EASY Mobility Online Manual for Internal IRCs

First Part, update December 2023

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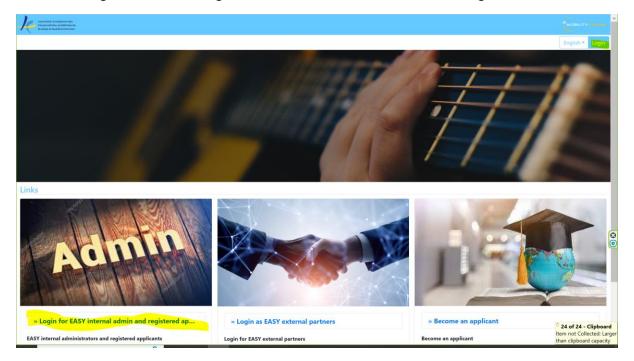
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Chapter 1: SETTINGS

How to login in the system (coordinators)

Go to: https://mobility.aec-music.eu/LoginServlet

Click on the login button on the right or on the first box down on the left to login



LOGIN Name:

The login name to enter the profile of your institution is the complete name of the main contact person you gave when you signed up for EASY last year. Should you have forgotten this name, please send an email to events@aec-music.eu

If people have multiple last names, include all of them with no spaces and capital letters

For example

Name: Juan Carlos Antonio

Login: JuanCarlosAntonio

If people have special characters in their names, do not include them in the username.

For example.

Name: Mădălina Petre

Login: MadalinaPetre

PASSWORD:

Your password is your Erasmus Code without the country code

Exception 1: if your Erasmus Code without the country code is too short (less than 8 characters) please insert a 1 or two 1s at the end in order to reach 8 characters, as the password needs to have at least 8 characters.

For example

Erasmus code without country = WIEN03

Password: WIEN0311 (so that we get to 8 characters - minimum password length)

Exception 2: if the Erasmus Code without the country code contains a hyphen, leave it out of the password.

For example:

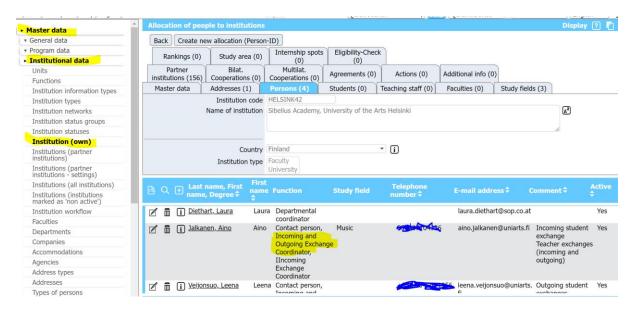
Erasmus code without country: F AIX-PRO29

Password: AIXPRO29

With the same login and password you can let access to 5 people. In the system you can create as many users as you want. You can change your password if you wish.

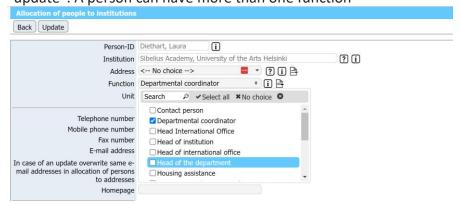
Persons and Functions

It is very important to have the right contacts in the system. It is compulsory to have in the system one person assigned to the Function "Incoming and Outgoing Exchange Coordinator" because all email templates for notifications are linked to this function. You can check if you have it by clicking on the main menu on the left Master data – Institutional data – Institution (own). Click on the bookmark "Persons

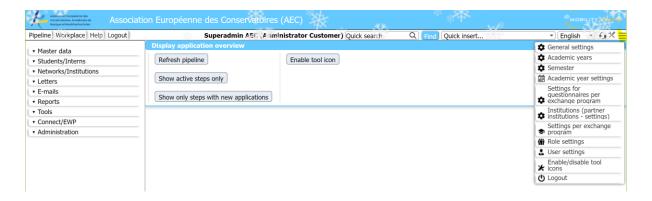


It is possible to have a different person for the Outgoings and another one for the Incomings. But in this case, it is not enough to change the function of those people, you need to contact Mobility Online to make sure what should receive what and that the templates are linked to the right function.

To add/ change a function to a person you click on the name of the person, you click on edit and you change the function in the dropdown menu and then you click on the button "update". A person can have more than one function

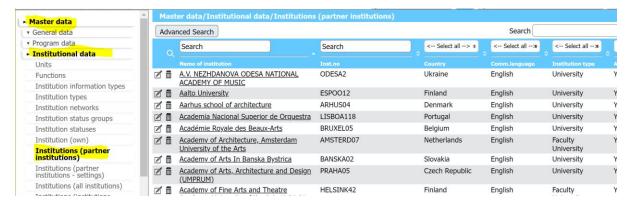


You find the most important settings in the burger menu on the top right corner (the three horizontal lines)

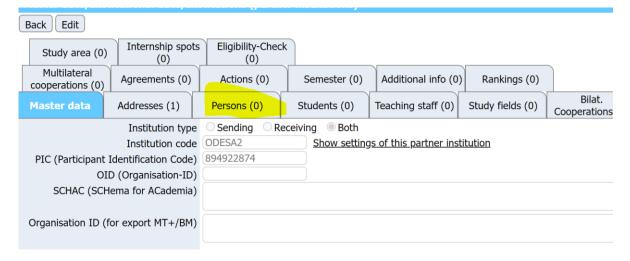


Check Name and Contacts of your (EASY External) partners

It is extremely important that the contact details of your (EASY External) partners are correct and up to date. While the AEC makes sure that the contact details of Internal Institutions are correct, it is up to each internal institution to check and update the contact of their external partners. Please note that the changes made by internal users are not visible systemwide, but they appear only in your institution's profile. To see the list of partners go on the left menu and click on Master data, Institutional data, Institutions (partner institutions). Click on the name of the institution to check their data.



