EASY APPFORMS & TABLES

AEC - IRC 2018 - BIRMINGHAM - SEPTEMBER 2018

SETTING UP APPFORMS AND TABLES IN 'EASY'

1. APPFORMS

2. TABLES

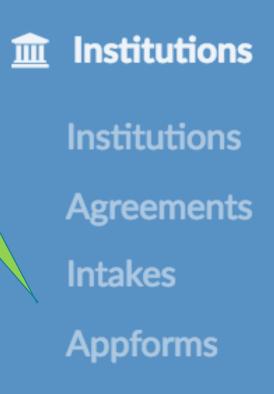


HOW TO SET UP YOUR APPFORM

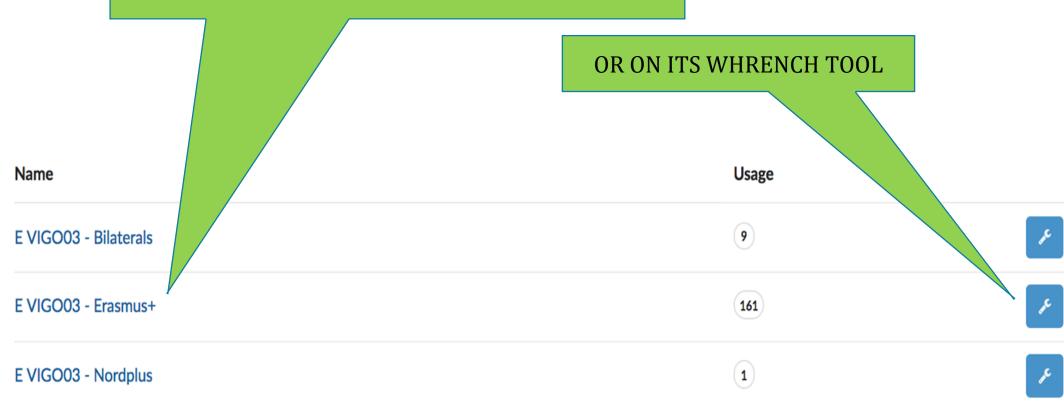
1.- AFTER LOGGING IN, GO TO THE MENU ON THE LEFT AND CLICK ON "'INSTITUTIONS"



2.- CLICK ON "APPFORMS"



3.- CLICK ON THE APPLICATION FORM "**ERASMUS+**



4.- NAME YOUR FORM

Edit appform



✓ Save changes

Name

E VIGO03 - Erasmus+

Please type a descriptive name for this appform. For example "Appform for BA programmes".

AND SAVE CHANGES

5.- YOU WILL FIND ALL THESE SECTIONS FOR SETTING UP

Edit appform



ъ.	
Prio	rities

Profile

Contact

Home university

Mobility

Education

Grades

Languages

Career

Activities

Residences

Documents

References

Medias

Other

6.- USE 'PRIORITIES' TO INSERT A LINK TO YOUR ACADEMIC OFFER & TO GIVE INSTRUCTIONS TO THE APPLICANT

Use _ _ for *italic* or * * for **bold**

THIS SECTION WILL BE SOON
RENAMED AS "INFO & ACADEMIC
OFFER"

Edit appform

✓ Save changes

Priorities

To compose your Study Plan, please check our aca mic offer:

_*http://csmvigo.com/erasmus/files/2018-19-CSN_V-CUADROS-ECTS.pdf*_

Always 'Save Changes'

You can also insert links, bold, italic read more

7.- IN 'PROFILE' USE THE BLANK FOR WRITING INSTRUCTIONS TO THE APPLICANT

Profile

Please, fill your data using CAPITAL LETTERS, except for your email address.

You can also insert links, bold, italic read more

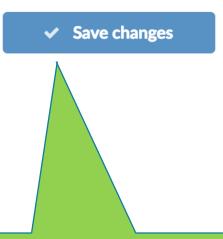
CLICK ON 'WORLD' TO GET AND SET UP THE LIST OF BLANKS YOU WANT IN YOUR FORM

- ▶ World
- + Add another territory

8.- TICK THE FIELDS YOU CONSIDER TO CUSTOMIZE YOUR FORM

DECIDE IF YOU WANT THEM **MANDATORY** OR NOT

Edit appform



Always 'Save Changes'

▼ World	
✓ Given name(s)	✓ mandatory
Family name(s)	✓ mandatory
Middle name(s)	mandatory
Previous family name	mandatory
Salutation	mandatory
Father's given name(s)	mandatory
Father's family name	mandatory
Mother's given name(s)	mandatory
Mother's family name	mandatory
Mother's previous family name	mandatory
✓ Gender	✓ mandatory

9. CLICK ON "**ANOTHER TERRITORY**" TO GET INFORMATION FROM APPLICANTS FROM SPECIFIC COUNTRIES THAT YOU MIGHT NEED



10. PROCEED SIMILARLY FOR NEXT SECTIONS LIKE CONTACT, HOME UNIVERSITY, ETC...

Contact

Please, fill the data using CAPITAL LETTERS, except for email address.

