

## 5.1 - Managing institutions

The "Institutions" form allows you to manage all the external institutions involved in the international activities of your institution, no matter what type they are (university, company, etc.) and whether or not they are partners.

For each institution, the various tabs in this form give you access to all the data relating directly to the selected institution: contacts, cooperations, agreements, exchange possibilities, visits, etc.

Various selection forms accessed from the main menu can be used to process the data (lists, correspondence, export).

To open the "Institutions" form, click "Institutions" in the main menu and then "Institutions' data".

### 1 - "Institutions" form

Fig. 1: "Institutions" form

#### Upper part of form

The upper part of the form includes a selection bar with drop-down lists. These lists allow you to filter the institutions by various criteria:

- type (university, research institution, company, network, other)
- status (partner, non-partner or all)
- country
- name

The basic data for the selected institution (name, translated name, country, city) is displayed underneath these drop-down lists.

#### Tabs

Various tabs give access to data relating to the selected institution in the form of lists or forms. These tabs are described in detail in part 3 of this section.

### 2 - Adding, editing or deleting an institution

To add an institution, click the Add button on the right of the institution selection bar.

To edit basic institution data, click the Edit basic data button in the "Tools" tab.

These two buttons open a window in which you can add or edit an institution.

The screenshot shows a web form titled 'Institutions' with the following fields and values:

- Institution type: Universities
- Country: Sweden
- moveonnet: Karistad | Karistads universitet | S KARLSTA01
- Name: Karistads universitet
- Translation: Karistad University
- City: Karistad
- Website: http://www.kau.se
- Erasmus code: S KARLSTA01
- EUC Number: 29403
- Partner:

Below the form is a summary table for 'moveonnet':

moveonnet	
moveonnet code	SEKARLSTA01
Country	Sweden
Name	Karistads universitet
Translation	Karistad University
City	Karistad
Website	http://www.kau.se
Erasmus code	S KARLSTA01
EUC Number	29403

**Fig. 2: Window for adding/editing an institution**

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

- Institution type (\*) (university, research institution, company, network, other)
- Country (\*)
- Name (\*)
- Translation
- City (\*)
- Website
- Erasmus code (universities only)
- EUC number (universities only)
- Institution status (partner or non-partner)

To specify a university, select the country and then use the moveonnet drop-down list to select the institution you require from the moveonnet directory of institutions. The various fields relating to the institution are then updated automatically with the data from the directory.

If the institution is associated with an institution in the moveonnet directory, the lower frame displays the institution data listed in moveonnet.

If the data entered in the upper frame does not correspond to the data in the directory, the divergent fields are highlighted. Click Correct the details in moveon to update your data with the correct information from moveonnet.

If you cannot find the institution in the moveonnet directory, you can enter the institution data manually. You can then send a request to add the institution to the moveonnet directory. To do this, click Request addition of this institution in moveonnet. Once it has been verified, the institution will be added to the directory by the moveonnet webmaster.

To delete an institution click the Delete button in the "Tools" tab.

### 3 - Tabs in the "Institutions" form

The "General info." and "Info. students" tabs contain a form whose content can be modified directly by clicking the Modify button in the upper part of the "Institutions" form.

The other tabs, such as "Contacts" or "Mobilities" contain lists of items which are managed in other forms. These forms are described in more detail in the following sections.

### "General info." tab

This tab contains general information about the selected institution.

Web sites		Optional fields	
Website	http://www.kau.se		
Website English			
Website international			
Website city			
Course catalogue			
<b>Erasmus</b>			
Erasmus code	S KARLSTA01		
EUC Number	29403		
<b>moveonnet</b>			
moveonnet code	SEKARLSTA01		
<b>Company</b>			
Sector			
Size			

Fig. 3: "Institutions" form, "General info." tab

On the left-hand side of this tab you can manage the following information:

