## 2024 - 25 EASY Mobility Online Manual for Internal IRCs

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## Chapter 1 – Basic information on the system and Support

The European Online Application System for mobility in music and arts education (EASY) is a project by the AEC, Started in 2016 with the IT solution provided by the Estonian Company Dreamapply, since January 2024 the system is powered by the Austrian company SoP and is called EASY MO (EASY Mobility Online).

Institutions who want to (re)join the system must fill in the subscription form sent by the AEC office at the end of the (solar) year and pay an yearly fee calculated on the basis of the declared number of applications exchanged by the institution during the previous academic year. This fee is a separate fee than the AEC membership fee. AEC members are encouraged to join the EASY system to manage their mobility application or at least to accept to deal with applications from partners using the EASY MO system.

SoP has a contract with the AEC and not with the single institutions in the system. Therefore, the AEC is considered the only client when it comes to the SoP's EASY MO product. Only representatives of the AEC office are entitled to contact and deal with SoP directly regarding issues in the system, unless institutions have purchased separate support packages with SoP

For any problem in the system, user should contact **Sara Primiterra**, **EASY Project Manager at events@aec-music.eu**.

Beside this manual, the most up to date support material is the following

- Recording of the EASY MO Workshop, 4 September 2024, Dublin
- Slides on the EASY MO Process for Internal Institutions
- Slides on the EASY MO Process for External Institutions



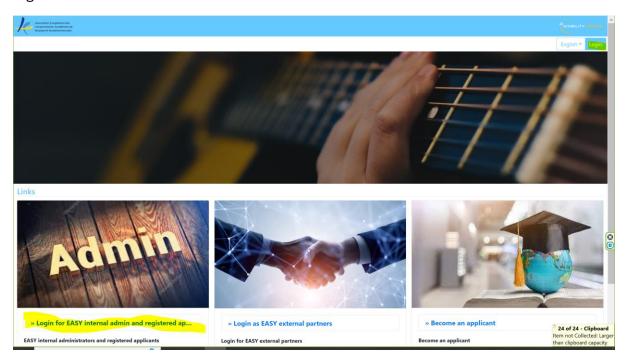
The EASY MO system is online and can be reached at <a href="https://mobility.aec-music.eu/">https://mobility.aec-music.eu/</a>

A **test environment,** accessible with credentials of the productive environment is available at <a href="https://mobility.aec-music.eu/mobility\_test/">https://mobility.aec-music.eu/mobility\_test/</a>

## How to login in the system (coordinators)

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

Click on the **login button on the top right corner** 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 when your institution joined the system, unless you changed it later. 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.

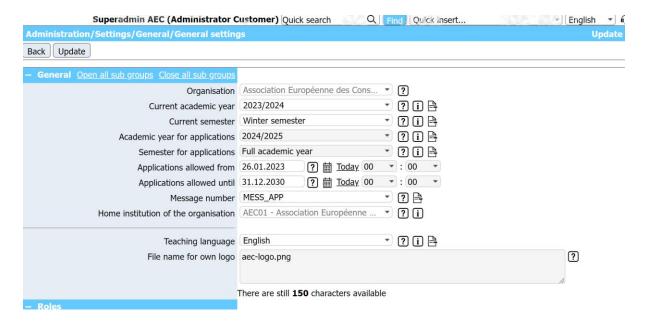
## **Chapter 2 - Settings**

## **Master Settings**

The main settings of the systems have been grouped in the first menu item called Master Settings

## **General Settings**

In the General Settings click on the submenu General Seetings to make sure the Academic Year for Application is the one you an to allow applications to and that the "Applications allowed from" is correct. Please leave all the other settings as you see them.



The date of the "application allowed until" should stay until 2030 for everyone (in the general settings)

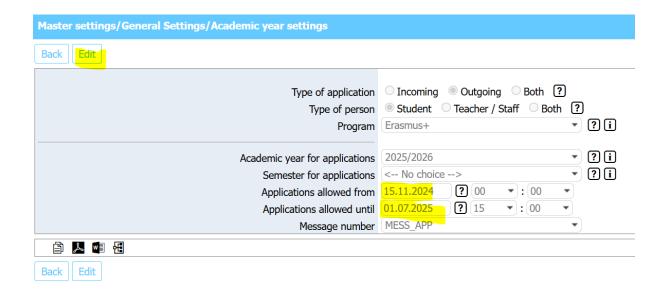
## **Academic Year Settings**

In General Settings you also have the Academic Year settings. By default, you have the following academic periods and deadlines



Please check the 4 applications periods and modify them as you wish (i.e. opening and deadline dates), also by creating new ones if you have specific deadlines for semesters and academic year

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 that does not have any semester specifical, so do not delete that (but you can change the dates).

If for some reason students get an error when trying to apply, please check that you have an entry in the Academic Year settings that has no semester or full year, just empty:

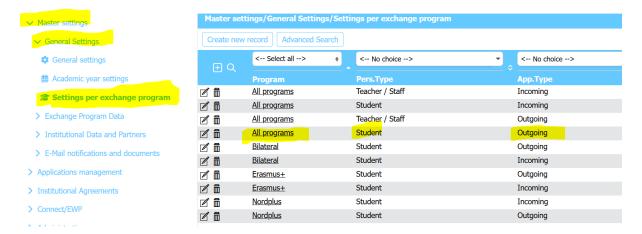


## Settings per exchange programme

## How to allow more than 4 choices to outgoing students

Normally, when your outgoing students register in the system, they are allowed to choose 4 possible destinations. Should you want to allow more choices, you need to activate the Multiple Stay Allowed function as follows.

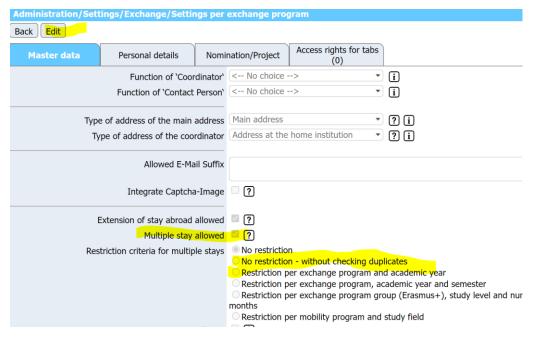
In Master Settings – General Settings – Settings per exchange programm, Select "All Programmes (Student – Outgoing)



Select Advanced Settings on the right



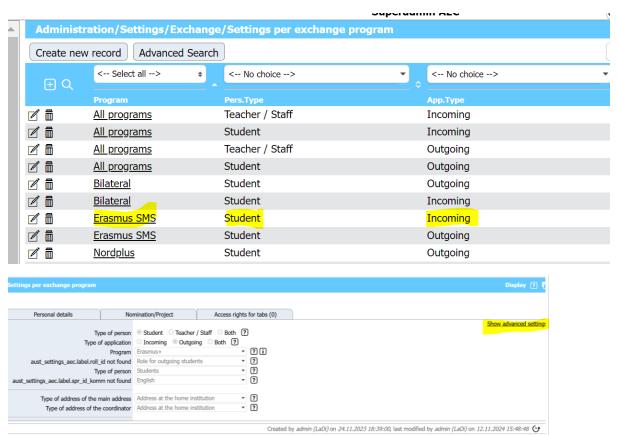
Click on Edit and select "Multiple stay allowed" – No restriction – without checking duplicates. With this setting, your students will not be limited to 4 choices and will be able to apply to <u>up to</u> 4 choices <u>multiple times</u> with the same login.



Please note that this does <u>not</u> mean that more choices will suddenly appear in the Outgoing registration form, but that the applicant can enter a second registration form to add up to four additional destinations. As a consequence, your applicant will appear in your system multiple times.

## Choose who to exchange applications with

In order to avoid receiving applications from "unwanted" partners, you need to indicate in the system which is your criteria to send and receive applications from. In Settings per Exchange Programme you need to select the Programme and then allow Advance settings as above



And you choose with whom you want to exchange: All? Only existing partners? Etc.

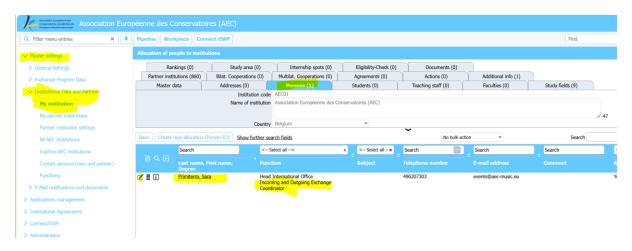


Please make sure you apply this choice to all the programmes involved.

## **Institutional Data: your institution and your partners**

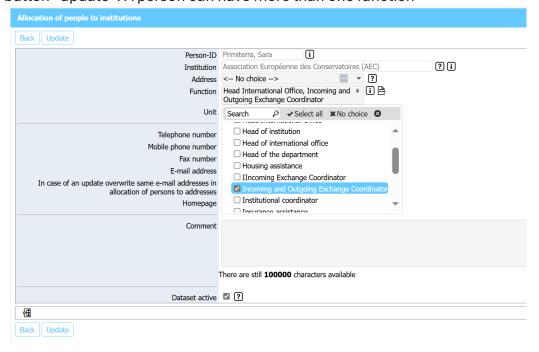
## Your function as Incoming and Outgoing Exchange Coordinator

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 Settings – Institutional Data and Partners – My institution. Click on the bookmark "Persons



Theoretically, is possible to have a different person for the Outgoings and another one for the Incomings but we advise against it as all the connections and notifications in the system are meant to have the Incoming and Outgoing Coordinator as reference function.

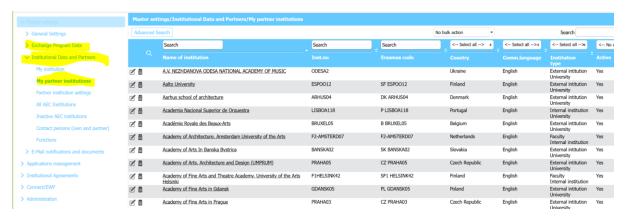
To add/ change a function to a person you click on the name of the person, you click on edit and you change the function in the dropdown menu and then you click on the button "update". A person can have more than one function



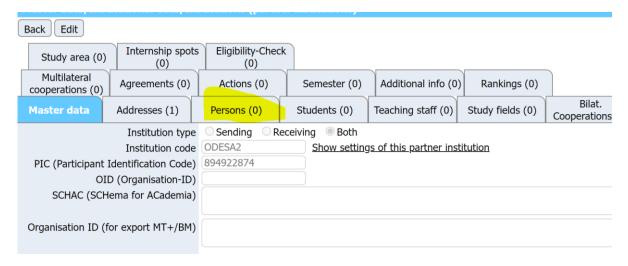
## Check Name and Contacts of your partners

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 Therefore, if you know about a change of contact person in an external institution, please inform the AEC office at events@aec-music.eu.

To see the list of partners go on the left menu and click on Master Settings, Exchange Programme Data, Institutional data and Partners, My partner institutions. Click on the name of the institution to check their data.



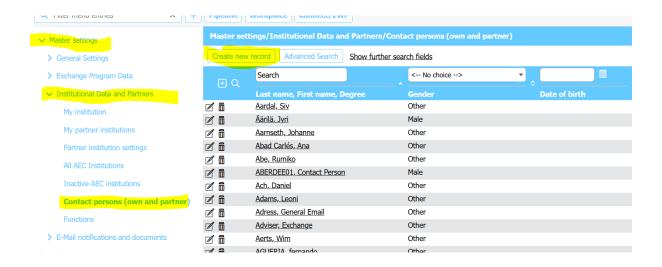
If you see 0 in the tab Persons, please create a user for this institution as indicated in the next point



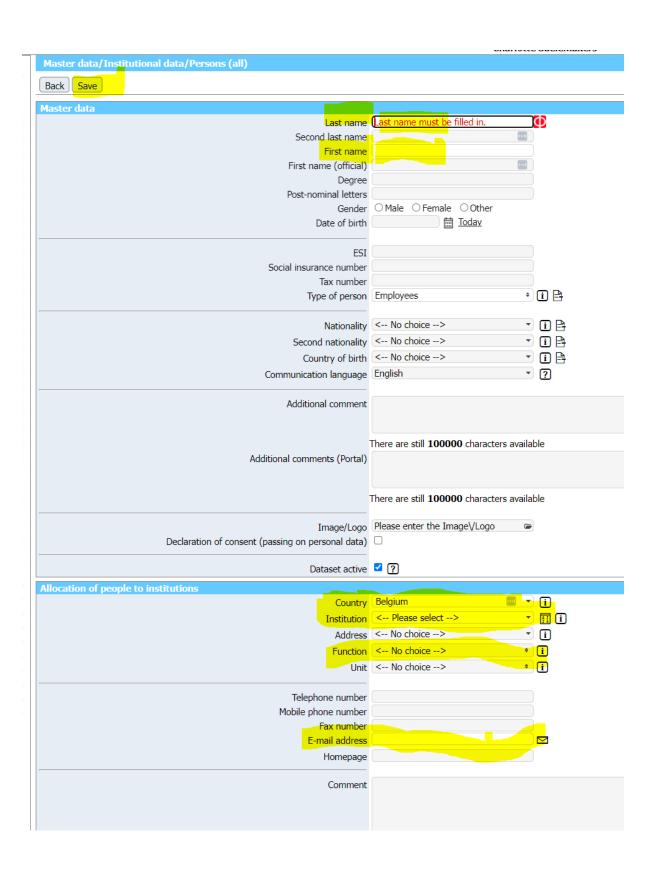
If there is a different number than 0, please click on the tab and check if the data are correct. If not, please apply changes always by following the path indicated in the next point.

## 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 Settings–Institutional Data and Partners – Contact persons (own and partner) 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. Please remember that all notifications go only to the person with the function Incoming and Outgoing Exchange Coordinator.



# Tips and Tricks: "Incoming and Outgoing Exchange Coordinator" function MISSING

The issue n.1 causing problems in the system is the lack/removal of the function Outgoing and Incoming Exchange Coordinator to the persons listed as users of your institution in the system.

All institutions, including yours, should have a person with the function **Incoming and Outgoing Exchange Coordinator** listed in the system. Even if in real life this title does not exist in your institution, or the job is shared by more people taking care of only one or the other aspect, you need to make sure that you have such a function in the system. More than one person can have this function in each institution. The email address associated with the person with this function is the mail address receiving all notifications from the system.

Also, if you see that the process with another institution does not work, please go and check, as very first thing, that this function is present in the profile of your partner.

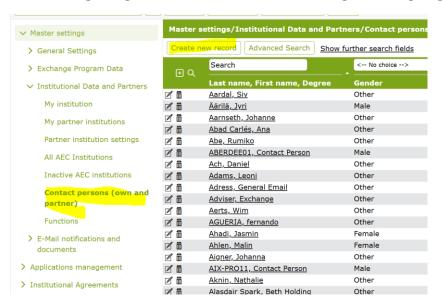
## Add Institutions and link them as partners

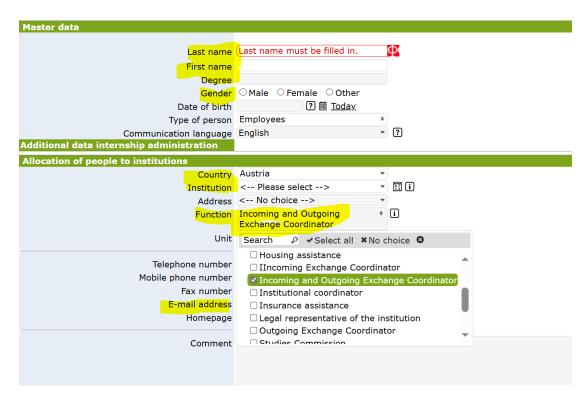
If an incoming student cannot find your institution in their dropdown list of an ougoing student of yours cannot find a specific institution they want to go to, it means that this institution does not exist in the system and/or you have not them as partners.

If you do not find this institution in the list of institution that you find in Master settings – Institutional Data and Partners – All AEC Institutions, you can create it by yourself by clicking on Create new record:



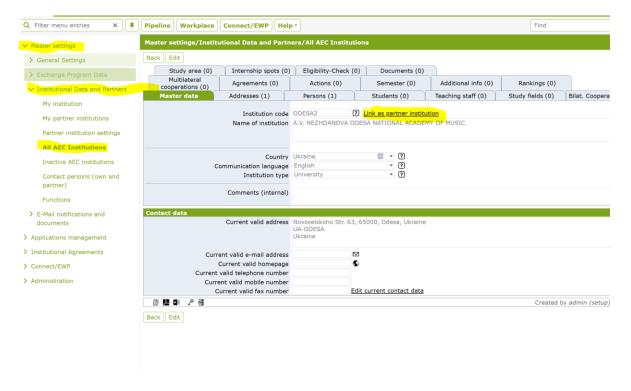
Then, you will need to go to Contact persons – Create new record and add full name, gender, country, institution and email address of the contact person in the institution, without forgetting to select the function Incoming and Outgoing Exchange Coordinator:





But actually, the best thing to do is to contact Sara at <a href="events@aec-music.eu">events@aec-music.eu</a> so that she can add the institution for everyone. You need to send her the name, city and country of the institution, and email and full name of the contact person.

Once the institution is in the system, if you exchange with all institutions, it will automatically appear in your list of partners. If you work only with partners, you will need to go to Master settings – Institutional Data and Partners – All AEC Institutions, then look for the institution, click on the name and click on the link "Link as partner institution"



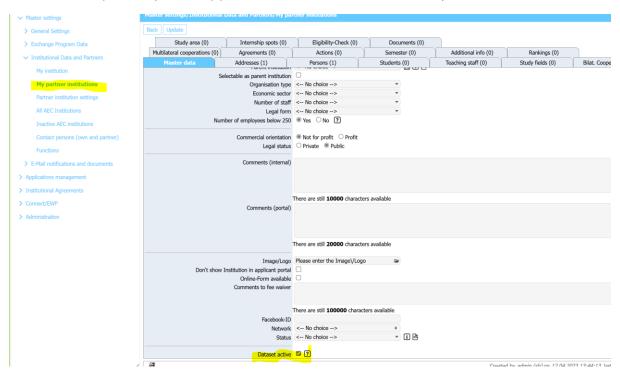
If you see an institution in the list of partners but still does not appear to those who want to apply, click on the name of the institution and verify that the box Dataset Active is ticked:

Master data	Addresses (1)	Persons (2)	Students (0
Selecta	able as parent institution	?	
	Legal form	< No choice>	•
	Comments (internal)		
	Comments (portal)		
	Image/Logo tution in applicant porta Online-Form available Comments to fee waiver		?
Facebook-ID			?
	Network	< No choice>	•
	Status	< No choice>	▼ i
	Dataset active	· · · · · · · · · · · · · · · · · · ·	
Contact data			

### Partners' individual deactivation

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.

