

5.2 - Managing external contacts

This section describes how to manage external contacts, i.e. contacts associated with an external institution.

In the "Institutions" form the "Contacts" tab contains a list of contacts associated with the selected institution. The Add and Details buttons on this tab can be used to add a new contact and to view details of an existing contact respectively. The "Contacts" form is used for detailed management of contacts.

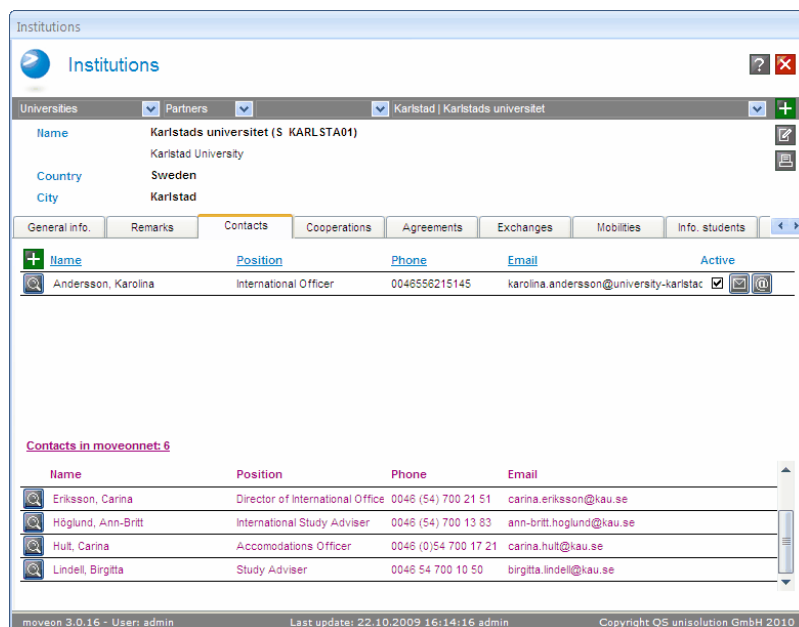


Fig. 1: "Institutions" form, "Contacts" tab

1- Adding a contact

To add an external contact, select the associated institution and then click Add in the "Contacts" tab of the "Institutions" form.

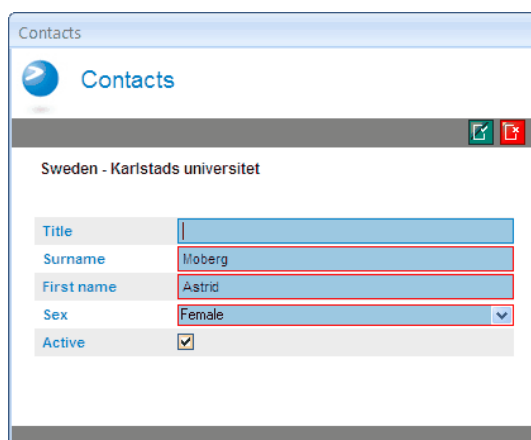


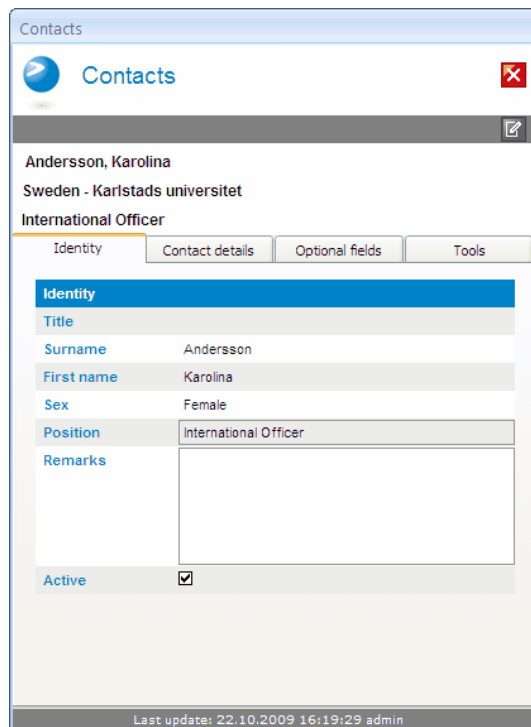
Fig. 2: Add contact window

For each contact you can specify the following basic data (fields marked with an asterisk are mandatory):

- Title (e.g. Prof, Ms, Mr, etc.)
- Last name (*)
- First name (*)
- Gender (*) (select from a drop-down list)
- Contact status (active or non-active)

2- "Contacts" form

The "Contacts" form allows you to manage the detailed data for contacts: identity, contact details and optional fields.



