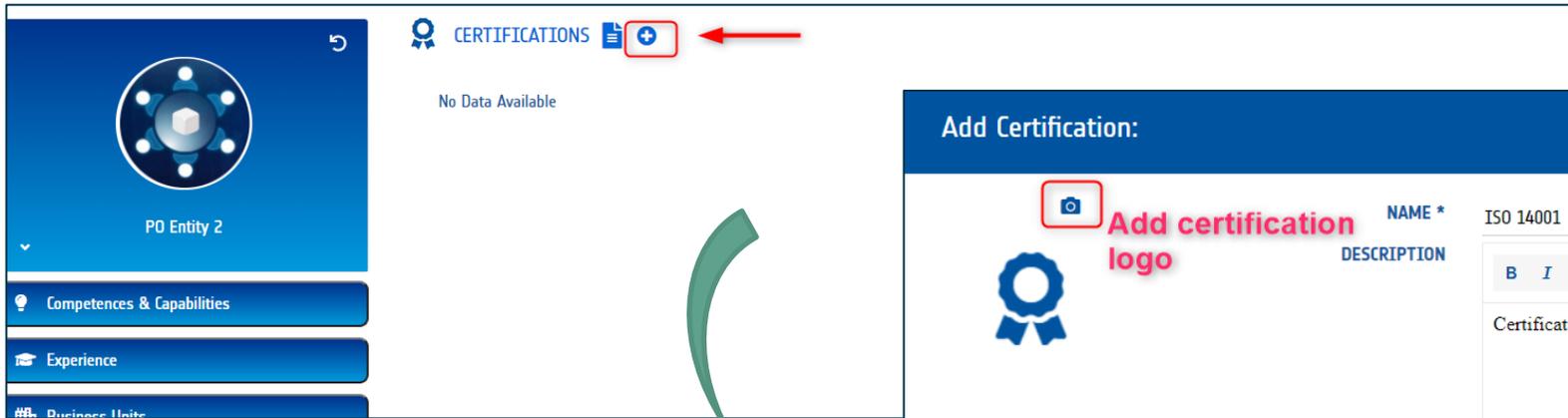
Managing the Entity Profile: Certifications (1/3)

- To manage certifications, open the relevant section by clicking on “Access the section” in the Certification box on the entity profile homepage
- Click on “Edit Page” in the Certification section.



Managing the Entity Profile: Certifications (2/3)

➤ Click on the “+” icon to add a certification. In addition to the basic information, you can:



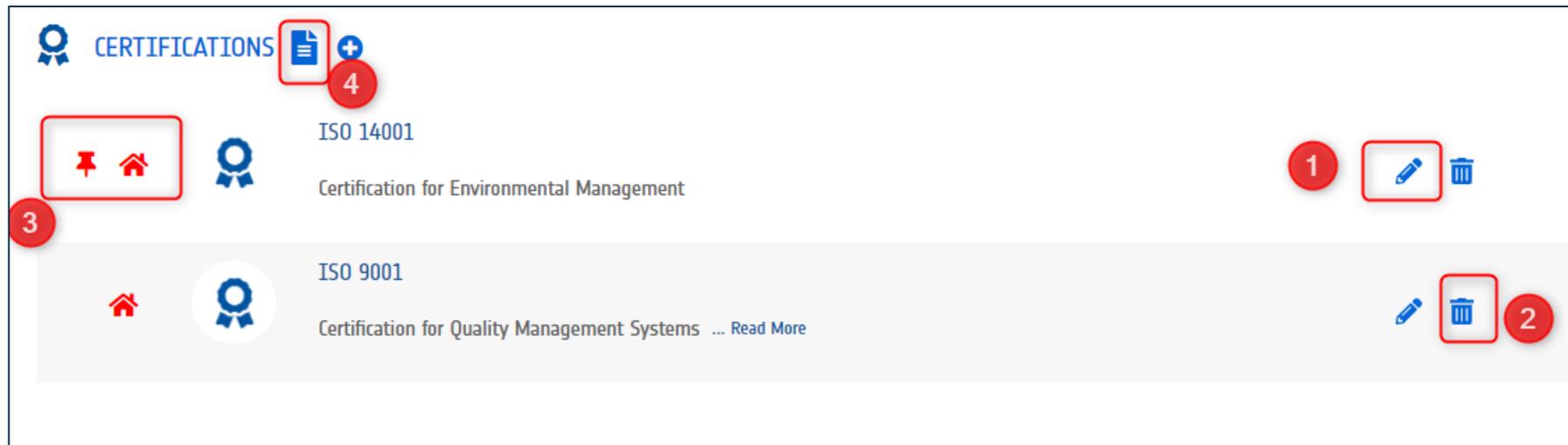
- ❖ Upload a certification logo
- ❖ Upload an attachment in pdf format
- ❖ Pin the item to keep it at the top of the list in the section and/or to make sure it is always visible on the entity profile page

➤ Click on **SAVE** to confirm or **CLOSE** to discard changes.

The 'Add Certification' form is shown with several annotations in red. A camera icon is labeled 'Add certification logo'. The 'NAME *' field contains 'ISO 14001'. The 'DESCRIPTION' field contains 'Certification for Environmental Management'. Under 'SPECIFICATION', there are two toggle switches: 'PIN TO LIST (max. 3)' and 'PIN TO MAIN PAGE (max. 3)', both labeled 'Show on the top of the section' and 'Show in the Entity Profile homepage'. An 'Upload file' button with a file icon is also annotated. At the bottom right are 'SAVE' and 'CLOSE' buttons.