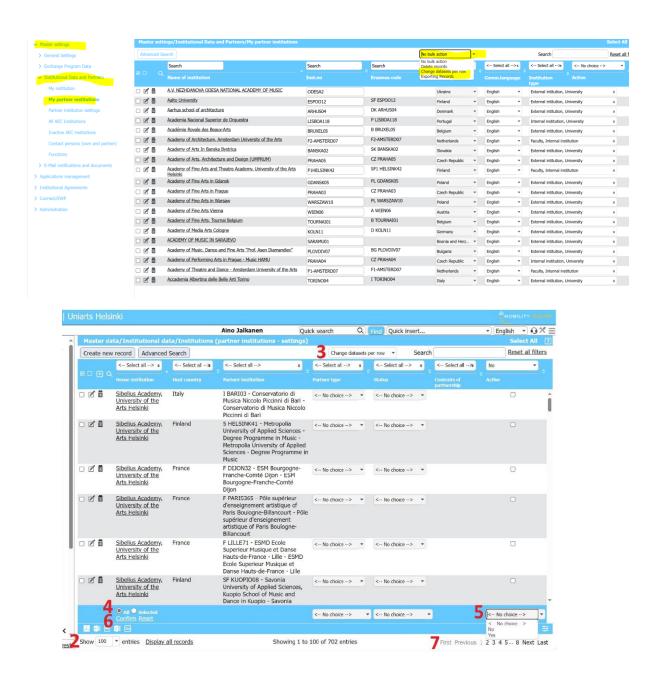
In the left menu click on: Master Settings – Institutional Data and Partners– My Partner Institutions, then select the institution you do not want to appear as your partner and click on the link on the right that says "Shows advanced settings", then click on button Edit, scroll down, and **deselect the 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 Settings- > Institutional data and partners-> My partner institutions
- 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



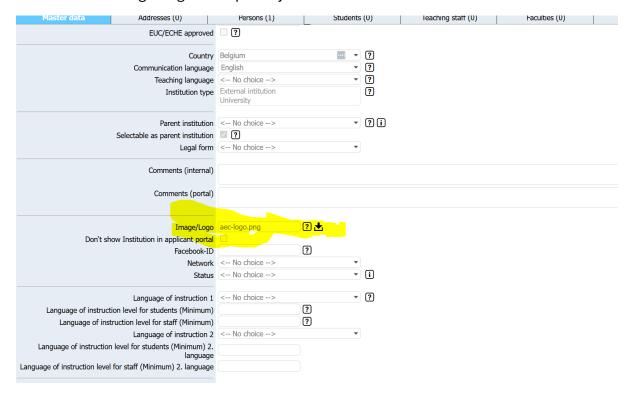
Then you can proceed to activate back those you want to exchange applications with.

## Change your logo and your interface color

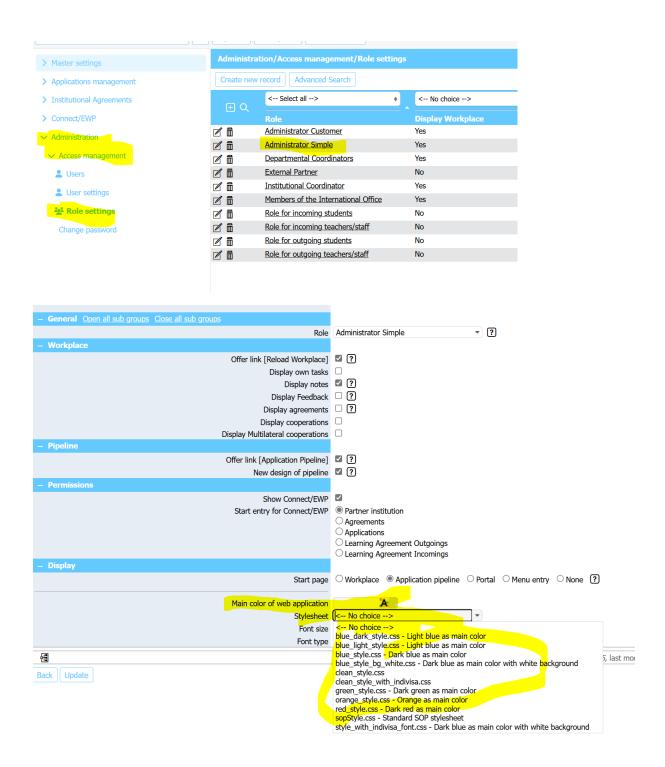
Did you institution go through a recent rebranding? You can change your logo following this path: Master Settings – Institutional Data and Partners – My Institution – tab Master data – link on the right Show advanced settings



## Then scroll to Image/Logo and upload your new file

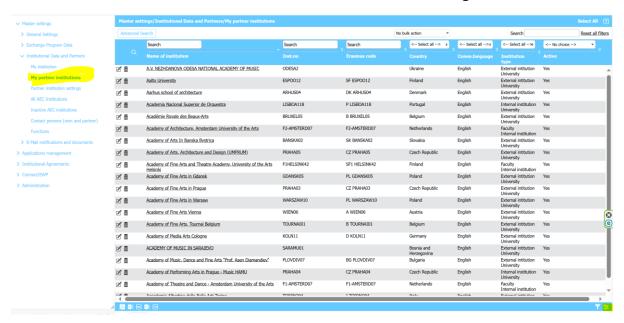


To change the colour of you interface you can go to Administration – Access Management – Role Settings – Administrator Simple and then input the color your want in Main color of web application and Stylesheet

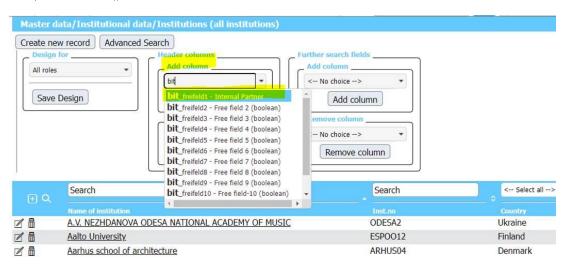


## Display who is internal and who is external

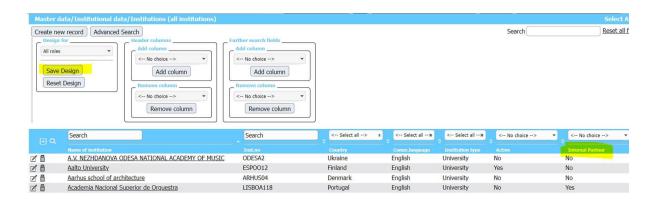
If you want to see who are the internal and who are the external institutions of EASY MO, you need to go to Master Settings- Istitutional data and Partners – My partner institutions and click on the small icon with lines and dots in the right bottom corner



The, select the "add colums" combobox and add the internal Partner field:



Then add it and click on Save design. You will see an additional column appearing telling you if that institution is an Internal institution (partner) of EASY MO or not:



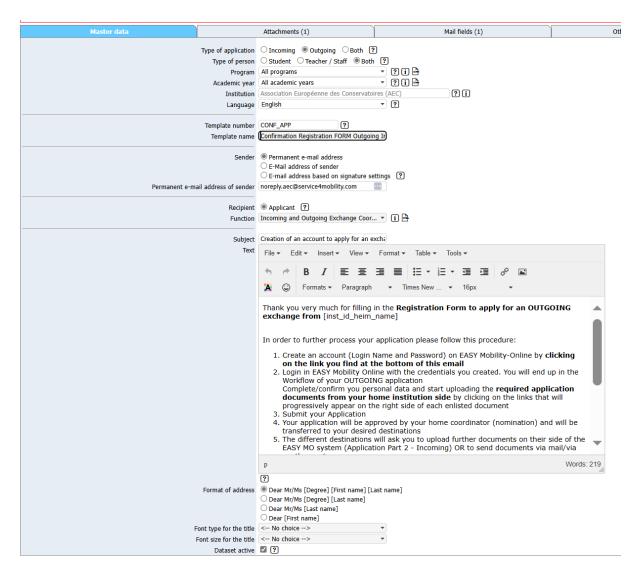
## **E-Mail Notifications**

## How to change emails templates and add emails to pipeline steps

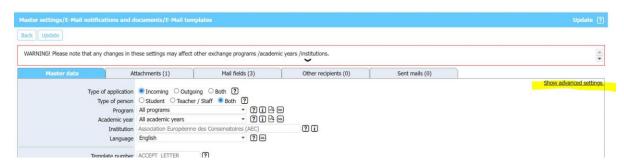
The system generates many automatic and manual notifications for each step of the process. You can find the email sent by the system in Master Settings - Email Notifications and Documents - E-mail templates You get the list of all of them, and in the second column you see what the mail is about



If you click on the name of one of the templates, you see all the information regarding that email: from which address it is sent, to whom, the text, etc. You can edit all those data, including the text of the email. Here you can also see why the function Incoming and Outgoing Exchange Coordinator is so important in the system: most email templates are linked to this function, and email templates are linked to specific actions and steps of the process in the system. This is why, If there is no email address in the system attached to this function, everything gets stuck! We advise not to change these settings (but you are welcome to change the text of the emails). Should you want to change the function attached to a specific email template, please make sure that in the system you have at least one Person attached to this function.



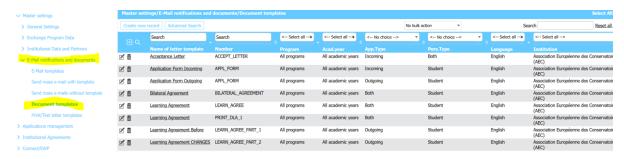
More functionalities, for example display and change who is in CC for that specific mail template, can be activated by clicking on the link on the right "show advanced settings"



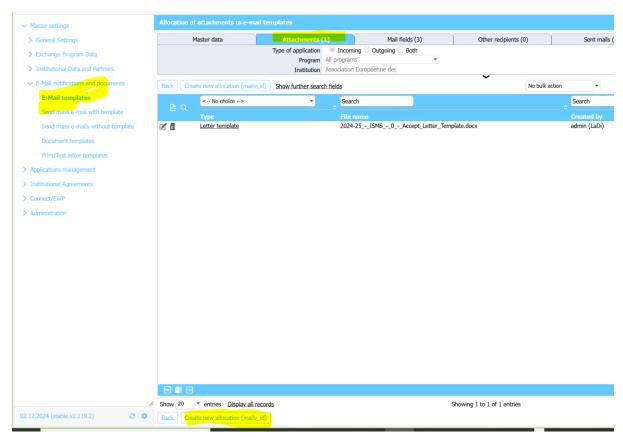
If you are really the champion of the pros of EASY MO, you can go even further and decide to link email templates and letter to specific pipeline and workflow steps. There is a wonderful document by SoP that can help you do this.

## How to generate standard PDF letters to attach to email templates

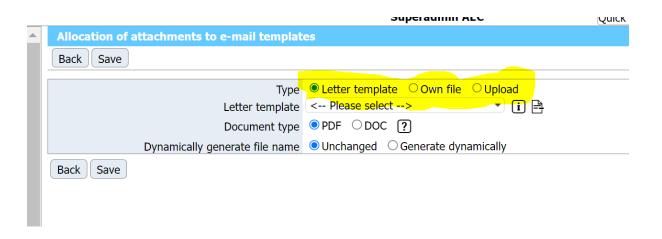
If you need, for example to attach an official acceptance letter to the acceptance email to the student you can find a document by SoP on how to <u>Create Letter Templates</u>. You can find here the <u>mergefield directory</u>. An easier way to do it is to create your letter in Microsoft Word (by using the **mergefields** of Mobility Online) and then upload it to the system here:



Then, you can attach it to email templates here (select the template email you want to attach your document to):



You click on the button on the bottom Create new allocation and then you select as follows:



## **Applications Management**

## Registration Forms – first data entry point

The former application forms are now called **Registration Forms**. These forms are the **first data entry point** of applicants in the system and their name has been changed because they do not constitute the application itself, but **just the very first step** for applicants. After filling them in, the students receives an email to create an account in the system and then needs to upload and submit a number of documents before actually submitting their outgoing or incoming application.

## There are two Registration Forms:

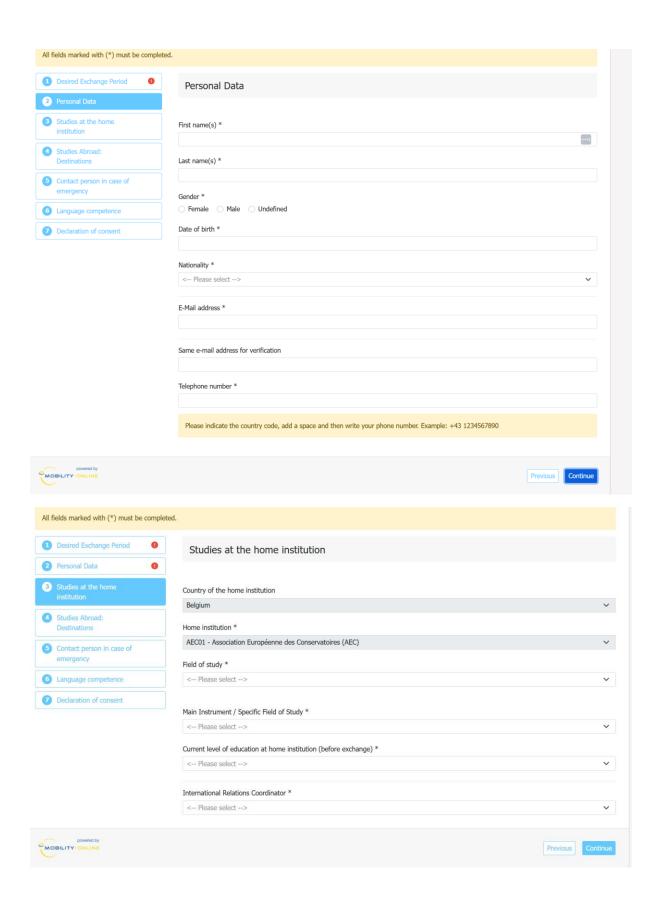
- The Outgoing Registration Form, filled in ONLY by your own outgoing students;
- The Incoming Registration Form, filled in ONLY by incoming applicants from external institutions

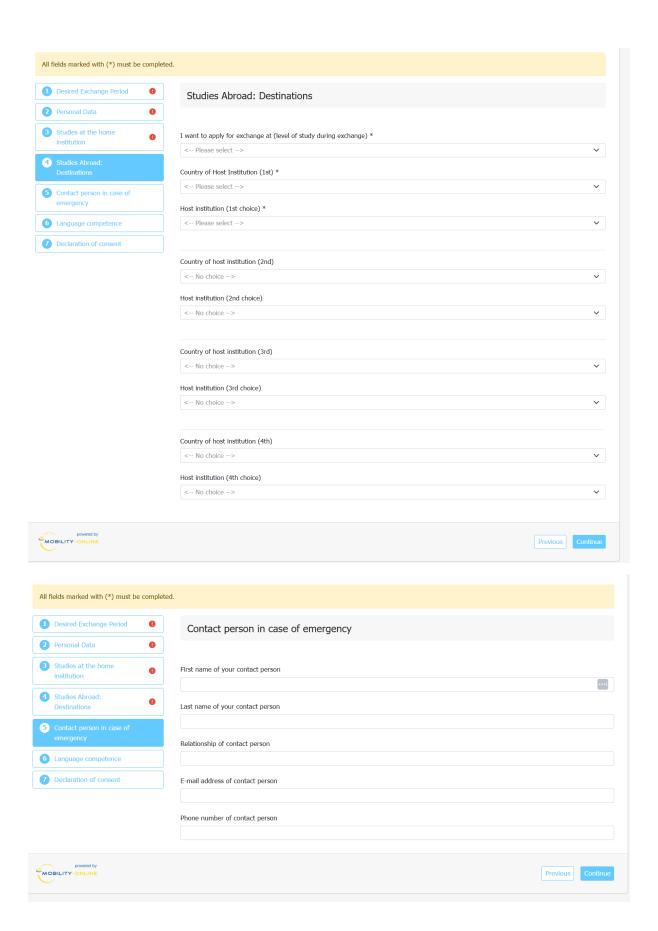
Both forms are accessible to both the IRC administrator (in the institutional admin profile) and the applicants ONLY if the relevant application period is open.

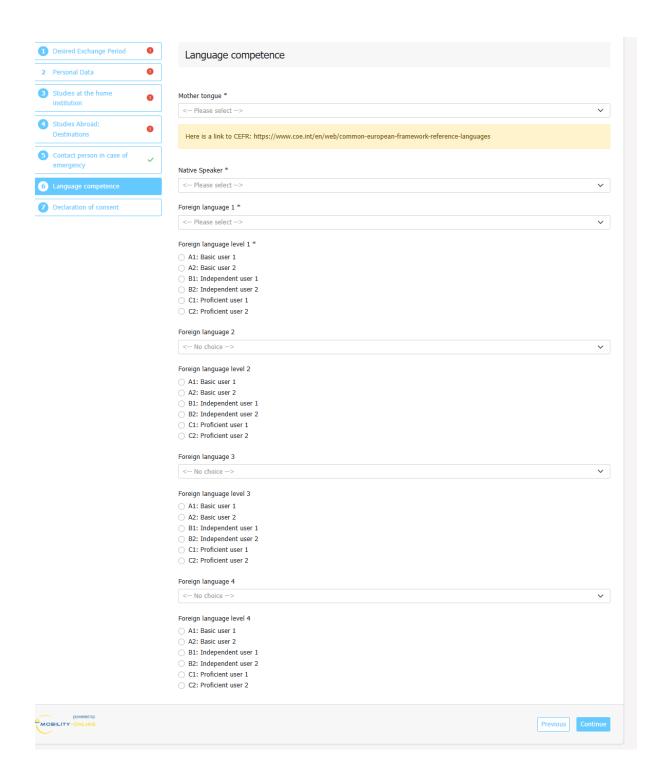
Each form is divided in sections, visible on the left part of the screen. See below the sections and questions in each section. This is the standard form that we advise to keep. Nevertheless, the form is customisable (see later how).