The screenshot shows a web application window titled "Contacts". The main content area displays the following information:

- Andersson, Karolina**
- Sweden - Karlstads universitet**
- International Officer**

Below this information are four tabs: "Identity", "Contact details", "Optional fields", and "Tools". The "Identity" tab is selected and shows the following fields:

Title	
Surname	Andersson
First name	Karolina
Sex	Female
Position	International Officer
Remarks	
Active	<input checked="" type="checkbox"/>

At the bottom of the window, a status bar indicates: "Last update: 22.10.2009 16:19:29 admin".

Fig. 3: "Contacts" form

Upper part of form

The upper part of the form shows the contact's key data (title, last name, first name, institution, function).

Tabs

Various tabs give access to data relating to the selected contact in the form of lists or forms. These tabs are described in detail in part 4 of this section.

3- Editing basic data, deleting a contact

The "Tools" tab in the "Contacts" form allows you to edit basic data and delete a contact.

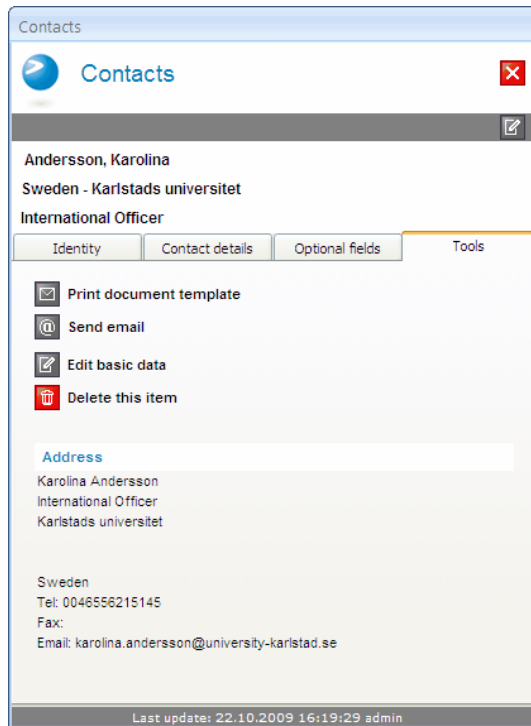


Fig. 4: "Contacts" form, "Tools" tab

To edit basic contact data (last name, first name, gender), click the Edit basic data button in the "Tools" tab. This button opens a window identical to the Add contact window (see above), in which you can edit basic contact data.

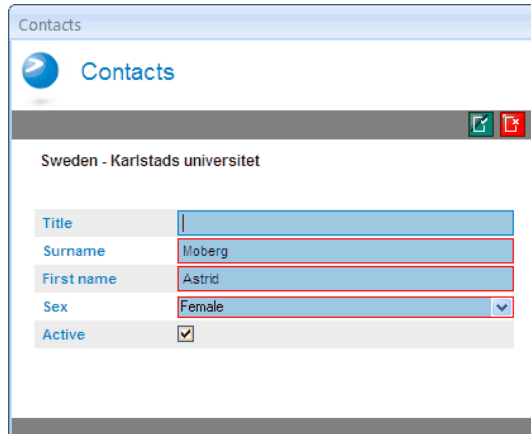


Fig. 5: Edit basic contact data window

To delete a contact, click the Delete button in the "Tools" tab.

4- Tabs in the "Contacts" form

"Identity" tab

This tab contains the following details relating to the contact's identity:

- Basic data (title, last name, first name, gender), which cannot be edited directly in this tab
- Function
- Remarks
- Contact status (active or non-active)

Contacts

Andersson, Karolina
Sweden - Karlstads universitet
International Officer

Identity | Contact details | Optional fields | Tools

Identity

Title

Surname Andersson

First name Karolina

Sex Female

Position International Officer

Remarks

Active

Last update: 22.10.2009 16:19:29 admin

Fig. 6: "Contacts" form, "Identity" tab

"Contact details" tab

This tab contains the contact's details:

- Office
- Address
- Email, phone, mobile, fax
- Salutation address (e.g. Dear Sir, Madam President, etc.)