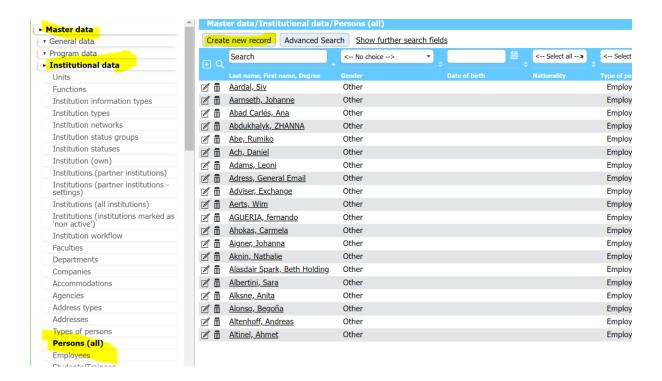
If you see 0 in the tab Persons, please create a user for this institution as indicated in the next point



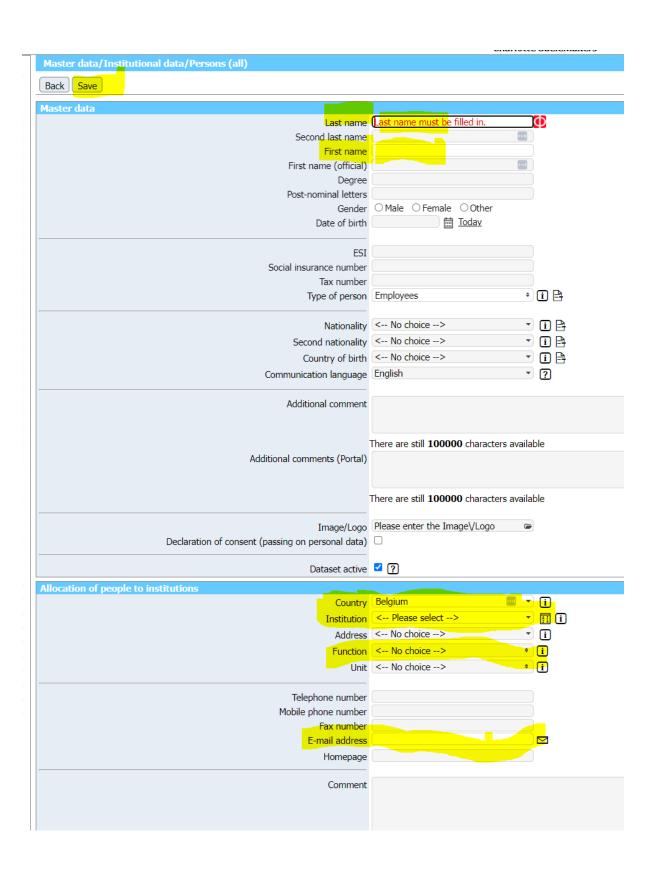
If there is a different number than 0, please click on the tab and check if the data are correct. If not, please apply changes always by following the path indicated in the next point.

Add Persons in the system for both your institutions and your partners

To create a person, you need to click on the left menu on Master Data – Institutional Data – Persons and then click on the button Create a New Record



You then get a form to fill about the person. See below the fields that you must fill in. Very Important: do not forget to put the email address and the function of the person (if you do not know exactly, just select Contact Person from the list)

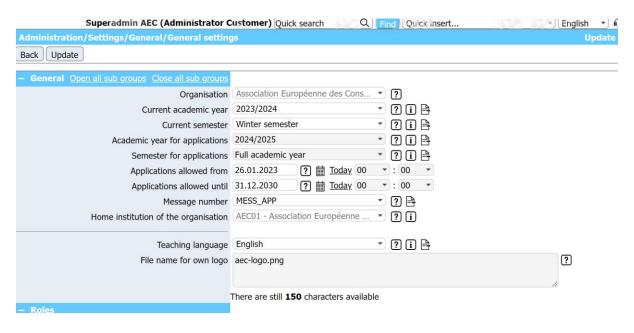


General Settings

The main settings of the systems are available in the so call "burger menu" (3 horizontal lines) in the top right corner of the main page you get when you log in:



Click on General Settings (first item in the burger menu), and then edit. See the settings below. Make sure that applications are allowed now by making sure we are in the indicated range and that **the Academic Year of applications is 2024/25**

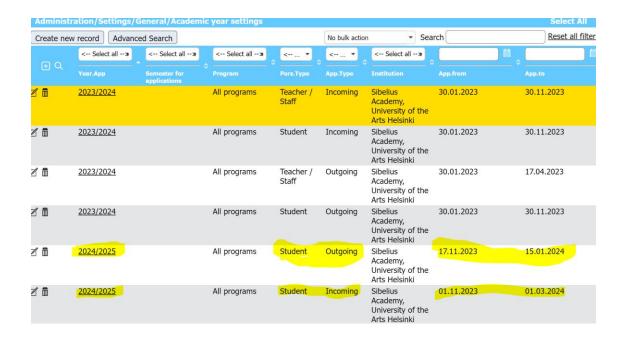


Academic Year Settings

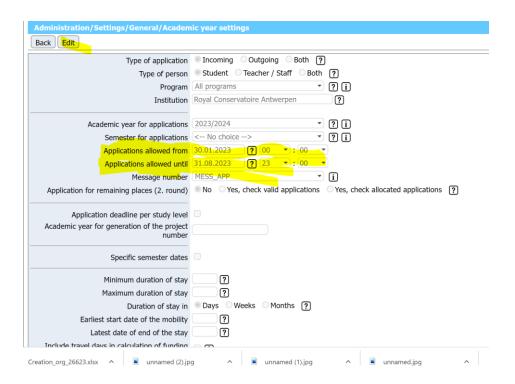
You need to set up the academic year settings in order to establish your application period.

Click on the Academic Year Settings from the burger menu on the top right corner of the main page you get when you log in.

Select each line that you want to adjust (see below the lines we advise you to adjust now)



Click on the academic year (underlined) and then on edit, to change dates



It is possible to have different academic year settings per semester, but you also need one setting for the whole year.

So for example like this, where full academic year is still closed:

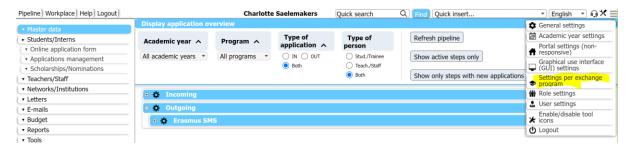


The example above shows that the Outgoing applications open for 24/25, and spring and fall semester are available, but as soon as you try to apply for Full academic year, it is closed.

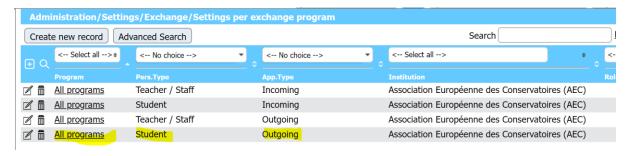
Settings per exchange programme

How to allow more than 4 choices to outgoing students

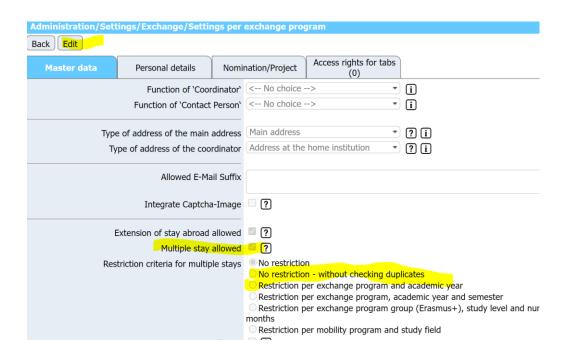
In the top right burger menu select "Settings per exchange programme"



Select "All Programmes (Student - Outgoing)



Click on Edit and select "Multiple stay allowed" – No restriction – without checking duplicates. With this setting, your students will not be limited to 4 choices and will be able to apply to <u>up to</u> 4 choices <u>multiple times</u> with the same login. Please note that this means that this applicant will appear in your system multiple times.