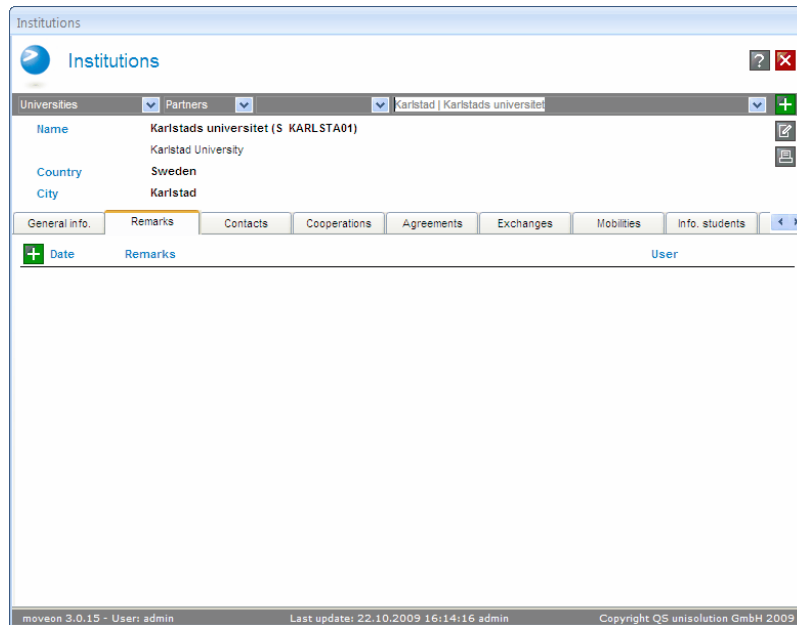
- Website address
- English website address
- International website address
- City's website address
- Course catalogue address
- Erasmus code (universities only)
- EUC number (universities only)
- moveonnet code (universities only)
- Economic sector (companies only)
- Size (companies only)

Web buttons allow you to open the corresponding websites.

On the right-hand side of this tab, optional fields can be added (a maximum of 12). These can be used to specify the active partnership types or membership of a network, for example. These fields are not visible initially. They can be activated in the "Optional fields" form (see section 4.4 Optional fields).

### "Remarks" tab

This tab can be used to make a note of any communication or information relating to the institution.

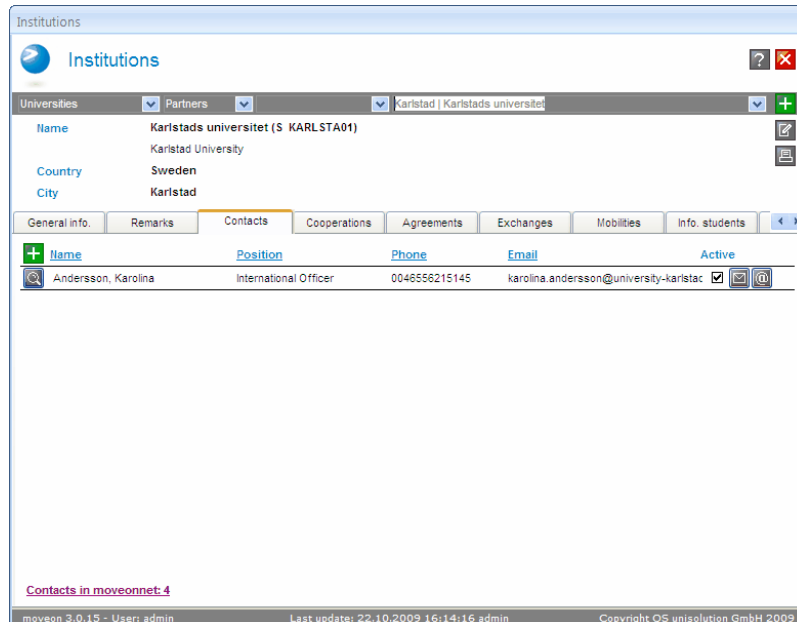


**Fig. 4: "Institutions" form, "Remarks" tab**

Each remark is date-stamped. When a remark is added, the default date used is the current date. The user who added or last edited the remark is also shown in the tab.

#### "Contacts" tab

This tab contains a list of contacts associated with the selected institution.



**Fig. 5: "Institutions" form, "Contacts" tab**

Non-active contacts appear at the end of the list.

In the lower part of this tab, the Contacts in moveonnet button indicates the number of contacts for this institution listed in the moveonnet directory. Clicking this button displays a list of the various contacts where applicable.

Details of how to add and edit external contacts and import contact data defined in moveonnet can be found in section 5.2.

The Document and Email buttons take you to the correspondence functions for the contacts (see Chapter 8).

### "Cooperations" tab

This tab contains a list of cooperations associated with the selected institution.