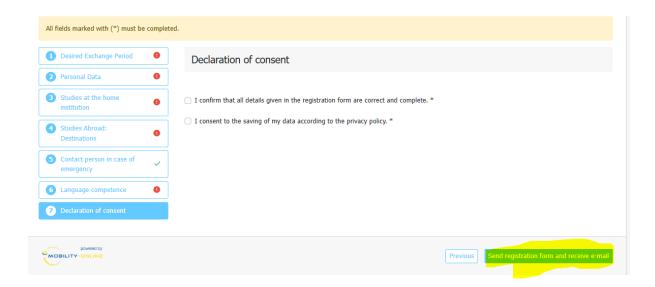
# Registration read to prote and Exchange Period Administration Administration Administration Desired Exchange Period Personal Data Desired Exchange Period Personal Data Student Abread: Desired Exchange Period Personal Data Desired Exchange Period Procedings Desired Exchange Period

## **Outgoing Registration Form**

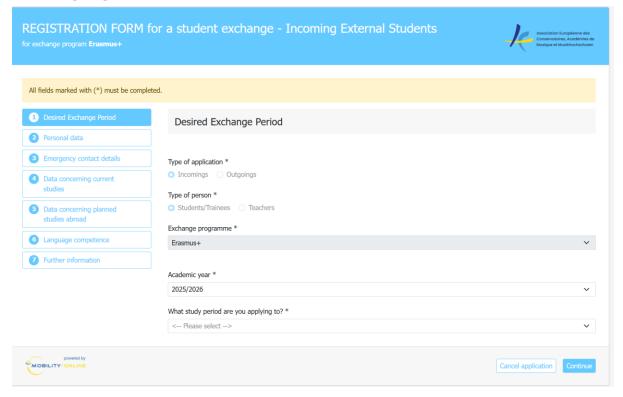


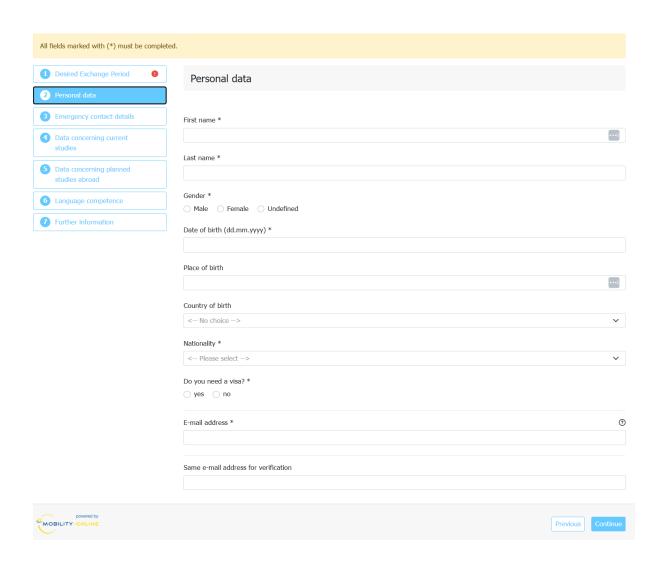


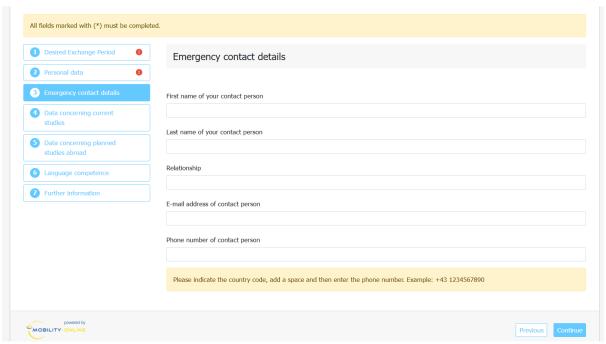


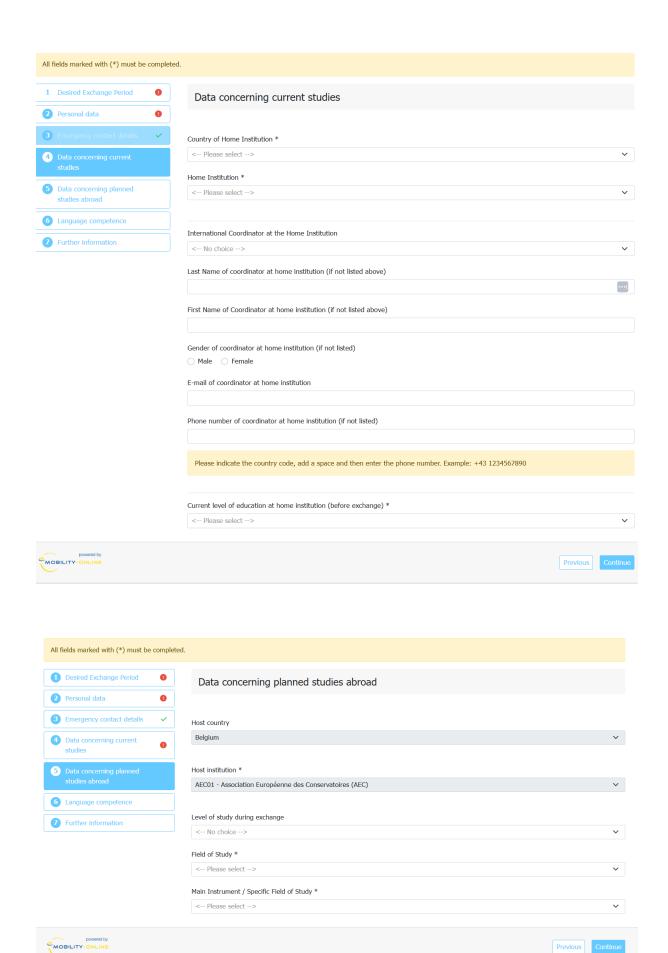


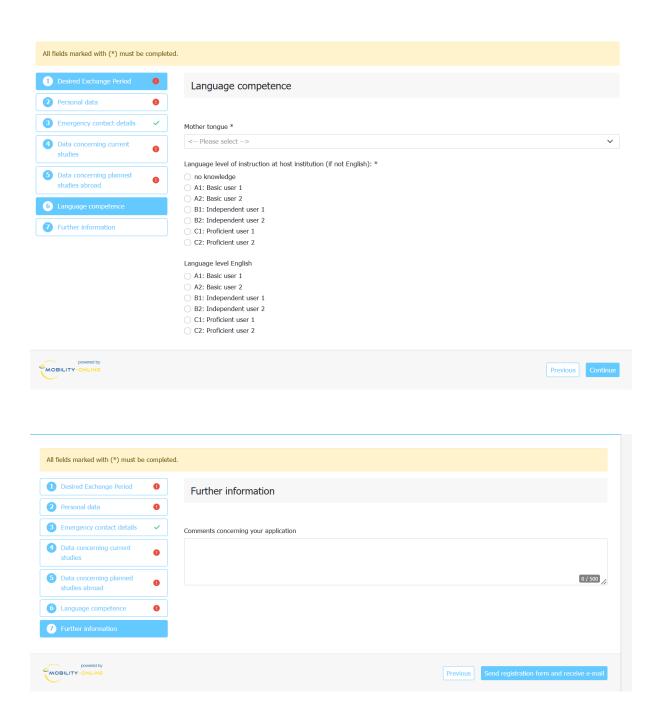
## **Incoming Registration Form**







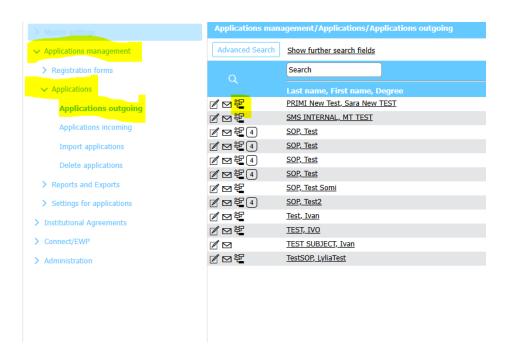




## Workflows – the applicant's documents uploading point and decisions inputs

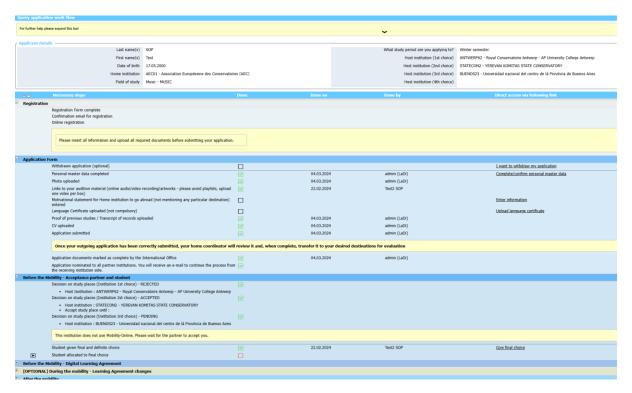
Only after filling in the registration forms <u>and</u> creating an account in the system, applicants have access to the so-called Workflow(s) – where they can upload documents and perform several actions to progress in the application process.

You get to the workflow of a student by going to Application Management, Applications, Applications outoing (or incoming) and clicking on the icon with connected rectangles on the line where the student name is:



You have access to the applicant workflow but, <u>as IRC you are supposed to perform</u> <u>all actions related to your role from the Pipeline</u>. Any other way of getting actions done in the systems could have as a consequence some malfunctioning of the process.

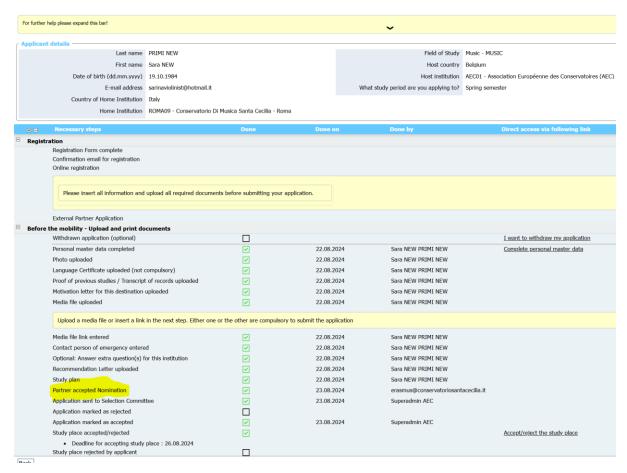
This is the standard Outgoing workflow filled in by student an internal Outgoing (Home) institution until the choice of the student:



On the right you have the list of documents to upload and on the left the action links the applicant needs to click on in order to performe the required action for that workflow

step, such as uploading a document or performing an actions such as submitting the application or accept a study offer.

This is the new standard workflow of an internal Incoming (receiving) institution. You can see that now the nomination by the home institution (if external) happens after all documents have been uploaded<sup>1</sup>:



In the new process 2024/25 documents and submission of the Incoming application need to happen by the deadline set by the Incoming institution.

In both workflows, each time a document is added via the action link on the right side, the box becomes green. Documents can now be uploaded in random order. When a document is not compulsory, the box becomes black. Nevertheless, there are some compulsory documents that need to be uploaded in the order given by the workflow. If not uploaded, the applicant cannot go on in the workflow and upload the remaining documents.

The sentences in the yellow stripes should be read by the applicant as indication of what to do at that point of the process.

Please note that, in the pipeline, there is a step by the incoming coordinator entitled "Applications marked as Complete". Please note that you do not need to check the

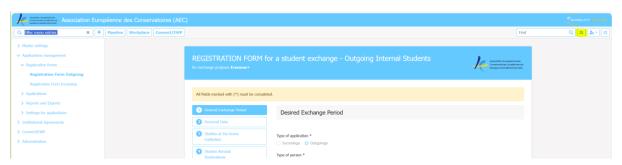
<sup>&</sup>lt;sup>1</sup> For internal students, the nomination from their home coordinator happens at the end of the Outgoing process

incoming applications before sending them to the Selection Committees if you do not want to. The system checks itself that all compulsory documents have been uploaded before letting the student submitting the application. The content and the quality of the document remains a responsibility of the student.

## Make changes in your Registration Forms

Standard Outgoing and Incoming Registration Forms are already uploaded in the profile of each internal institution. We strongly advise against changes, but if you really need to customise your form, you can.

If you want to change your application form click first on the Tool Icon that you see in the right up corner of your page



You get a series of icons on the right of each question:

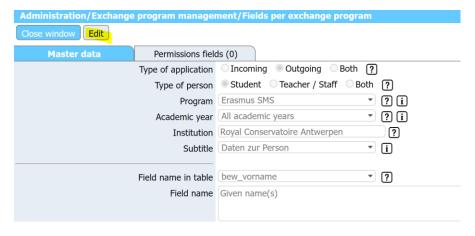
. The bin and the arrows are fore deleting and moving the question un or down in the form. The mechanism will is to change the features of that particular question an the plus sign is to add a new one.

.0) 🏚 🕕 🛅 🚖

# REGISTRATION FORM for a student exchange Outgoing Internal Students for exchange program Erasmus+



Il fields marked with (*) must be completed.	
- Desired Exchange Period	*
Type of application *	(kz_bew_art, 10) <b>‡</b> ⊕ 🛅 🛊
Incomings Outgoings	(==,,,+,=,=,
	(In how one 20) ♣ [7] ♣ ▲
Type of person *  Students/Trainees Teachers	(kz_bew_pers, 20) 🏚 🛨 💼 💠
Students/ Hamees Teathers	
Exchange program *	™ (aust_prog_id, 30) 🏚 🛨 🛅 🕏
Erasmus+	~
Academic year *	(studj_id, 40) ❖ 🛨 🛅 💠
2025/2026	~
What study period are you applying to? *	(sem_id, 50) 🏚 🛨 🛗 💠
< Please select>	<b>v</b>
- Personal Data	*
First name(s) *	(bew_vorname, 10) 🏚 🛨 🛅 💠
	•••
	(bew_nachname, 20) 🏚 🛨 🛅 💠
Last name(s) *	
Last name(s) *  Gender *	(bew_geschlecht, 30) 🏚 🛨 🛅 🖨
	(bew_geschlecht, 30) 🌣 🛨 🛅 💠



#### Add a radio button question in the Registration Form

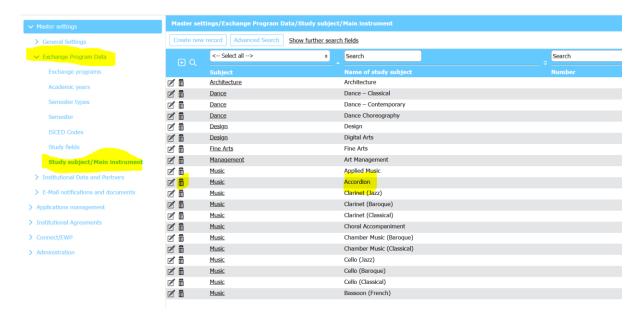
To add a multiple choice question (radio button) you need to add a new field that holds characters, e.g. you can choose char\_freifeldX free fields from the dropdown list of possibilities and choose the field type "radio button". Under the allowed values you can then specify custom values that should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



#### Upload your own list of instruments in the Registration 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 <a href="mailto:events@aec-music.eu">events@aec-music.eu</a>. 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 Settings – Exchange Program 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".



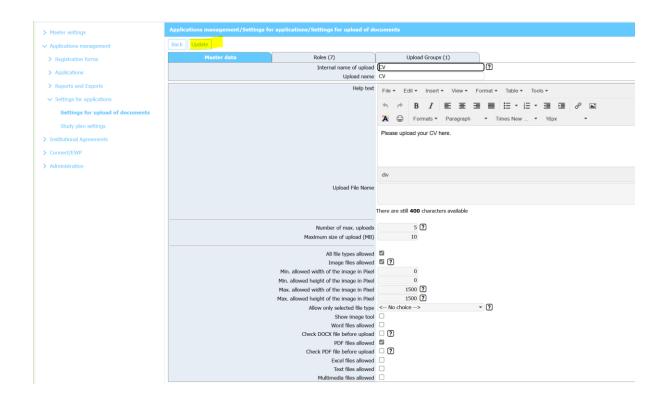
## Make Changes in your Student Workflow

#### Changes in the upload items such as helptext

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



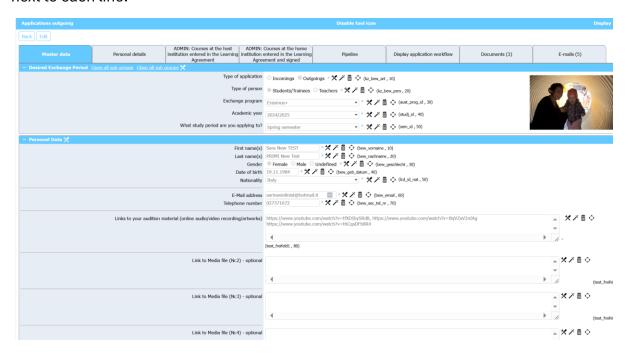
Click on Edit, then after the changes click on the same button, now called Update



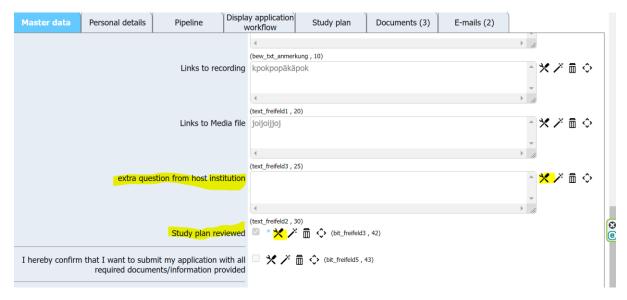
## Helptext or change the text to questions / add a link to your Course Catalogue

Go to Applications – Applications Incoming / Outgoing, and then click on the underlined name of the student

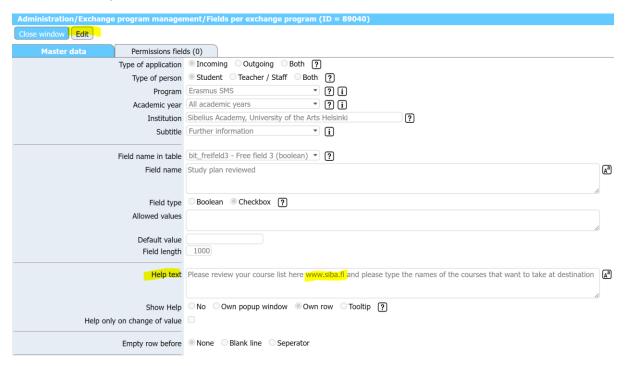
Click on the Tool Icon on the up right corner and you will see tool icons appearing next to each line.



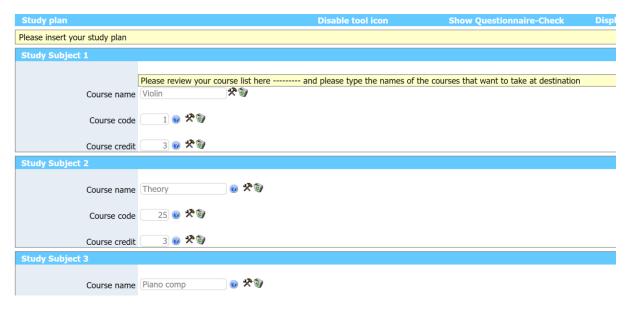
Scroll until the questions you need to update (such as the link to your course catalogue in the study plan) and click on the relevant tool icon



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



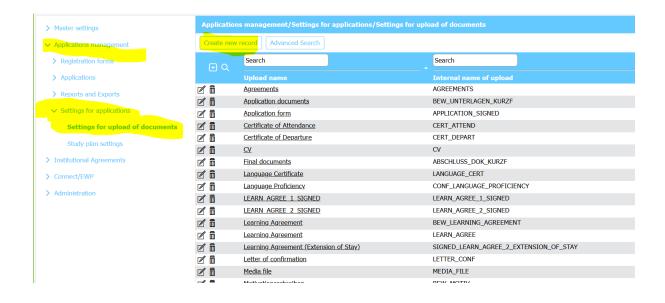
The study plan is structured as a table with entries. You can change the name of the entries using the tool icon

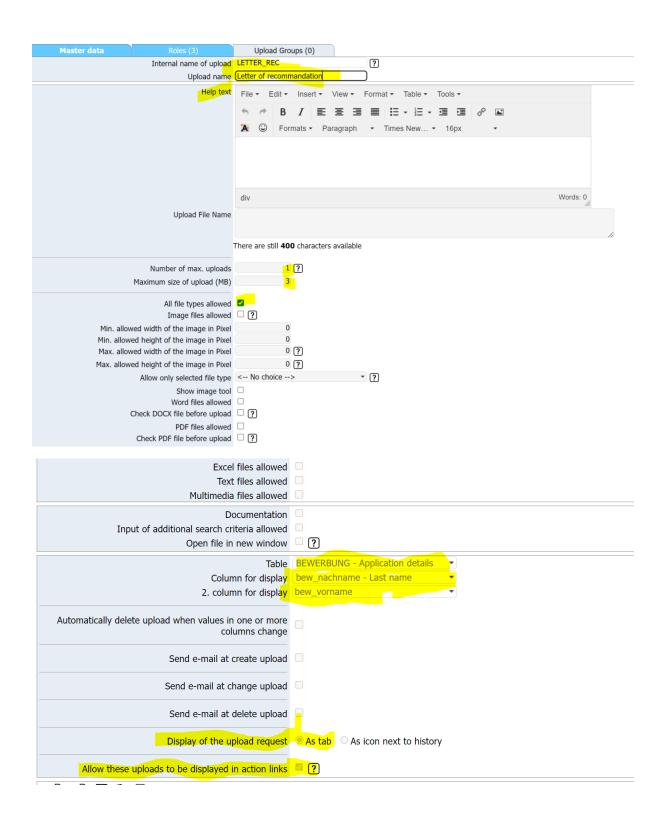


#### Add an upload step

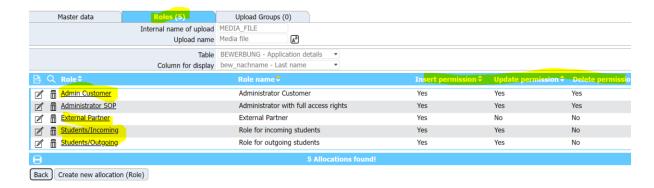
Let's imagine you want to add a Recommendation Letter in the Incoming Workflow.

