

3.1 - Concepts and terminology

This section describes the data structure and the various specific terms used in moveon. You must read this section in order to be able to use moveon correctly.

1- Definition of the structure of the institution and course offer

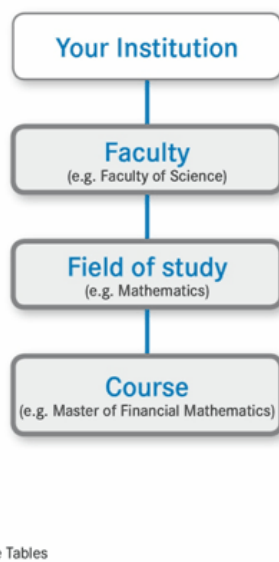


Fig. 1: Concepts - structure of the institution and course offer

Faculty (configurable reference table)

A faculty is a higher-level element of the structure of your institution. Depending on your institution, a faculty may correspond to a school.

A faculty is identified by a code (abbreviation, number or internal code) and a name.

The list of faculties is one of the moveon reference tables. This list must be configured prior to using moveon.

Examples of faculties:

Code	Name
FSS	Faculty of Social Sciences
M	School of Management

Field of study (configurable reference table)

A field of study is an element of the structure of your institution that identifies an area of study or teaching. Depending on your institution, a field of study can correspond to a department, an institute, a laboratory, etc.

A field of study is associated with a main faculty and is identified by a code (abbreviation, number, internal code, etc.) and a name.

The list of fields of studies is one of the moveon reference tables. This list must be configured prior to using moveon.

Examples of fields of studies:

Faculty	Code	Name
FSS	Socio	Sociology
M	Man	Management

Course (configurable reference table)

A course is a course of study offered by your institution.

A course is associated with a main field of study and is identified by a code (abbreviation, number, internal code, etc.) and a name.

The list of courses is one of the moveon reference tables. This list must be configured prior to using moveon.

Examples of courses:

Field of study	Code	Name
Socio	MSSocio	Master in Sociology
Man	MBA	Master in Business Administration

Subject area (non-configurable reference table)

A subject area is a field of study or teaching defined according to the ISCED international classification. This non-configurable classification can be found in section 10.4.

Subject areas are used in moveon in connection with exchange agreements and mobilities to specify the field of study or teaching in accordance with an international classification, so as to provide consistency in communications with partners regarding the definition of exchange agreements and the nomination of students and also with the Erasmus Agency regarding the creation of Erasmus financial reports.

Examples of subject areas:

Code	Name
4	Science, Mathematics and Computing
46	Mathematics and statistics
462	Statistics

2- Managing internal contacts

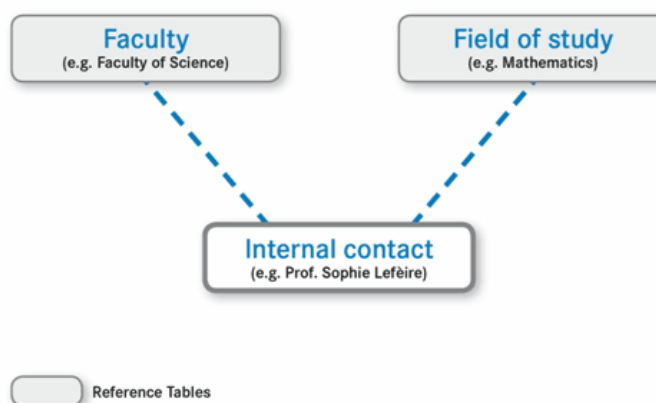


Fig. 2: Concepts - managing internal contacts

Internal contact

An internal contact is a person from your institution involved in international activities. An internal contact can be someone working in the International Office, the President/Rector of the institution, or someone working in a faculty.

An internal contact may or may not be associated with a faculty and a field of study and is identified by a last name, first name and status (active/inactive). Additional information can be included to describe an internal contact in detail (job title, address, etc.).