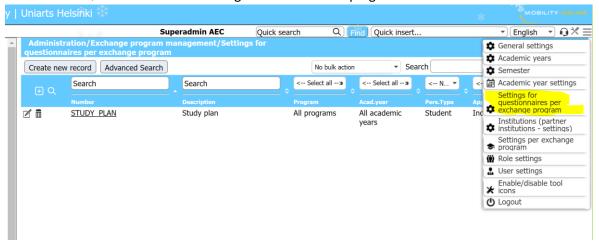


Set up your study plan

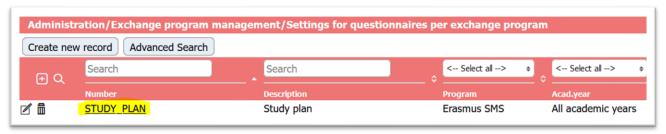
In the Study Plan, the applicant can suggest subjects at the host institution during the exchange. As Incoming coordinator it is important to review/edit the Study Plan questions, so they are in line with the possibilities at your institution.

The Study Plan is **not** the Digital Learning Agreement (DLA), which comes later in the process and only for applicants, who have been accepted.

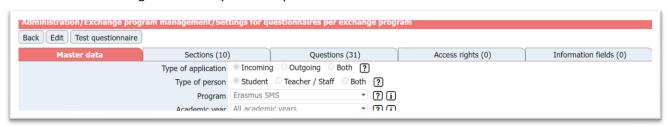
1. OPEN THE STUDY PLAN QUESTIONNAIRE Click *Questionnaires* in the burger menu on the top right:



In the new page you should see a Study Plan template - click the *Study Plan* link to open this template:



You now see the settings of the Study Plan template:



2. OPEN TEST QUESTIONNAIRE Click Test questionnaire:

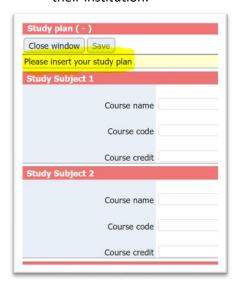


A new window will open with the questionnaire, the applicants will see. Keep this window open while editing and refresh it regularly, if you want to shift over and see the applicants view of your updates:

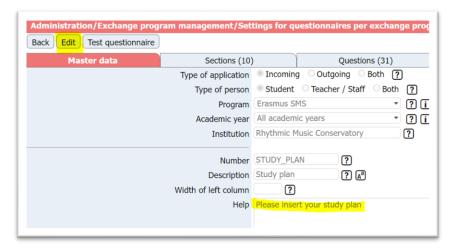


3. EDIT HELP TEXT

We strongly advise you to **insert the link to the study catalogue** the applicant needs to consult in order to put together the list of subject they want to take during their mobility at their institution:

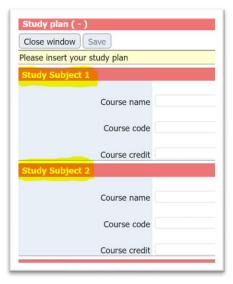


.. go back to the main settings page, click *Edit* and edit the help text here by putting the link to your course catalogue and any other information that can help the student filling in their study plan:

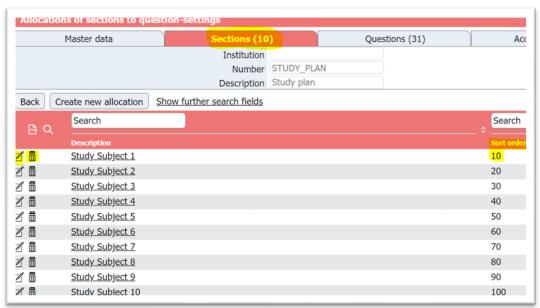


4. EDIT SECTIONS

If you want to edit these section headlines (or delete some or add more):

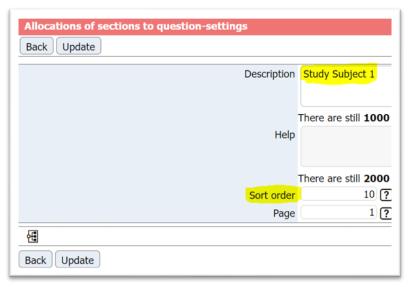


.. click the *Sections* tab and click the Edit or Delete icon left to the relevant headline (also note the sort order to the right):



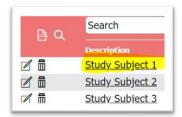
If you click the Edit icon, please note these fields on the edit page:

- Description: Refers to section headline title
- Sort order: This defines this section sort order among your other sections. It can be changed to a higher/lower number, if you want to move this section up or down. See the sort order of all your sections on the Sections tab (previous screenshot)

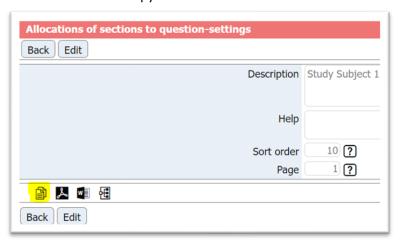


5. ADD NEW SECTIONS

If you want to add a new section headline, the easiest way is to click an existing headline, that has approximately the same content and setting as the new one should have:



.. and then click the copy icon at the bottom left:

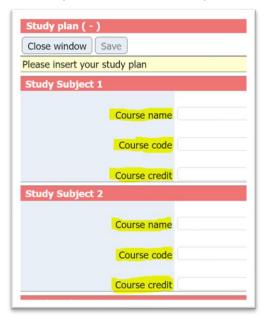


The new page that opens is your new section/headline, so you just edit what you need and click Save.