The first thing to do is to verify if the item already exist and, if not, to add the upload item in the settings by going to Applications Management, Settings for applications, Settings for upload of documents. You see the list of documents that can be uploaded in the system and you can click on the button on the top Create new record to create a new document to be uploaded.

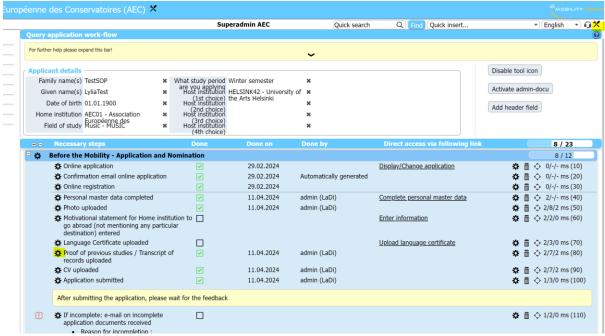




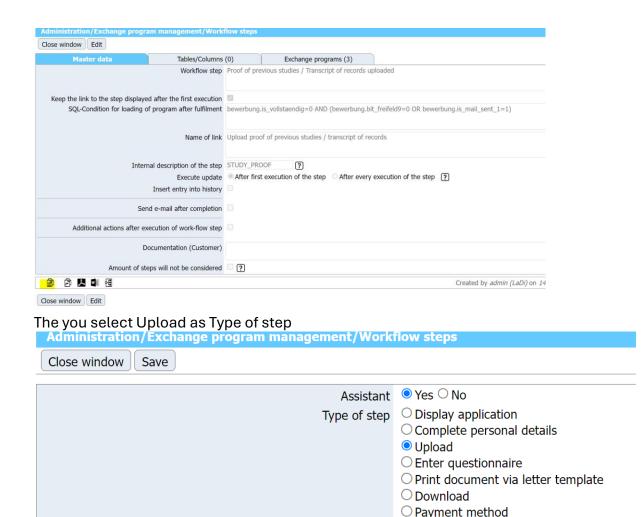
Then, you need to insert roles in the tab Roles, meaning the permission to certain users to proceed with the uploads (insert /update/delete):



Now, to create a new workflow step, you need to go the workflow of any student and activate the tool icon of the system on the top right corner. Then you can click on the tool icon of any of the other upload steps. Please consider if you want to add the step in the Outgoing or Incoming workflow.



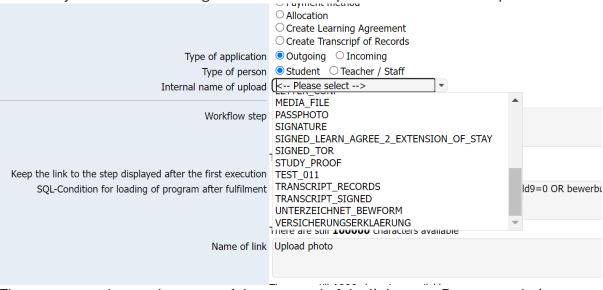
And then copy the step (bottom, left hand side)



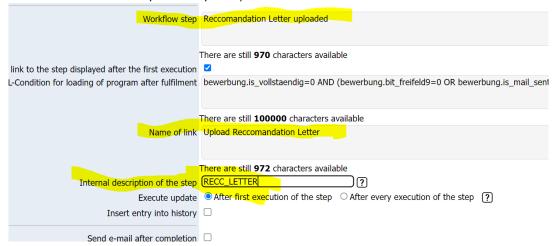
A new field called "Internal name of upload" will pop up. Then you select as type of application Outgoing or Incoming according to the which workflow you are updating and then you can select the right file from the drop-down list of internal upload names.

Allocation

Create Learning AgreementCreate Transcripf of Records



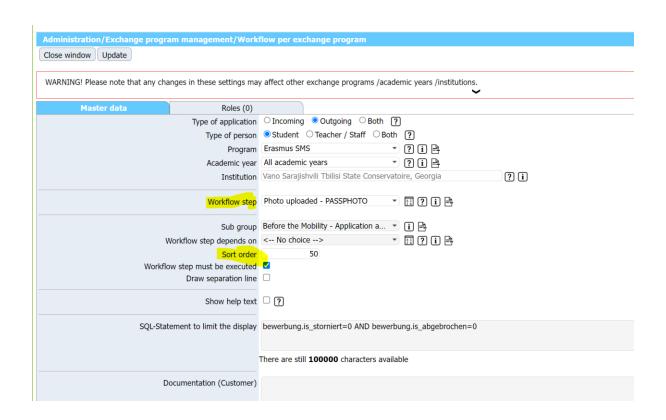
Then, you can change the name of the step and of the link to say Reccomandation Letter instead of the file that was in the step you copied. The important thing before saving the new step is to copy or remember the internal name of the step.. There might already be steps with the internal name RECC\_LETTER, because whenever you generate an upload step, it will automatically use the internal upload name for the internal workflow step description).



Then you save the step, by clicking on "save".

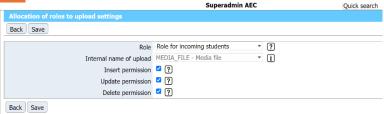
Then you go back into the workflow and open any toolicon on the left hand side of any step and you copy the step again as showed before. Now you only change the workflow step name to RECC\_LETTER and select the step that you had previously created and change the sort order (choose between 60 and 100). If you mark "workflow step must be executed" the step becomes mandatory. And finally, save.





## Tips and Tricks: Issues in Media Files Upload – permission needed!

If your applicants do not manage to upload a file in your workflow, the problem might be the missing roles in your upload settings. Please check: Applications management – Settings for application- Settings for the upload of Documents. Both you (Administrator Simple) and the student should be listed in the role. If not, you can add a role by clicking on the button on the top saying Create New Allocation (Role), select the type of user and give the permissions



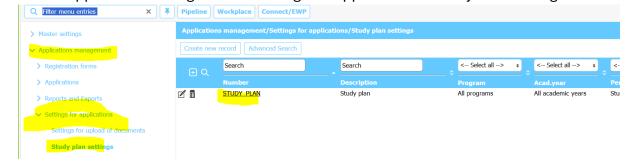
## Set up your study plan

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.

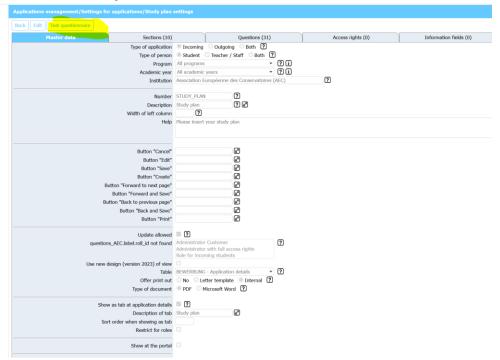
The Study Plan is **not** the Digital Learning Agreement (DLA), which comes later in the process and only for applicants, who have been accepted.

OPEN THE STUDY PLAN QUESTIONNAIRE
 Application Management – Settings for applications – Study Plan settings

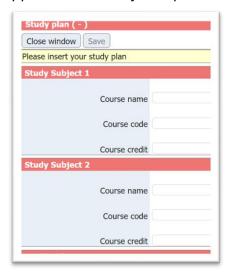


In the new page you should see a Study Plan template - click the *Study Plan* link to open this template:

You now see the settings of the Study Plan template, divided in several tabs. Click on the button Test Questionnaire:

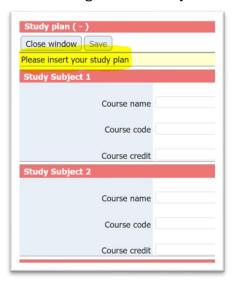


A new window will open with the questionnaire, the applicants will see. Keep this window open while editing and refresh it regularly, if you want to shift over and see the applicants view of your updates:

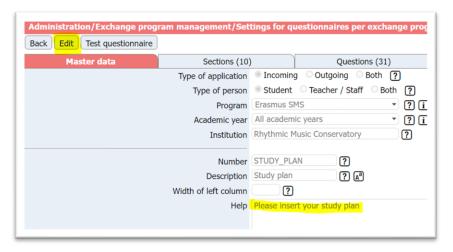


#### 2. EDIT HELP TEXT

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:

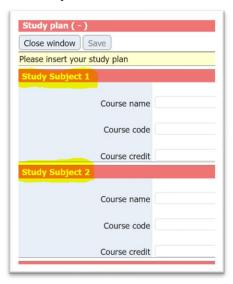


.. go back to the main settings page, click *Edit* and edit the help text here by putting the link to your course catalogue and any other information that can help the student filling in their study plan:

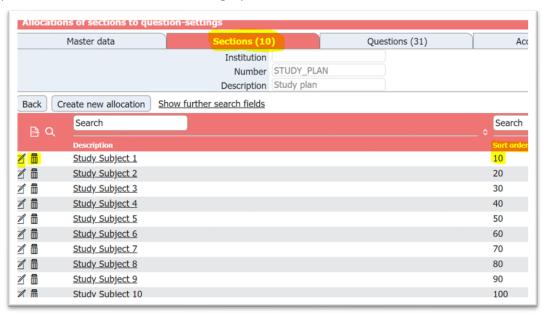


#### 3. EDIT SECTIONS

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

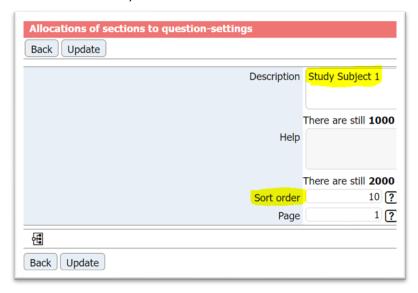


.. click the Sections tab and click the Edit or Delete icon left to the relevant headline (also note the sort order to the right):



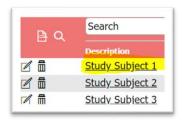
If you click the Edit icon, please note these fields on the edit page:

- 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)

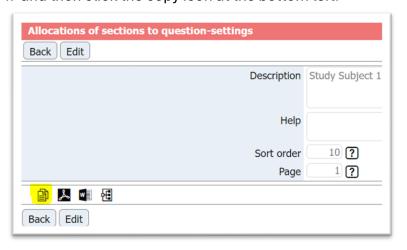


#### 4. ADD NEW SECTIONS

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:

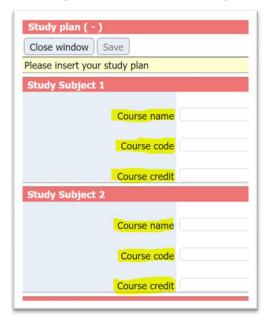


The new page that opens is your new section/headline, so you just edit what you need and click Save.

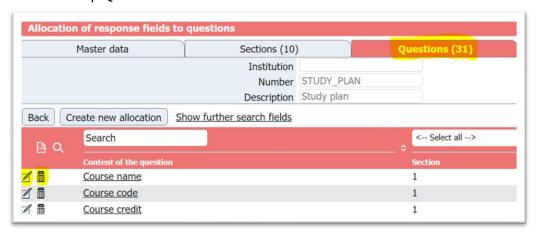
(this is in general the easiest way to create new fields, questions etc. in Mobility Online)

#### 5. EDIT COURSE TITLES

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



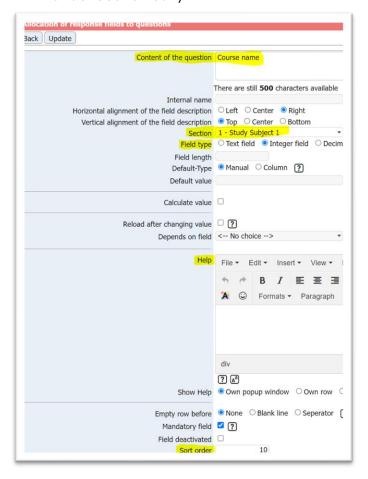
.. click the tap Questions and the Edit or Delete icon left to the relevant title:



If you click on 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)

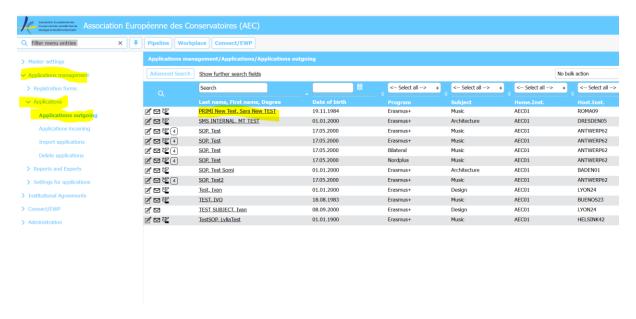


#### 6. ADD NEW QUESTION

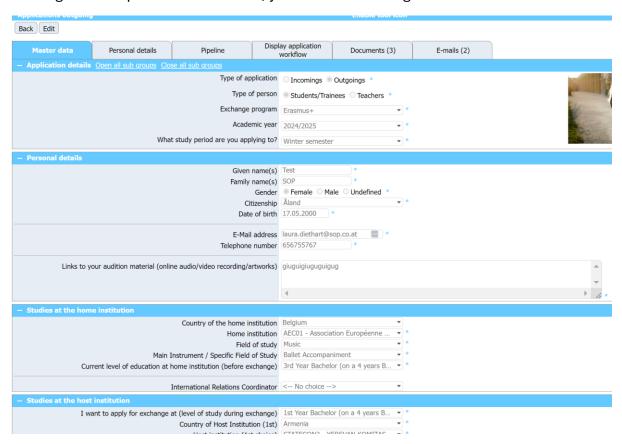
If you want to add a new question, you can use the same copy-process as under new section (please see number 5).

## Access to application data and documents and possibility of correction

To see what the status of the application of a particular student is, you can follow the following path, finally clicking on the name of the student:



In the master data tab, you can see the data they input in the Application Form. By clicking on the top on the Edit button, you can make changes to the data.

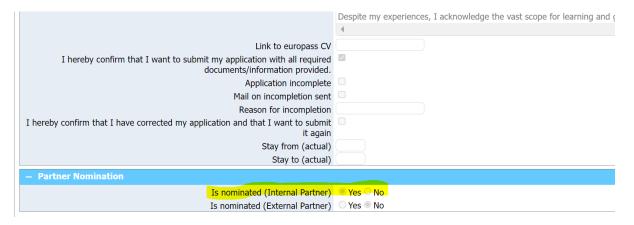


When you scroll down, you find some information on the status of the application. This part is particularly important for Incoming Students. By scrolling down, you find also data related to the documents uploaded in the Workflow and, in case of difficulties in the process because of inaction of the partner institution, you can perform some action that let the application move forward and backwards in the pipeline by clicking or unclicking the boxes that you see in the screenshot below. You can, for example, **undo** 

**actions** by acting on those boxes. One important action that you can perform here is to **nominate the student on behalf of an external outgoing institution** by clicking on the box "Nomination Accepted by External Partner" (at the very end)<sup>2</sup>.

documents/information provided	
Documents complete Documents incomplete Reason for incompletion Confirm completion of uploads	
LA managed externally via OLA	<u> </u>
- Selection Committee	
Application shared with Selection Committee	
Decision of IRC  Date for final acceptance student  Final decision of student	accepted rejected accepted rejected
- Partner Nomination	
Nomination accepted by External Partner  Nomination rejected by External Partner	

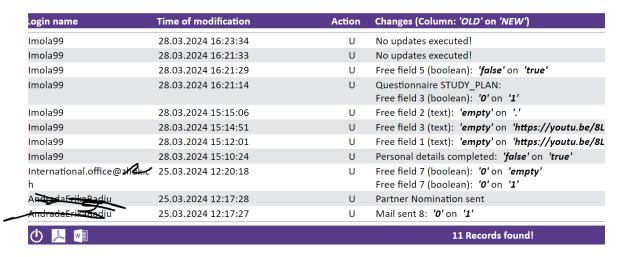
In the Master data of your Outgoing student, you can also go to the same section to remove the nomination to your own student. This is useful in case they add further destination to their Outgoing application after your nomination so you need to put them back in the pipeline in order to be able able to transfer their application to further destinations:



At the very end of the Master Data, on the bottom right corner, there is an icon that you can click to see the history of the application: what it was done by who:

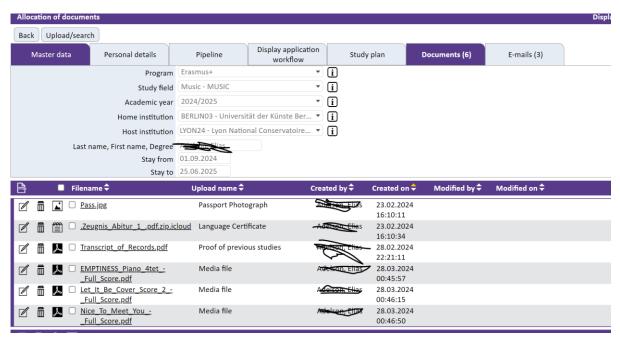


<sup>&</sup>lt;sup>2</sup> as IRC you are supposed to perform all actions related to your role from the Pipeline. Any other way of getting actions done in the systems could have as a consequence some malfunctioning of the process.

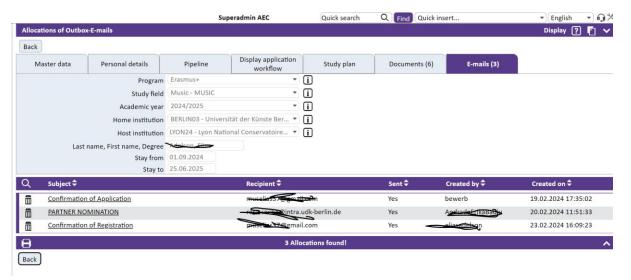


This is particularly useful when there is something wrong with the application and you want to understand what happened.

In the tab Documents you can see all the documents uploaded by the student:



And in the tab E-mail you can see the email sent from the system to the student, by whom and when:

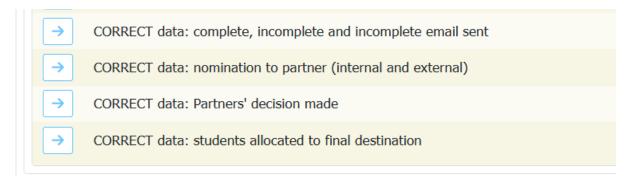


In the bookmark Pipeline, you can visualize in which step of the pipeline the student's application is. By clicking on it, the view moves to the Pipeline but it will show only the position of the applicant you are looking at.