Examples of internal contacts:

Title	Last name	First name	Faculty	Field of study	Job title	Status
Prof.	Smith	John			President of the University	Active
Ms	Poter	Jean			Incoming Erasmus students manager	Active
Ms	Jane	Mary	FSS	Socio	Exchange coordinator	Inactive

3- Managing institutions and external contacts

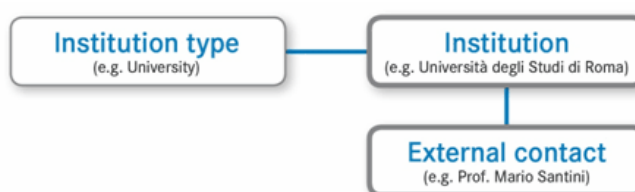


Fig. 3: Concepts - managing institutions and external contacts

Institution

An institution is a body external to your institution, abroad or otherwise, that is involved in your international activities.

An institution is identified by a type of institution (see definition of this term), a country, a name, a city and a status (partner/non-partner). Additional information can be included to describe an institution in detail (website addresses, practical information for students, etc.). An unlimited number of external contacts, cooperations, agreements, exchanges, mobilities and visits (see definitions of these terms) can be associated with an institution.

The status is used to indicate institutions with which a partnership is active, institutions with which an activity is taking place outside a partnership or with which the partnership has ended.

University-type institutions can be identified by an Erasmus code (indicating institutions holding an Erasmus charter) and a moveonnet code (indicating institutions listed in the directory of higher education institutions at www.moveonnet.eu).

Examples of institutions

Type	Country	City	Name	Erasmus code	moveonnet code	Partner
University	Italy	Rome	Università degli Studi di Roma 'La Sapienza'	I ROMA01	ITROMA01	Yes
University	Brazil	São Paulo	Universidade de São Paulo		BRSAOPAU01	No
Company	Germany	Stuttgart	QS unisolution			No
Network	Canada	Not known	CREPUQ			Yes
Other	Italy	Rome	French Embassy in Rome			No

Institution type (non-configurable reference table)

An institution type is an element which can be used to categorise institutions according to their type. The list of institution types is not configurable.

Available institution types: university, company, network, research institute, other

In the interests of simplicity, the term university in moveon refers to a higher education institution.

External contact

An external contact is a person from an institution involved in your international activities.

An external contact is associated with an institution and is identified by a last name, first name and status (active/inactive). Additional information can be included to describe an external contact in detail (job title, address, etc.).

Examples of external contacts:

Title	Last name	First name	Institution	Job title	Status
Prof.	Santini	Mario	Università degli Studi di Roma 'La Sapienza'	Dirrettore Ufficio Relazioni Internazionali	Active

4 - Managing cooperations

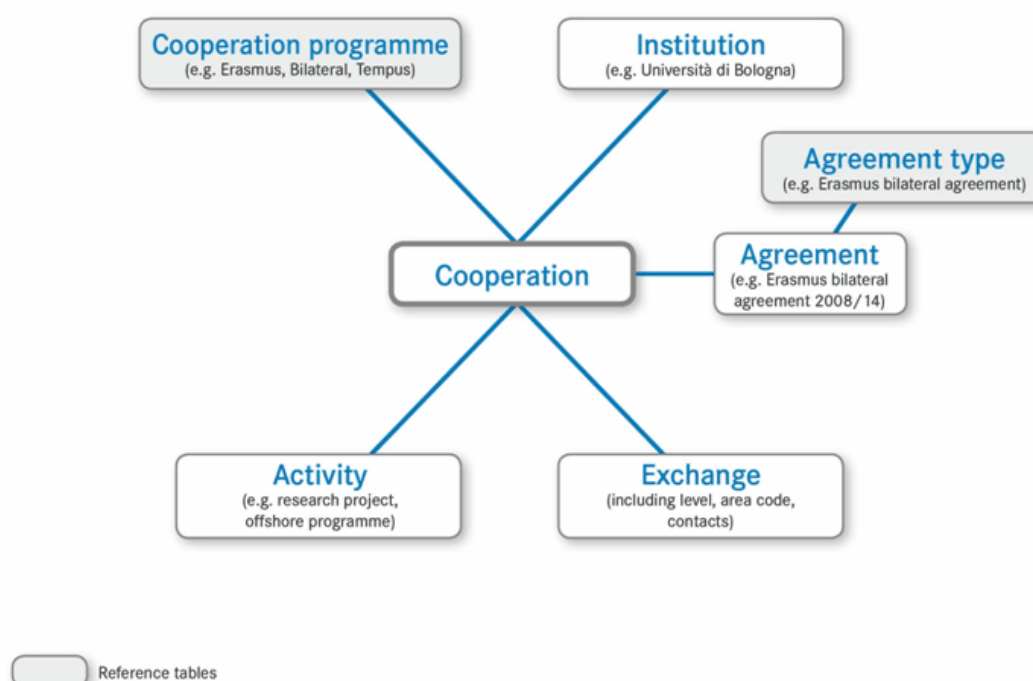


Fig. 4: Concepts - managing cooperations

Cooperation

A cooperation is a set of activities performed together with an external institution under a common framework.