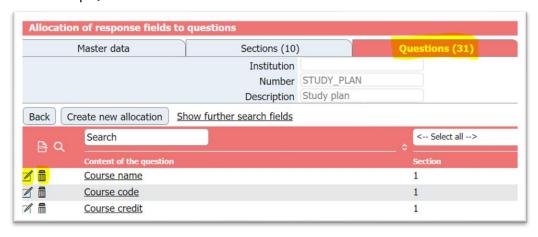
(this is in general the easiest way to create new fields, questions etc. in Mobility Online)

6. EDIT COURSE TITLES

If you want to edit these questions/titles (or delete some or add more):

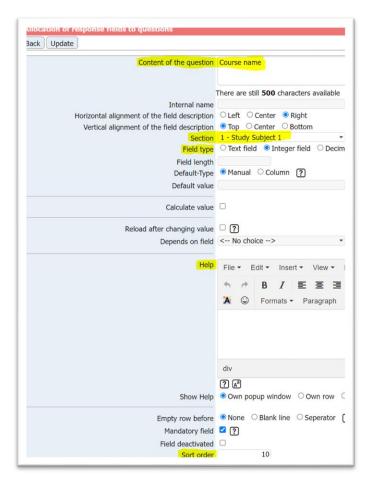


.. click the tap Questions and the Edit or Delete icon left to the relevant title:



If you click the edit icon, please note these fields on the edit page:

- Content of question: Refers to the title of the question
- Section: Refers to the sections mentioned above and the question will appear in the section you choose here
- Field type: Can be changes to e.g. Checkbox or Radio button, if you want the applicants to choose between possibilities instead of writing. In that case, you must write the possible choices separated with comma in the field that will appear, if you select e.g. Radio button. Example: 1=XX,2=YY,3=ZZ
- Help: Here you can add help text for the question
- Sort order: This defines the order of all your question (same way as described under Section edit)



7. ADD NEW QUESTION

If you want to add a new question, you can use the same copy-process as under new section (please see number 5).

Partner Institutions

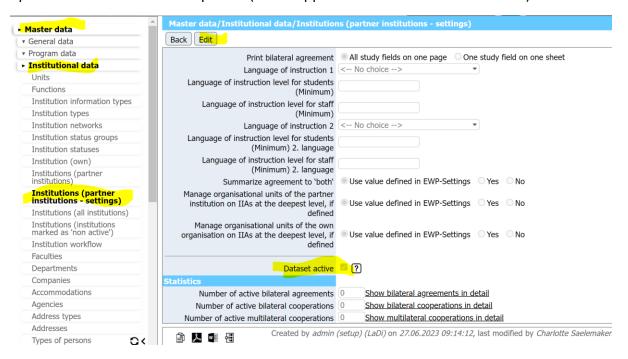
Decide with whom you want to exchange applications

By default, all internal and external institutions are indicated as your partners in the system.

If you want to exchange applications just with institutions you indicate as partner, but not all institutions in the system are your partners, you need to "disactivate" the partnership as follows.

Partners' individual deactivation

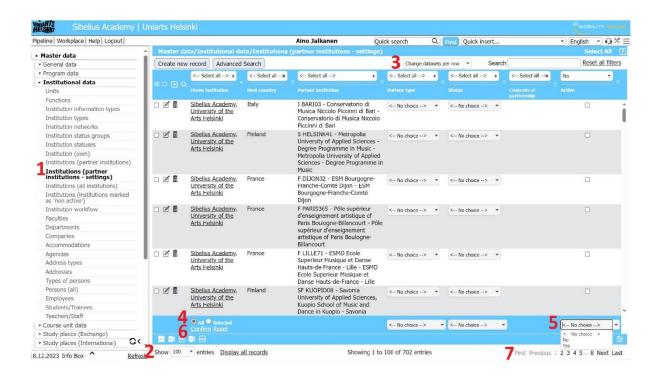
In the big left menu click on: Master Data – Institutional Data – Institutions (partner institutions - settings), then select the institution you do not want to appear as your partner and click on the button Edit, scroll down, and deselect the setting "Dataset Active". Then go up and click on the button "Update" (which appear instead of the button "Edit").



Partners' deactivation as bulk action

- 1. Go to Master data > Institutional data -> Institutions (partner institutions settings)
- 2. Change the number of entries that are shown to 100 (Show 100 entries) on the bottom of the page
- 3. Click on "No bulk actions" and choose "Change datasets per row"
- 4. Choose "All" on bottom left
- 5. Go to the column "Active" on right, click on the bottom or top of the column and choose "No"
- 6. Click "Confirm" on left bottom of the page.
- 7. Choose the next page and repeat until you have deactivated all institutions.

N.B.: you can also try to directly display all records and disactivate all partners in one go, but if it does not work, better to do it in groups of 100 entries



Then you can proceed to activate back those you want to exchange applications with.

Chapter 2: LOGIC OF THE SYSTEM and PROCESS

The application is divided in two parts OUTGOING and INCOMING.

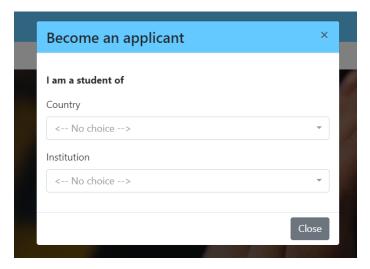
The procedure is slighly different according to the status of the institutions involved, internal or external.

- Internal Institutions = they use EASY MO as their application management system, and they pay a fee to the AEC for that
- External institution = they can receive applications and send applications to internal institutions, but their actions within the system is very limited

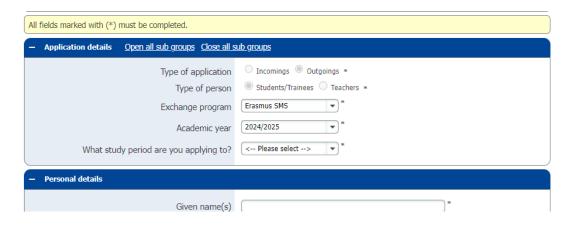
Case 1: an outgoing student from an internal institution applies as incoming to another internal institution (internal to internal)

1. The student goes to https://mobility.aec-music.eu/LoginServlet, clicks on Become and applicant and choses their country and home institution





and fills in the Outgoing Application Form.



N.B. = the academic year refers to the year when the mobility will take place.

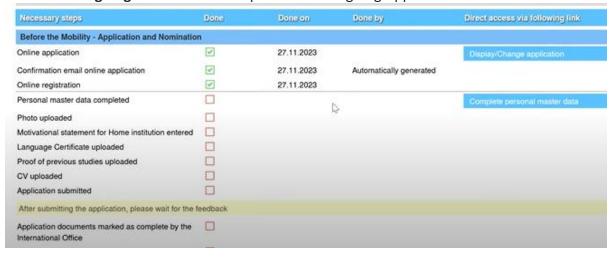
The outgoing application form contains up to 4 destinations, so the students fills in 1 outgoing application form for up to 4 destinations. The student can apply as long as the Outgoing application period of his own institution is open, regardless of if the Incoming application period is still closed or not, BUT – if the application deadline of one of the destinations has already expired, the student gets a warning message when filling in the form.