You can also insert links, bold, italic read more

- ▶ World
- + Add another territory

Home university

Please, fill in the required data using CAPITAL LETTERS, except for email address.

You can also insert links, bold, italic read more

- ▶ World
- + Add another territory

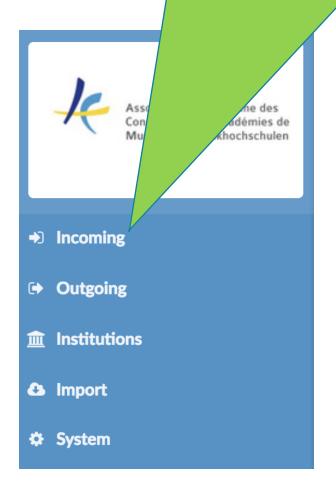


2. TABLES

HOW TO CONFIGURE YOUR TABLES

YOU CAN GET IN YOUR
TABLES ONLY THOSE
FIELDS HAVING BEEN
TICKED WHILE SETTING
THE RESPECTIVE
SECTIONS IN THE
APPFORMS

1.- AFTER LOGGING IN, GO TO THE MENU ON THE LEFT AND CLICK ON 'INCOMING' or 'OUTGOING'



2.- CLICK ON "TABLES"

→ Incoming Browse Search Outgoing Browse Search

CREATE INCOMING "TABLES" Outgoing → Incoming Browse Journal Search Browse **Tables** Rankings Search **Tables** OR OUTGOING "TABLES"

INCOMING 'TABLES' - 1. PRESS 'NEW SHEET'

Start by creating a new table sheet.

+ New sheet

2. GIVE A NAME TO YOUR TABLE

Create a new sheet

Please type a name for the sheet:

Untitled

Who will be able to access this sheet?

- Only me at the moment (you can share it later)
- All administrators

cancel

+ Create a new sheet

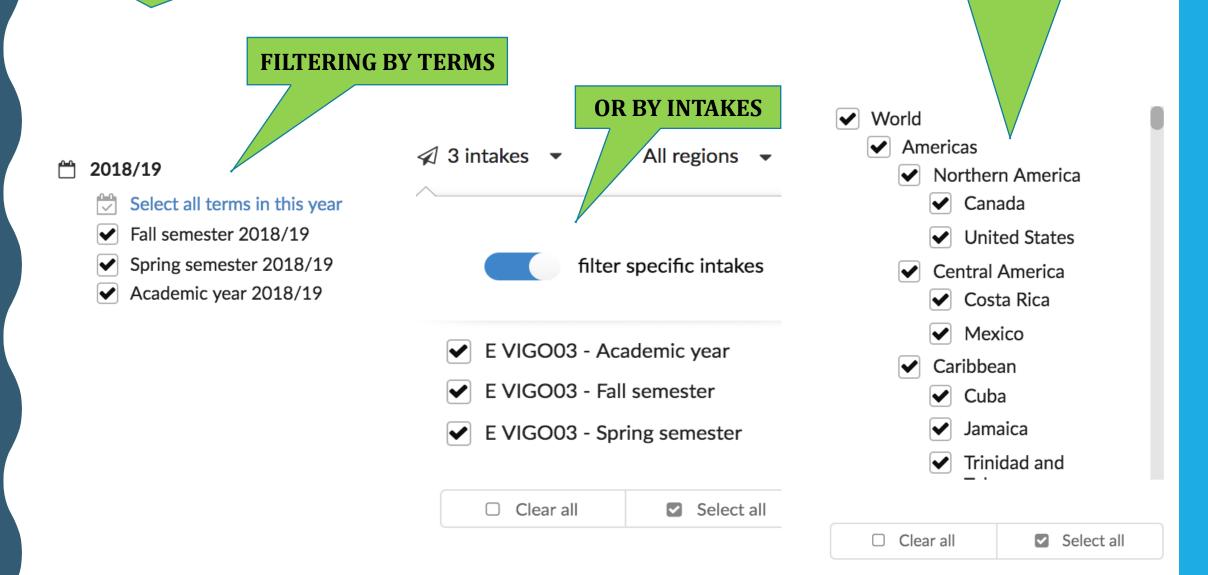
FILTERING DATA USING ACCORDING TO DIFFERENT CRITERIA

TEST BIRMINGHAM

+ Ney

Application status ▼ Offer status ▼ Offer decision ▼

OR BY REGIONS OR COUNTRIES



BY MOBILITY TYPES

FILTER DATA USING OTHER CRITERIA, LIKE 'HOME INSTITUTION'

Filter tes you want to see:

Se: ... Q

- All institutions
- All types
- All modes
- All languages
- All partners

e mobilities you want to see:

Q

Select all

All institutions

rch...