These common activities can include student or staff mobilities, research projects, events, common or remote courses, etc.

A cooperation is associated with an institution and is identified by a cooperation programme (see definition of this term), a name, a period of validity, the faculties/fields of studies concerned and a status. The name can be omitted if the cooperation programme in itself defines the cooperation clearly and unambiguously. If no faculty is specified, the cooperation covers all faculties.

Additional information can be included to describe a cooperation in detail (contents, fundings, contacts, etc.). An unlimited number of cooperation activities, exchanges and agreements (see definitions of these terms) can be associated with a cooperation.

Examples of cooperations for a single institution:

Programme	Name	Period of validity	Faculties	Fields of study	Status
Bilateral agreement		2005-			Active
Bilateral agreement	School of Management Annex	2005-	M		Active
Erasmus		1997-	FSS M	Sociology Management	Active
Network	Tethys Network	2000			Active
Bilateral agreement	Law Faculty Annex	2005-2009	Law		Completed

Cooperation programme (configurable reference table)

A cooperation programme is an element which can be used to categorise cooperations by their framework.

A cooperation programme is identified by its name.

The list of cooperation programmes is one of the moveon reference tables. This list should be configured prior to using moveon. Each institution can define its own cooperation programmes according to its range of existing cooperations, its strategy, its statistical requirements, etc.

Examples of cooperation programmes:

- Bilateral
- Erasmus
- Network
- Informal cooperation

Cooperation activity

A cooperation activity is an individual activity performed with an institution.

A cooperation activity is associated with a cooperation and is identified by a cooperation activity type (see definition of this term) and a name.

Additional information can be included to describe a cooperation activity in detail (description, contacts, website, etc.).

Examples of cooperation activities:

Type	Name
Joint research project	Characterisation of the bamboos of Central Africa
Intensive programme	Migration and Narration
Offshore programme	Creation of a German-Vietnamese degree programme in medical biology

Cooperation activity type (non-configurable reference table)

A cooperation activity type is an element which can be used to categorise cooperation activities according to their type.

The list of cooperation activity types is not configurable. This list can be found in section 10.6.

Examples of cooperation activity types:

Curriculum development, Offshore programme, Thematic network, Joint research project, Other

Agreement

An agreement is a paper document signed with an institution defining or modifying the planned activities with this institution.

An agreement is associated with a cooperation or an institution and is identified primarily by an agreement type (see definition of this term), a name, a period of validity and a signature date. The name can be omitted if the agreement type in itself defines the agreement clearly and unambiguously. Depending on the agreement type, the period of validity is expressed in calendar years or academic years.

There is no limit to the number of agreements associated with a cooperation. A cooperation can include different agreements for consecutive periods (e.g. agreement renewals every 5 years), different agreements for the same period (e.g. Erasmus agreements for the same period but for different faculties), a main agreement supported by different secondary agreements (e.g. bilateral agreement and annexes by faculty).

Additional information can be included to describe an agreement in detail (contacts, signees, comments, free fields, agreed mobility flows, etc.).

If cooperations are not managed in moveon, it is possible to create an agreement and associate it with an institution rather than a cooperation.

Examples of agreements for a single institution:

Type	Name	Period of validity	Signature date
LLP-Erasmus bilateral agreement		2009/10-2012/13	01/02/2009
Bilateral agreement		2006-2010	15/12/2005
Annex to a bilateral agreement	Law faculty	2006-2010	15/12/2005

Agreement type (configurable reference table)

An agreement type is an element which can be used to categorise agreements according to their type.

An agreement type is identified by its name.

The list of agreement types is one of the moveon reference tables. This list must be configured prior to using moveon. For each agreement type you should specify whether the associated agreements are defined for a period expressed in calendar years or academic years.