Please note that, once the student has submitted the application, only the Outgoing coordinator sees the applications (the incoming coordinator does not).

2. After submitting the Outgoing Application Form, the student receives an email to register in the system. The student needs to remember his Login and Password



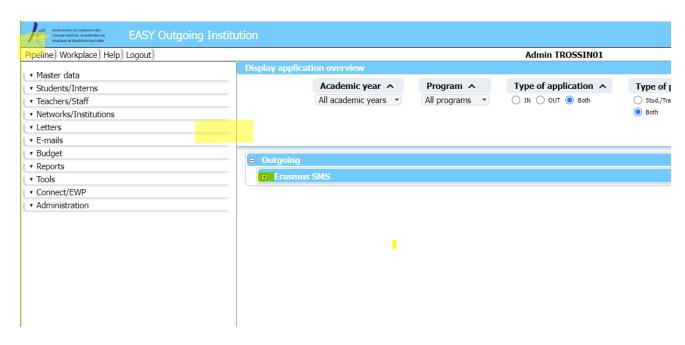
3. The student receives an email to login in the system to upload documents and media file in the **Outgoing Workflow** to complete their Outgoing Application.

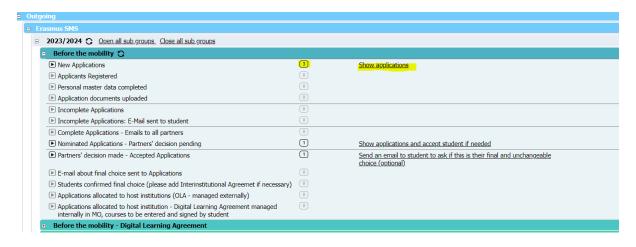


The blue actions on the right are the actions that the student must perform to complete the workflow. The student can do the action by clicking on t. Once the action is complete the "Done" box becomes green and ticked. If it is red, it means that the document still needs to be filled in/uploaded. The student needs to click on sabe/update according to the action. He finally needs to Submit the Application.

To sum up, the Outgoing application is composed of 2 parts: Outgoing Application Form + Outgoing Workflow. Once the Outgoing Workflow has been filled in with all necessary upload, the students get a message in the workflow in yellow that they have to wait for the approval of the home coordinator.

4. The Outgoing Coordinator now logs in the system and clicks on **Pipeline** (first horizontal menu item up on the left). Then they click on the little + next to **Outgoing**, then on the + next to Erasmus, then on the + next to the **Academic Year the** application is for (2024-2025), and then on **Before Mobility**



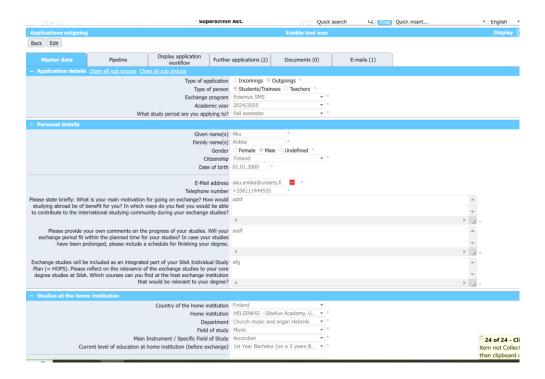


You now see the various "drawers", called **pipeline steps**, indicating which is the status of the applications. The little number in the square indicates the number of applications in the same status. Next to the number you can see an action link. Thanks to the actions of the student and the two coordinators (outgoing and incoming), the application will pass through the various steps and action links will appear on the right, telling you as coordinator what to do. You will need to click on those action links to proceed.

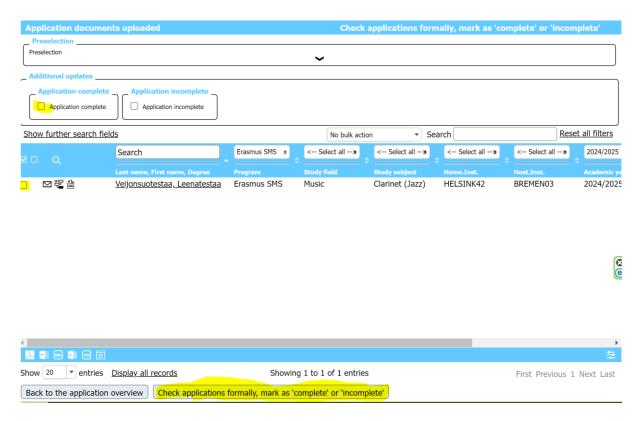
At this point, the Outgoing coordinator needs to click on the application to review all the data and documents the student has entered, by clicking on the various tabs that compose it.



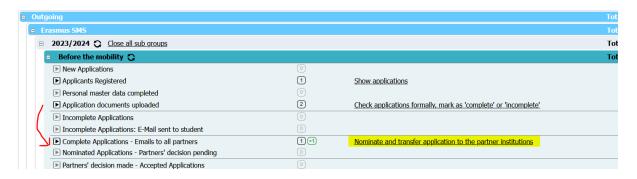




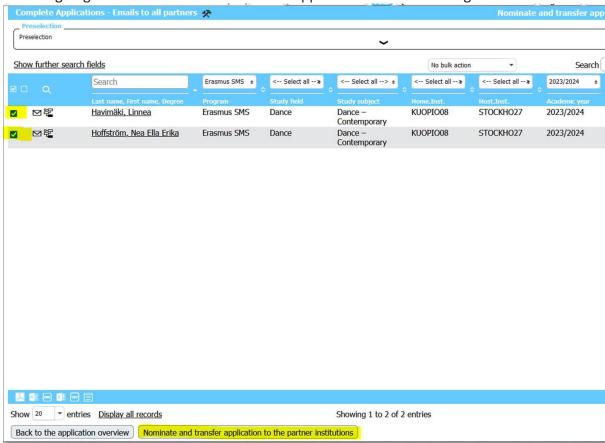
To mark the application as complete, the Outgoing Coordinator needs to click on the 2 boxes and the button highlighted below



5. After marking her as complete, the application will directly appear in pipeline step to nominate and transfer application to partner:

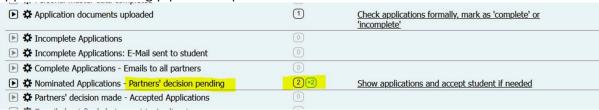


6. The Outgoing Coordinator now transfers the application to the Incoming Institution.



Only now the Incoming coordinator sees that there is an application.