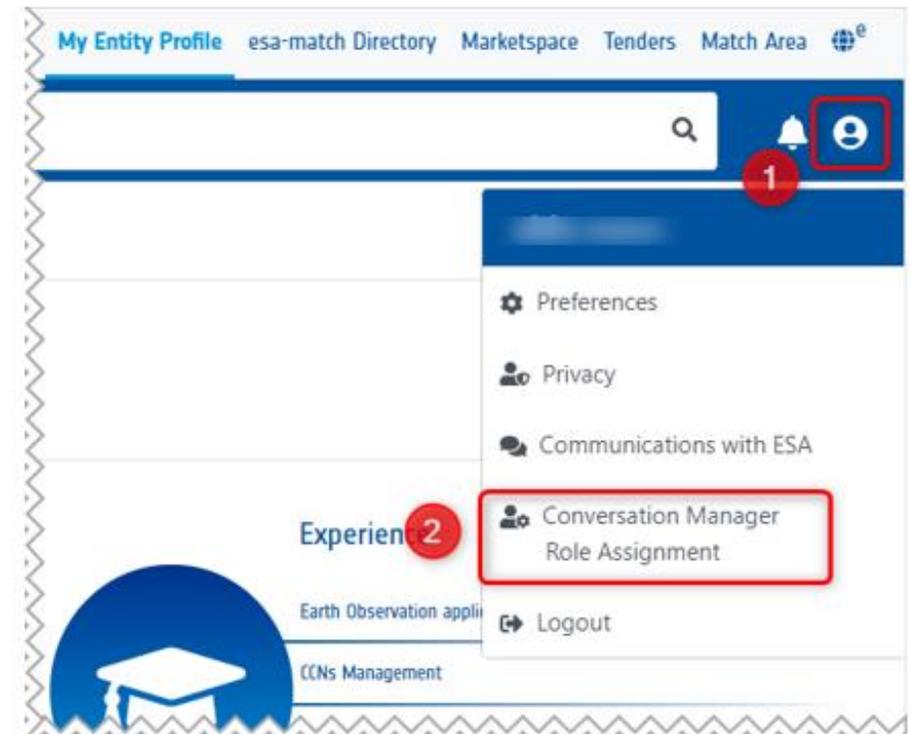
Managing the Entity Profile: Certifications (3/3)

- With the profile in editing mode, you can:
 1. Access and modify the detail fields by clicking on the pencil icon in each row
 2. Delete an existing item by clicking on the bin icon available in each row
 3. Identify which items are pinned to the homepage (🏠) and the list (📌)
 4. Access the changelog and export it in an Excel file.



Conversation Manager Role Assignment (1/3)

- The assignment of the Conversation Manager role is directly managed in esa-match by the esa-match Responsible. This assignment is also visible under the “Contacts” section in esa-star Registration
 - As the esa-match Responsible, you can only assign this role to users in your entity with a valid role in esa-star Registration
- Click on your profile icon and select the “Conversation Manager Role Assignment” option.



Conversation Manager Role Assignment (2/3)

- The section contains the list of any users belonging to your entity who are already assigned the Conversation Manager role
- Click on “Add Conversation Manager Role” to assign the role to a user
- In the field for selecting the user (1), you can see the list of all users in your entity with a valid role assigned in esa-star Registration (except for those users already assigned the role of esa-match Responsible or esa-match Conversation Manager). Once you have selected a user, click on “Save”.

Conversation Manager Role Assigned To

Information

- For more details regarding the roles and their capabilities, please refer to Management of Entity Profile, Ads in MarketSpace and Communications esa-match User Manual

Add Conversation Manager Role +

Username	First Name	Last Name	Email	Remove Conversation Manager role
EMP_LRossi	Lucia	Rossi	lucia.rossi@moro.it	

1 - 1 of 1 items

Add Esa-Match Conversation Managers

Select users:

Luca Bianchi (EMP_LuBianchi)

Close Save

Conversation Manager Role Assignment (3/3)

- You can also remove the role from one or more users by clicking on the bin icon. A pop-up will appear asking you to confirm removal. For both assignment and removal of the Conversation Manager Role, the affected users are notified by the system.

The screenshot shows the 'Conversation Manager Role Assigned To' page in the ESA Match system. At the top, there is a search bar with 'All (Match Area)' and a search icon. Below the search bar, there is an 'Information' section with a link to the 'esa-match User Manual'. A table lists users with their roles. The table has columns for Username, First Name, Last Name, Email, and Remove Conversation Manager role. The user EMP_LuBianch is highlighted, and a red box around the bin icon in the 'Remove Conversation Manager role' column indicates the action to be taken. A green arrow points from this icon to a confirmation dialog box titled 'Esa-Match Conversation Manager Role Deletion'. The dialog box asks 'Do you confirm the removal of esa-match Conversation Manager Role to the user: EMP_LuBianch?' and has 'Yes' and 'Cancel' buttons. The 'Yes' button is highlighted with a red box.

Username	First Name	Last Name	Email	Remove Conversation Manager role
EMP_LRossi	Lucia	Rossi	lucia.rossi@moro.it	
EMP_LuBianch	Luca	Bianchi	luca.bianchi@moro.it	

To Recap

- What has been learned:
 - How to manage entity privacy settings
 - How to manage the entity profile
 - How to assign the esa-match Conversation manager role.