Institutions

Universitet | Partners | Karlstad | Karlstads universitet

Name Karlstads universitet (S KARL STA01)

Country Sweden

City Karlstad

General info | Remarks | **Contacts** | Cooperations | Agreements | Exchanges | Mobilities | Info students

Name	Position	Phone	Email	Active
Andersson, Karolina	International Officer	0046558215145	karolina.andersson@university-karstar	<input checked="" type="checkbox"/>

Contacts in movopennet: 6

Name	Position	Phone	Email
Eriksson, Carina	Director of International Office	0046 (0) 700 21 51	carina.eriksson@kau.se
Högund, Ann-Britt	International Study Adviser	0046 (0) 700 13 83	ann-britt.hogund@kau.se
Hult, Carina	Accommodation Officer	0046 (0) 704 700 17 21	carina.hult@kau.se
Lindell, Birgitta	Study Adviser	0046 54 700 10 50	birgitta.lindell@kau.se

movopen 3.0.16 - User: admin | Last update: 22.10.2009 16:14:16 admin | Copyright QS unisolution GmbH 2010

Fig. 7: "Contacts" form, "Contact details" tab

"Optional fields" tab

This tab contains the optional fields configured specifically for your institution (maximum of 12). They can be used to define certain responsibilities (e.g. President/Rector, Erasmus coordinator, Incoming students manager) or for sending out bulk information (e.g. greetings cards), for example. These fields are not visible initially. They can be activated in the "Optional fields" form (see section 4.4 Free fields).

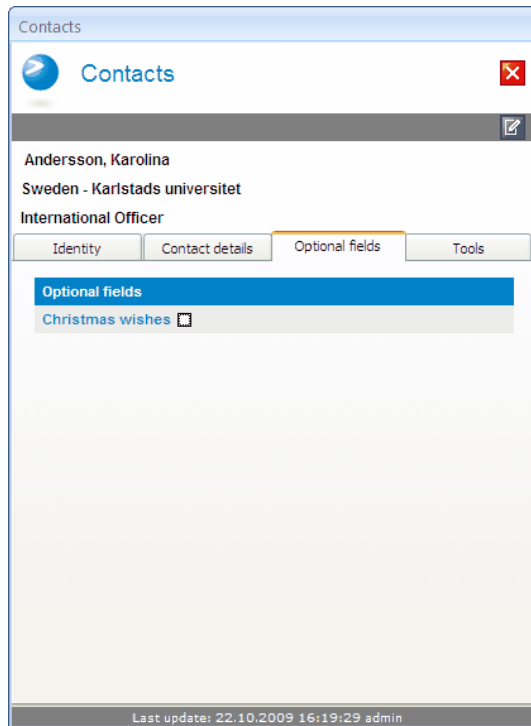


Fig. 8: "Contacts" form, "Optional fields" tab

"Tools" tab

This tab contains a number of different buttons, which can be used to:

- Generate a document template for the selected contact (see section 8.3)
- Send an email to the selected contact (see section 8.2)
- Edit basic data (see above)
- Delete the item (see above)

The Address frame in this tab also shows the contact's details. You can use the copy/paste function to copy this information to a document or email.

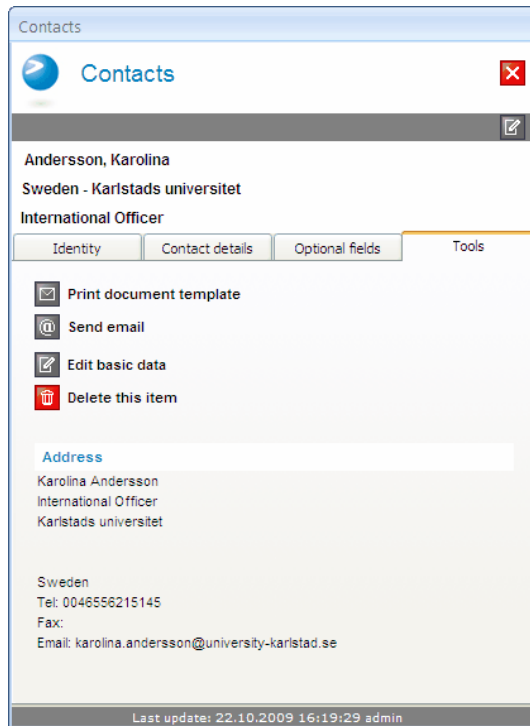


Fig. 9: "Contacts" form, "Tools" tab

5- Importing external contacts from the moveonnet directory

All higher education institutions can list details of contacts involved in international activities in the moveonnet directory.