## Trick and Tips: Pipeline Actions that can be undone

If you make mistakes or change your mind about some actions you performed to make the students' applications progess, there is a specific place at the bottom of each Pipeline called "General Queries", you recognize it as it is marked in yellow, where you can undo some actions and also view and delete applications.

The following are the actions you can undo from the General Queries of the Outgoing Pipeline:



While following are the actions you can undo from the General Queries of the Incoming Pipeline:

(UNDO) Documents reviewed

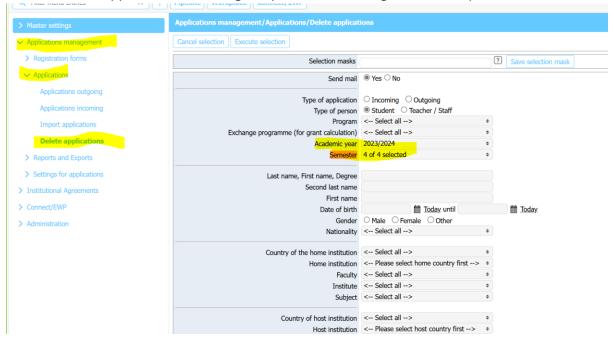
(UNDO) Sent to selection committee

(UNDO) Application marked as rejected by Selection Committee

(UNDO) Acceptance Letter sent

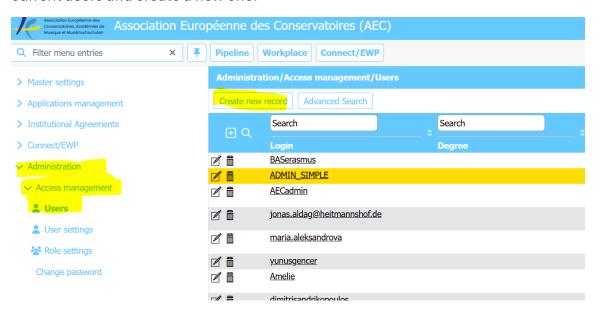
## Delete Applications for GDPR Reasons

You can delete applications following this path and selecting the relevant parameters:

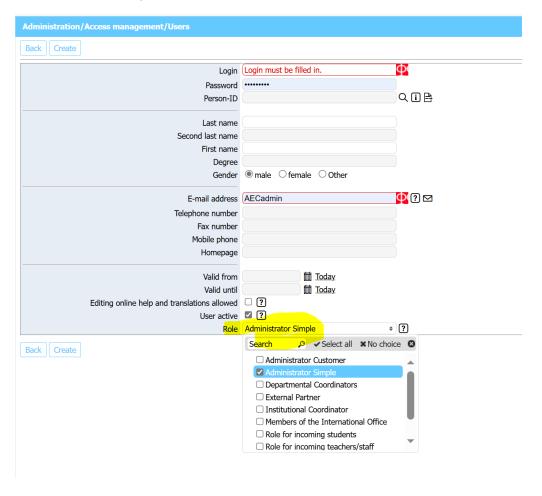


### **Administration and Users**

If you have a new colleague in the international office who needs access to the system as admin, In the menu Administration – Access Management – Users you can see the current users and create a new one:



Here you can create login and password as new user. As a Role, please choose Administrator Simple:



This role will give your colleague access to the same view as you have. Administrator Customer gives you access to more settings but also gives you a more complicated menu to navigate.

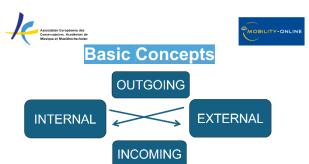
In the Role Settings and User Settings you can see an modify what the users can do and see, but we advise you not to touch at these settings

## **Chapter 3 - LOGIC OF THE SYSTEM and PROCESS**

## **Basic Concepts**

In order to understand the logic of the system it is important to understand the following 4 concepts:

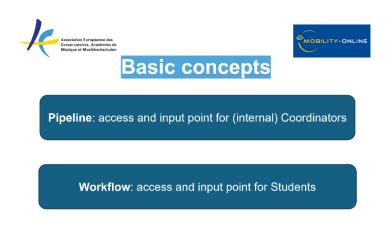
- Internal Institutions = institutions using EASY MO as their application management system, they subscribed to it and they pay an annual fee to the AEC for the use of the system;
- **External institutions** = institutions not using EASY MO as their application management system but can still receive applications and send applications to



internal institutions; their actions within the system is very limited

- Outgoing = you students applying to study abroad
- **Incoming** = students applying to come to your institution

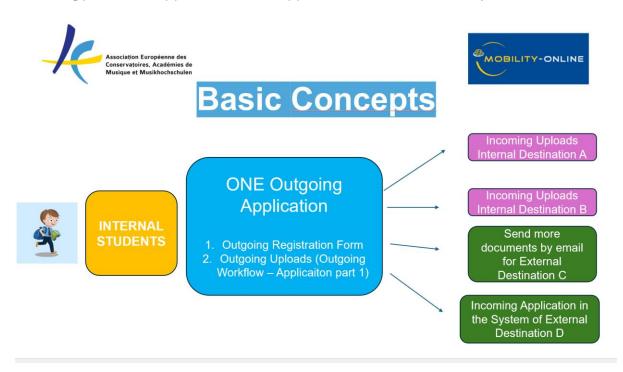
The intersection between these 4 concepts generates different scenarios that translate in different processes in the system. Please see below the various scenarios and paths of applications in the EASY MO system.



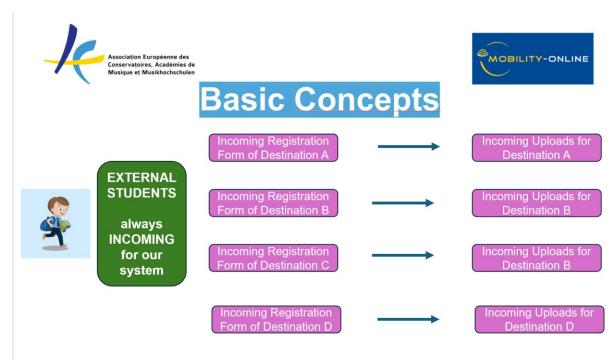
Please note that the entry point / window on the system for the international coordinator (IRC) is the so called **Pipeline**, while the students inputs data and decision in the **Workflow**. The IRC has access to the student's workflow but should always perform actions via the Pipeline in order to guarantee

the good functioning of the process. Any other manipulation can compromise the process.

Students from Internal Institutions need to submit **only one Outgoing Application**, composed by Registration Form and Workflow uploads. Then, for each destination, they need to provide application documents according to the requirements of the various destinations. For destinations which are also EASY MO Internal Institutions, the Incoming part of the application also happens within the EASY MO System.



Students from External Institutions – who are always incoming students for internal institutions need to fill one Incoming Application for each destination (Incoming Registration Form + Incoming Uploads in the Workflow)



So Internal Outgoing Students fill in the Outgoing Registration form, and External Incoming Students fill in the Incoming Registration Form.

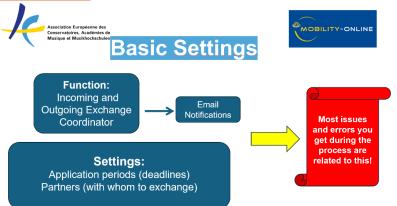
Internal Incoming students will have the information collected in their Outgoing Application transferred to the internal destinations and will upload the documents required by the incoming destination in the relevant workflow within the EAYS MO system.



# Tips and Tricks: main reasons why students get stuck at the beginning of the process

The following are the main reasons your students have difficulties in entering an application. Please check these data when a student tells you that the system "does not work":

- Missing Incoming and Outgoing
   Coordinator Function in either the
   home or one of the receiving
   institutions please add it in the
   system.
- Closed application period at the home or receiving institution → please check your application opening and closing dates and ask to your partner institutions to do the same.
- Partnership restrictions: one of the two institutions home or receiving) has put in place restrictions regarding institutions to exchange applications with
- Multiple stay not activated: if you did not tick on the "Multiple stay allow" box of the concerned programme in your Settings per exchange programme, your outgoing student are able to fill in only one Registration Form, and therefore apply to maximum 4 destinations
- Right cademic year not selectable: activate the academic year in General Settings



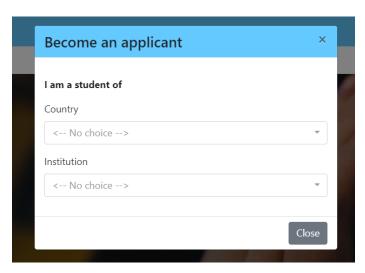
## **Outgoing Process**

Let's have a look at your Outgoing Process, from the point of view of you as internal outgoing coordinator, also looking at what the student needs to do in the system to make the application progress.

#### Part 1: Student's Outgoing Application Process

The student from the internal institution goes to <a href="https://mobility.aec-music.eu/LoginServlet">https://mobility.aec-music.eu/LoginServlet</a>, clicks on **Become and applicant** and choses their country and home institution and choses Enter application.





He can now start filling the **Outgoing Registration Form.** 

The outgoing registration form asks for several information, including the academic year when the mobility will take place, and asks the applicant to fill in **up to 4 destinations**, so the student from an internal institution fills in 1 outgoing registration form for up to 4 destinations. More destinations can be entered by filling another registration form, but only if the home institution has activated the "multiple stay allowed" option in the Settings.

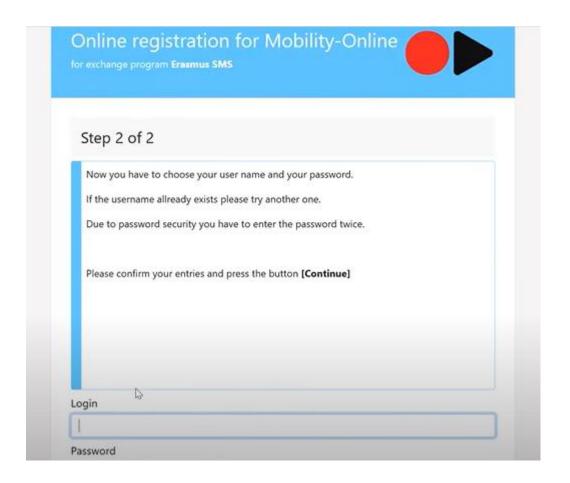
Students from internal institutions can apply to go abroad as long as the Outgoing application period of their own institution is open, regardless of if the Incoming application period is still closed or not, BUT – if the application deadline of one of the destinations has already expired, the student gets a warning message when filling in the form.

Please note that, when the student has submitted the registration form, only the Outgoing coordinator sees that there is an application that has been started (the incoming coordinators do not see the student yet).

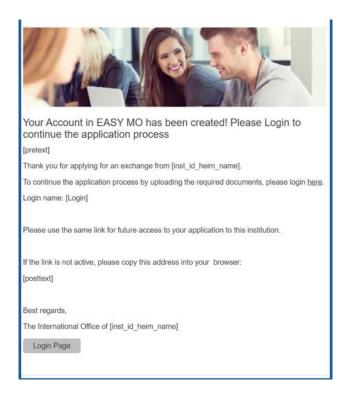
2. After submitting the Outgoing Registration Form, the student receives an email describing the next steps:

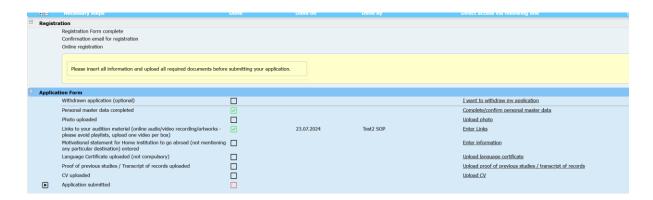
t	Thank you very much for filling in the Registration Form to apply for an OUTGOING exchange from [HOME INSTITUTION NAME]
	OUTGOING exchange Iron [HOME INSTITUTION NAME]
	In order to further process your application please follow this procedure:
	<ol> <li>Create an account (Login Name and Password) on EASY Mobility-Online by clicking on the link you find at the bottom of this email</li> </ol>
	Login in EASY Mobility Online with the credentials you created. You will end up in the Workflow of your OUTGOING application
	Complete/confirm you personal data and start uploading the required application documents from your home institution side by clicking
	on the links that will progressively appear on the right side of each enlisted document
	3. Submit your Application
	4. Your application will be approved by your home coordinator (nomination) and will be transferred to your desired destinations
	5. The different destinations will ask you to upload further documents on their side of the EASY MO system (Application Part 2 - Incoming) OR to send documents via mail/via another system
	6. Your application will be evaluated by Selection Committee at destination and you will receive the results by email and - in case of acceptance/s - you will need to make your final choice in the EASY Mobility Online system

By clicking on the link included at the bottom of the email above, the student can **create an account**. They need to choose and save / remember their 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 action links on the right of the list are the actions that the student must perform to complete the workflow. The student can do the action by clicking on the links in random order. Once an 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 save/update according to the action. When all compulsory documents are uploaded, the student can click on Submit Application. Once the application is submitted, the system sends a notification to the Outgoing Coordinator, with the student in copy, to notify that the Outgoing Application has been submitted and action is required on their side:

The applicant: [bew\_vorname] [bew\_nachname] has submitted an OUTGOING application to go on exchange in the EASY MO system.

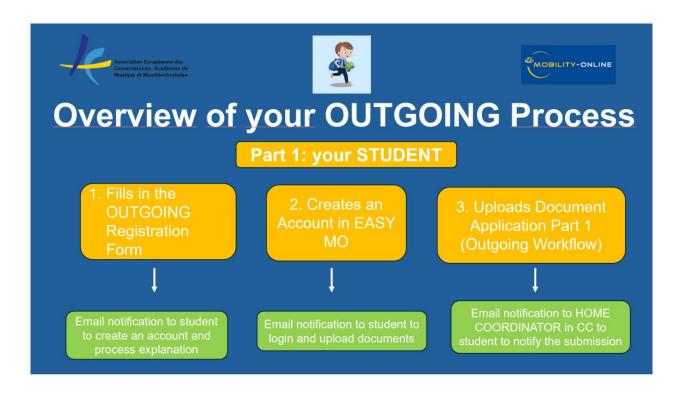
Please login to the system and check the application to suggest changes or to approve it by giving your nomination and transfer it to the desired destination.

We kindly ask you to do this as soon as possible as the incoming process on the destinations' side might close soon.

Best regards

The EASY MO system

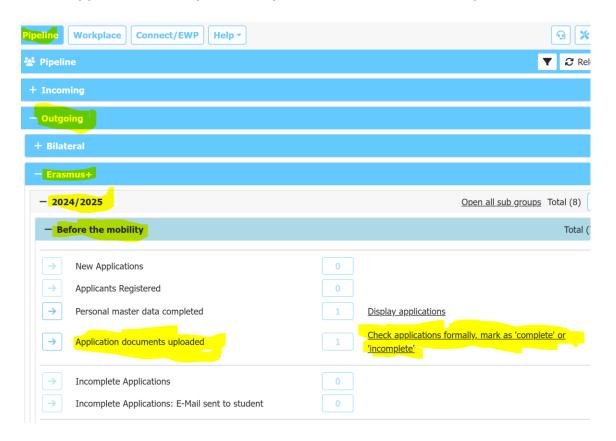
To sum up, the Outgoing Student's Application Process is composed of 3 parts: Outgoing Registration Form + the Account Creation and the upload and submission of documents in the Outgoing Workflow. Once the Outgoing Workflow has been filled in with all necessary uploads, the students get a message directly in the workflow (in yellow) informing that that they have to wait for the approval of the home coordinator.





#### Part 2: Outgoing Coordinator's Nomination Process

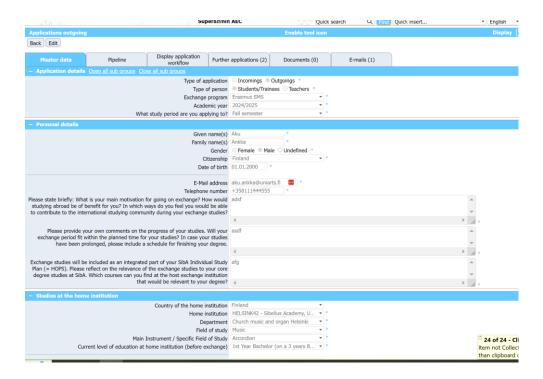
 The Outgoing Coordinator now logs in the system and clicks on Pipeline (first horizontal menu item up on top). Then click on the little + next to Outgoing, then on the + next to Erasmus, then on the + next to the Academic Year the application is for (2024-2025), and then on Before Mobility



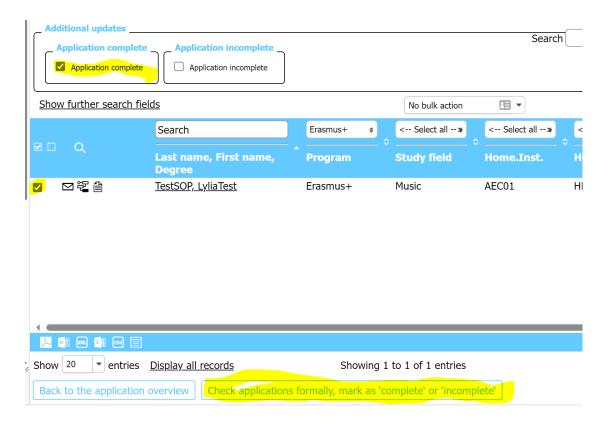
You now see the various "drawers", called **pipeline steps**, indicating which is the status of the applications. The little number in the square at the left of the action links indicates the number of applications in the same status. Next to the number you can see an action link. Thanks to the actions 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.

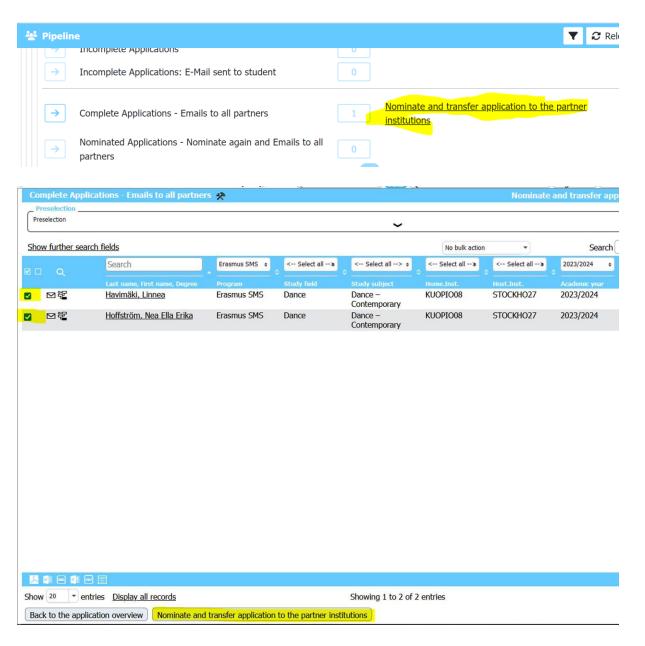




To mark the application as complete, the Outgoing Coordinator needs to click on the 2 boxes and the button highlighted below and then on the button on the bottom indicating the action:



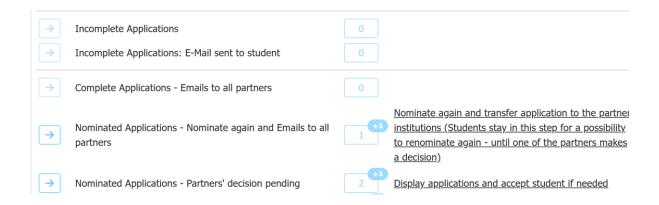
2. After marking it as complete, the application will directly appear in pipeline step to nominate and transfer application to partner. Now the Outgoing coordinator can "nominate and transfer" the applications to the incoming destinations:



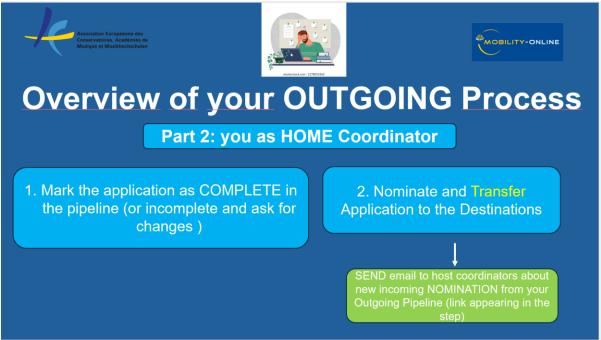
There is a possibility no nominate and transfer the applications again, if necessary.