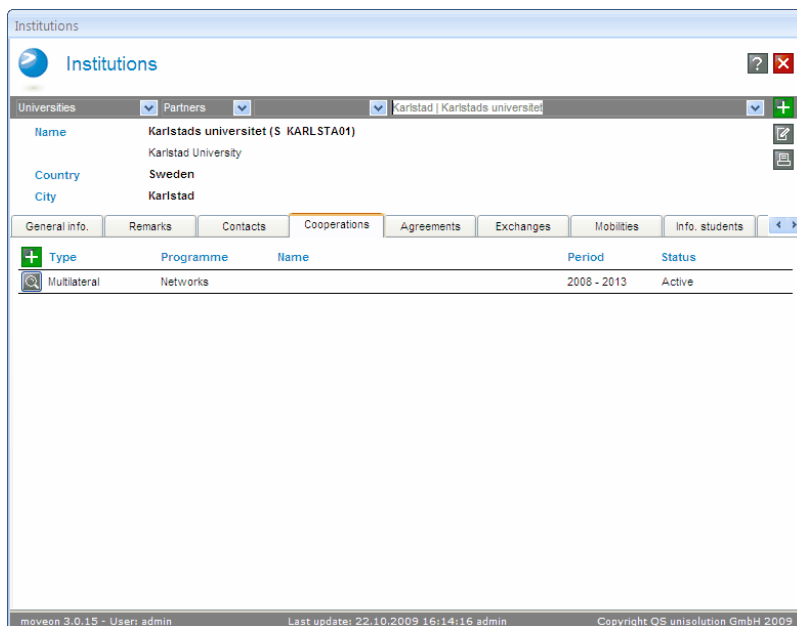


Fig. 6: "Institutions" form, "Cooperations" tab

Details of how to add and edit cooperations can be found in section 5.4.

### "Agreements" tab

This tab contains a list of agreements associated with the selected institution.

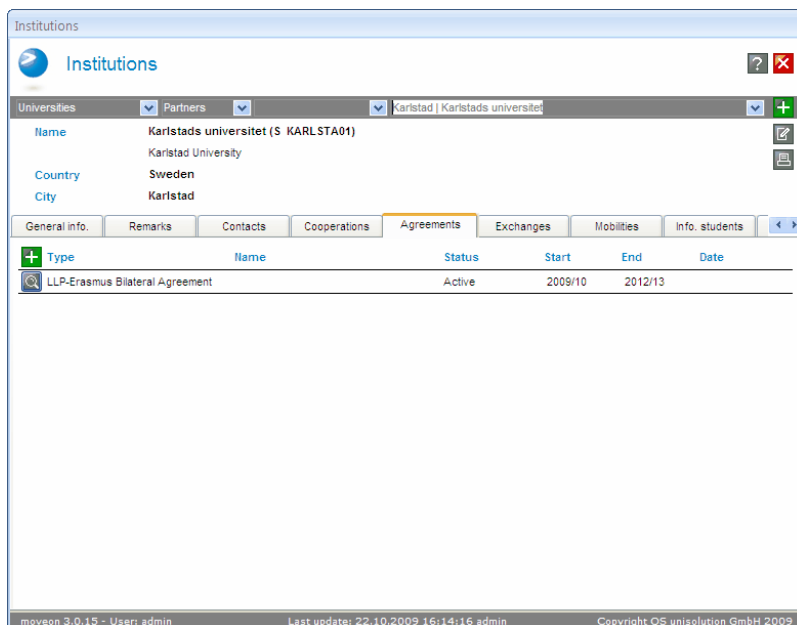
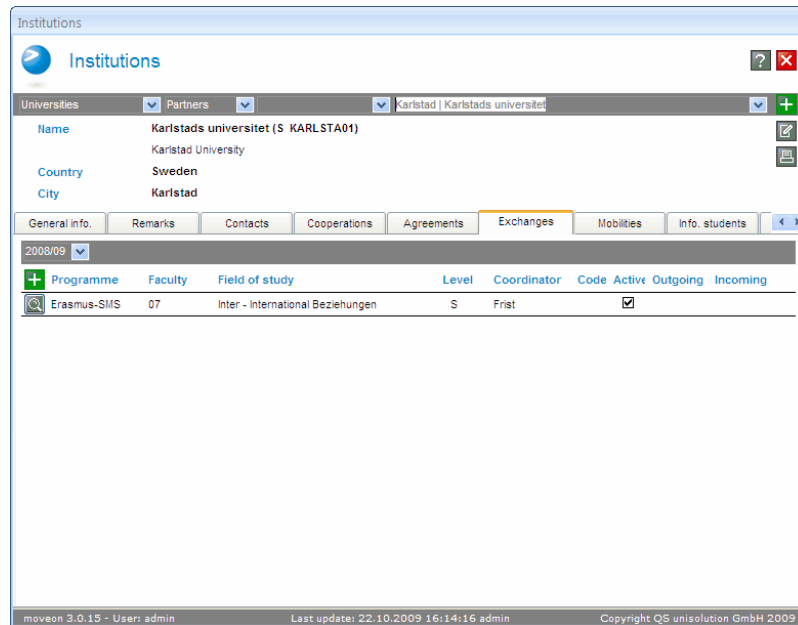