If an external institution has listed contacts in the moveonnet directory, their details can be viewed from the "Contacts" tab in the "Institutions" form.

Clicking "Contacts in moveonnet" displays a list of these contacts where applicable.

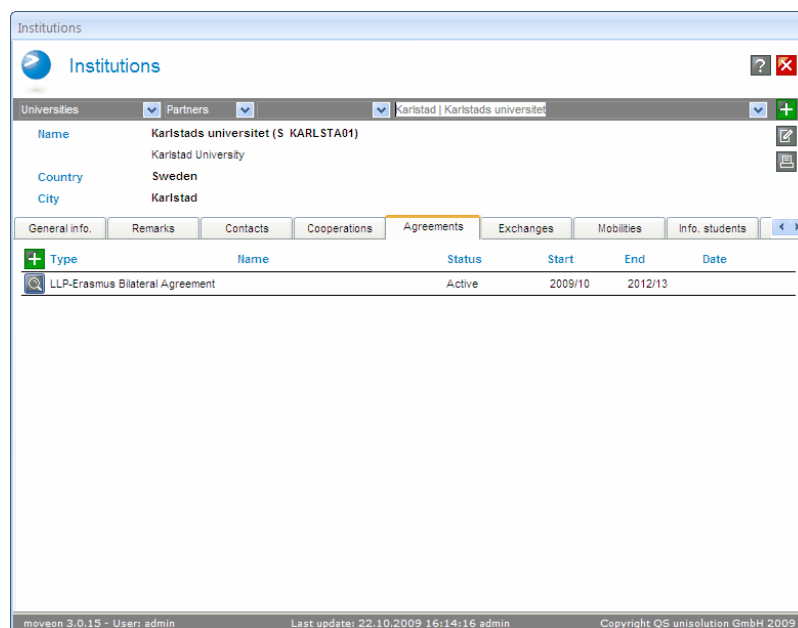
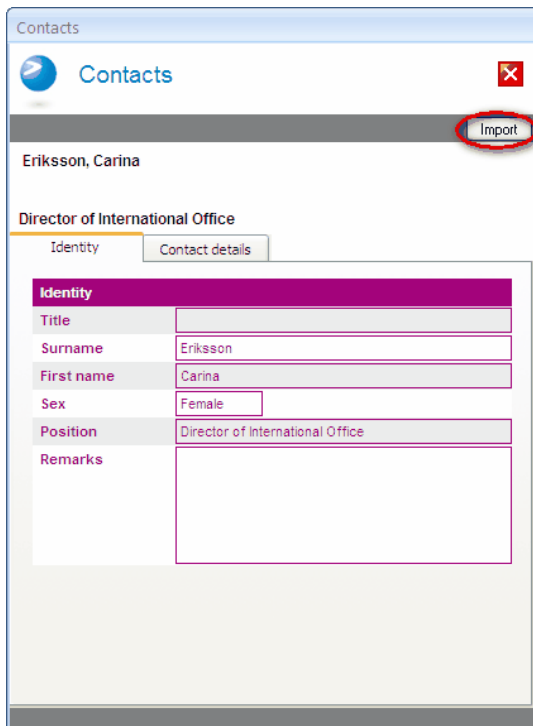


Fig. 10: "Institutions" form, "Contacts" tab

The Details button in this list opens the "Contacts" form, in which the contact's details can be viewed.

The "Import" button in the "Contacts" form allows you to automatically add the contact as an external contact in moveon by importing all the contact details entered by the partner.



The screenshot shows a web interface for managing contacts. At the top, there is a header with a blue globe icon and the word "Contacts" in blue. To the right of the header is a red close button (X). Below the header, the name "Eriksson, Carina" is displayed. Underneath, the title "Director of International Office" is shown. There are two tabs: "Identity" (selected) and "Contact details". The "Identity" tab contains a form with the following fields: "Title" (empty), "Surname" (filled with "Eriksson"), "First name" (filled with "Carina"), "Sex" (filled with "Female"), "Position" (filled with "Director of International Office"), and "Remarks" (empty text area). The "Import" button is located in the top right corner of the form area and is circled in red.

Fig. 11: "Contacts" form, "Import" button

6- Processing contact data

A selection form is available for generating lists or for producing correspondence relating to the contacts:

- Selection of external contacts

This form can be accessed from the main menu in the "Institutions" menu.

The way in which selection forms work is described in detail in section 8.1.