Only now the Incoming coordinator sees that there is an application and needs to import it.

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



To some up part the Coordinator's Outgoing Nomination process:

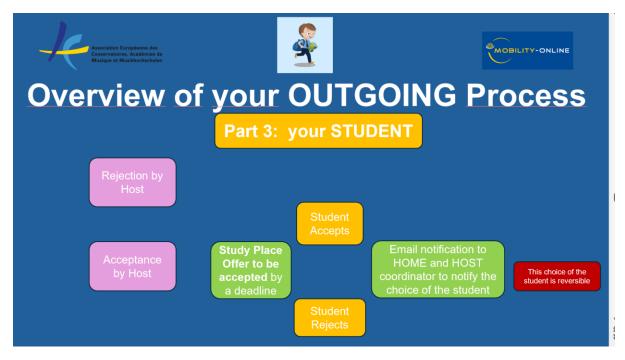


From this point your Outgoing process is on hold and it is on the Incoming Coordinator to act:



#### Part 3: Your Outgoing Student's Decision

Once the Incoming Coordinator at destination inputs their decision in the system, your outgoing student receives the decision via email. the decision can be a rejection or an offer of a study place. When the student is offered a study place, a deadline to accept or reject it is indicated in the email. At this point the student needs to login in the Outgoing or Incoming workflows to accept or decline the offer. The two coordinators are notified by email regarding the decision of the students, which is still reversable at this point

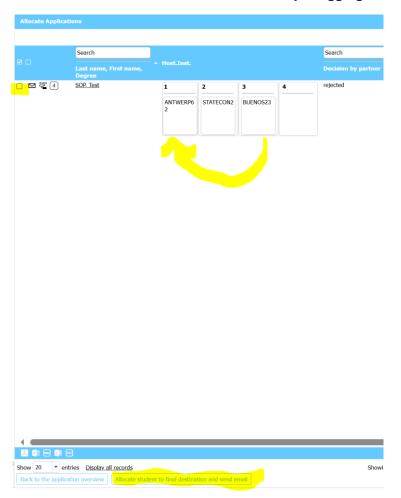


#### Part 4: Outgoing Coordinator's Final Destination Allocation and launch of DLA Process

The Outgoing Coordinator can now make sure that the student is sure with their final destination and proceed with the so called "allocation", meaning the final assignment to the student to a certain destination.

<b>→</b>	Partners' decision made - some or all options have been rejected by the partners		Show applications and accept student if needed	
<b>→</b>	Partners' decision made - Accepted Applications		Send an email to student to ask if this is their final and unchangeable choice (optional)	
->	E-mail about final choice sent to Applicants			
->	Students confirmed final choice (please add Interinstitutional Agreement if necessary)		Allocate student to final destination and send confirmation email	
<b>→</b>	Applications allocated to host institutions (OLA - managed externally)		Mark applications as courses done externally via OLA	
<b>→</b>	Applications allocated to host institution - Digital Learning Agreement managed internally in MO, courses to be entered and signed by student		Display applications	
- Before the mobility - Digital Learning Agreement				

The system allocates the student by default to the 1st choice, that is why you will need to switch the destinations putting as first priority the destination you are going to allocate the student to. You can do that by dragging and dropping the boxes:



Only after you have done this switch and you are sure that the final destination appears under the number 1, you can click on the button at the bottom of the page to allocate the student. If you do not apply this switch, when you click on the allocation button the student will automatically be allocated to the first choice.

When you do the switch in the P ipeline, the switch happens in the master data of the students as well. In order to be sure of what you are doing and avoid mistakes, please

check carefully the whole line of the student in the Pipeline step of the allocation and make sure that both the columns "Decision by Partner" and "Decision by Student" indicate "accepted":

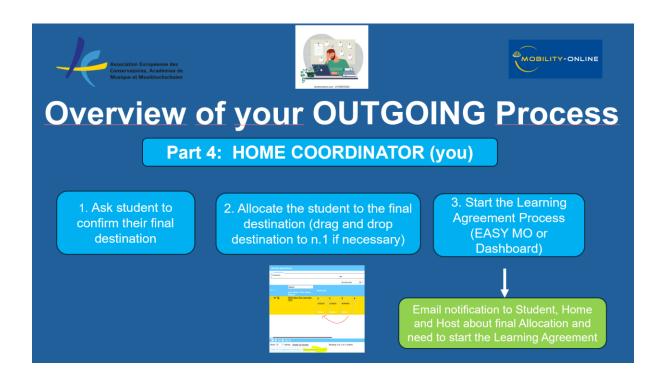
The reversion/correction of the allocation can be done in the General Queries of the Outgoing Pipeline.

If the student wants to wait for the other destinations' responses before deciding where to go, please do not allocate them immediately. This is why in the system the final assignment of the destination is done in two steps:

- 1) The student acceptance of the study offier
- 2) The final allocation by the Outgoing coordinator

When this process is over, the three parties receive an email notification about it.

The Outgoing Coordinator can now start the DLA process within or outside the EASY MO system.



### Outgoing Students applying to External destinations

When one or more destination option of your Outgoing student is an External Institution, the system sends an email notification to the external partner including a link to the full Outgoing Application, with the following instructions:

Dear [Name of the External Coordinator"

The applicant [Name of the Student] has been nominated by their home institution [Home Institution Name] for an exchange to your institution from via the EASY MO system.

Please click on the following Link to check the application data and documents: <u>link to the outgoing application info and documents</u>

This link can be shared with your Selection Committee for a final decision on the applicant.

Please note that by clicking on "accept" in the link above you accept the student for an exchange period in your institution and therefore you offer them a study place.

Should you need this student to apply as an incoming student via your own system or by sending extra documents via email, please provide them with instructions on how to do so.

Here the necessary contact details:

Home institution Coordinator: [email of the home coordinator]

Applicant: [email of the applicant]

Once your own selection process is complete, we kindly ask you to click on the link above to accept or reject the student, so that the result of the application is recorded in EASY MO as well.

Please note that the AEC warmly encourages institutions not adopting EASY MO as their application system to support the AEC community by welcoming applications from the system.

Best regards

The EASY MO system

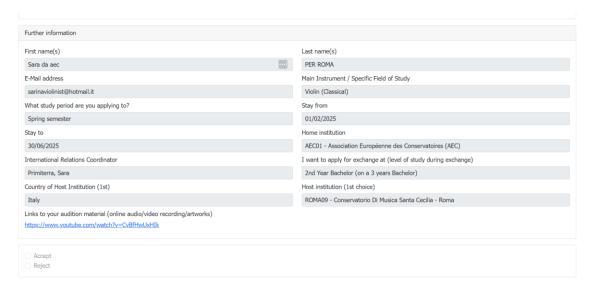
It is therefore on the external partner to decide on how to proceed and inform the student and the home coordinator about their Incoming procedure. However, AEC warmly encourages all its members to consider applications coming from the EASY MO system.

The link that the External Partner receives displays the following information:

 Documents such as photo, CV, language certificate and TOR as tabs, dowloadable as PDFs

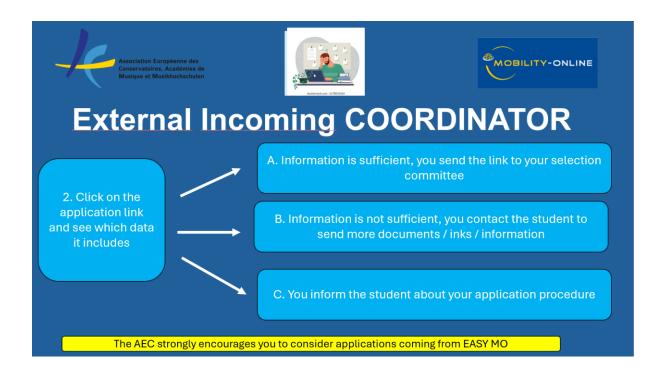


- Main information on the applicant, including links to their audio-video material
- Button "Accept or Reject"

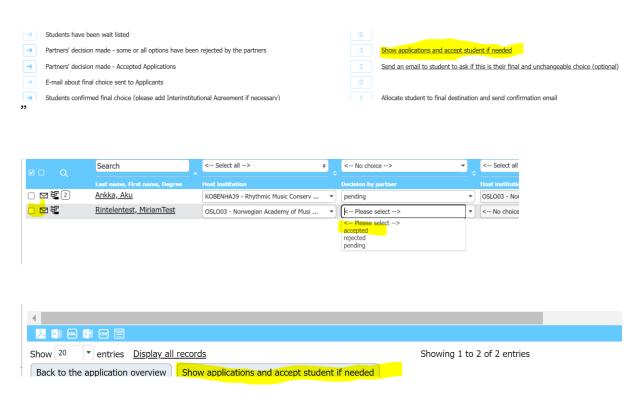


Once the external coordinators receive your Outgoing Application they can react in 3 ways:

- Decide that the material collected via the EASY MO Outgoing Process is sufficient, so they send it directly to their Selection Committee;
- Decide that the material collected via the EASY MO Outgoing Process needs some integration, so they ask for further material by email;
- Do not accept the application sent via EASY MO, contact the student and the coordinator with information regarding their own Incoming Applications

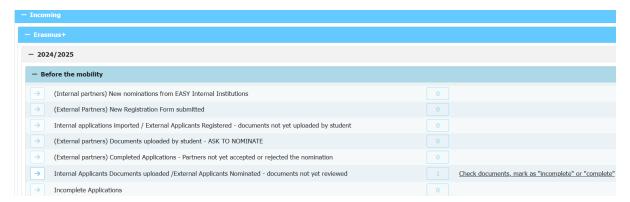


Whatever procedure is decided by the External Partner, they should click on the Accept/Reject button in order to let you know if they accept your student for the mobility or not. If they don't -as it's the case most of the time – you can accept the application on their behalf in the Outgoing Pipeline by clicking on the actionlink "Show applications and accept student if needed



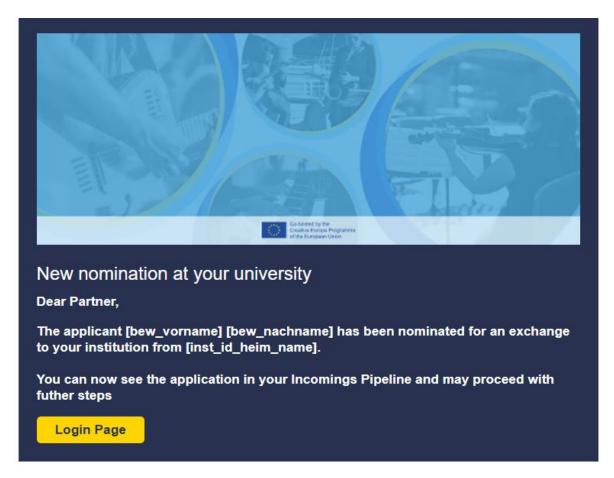
## **Incoming Process**

The start of the Incoming process is different if the applicant comes from an Internal or an External Institution. The Incoming Pipeline shows different step according to this difference:



### **Applicants from Internal Institutions**

When an Outgoing Application is transferred to an internal destination, the internal Incoming Coordinator receives the following email notification:



Nominated applicants from Internal Institutions now appear in the Incoming Coordinator's Pipeline and will need to be imported by clicking on the action link on the pipeline or from the menu Applications Management – Applications – Import Applications. Now the student receives an email notification (in CC to their Home

Coordinator) to login in the system to complete the uploads and actions in the **Incoming Workflow by the incoming deadline.** 

You can now proceed with the second part of your application by uploading further documents and relevant information for the destionation [inst\_id\_gast\_name].

The deadline to submit all your uploads is [dat\_frefield2]

Please login at <a href="https://mobility.aec-music.eu/LoginServlet">https://mobility.aec-music.eu/LoginServlet</a> ( Login name: [login]) and select [inst\_id\_gast\_name] from the dropdown manu.

You might be asked later to do the same procedure for other destinations

Best regards

The EASY MO system

?

To 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.

The Incoming Workflow works the same as the Outgoing one, with documents to upload by clicking on the action links on the right and boxes that become green as soon as the student proceeds with the uploading. Workflow of internal students will appear already as partially pre-populated as some documents are directly imported there from the Outgoing application.

In the Incoming Workflow, the student will be asked to fill in their **Study Plan:** 



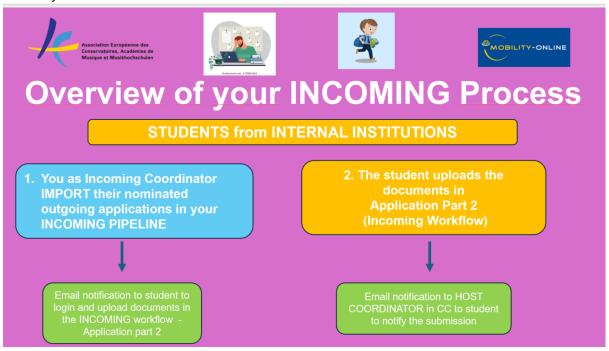
Please note that the information inserted in the Study Plan of the Incoming Workflow do not pre-populate the DLA's tables.

Once all compulsory documents of the Incoming Workflow are uploaded by the student, the student can submit the application by clicking on the relevant action link of the workflow. The student and the Incoming Coordinator will then receive an automatic email notification from the system notifying the submission of the application.

#### Please note that:

- Students coming from Internal Institutions are already pre-nominated by their home coordinators when they "nominate and transfer" the outgoing application of the student to the various destination

- Documents required in the Incoming Workflow need to be uploaded by the deadline of the Incoming Institution for the entire application to be considered by the destination.





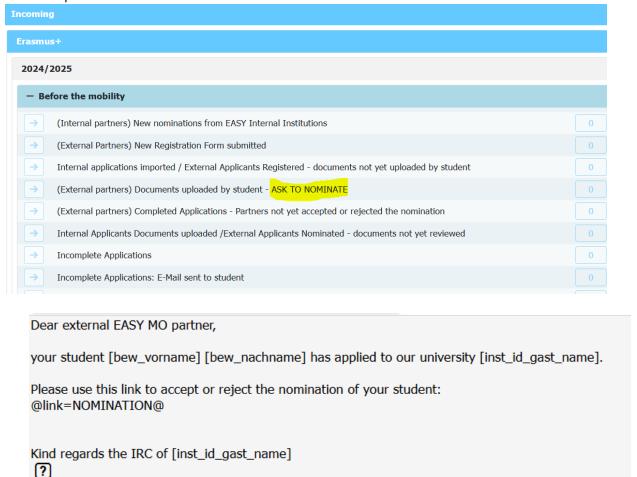
## Applicants from External Institutions

Applicants from External Institutions do not have any Outgoing Application in the system. That is why they need to input all information in their Incoming Application, which is divided in 3 parts:

- Incoming Registration Form
- Account Creation
- Incoming Workflow

Therefore, while internal applicants fill in their registration form and create into account within their Outgoing Application, external applicants need to do everything within the Incoming Application and will need to upload more documents in the Incoming Workflow. They also receive email notifications from the system after performing each step, similarly to what happens to outgoing internal students.

Please note that external applicants are nominated by their home coordinator after the uploads of the documents in the workflow. Incoming coordinators need to manually send from the Incoming Pipeline an email to ask for nomination of students coming from external institutions. The nomination request email can be sent again in case the external partner does not act



In case the partner does not respond or send a nomination via other means than the action link sent via email, the internal Incoming Coordinator can nominate the student on behalf of the student b in the Master Data (scroll down until the end).

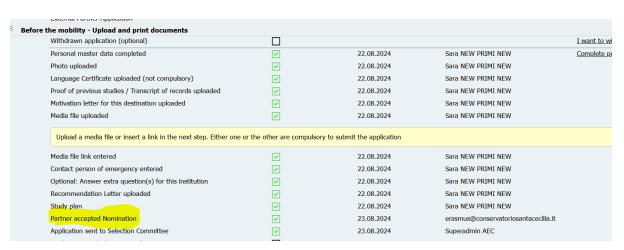
i mai accision of the student	- I accept the study p
— Partner Nomination	
External Partner	
Nomination accepted by External Partner	
Nomination rejected by External Partner	

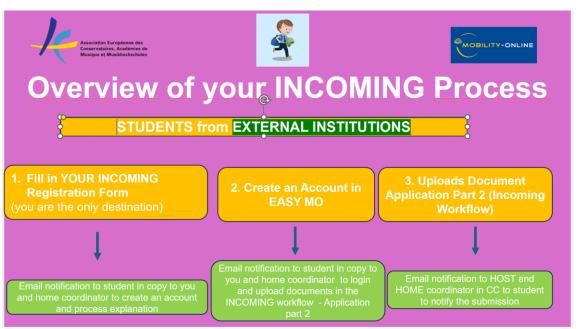
Nevertheless, we advise to avoid this manipulation that might compromise the position of the applicant within the Pipeline.