▼ All types

✓ Erasmus+ BA

☐ Clear all

✓ Erasmus+ MA

✓ Erasmus+ PhD

✓ Nordplus

✔ Bilateral

BY APPLICANT STATUS

Application status ▼

Applicant progress

Search based on how far th applicant has progressed wi application.

use these options

Blank

Prepare

Inactive

Blocked

Submitted

Reopened

Resubmitted

Closed

BY OFFER STATUS

Offer status •

Offer decisi

m Offers and replies

Search based on what offers and replies have been sent out.



use these options

Waiting for nomination

External was notified

OUT: Feedback

OUT: Sent to committee

OUT: Rejected

Nominated

IN: Feedback

IN: Sent to committee

■ INI: Whitlisted

BY OFFER DECISION

Offer decision •

Offer decision

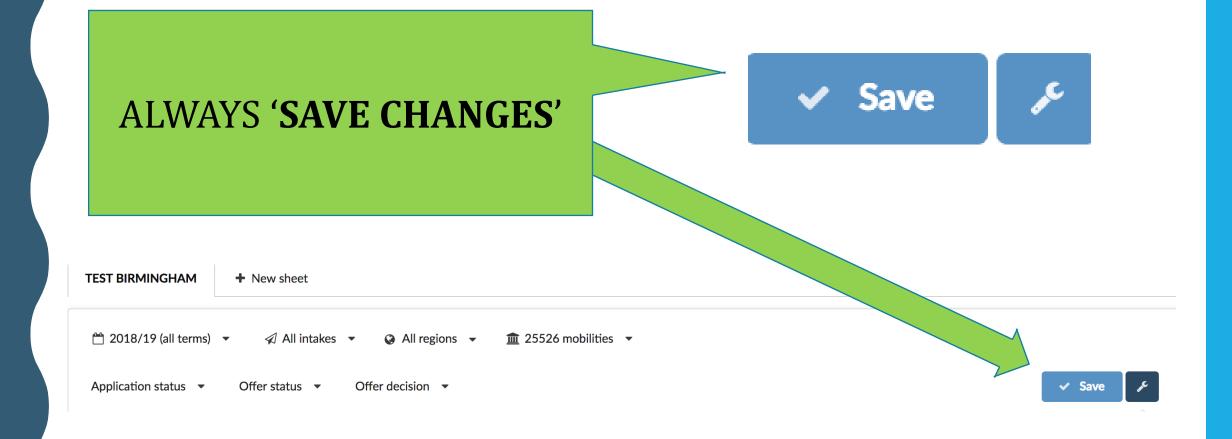
Search based on if the applicant has made a decision on an offer.

use these options

None

Final

Declined



4. ORDERING DATA

CLICK ON COLUMN NAMES TO ORDER DATA AFTER YOUR PREFERENCES

Sending institution name

Submitted date

First name(s)

Family name



TWO WHRENCHS: BLACK AND WHITE

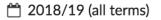


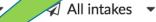
BLACK ON THE LEFT

WHITE ON THE RIGHT

TEST BIRMINGHAM

★ New shee







All regions
 ▼



Application statu



Offer decision •







Application

Status

Offer type

Sending institution name

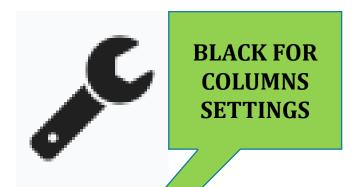
Submitted date

First name(s)

Family name

Citizenship

E-mail







TEST BIRMINGHAM

ew sheet

¹ 2018/19 (all te ns) ▼

Application status ▼

Offer status 🔻

Offer decision •

✓ Save



Application Status

Offer type

Sending institution name

Submitted date

First name(s)

Family name

Citizenship

E-mail

BLACK FOR COLUMNS SETTINGS



Choose the columns that you want to see in the table.