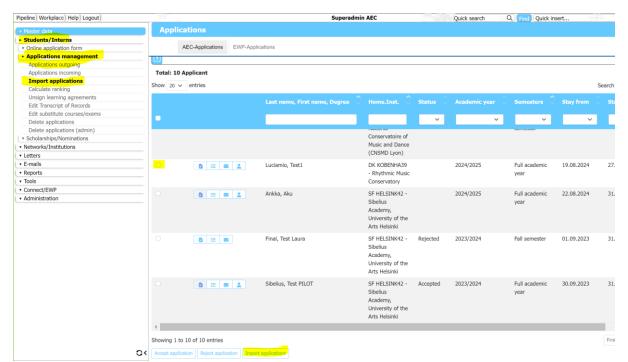
The outgoing application is now waiting for the Incoming institution to act and appears in the following pipeline step



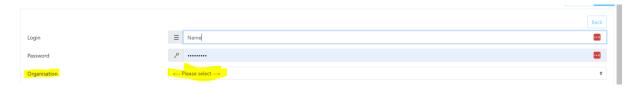
7. the Incoming Coordinator needs now to import the application from the internal partner. They therefore need to click on Pipeline, Incoming, Academic year of reference and Before Mobility. The application should appear in the step highlighted below and can be imported by clicking on the action link on the rightm select the application and then click on Import Applications.



In case this procedure does not work, an alternative way to import applications from internal institution is the following: from the left menu click on Student/Interns – Application Management – Import applications. Then you select the application to import and you click on the button on the bottom "import applications".



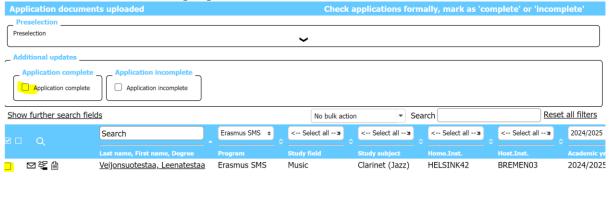
8. Now the student receives an email to login to complete the **Incoming Workflow.**When login in the system, the student can use the same credentials they used for the Outgoing Workflow but needs to make sure to select the Incoming Institution they are completing the workflow for. Please note that the student needs to complete one Incoming Workflow per chosen destination.

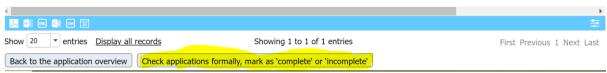


To sum up, while there is only one Outgoing Application Form and one Outgoing Application form to complete, there are as many Incoming Workflows to complete as the number of incoming destinations that the student has chosen. The Incoming Workflow works the same as the Outgoing one, with documents to upload by clicking on the blue actions on the right and boxes that become green as soon as the student proceeds with the uploading. In the Incoming Workflow, the student will be asked to fill in their Study Plan:



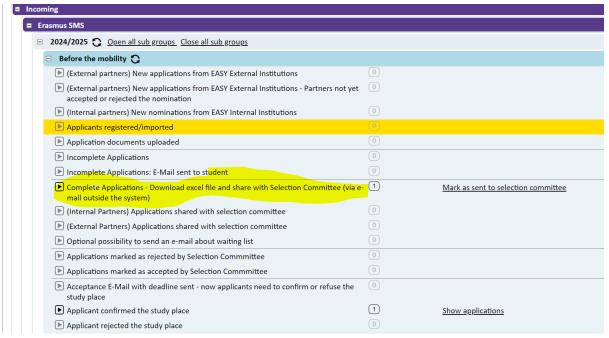
9. Once the student has submitted the documents of the Incoming Workflow, the Incoming Coordinator can see that the application moved to the step "Application documents uploaded" and can mark the application as complete by clicking on the boxes and button highlighted below





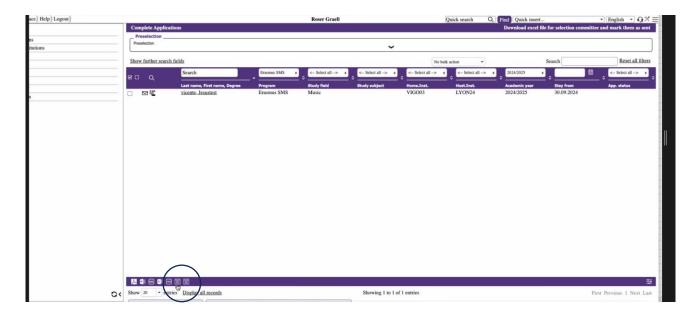
This action can be also done at the same time for more applications.

10. The application has now moved to the step "Complete Applications - Download excel file and share with Selection Committee (via e-mail outside the system)".

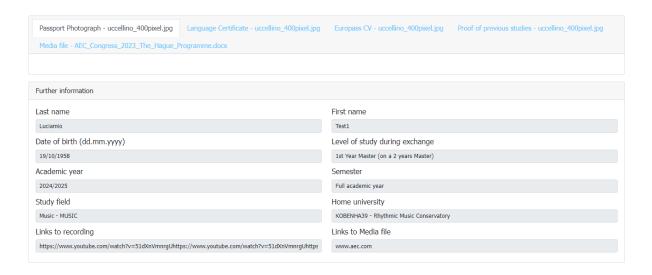


In this step you can download an excel file with the **link to the application documents** and another one with information about the application/s, to be shared via mail with the selection committee outside the system. You can now click on "Mark as sent to selection committee".

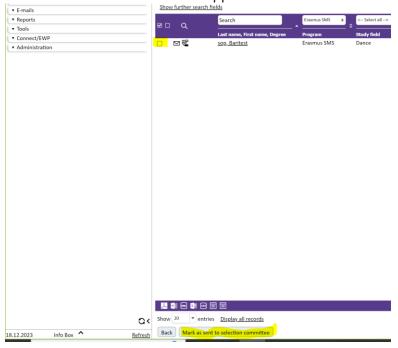
See where to download the excel file in the screenshot here below (the two small icons in the circle, on the bottom of the page) – click on those icons to obtain the files



The application link that you find in one of the excels will display the materials and information of the application as follows:



11. Once the files have been sent to the Committee outside the system, the Incoming coordinator can now mark the application as "Shared with the Committee"



12. The application moves to the following step in the Incoming Pipeline and the Incoming Coordinator will mark the application as accepted/selected/waitlisted according to the decision of the Committee.

13. The student receives the decision by email with a deadline for acceptance on their side (if their application is accepted). The student can accept or reject the application either in the Outgoing or in the Incoming Workflows



14. The final part of the application process goes back to the Outgoing Coordinator, who will ask to the student which is their final and ultimate choice, will allocate the student to the chosen destination and start the LA process



The student will have to login in the Outgoing Workflow to work with the learning agreement.