Once the external partner has nominated their student, the internal Incoming Coordinator receives the following email notification:

Coordinator receives the rottowing emait notification.		
t	The external partner [inst_id_heim_name] has nominated the applicant [bew_vorname] [bew_nachname] for an incoming application at your institution.	
	You can now go to your pipeline and send the application to the Selection Committee	
	Best Regards	
	The EASY MO system	

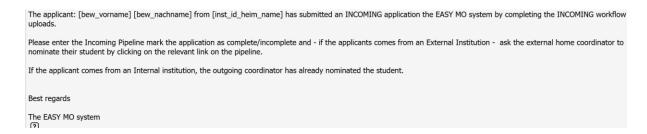
And the Incoming Student moves both in their workflow and in the pipeline



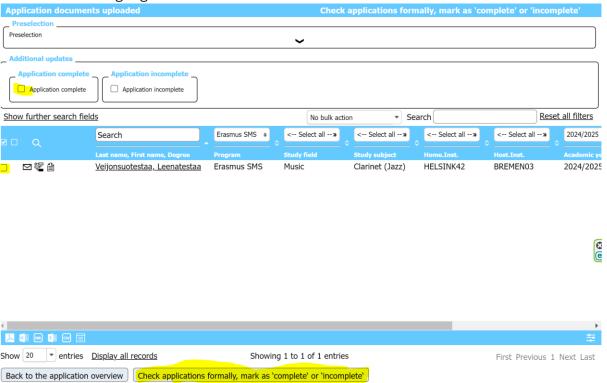


### Sending Incoming Applications to the Selection Committee

Once the Internal Incoming Students have submitted their Incoming Application documents and the External students have been nominated by their home coordinator after the upload of the documents, the Incoming Coordinator gets this email notification:

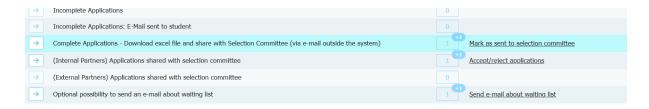


The Incoming Coordinator can see that the application moved to the step "Internal Applicants Documents uploaded /External Applicants Nominated - documents not yet reviewed" and can mark the application as complete by clicking on the boxes and button highlighted below

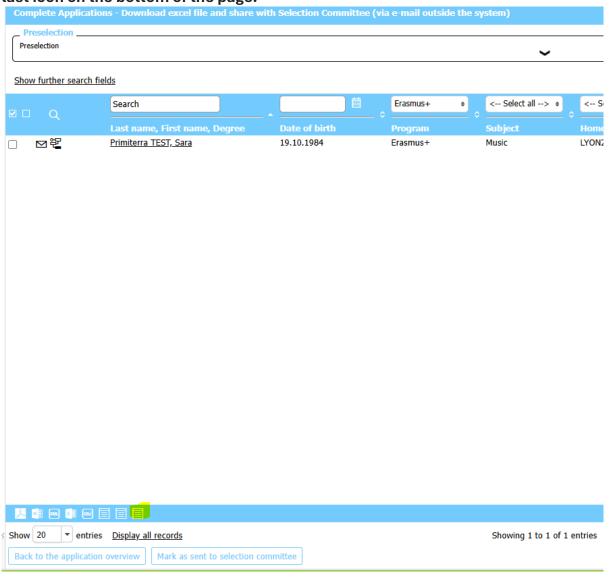


This action can be also done at the same time for more applications.

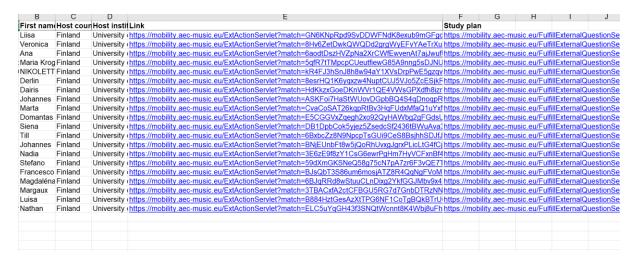
The application has now moved to the step "Complete Applications - Download excel file and share with Selection Committee (via e-mail outside the system)".



In this step you can download an excel file with the **link to the application documents** and information about the applicants, to be shared via mail with the selection committee outside the system. You get this file by clicking on the action link of the above mentioned pipeline step "Mark as sent to the selection committee", and clicking on the **last icon on the bottom of the page:** 



You will download an Excel file that looks like this:



The Excel file you obtain contains columns with the following information:

Exchange programme

Academic year

Study Period of Application

First name

Last name

Gender Date of birth

Place of birth

Country of birth

**Nationality** 

Visa

E-mail address

First name of your contact person

Last name of your contact person

Relationship

E-mail address of contact person

Phone number of contact person

Country of Home Institution

Home institution

Last name of home international Coordinator

First name of home international coordinator

Gender of coordinator at home institution (if not listed)

E-mail of coordinator at home institution

Phone number of coordinator at home institution (if not listed)

Current level of education at home institution (before exchange)

Host country

Host institution

Level of study during exchange

Field of Study

Main Instrument/Specific Field of Study

Mother tongue

Language level of instruction at host institution (if not Englisch):

Language level English

Comments concerning your application

**Prefered Professor** 

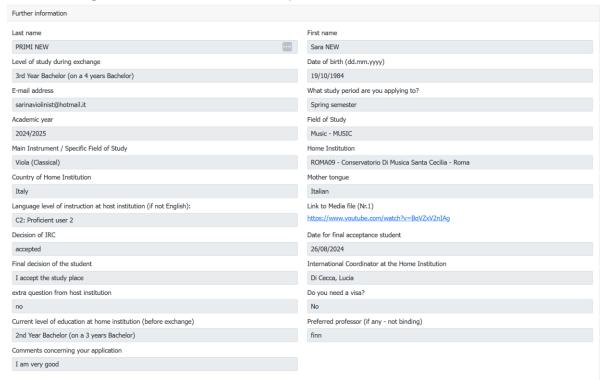
First name of contact person

Last name of contact person

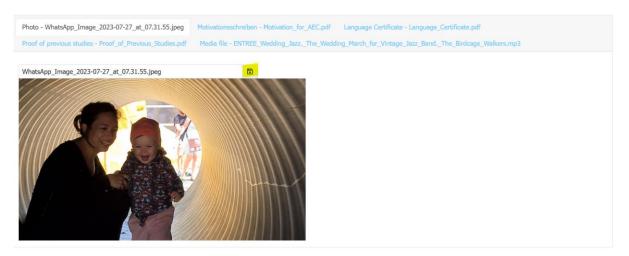
Relation to contact person
E-mail of contact person
Phone number of contact person
Application Documents via Action-Link
Study Plan via Action Link

The **Application Link** displays information and materials as follows:

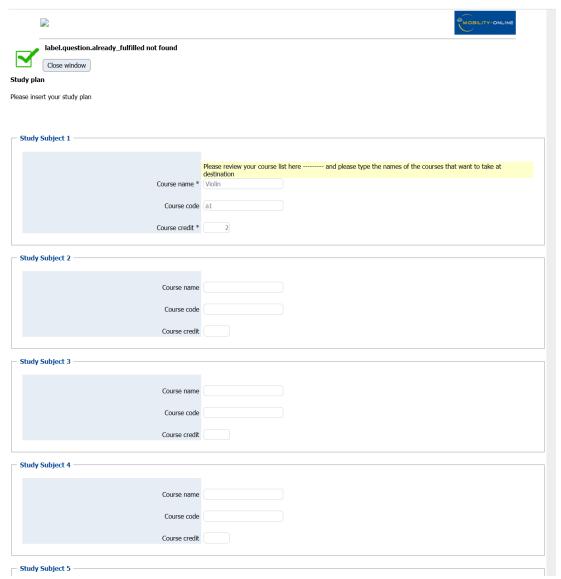
The following information come on the top:



The uploaded files come on the bottom in tab format, but they can also be downloaded by clicking on the disc icon next to the name (you see it highlighted in yellow)



The link to the **Study Plan** displays as follows:



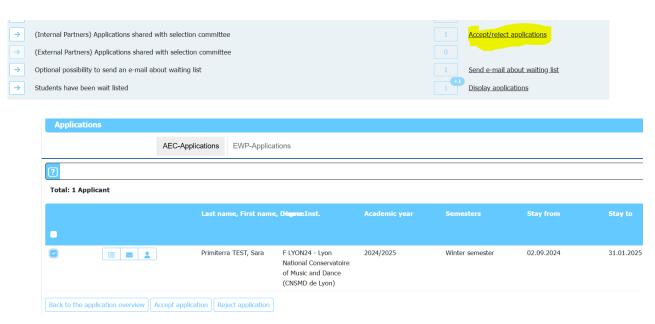
The Excel file can be filtered with the usual excel filter so that you can select the information and the applicants you need and filter them as you prefer (i.e. according to the instrument). Links to the Applications and Study Plan can be shared and are visible outside the system.

Once you have downloaded and shared the application data with the relevant Selection Committees you can select the application and click on "Mark as sent to selection committee". Should you need to download again the Excel file, you can go to the General Queries and undo the "sent to selection committee" so that the application goes back to the step where the download of the file with the application data and links is possible.

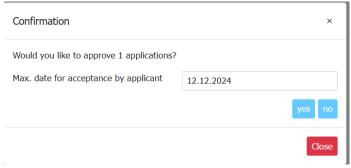
Please note that the Selection Committee, via the application link, can only see the application, but cannot directly accept/reject the applicants. The feedback needs to be given to the IRC outside the system and it will be the IRC who will act in the Pipeline to accept or reject the incoming student.



Once the Incoming Coordinator receives outside the system the decisions of the Selection Committee, can mark the application as Accepted, Rejected or send an email regarding the waiting list.



If the application is marked as accepted, the system asks to indicate a date for the student to accept the study place:



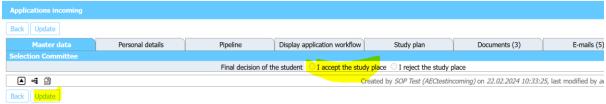
This information is included in the email notification that the student gets, with their home coordinator in copy, regarding the decision of the destination:



The student can accept or reject the application either in the Outgoing or in the Incoming Workflows

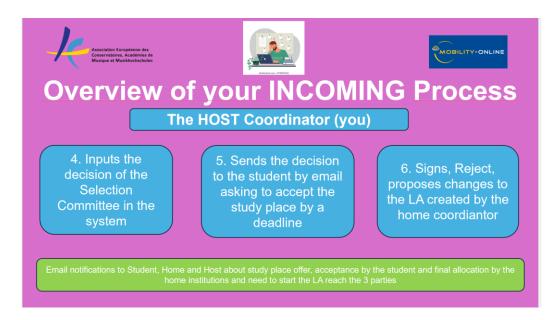


By clicking on the action link of the acceptance/rejection, the student needs then ton select "I accept the study place" and click o the button Update. Please note that this button cannot be clicked by the IRC.



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.



#### **Partner View for External Institutions**

External institutions can accept incoming students and nominate outgoing students via their Partner View Access<sup>3</sup>.

The Partner View Access is a (limited) view of applications that an external partner receives from and sends to EASY MO internal institutions. It should be considered as a summary overview, something to keep track of the applications exchanged with institutions using EASY MO. However, links to the applications received by email, include more information and documentation about the students applying than the Partner View. Also, please note that externals can nominate their outgoing students only via the action link sent by email.

-

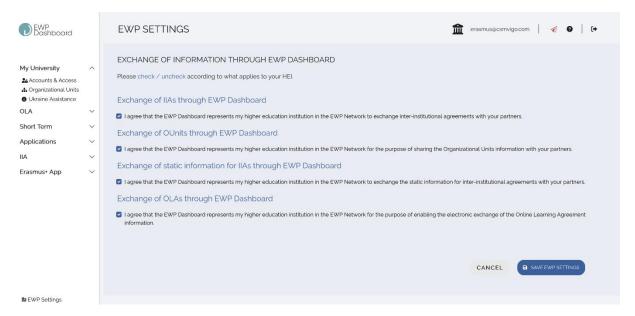
<sup>&</sup>lt;sup>3</sup> If one of your external partners informs you that they do not have access to this Partner View, please ask them to send a request for an activation link to <a href="mailto:events@aec-music.eu">events@aec-music.eu</a>

# Chapter 4 - EWP settings, IIAs and DLAs

## **Dashboard Settings**

Any internal user of EASY MO can decide if connecting the system with EWP and therefore manage Learning Agreements and/or Interinstitutional Agreements within the EASY MO platform.

If you go for this choice, the first thing to do is to go to your Dashboard account, click on EWP settings (you can find it, very small in the bottom left corner of the screenshot below) and deactivate the third and/or the third box (IIAs and OLA), and click save.



Please note that it is not compulsory at all to connect EASY MO to EWP. You can keep on using Dashboard and OLA and limit your use of EASY MO to the exchange and selection of applicants.

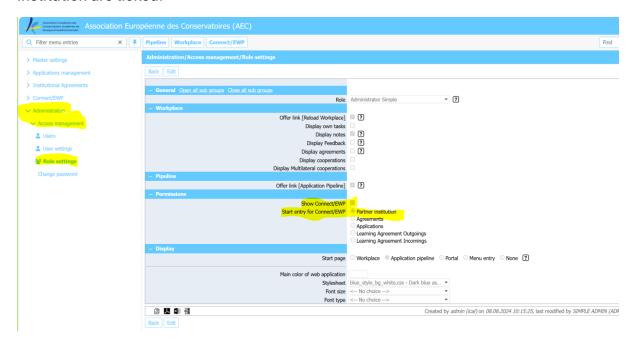
## EASY MO Settings to connect to EWP

First of all, please note that you can do all tests regarding this part in the test environment (you can use your usual credentials to enter: <a href="https://mobility.aec-music.eu/mobility\_test/LoginServlet">https://mobility.aec-music.eu/mobility\_test/LoginServlet</a>)

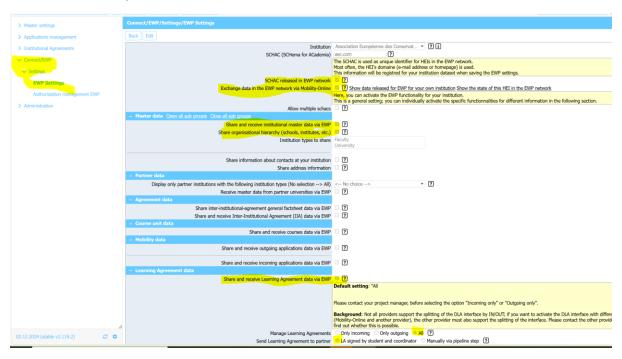
You know that your connection with EWP is activated when the **Connect/EWP** button appears in the horizontal menu on top:



If it does not appear, you need to activate your EWP settings. Please go to Administration – Access Management – Role Settings - Aministrator Simple and make sure that the boxes Show Connect/EWP and Start entry for Connect/EWP Partner Institution are ticked:



Then go to the left menu, Connect/EWP, Settings, EWP Settings, and make sure that the boxes that allow you to share the basic data with the EWP network are ticked.

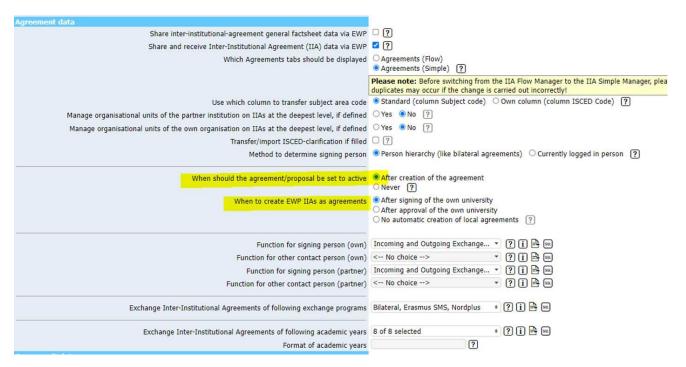


If the boxes are not ticked, click on the button edit, tic, the boxes, then click on the Save button and refresh the page. At this point the Connect/EWP Button on the top horizontal menu should appear.

## Interinstitutional Agreements (IIAs) Settings

Scrolling down in the same section as above (Connect/EWP, Settings, EWP Settings) you find the IIAs Settings. Please note that more fields appear as soon as you click on the various boxes, so do not worry if, when you scroll down the first time on this page ,you do not see everything that appears in the screenshot below.

Please find below the boxes that should be ticked to activate the connection with EWP for IIAs:



The exchange IIASs of exchange progrmas, depends on the agreements that you have.

N.B.: Please note that Dashboard has removed the possibility to release and visualise already signed IIAs via systems by commercial providers.

#### 6.2.9. Changes icon



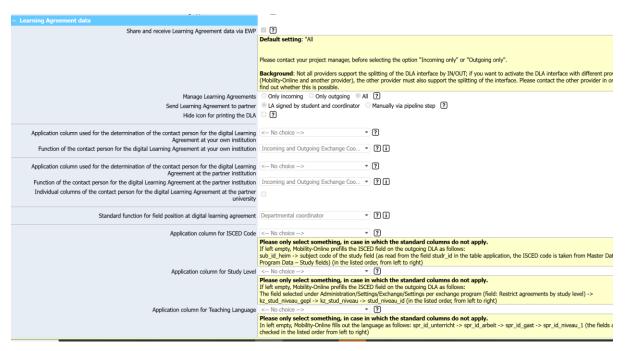
Figure 21: Change icon

The red warning sign indicates that we have received a CNR from the partner institution and that something on the respective IIA has changed (i.e. the no. of places, the study levels, no. of conditions or that the status has changed, for instance that the agreement has been signed).

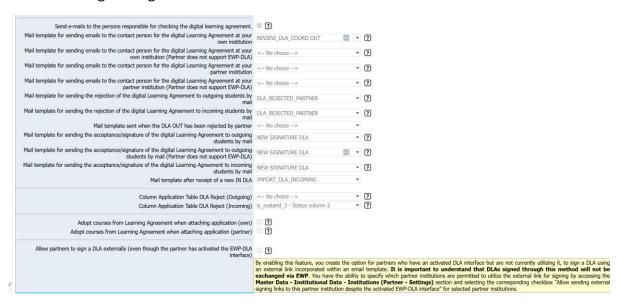
## Learning Agreement (LA, or DLA) Settings

Scrolling down in the same section as above (Connect/EWP, Settings, EWP Settings) you find Learning Agreement Settings. Please note that more fields appear as soon as you click on the various boxes, so do not worry if, when you scroll down the first time on this page ,you do not see everything that appears in the screenshot below.

Please find below the boxes that should be ticked to activate the connection with EWP for LAs;



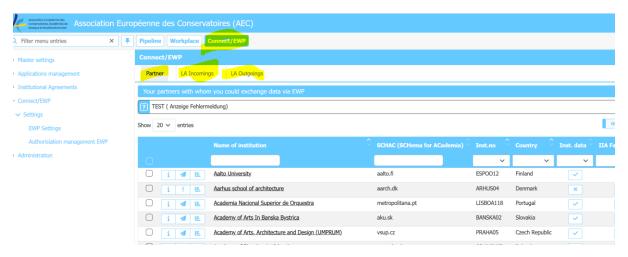
#### The remaining settings should be as follows



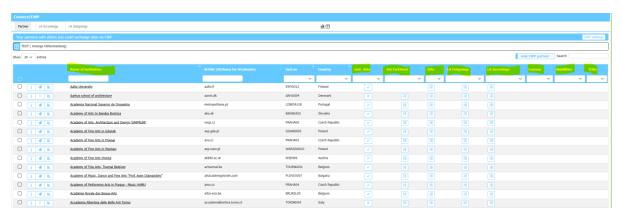
Please note that data of previously signed Learning Agreements cannot be imported in SoP.

## Where to see the data exchanged with EWP

Once you have activated all the settings explained above and you have started exchanging data with partners, you can have access to those data and documents from the button Connect/EWP of the top menu:



In "Partner" you can see also which institutions have connected to EWP and for what



And you can see the DLAs you have in place through the EWP Network by clicking the buttons LA Incomings and Outgoings

Important note about Nominations in EWP: at the moment, we did not activate the possibility of Nominations via EWP in EASY MO. Some other commercial providers, such as Osiris, have already activated Nominations via EWP in their systems. In principle, this function is also available in Mobility Online. However, the EWP project has announced that this web service is still supposed to be updated, and then new tests need to be done. This is the reason why, even though already available, the transfer of nominations is not yet tested and ready to be used with other commercial providers. This is planned as one of the next steps for EWP, as currently the focus is on the IIAs and Las. SoP does not think that the final version of the nominations will be updated and tested by everyone within the next six months at least.