Fig. 7: "Institutions" form, "Agreements" tab

Details of how to add and edit agreements can be found in section 5.5.

### "Exchanges" tab

This tab contains a list of exchanges associated with the selected institution.



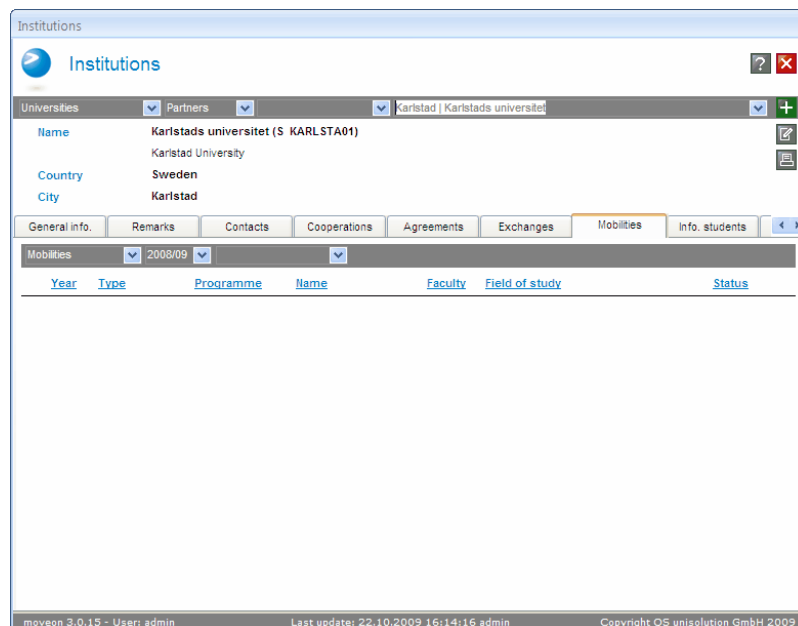
**Fig. 8: "Institutions" form, "Exchanges" tab**

Non-active exchanges appear at the end of the list. The Coordinator column contains the name of the internal departmental coordinator. The last four columns contain the planned flows (number of students or staff and duration). A drop-down list at the top of the tab can be used to change the academic year for which the flows are displayed (the current year is the default setting).

Details of how to add and edit exchanges can be found in section 5.6.

### "Mobilities" tab

This tab contains a list of mobilities (students and staff) associated with the selected institution and a list of students to be nominated or already nominated via the e-nomination procedure.



**Fig. 9: "Institutions" form, "Mobilities" tab**

Three drop-down lists at the top of the tab can be used to filter the items by mobility type/e-nomination, by academic year and by person type respectively.

## "Info. students" tab

This tab contains information about the selected institution of use to outgoing students.

moveon	moveonnet
<b>Teaching language</b>	<b>Teaching language</b>
	Swedish and English All courses and programmes offered in English are found on our website.
<b>Term dates</b>	<b>Term dates</b>
	Fall 2008, 2008-08-25 until 2009-01-18 Spring 2009, 2009-01-19 until 2009-06-07
<b>Accommodation</b>	<b>Accommodation</b>
	The university has a fixed amount of rooms with furniture. Reservations are made after the students have paid a deposit of 3000 SEK. The deadline for paying deposit to get housing in spring is the 15th of November and for housing in fall the 1st of June. You find more information of our offer at
<b>Language preparation</b>	<b>Language preparation</b>
	Swedish as a foreign language 1, 2, 3, and 4. They are all given during the semester and you have to apply for them on the application form together with the other courses. Codes and ECTS credits are