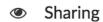
- My columns
- ▶ Application: Metadata 2
- ▶ Application: Offers 2
- ▶ Application: Profile ③
- ▶ Application: Contact 1
- ▶ Application: References
- ► Application: Documents
- Application: Other
- ► Application: Education
- ▶ Application: Languages
- ▶ Application: Home
- ► Application: Employment
- ► Application: Extra fields

WHITE FOR **TABLE EDITING**









Save







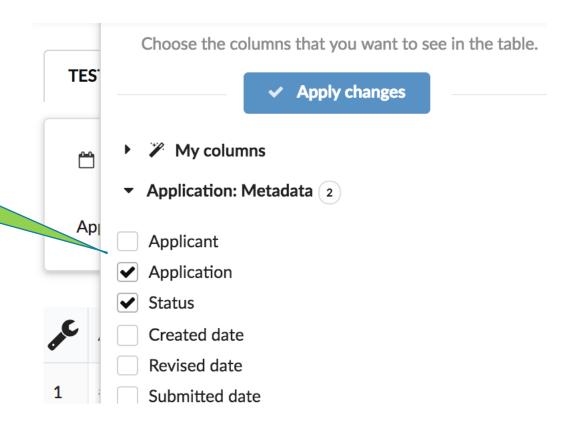


click on the BLACK wrench to customize your columns



▼ Application: Offers 5	▼ Application: P	rofile 3
✓ Offer priority	✓ First name(s)	
✓ Offer type	Family name	
Offer type (confirmed)	Middle name(s)
 Offer type (confirmed) Offer score Offer score (extra) ✓ Offer decision Offer course part each section the boxes you were part of the boxes you	Previous fami	ly name
✓ Offer decision the DO?	Salutation	
Offer course par oach section	Father's given	name(s)
off tick on ear	Father's family	y name
Recenge institution name	Mother's give	n name(s
Receiving institution country	Mother's fami	ilv name
✓ Sending institution name		•
Sending institution country	Mother's prev	ious fam
	Gender	

TO REMARK: TICK ON THE 'APPLICATION'
BOX IN 'APPLICATION: METADATA' IF YOU
WANT A LINK TO EACH APPLICATION IN
YOUR TABLE



REMINDER:

YOU WILL GET IN YOUR
TABLES ONLY THOSE
FIELDS HAVING BEEN
TICKED WHILE SETTING
THE RESPECTIVE
SECTIONS IN YOUR
APPFORMS



Application: Extra fields







USE THE WHITE WHRENCH

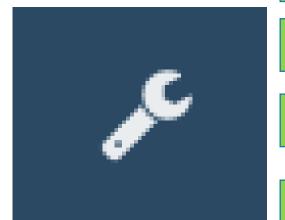


Rename





Sharing



SHARE THE TABLE



Print

CREATE A PDF TO PRINT

CREATE THE TABLE TO EXCEL



Excel



Delete

Save



ONE OPTION TO SHARE THE DATA TO YOUR ADMINSTRATORS OR REVIEWERS IN A PDF OR IN A EXCEL TABLE

THESE OPTIONS, DO NOT PROVIDE DIRECT ACCES TO THE APPLICATION, ONLY TO THE APPLICANT RECORDINGS, ONCE THIS FIELD IS IMPLEMENTED IN THE APPLICATION FORM



Rename



Sharing



Print



Excel



Delete





CLICK ON SHARING

Rename

0

Sharing



Print



Excel



Delete

YOU WILL GET THE NEXT MESSAGE:

Sharing

Who should have access this sheet?

- All administrators can access this sheet
- Only the author and the administrators that you choose

FOR THE TIME BEING, THERE IS ONLY ONE WAY TO GIVE DIRECT ACCES TO THE REVIEWERS:

THIS IS TO PROVIDE THE REVIEWERS WITH A LIMITED ACCESS AS TEMPORARY ADMINISTRATORS



- **→** Incoming
- Outgoing
- **m** Institutions
- **₾** Import
- ♣ System

TO PROVIDE THE REVIEWERS WITH A LIMITED ACCESS AS TEMPORARY ADMINISTRATORS GO TO 'SYSTEM' IN THE LEFT MENU:

⇔ System

CLICK ON 'ADMINISTRATORS'

Administrators

Letterheads

△ Admin roles

Filter by administrator roles

- ✓ Superuser (all permissions)
- ✓ Admissions administrator
- ✓ Academic supervisor
- ✓ Academic consultant
- ✓ Marketing administrator
- ✓ Content administrator
- ✓ Courses administrator
- **✓** Accountant
- **✓** AEC Admissions administrator
- **✓** AEC Academic supervisor
- **✓** Custom permissions

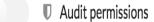
∀ Validity

Filter based on the account validity period.