More information on the last part of the application process including the LA, will be included in the second part of the manual that will be published in January/February 2024

Case 2 – an outgoing student from an internal institution applies as incoming student to an external institution (internal to external)

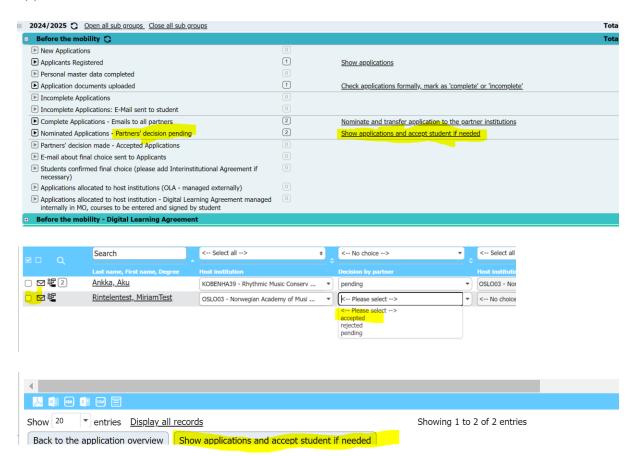
Points 1 to 4 of the process described above (Case 1 internal to internal) also apply to Case2, as the Outgoing part for the student, meaning the filling in of the Outgoing Application Form and the Outgoing Workflow, is on the internal institution's side.

What happens afterwards, depends on the way the Incoming External Institution handles incoming application, because externals do not have an Incoming Workflow in the EASY MO system.

What the External Incoming Coordinator can do is:

- to accept or reject a student via an action link received by email from the EASY MO system, based on the material of the Outgoing Part of the application;
- Ask to the student, outside the system, to send additional material via email, and then take a decision in EASY MO via the action link, received by email from our system;
- Contact the student / outgoing Coordinator to tell them that the Incoming Part of the application should be completed via another system, and provide the link to their system

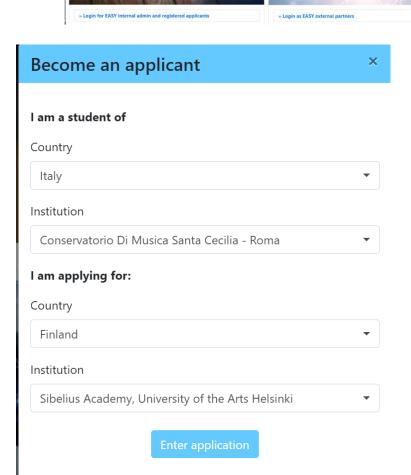
The Internal Outgoing Coordinator can still move by themselves applications for externals by directly acting in the pipeline and marking as rejected or accepted their outgoing applications



From this point onwards, the Internal Outgoing Coordinator can proceed with the same final steps as in Case 1 (ask to the student which is their final and ultimate choice and allocate the student to the chosen destination and start the LA process)

Case 3 – an outgoing student from an external institution applies as incoming to an internal institution (external to internal)

1. The student goes to https://mobility.aec-music.eu/LoginServlet, clicks on Become and applicant and choses their country and home institution AND the country and institution they want to apply to



The student is now directed to the **Incoming Application Form.**

Please note that, while students from internal institutions fill in the Outgoing Application
Form + Outgoing Workflow + Incoming Workflow, students from external institutions fill in the Incoming Application form and the Incoming Workflow

So, the Incoming Application form is for students coming from external institutions <u>only</u>. Internal students do not fill that in, they fill in the outgoing application form and incoming workflow instead.

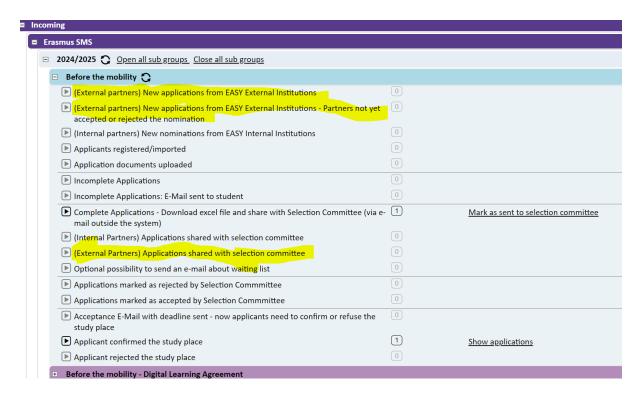
Also, while internal students fill in only one outgoing application form per 4 destinations, external students need to fill in one incoming application form per destination.

2. After submitting the Incoming Application Form, the student receives an email to **register** in the system. The student needs to remember his Login and Password



- 3. The student receives an email to login in the system to upload documents and media file in the Incoming **Workflow** in order to complete their Incoming Application (to see how the workflow works, see the related points in Case 1)
- 4. In this case, the Incoming Coordinator does not need to import the application, they will just appear in the Incoming Pipeline marked as New Applications from External partners

The steps concerning incoming application coming from external institutions are clearly marked in the Incoming Pipeline, so applications from external students will end up in those steps, while applications from internal students will not:



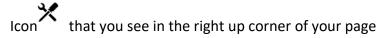
Points 8 to 12 of Case 1 (see above) also apply to Case 3.

The Learning Agreement part will be addressed by the second part of this manual sent in January/February 2024

Chapter 3 – MAKE CHANGES TO THE APPLICATION FORMS AND WORKFLOWS

Change your application forms

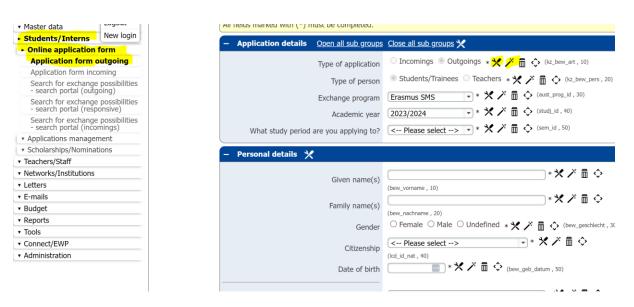
Standard Outgoing and Incoming Application forms are already uploaded in the profile of each internal institution. If you want to change your application form click first on the Tool