Fig. 10: "Institutions" form, "Info. students" tab

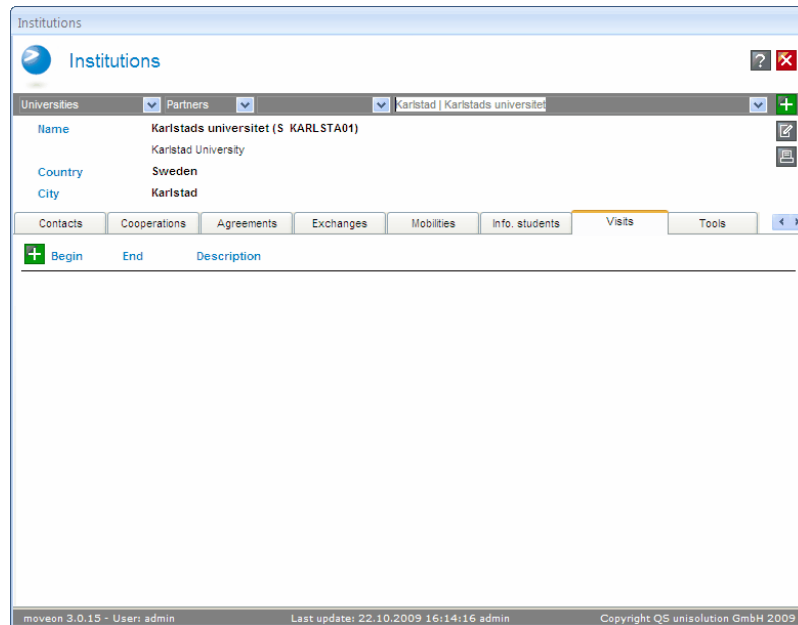
On the left-hand side of this tab you can manage the following information:

- Teaching language
- Term dates
- Accommodation
- Language preparation
- Fees
- Application formalities
- Language requirements
- Application deadlines
- Miscellaneous

The corresponding information entered by the external institution in moveonnet is displayed on the right-hand side of this tab. You can transfer the data from moveonnet to moveon using the copy/paste function.

## "Visits" tab

This tab contains a list of visits associated with the selected institution.



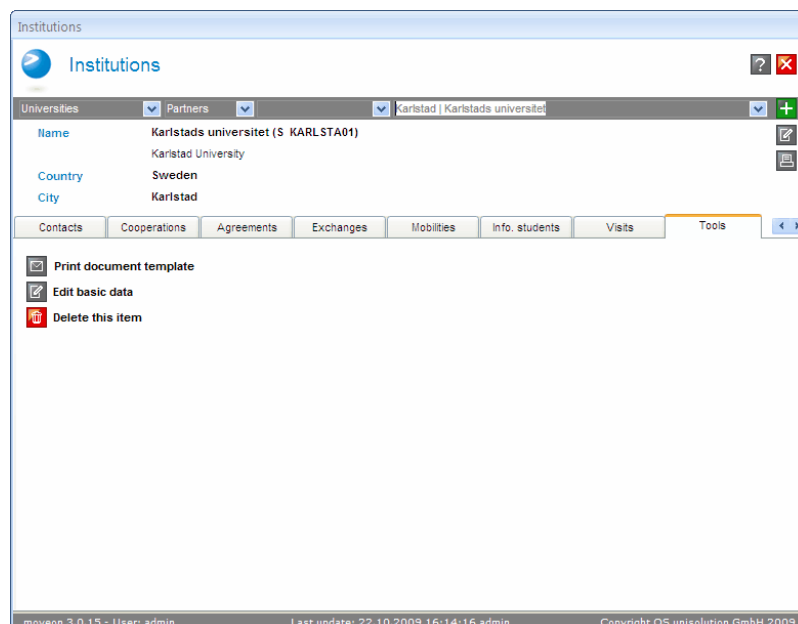
**Fig. 11: "Institutions" form, "Visits" tab**

Details of how to add and edit visits can be found in section 5.7.

#### "Tools" tab

The "Tools" tab contains various buttons which allow you to:

- Edit the basic data (see above)
- Delete the item (see above)
- Open a document template (see section 8.3)



**Fig. 12: "Institutions" form, "Tools" tab**

## 4 - Processing institution data

A number of different selection forms are available for generating lists or for producing correspondence relating to the institutions:

- Selection of institutions

- Selection of external contacts
- Selection of cooperations
- Selection of cooperation activities
- Selection of agreements
- Selection of exchanges
- Selection of visits

These forms 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.