- **✓** ! Unlimited
- ✓ ✓ Is currently valid
- ✓ ② Not valid yet
- ✓ X Not valid any more

Administrator permissions are either assigned via a role (that contains a set of permissions) plus any number of additional individual permissions for advanced cases.

Turn on the 'permissions audit' feature to see an overview of all permissions assigned to an administrator, regardless if it is from a role or individually assigned.

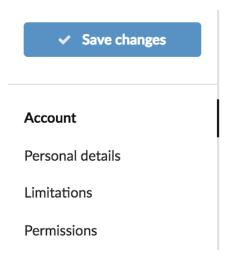


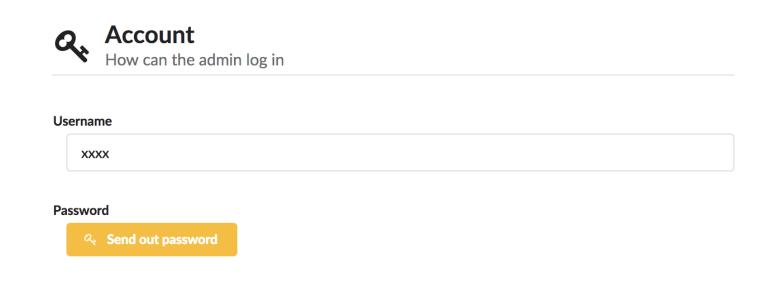
CLICK ON 'ADD NEW ADMINISTRATORS'
AT THE BOTTOM OF THE PAGE

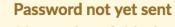
+ New administrator

Set up a new administrator with limited access

Edit administrator: xxxx







After you have finished setting up the access limitations, please click the button above to send out the username and password to the administrator's email address

Set up the permissions and tvalidity period for new administrator

	Permissions Set what actions can this admin perform			
	F-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1			
Role				
	can choose multiple roles that this administrator will perform. Selecting a role will add all the necessar missions to the administrator's account.			
	Superuser (all permissions) Should never be used for everyday work!			
Admissions administrator Allows working with applications, confirming offers and other ever				
	 Academic supervisor Read-only access to applications, adding flags, scoring and editing offers (but no confirming) 			
	Academic consultant Read-only access to applications			
	Marketing administrator Read-only access to applications, plus marketing tools & content			
	Content administrator Allows managing news, events and menu content			
	Courses administrator Allows updating course info, admission requirements, intakes etc			
	Accountant Read-only access to applications plus invoices			
	AEC Admissions administrator Allows working with applications etc (normal EASY settings)			
•	AEC Academic supervisor Read-only access to applications (normal EASY settings)			
	ne roles above do not satisfy you, add additional permissions by ticking the box below. In very special es you may even skip using roles completely and just add specific permissions by hand.			
	Add additional permissions (advanced)			
/alidit	ty period			
	Tick to make the account active starting from			
	Tick to make the account inactive after			

Validity period

✓ Tick to make the account active starting from ...

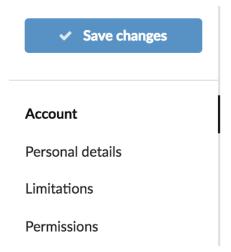
2018-09-17

✓ Tick to make the account inactive after ...

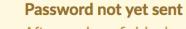
2018-09-22

Send out the password to the new administrator

Edit administrator: xxxx







After you have finished setting up the access limitations, please click the button above to send out the username and password to the administrator's email address





Export the table with the 'Application' links to Excel

Rename



Sharing



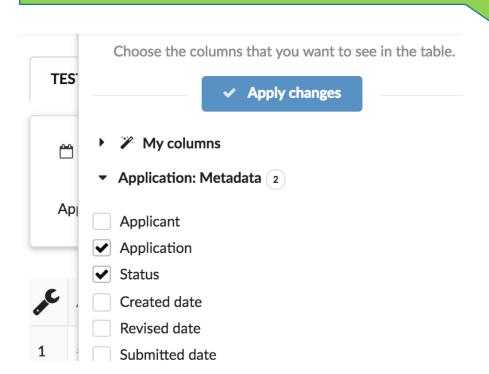
Print



Excel



Delete



The reviewers can have a temporary acces to the applications through the 'Application' links.

	ac.	Application	Status	Offer type	Sending institution name
)	1	#6455	Submitted	IN: Accepted	UKRAINIAN TCHAIKOVSKY NATIONAL ACADEMY OF MUSIC IN KIEV
	2	#6458	Resubmitted	IN: Accepted	UKRAINIAN TCHAIKOVSKY NATIONAL ACADEMY OF MUSIC IN KIEV

TIME FOR QUESTIONS