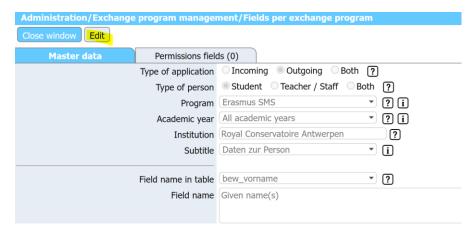


Then go to the left menu, click on Students/Interns – Online application form and then select the outgoing or incoming application, depending on the one you want to change. You see again the tool icon next to the questions and next to the sections. You can click on the

icon to make changes and on the stick icon to add questions

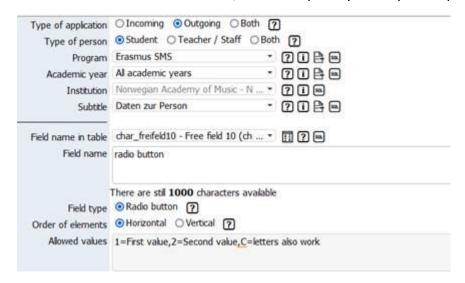


In order to make changes, click on edit (top of the page). To save changes click on the same button (now called Update)



Add a radio button question in the Application Form

To add a multiple choice question (radio button) you need to add a new field that holds characters, e.g. you can choose char_freifeldX free fields from the dropdown list of possibilities and choose the field type "radio button". Under the allowed values you can then specify custom values that should be saved and the text that should be displayed for each with the format value = text, with multiple key-value pairs separated by commas:



You will get this question in your application form:

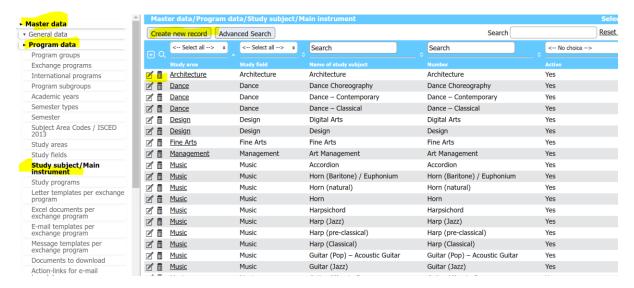


Upload your own list of instruments in the Application Form

By default, in your application forms you have a comprehensive list of study areas and instruments. Should you want to upload a completely different list of study areas and subjects/instruments please contact Sara at events@aec-music.eu. You will receive an Excel file to fill in according to the criteria of the system.

If instead you just want to delete or add instruments without uploading a whole new file you can go on the left menu and click on Master Data – Programme Data – Study Subject/Main Instrument and click on the garbage or edit button of the instrument you

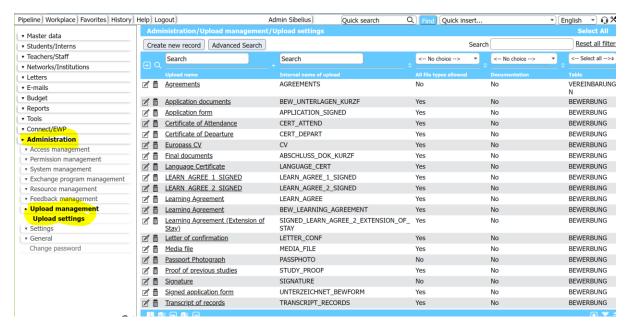
want to modify. You can also create a new instrument buy clicking on the button "Create new record".



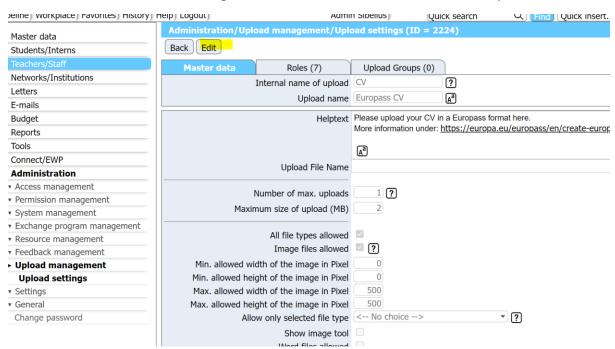
Changes to the Student Workflow

Make Changes to the Upload section of the Student Workflow – such as add helptexts

On the left menu click on Administration – Upload Management – Upload Settings. Click on the upload item you want to modify (or add an helptext about the item in your application form)



Click on Edit, then after the changes click on the same button, now called Update

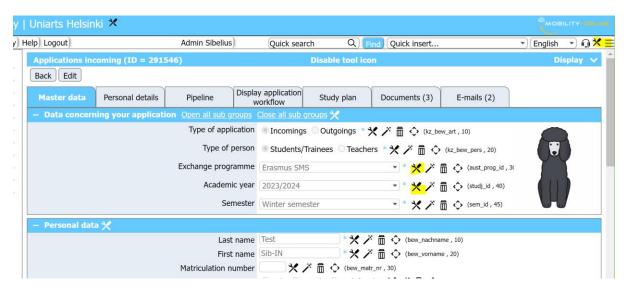


Add Help text or change the text to questions / add a link to your Course Catalogue in the Students Workflow

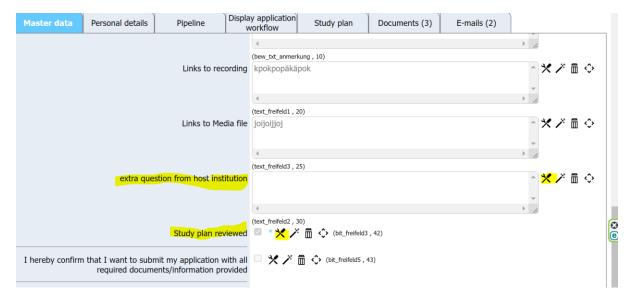
In the Incoming Pipeline, click on an application, and then click on the underlined name of the student



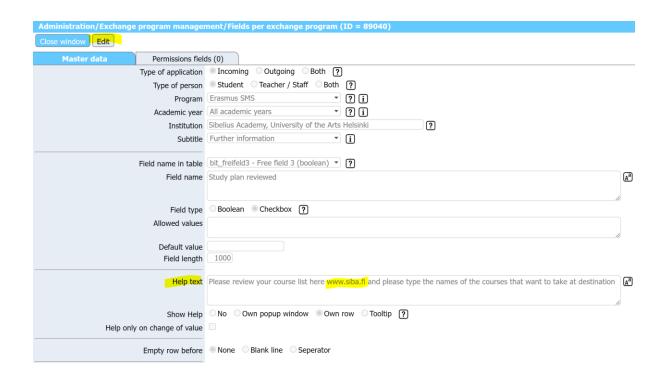
Click on the Tool Icon on the up right corner and you will see tool icons appearing next to each line.



Scroll until the questions you need to update (such as the link to your course catalogue in the study plan) and click on the relevant tool icon



To add the link to your course catalogue click on Edit, type the address and click on Update



The study plan is structured as a table with entries. You can change the name of the entries using the tool icon



How to visualize and make changes to the Student's Workflow



This is the Icon that lets you see the student's workflow: You find it, in the pipeline, by clicking on Display Applications. You find it next to the Name of the student