# Chapter 6 - Digital Learning Agreement (DLA) process

## **Basic Principles**

The first and most important thing that you need to know about the DLA in EASY MO is that the **Outgoing Institution** is the main owner, initiator, manager and treasurer of this important document. This simply reflects the OLA/EWP logic. In this context, the Incoming Coordinator has very little margin of action in the document, limiting to approve/refuse and sign the document. On the other hand, the Outgoing Coordinator is so "powerful" that can even act on behalf of the student in managing the document in EASY MO.

Do not expect a real signature for the Learning Agreement. The signature of the LA in EASY MO is simply a click, that on the document appears as a date next to the name of the person who signed. This is in line with the requirements of EWP.

A pdf document can be exported via the "Print on File" function. SoP is still working on improving the layout of this document as well as making the signature stamp somehow visible on the pdf document. However, as Learning Agreements in EWP are meant to be purely online documents, this function is not required by the rules of the Erasmus Programme.

Furthermore, email notifications regarding changes and new signatures on the documents include a simple standard text always sent to the three parties whichever change to the document is made by any of the three parties. It is not possible at the moment to customize text and receivers for any specific change of the document.

Please note that the basic principle of EWP is that each party uses their own tool to fill in a Digital Learning Agreement (DLA). If those tools are all connected to EWP, what each party does in their system is visible in the system of the other party. That means that if you decide to use EASY MO to fill in and sign DLAs, you can exchange DLAs from the EASY MO system to institutions using other systems or Dashboard without changing systems.

You can still use the EASY MO system for the management of your application process and use Dashboard for DLAs.

#### **DLA Process within EASY MO**

#### **DLA** as Outgoing Institution

After the Allocation of the student to their final destination by the Outgoing coordinator, the applications ends up in two pipeline steps at the same time, as the Learning Agreement (DLA) could be either be managed internally via EASY MO or externally via OLA / Dashboard.



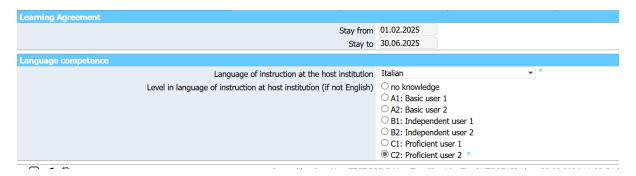
If you manage Learning Agreements with OLA, your student need go to on the OLA website and fill in the document.

If you manage Learning Agreements within EASY MO, your students need to go to their Outgoing Workflow, and the links about entering information and entering courses in the Learning Agreement will now appear.

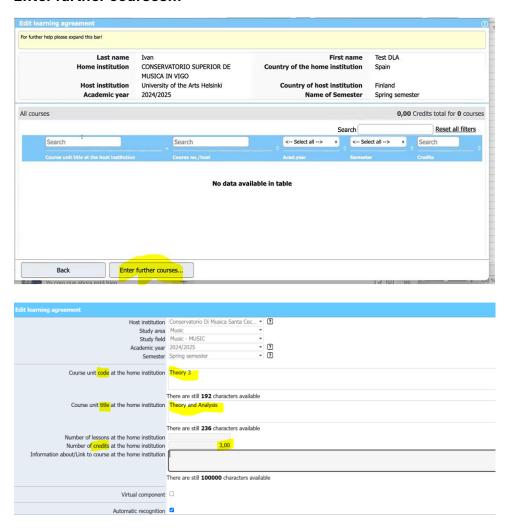


#### Student Signature

The student starts filling in the learning agreement. In the first step, by clicking on "Enter Information" they will be asked to fill in the **start and ending dates** (that they can take from their acceptance letter or you can add them in their Master Data) and language competences,

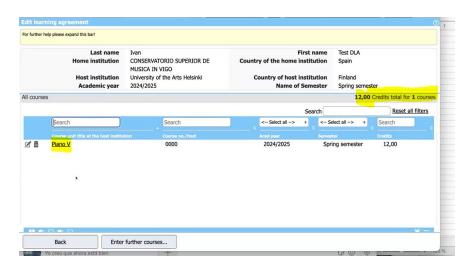


The following two steps are about filling in **courses at the host** institution and **courses at the home** institution, that will inform Tables A and B of the DLA. All the other data are automatically populated from the application. To add the courses they need to click on **Enter further courses...** 

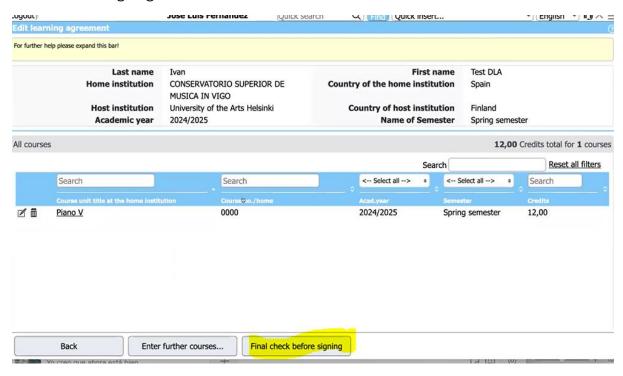


(grey fields are optional)

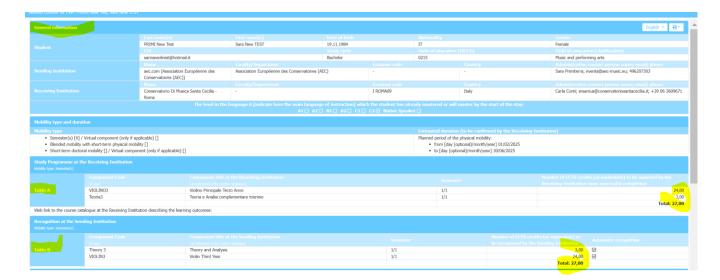
One saved, the courses will appear as follows



It is preferable that the students has already agreed with the coordinator/s on a list of courses to insert in the DLA, their official names, codes, and number of credits, and the corresponding courses at home (so basically all necessary data to fill in Table A and Table B of the LA). When the list of courses is complete, the student can click on Final check before signing



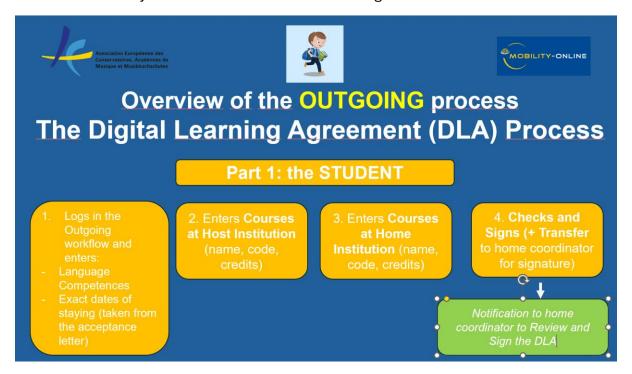
They now have the overview of the Learning Agreement (they need to scroll down to see the full document).



The student can now sign by clicking on the button Sign and Transfer

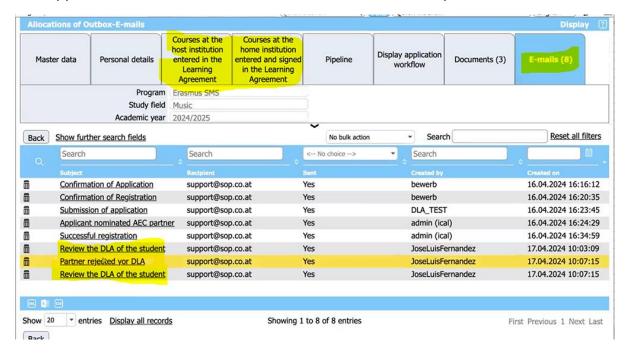


Please note that **the Outgoing Coordinator can enter the Workflow of the student and act on the courses.** This is an advantage compared to the Dashboard, where this functionality is not available. However, if this happens, the student needs to sign the document again, so it is somehow preferable that the Outgoing Coordinator checks the courses entered by the student before the student signs the document.



#### **Outgoing Coordinator Signature**

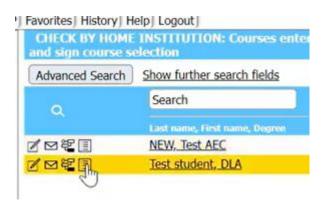
Now 2 new tabs related to the Learning Agreement appear in the Master data of the student in the Outgoing Coordinator view and emails about the LA sent by the system also appear in Email tab. The email notification is sent to the 3 parties:



Once the student has signed, the Outgoing coordinator has two options on their pipeline: sign the document themselves (option 1) or send the document for the signature of an external person (i.e. head of department). The application appears by default in the two steps so the Outgoing Coordinator can choose to click on the action link of the step they want to use.



By clicking on the action link of the first option (Sign DLA and release data in EWP) the list of applications whose learning agreement needs to be signed appear. To access the LA of the student, you need to click on the new little **icon (paper with lines)** that appears next to the name of the student:



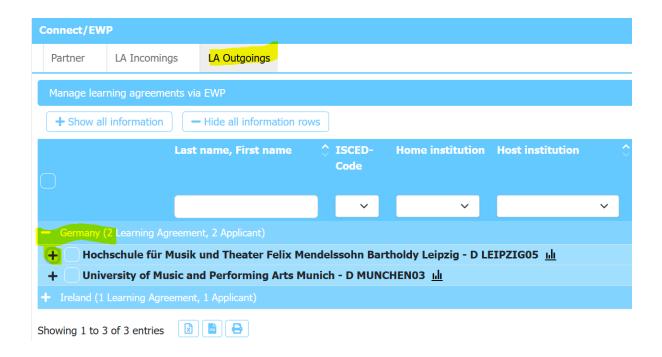


Here the data of the person signing can be changed. The accept button, if clicked, it turns into Reject, and a message about changes to be done can be sent to the student by typing a text into the message box next to it. The position of the person signing the DLA can be also inserted in the EWP/Connect - Settings



After the signature of the Home Coordinator, the application goes to the next step of the pipeline and it is now on the Incoming Coordinator to check and sign the DLA.

The DLA can be checked also in the EWP Connect section of the top menu, by clicking on the + next to the Country and the name of the Institution the DLA has been signed with



To see the document you click on the information icon



The document can be printed or printed as pdf by clicking on the printing icon, where you can also choose the page layout:

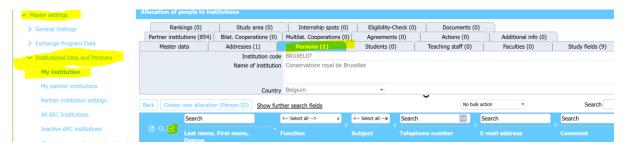


### Signature by another person of the Outgoing Institution

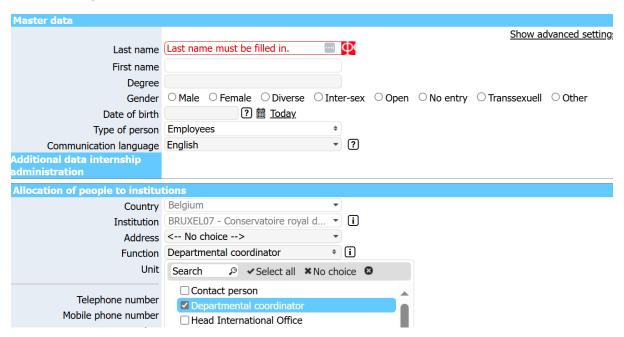
If you as Outgoing Coordinator cannot sign DLAs, you can go for OPTION 2 and send the document to the external person who needs to sign it. To do that, you first need to perform two actions:

- Add a Person with the function Departmental Coordinator
- Link the relevant email notification to this function

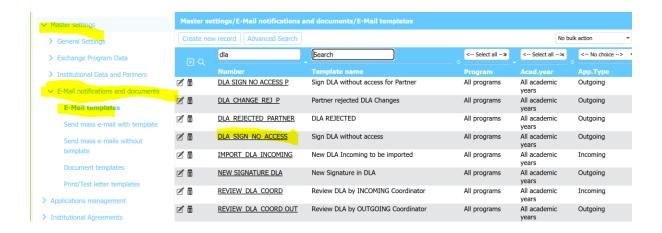
To add a person with this function go to Master Settings – Institutional Data and Partners – My Institution, then select the tab Persons, and click on the + icon



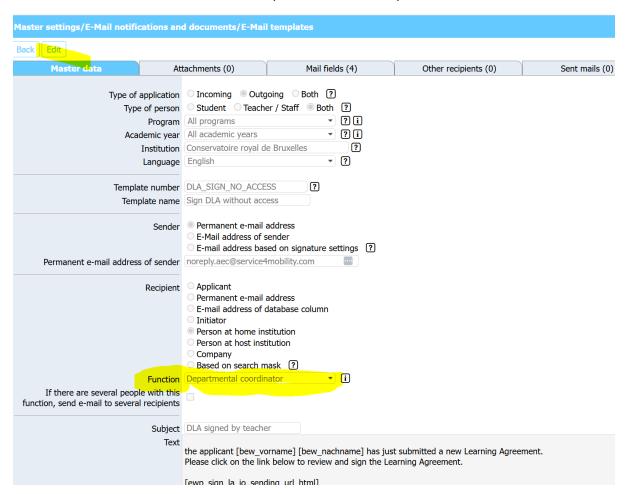
There, insert name, gender, email of the person who needs to sing the DLA and add the function Departmental Coordinator:



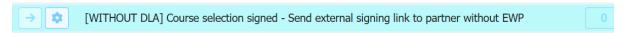
Then, go to Master settings – Email notifications and documents – Email templates and select DLA SIGN NO ACCESS



#### Click on Edit and then in the Function please choose Departmental Coordinator:



The link to sign the DLA can also be sent via an external link to a incoming institution without EWP via the action link in the following pipeline step





# Overview of the OUTGOING process The Digital Learning Agreement (DLA) Process

## Part 2: HOME Internal Coordinator

1A. Checks and Signs OR rejects (by proposing changes) from the Outgoing Pipeline

1B. Sends to an external person for signature

1

Notification to the other parties about the Signature or Rejection

The coordinator can act on the list or courses by entering from the student's Outgoing Workflow

Can change other data from the Masterdata of the student

#### DLA as Incoming Institution

The Incoming Coordinator sees that there is an Incoming Learning Agreement in waiting in the first Incoming Pipeline steps related to the DLA.



They also receivs email notifications triggered by the student's and the outgoing coordinator's signatures and can see their DLAs Incoming in the Connect/EWP section of the top menu.

When clicking on Show application, no DLA is visible yet. We need to make the DLA icon appear next to the name of the student.



To get this icon, the incoming coordinator needs to go to the top menu button Connect/EWP - LA Incomings. There, the incoming coordinator will find all the incoming LA grouped by country. Next to the country there is the + symbol, they need to click on it and then check the box of the name of the institution and click on Link/Import DLAs as applications



Once the Link/Import of the DLA has taken place, the Incoming Coordinator can go back to the pipeline and will find the application in the next pipeline step, again with two options (review the DLA themselves or send it to somebody else).



When clicking on the action link Review DLA on this step, the DLA icon next to the student's name will appear, and the DLA can be entered for the signature by the Incoming coordinator. Please note that **the Incoming Coordinator does not have any possibility to change data of the DLA**. They can just accept and reject, sending a motivation for the rejection in the message box of the DLA itself.

Similarly to what happens for Option 2 in the Outgoing Pipeline, to get an external person such as the Department Coordinator signing an Incoming DLA, you will need to follow the same procedure described for the Outgoing process meaning:

- Add a Person with the function Departmental Coordinator
- Link the relevant email notification to this function

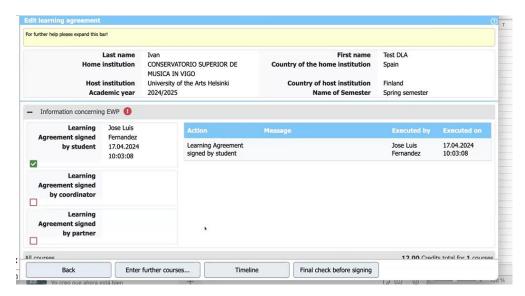
For details on how to do that, please refer to the <u>paragraph above</u>. The only difference is that the relevant email template to be modified with the function Departmental coordinator is the one called **REVIEW\_DLA\_COORD** 

### Changes in the Learning Agreements - Outgoing Pipeline

The three parties receive a general notification regarding a change in the Learning Agreement. If the Incoming institution rejects the DLA, the Outgoing Coordinator will see in their Outgoing Pipeline. The action links related to the rejection steps need to be all clicked for the student to be informed about the rejection:



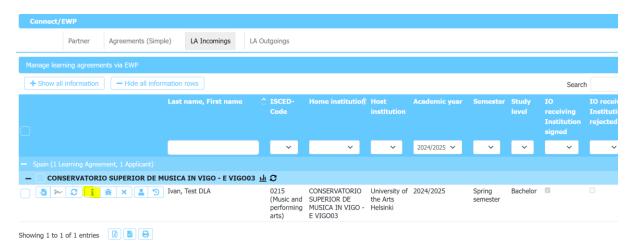
The student can correct and sign again the DLA in the Outgoing Workflow. The DLA is sent again to the Outgoing Coordinator and then to the Incoming Coordinator for the signature. The history of the document can be reviewed by clicking on the button Timeline.



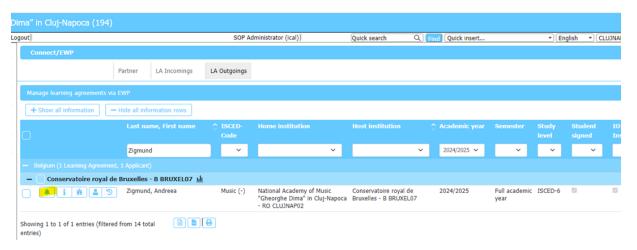
The student can still apply changes to the DLA during the mobility.

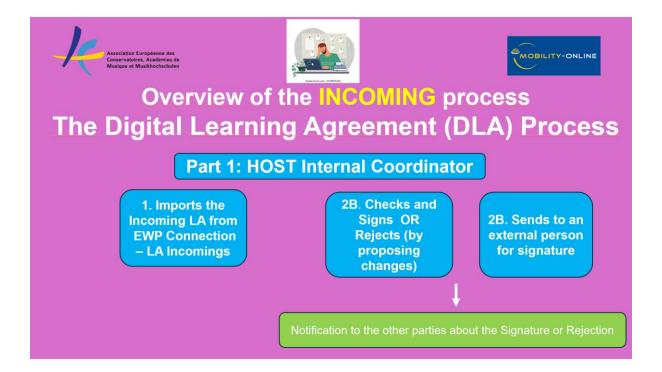


Please note that while the student and the Outgoing Coordinator have access to the signed Learning Agreement from the Pipeline, Workflow and Master Data, **the Incoming Coordinator can access to the Learning Agreements only from the button of the top menu Connect/EWP**, clicking on the various + symbols to get to the student and then click on the "I" icon.



You can also click on the bell to send notifications to the partners for a specific Outgoing (only) DLA





#### THE END

(for now....)

For any questions or doubt please mail Sara at <a href="mailto:events@aec-music.eu">events@aec-music.eu</a>

If necessary, this manual will be further updated in Spring 2025.