Examples of agreement types:

- Letter of intent
- LLP-Erasmus bilateral agreement
- Bilateral agreement
- Annex to a bilateral agreement / Specific agreement
- Amendment

5- Managing the mobility offer

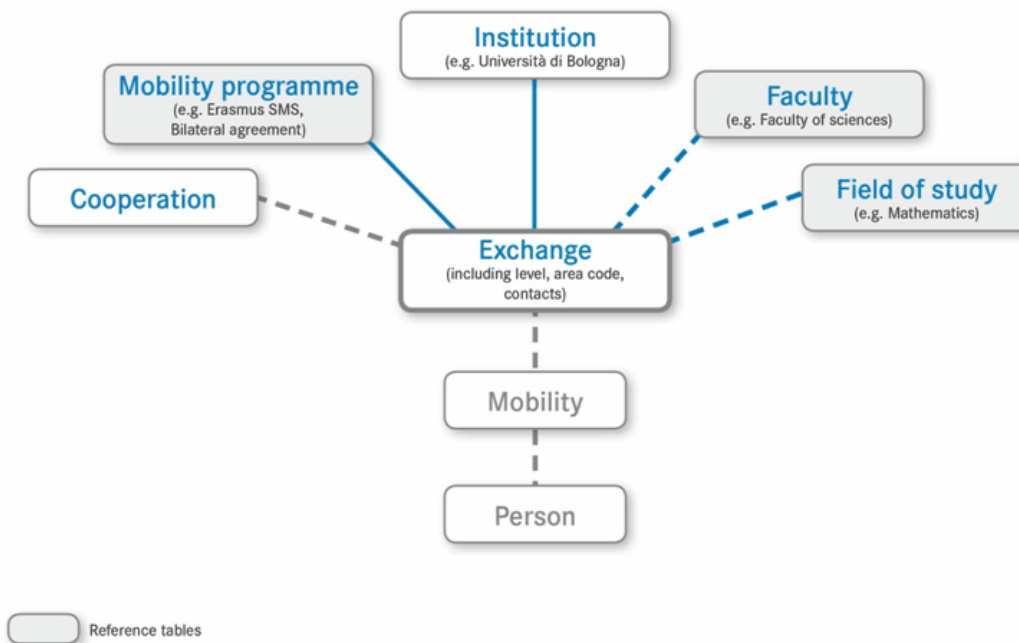


Fig. 5: Concepts - managing the mobility offer

Exchange possibility (exchange for short)

An exchange is a possibility open to students or to staff to undertake a mobility in an external institution (outgoing mobility) or in your institution from an external institution (incoming mobility) as part of a mobility programme.

An exchange is associated with an institution and is identified by a mobility programme and possibly a cooperation, a faculty, a field of study and a course (see definitions of these terms). If no faculty is specified, the exchange is open to people from all faculties. An exchange can thus be defined at more than one level in the structure of the institution: the entire institution, a faculty, a field of study or a course.

Additional information can be included to describe an exchange in detail (level, subject area, internal and external coordinators, etc.).

If cooperations are not managed in moveon, it is possible to create an exchange without associating it with a cooperation.

An unlimited number of agreed flows and mobilities (see definitions of these terms) can be associated with an exchange.

Examples of exchanges:

Programme	Institution	Faculty	Field of study	Course
Bilateral	Université de Montréal			
Asia-Link	University of Tokyo	Faculty of Social Sciences		
Erasmus	Gutenberg Universität Mainz	Faculty of Social Sciences	Sociology	
Erasmus Mundus	Gutenberg Universität Mainz	Faculty of Social Sciences	Sociology	Masters in Sociology

Mobility programme (configurable reference table)

A mobility programme is an element which can be used to categorise mobilities and hence exchanges by their framework.

A mobility programme is identified by its name.

The list of mobility programmes is one of the moveon reference tables. This list must be configured prior to using moveon. For each mobility programme you must specify the type of persons concerned, choosing from outgoing students, incoming students, outgoing staff and incoming staff.

Examples of mobility programmes:

Erasmus SMS, Erasmus STA, Double Degree, CREPUQ, ISEP, Free mover

Agreed flow

An agreed flow is defined by the number of outgoing and incoming persons and the corresponding mobility durations agreed by agreements in connection with an exchange for a given academic year.

The periods are expressed in months for students and in weeks for staff.

Examples of agreed flows:

Exchange	Year	Number of outgoing	Duration of outgoing	Number of incoming	Duration of incoming
Erasmus SMS programme, Università Roma Tre, Sociology	2008/09	2	10	4	5

6 - Managing mobilities

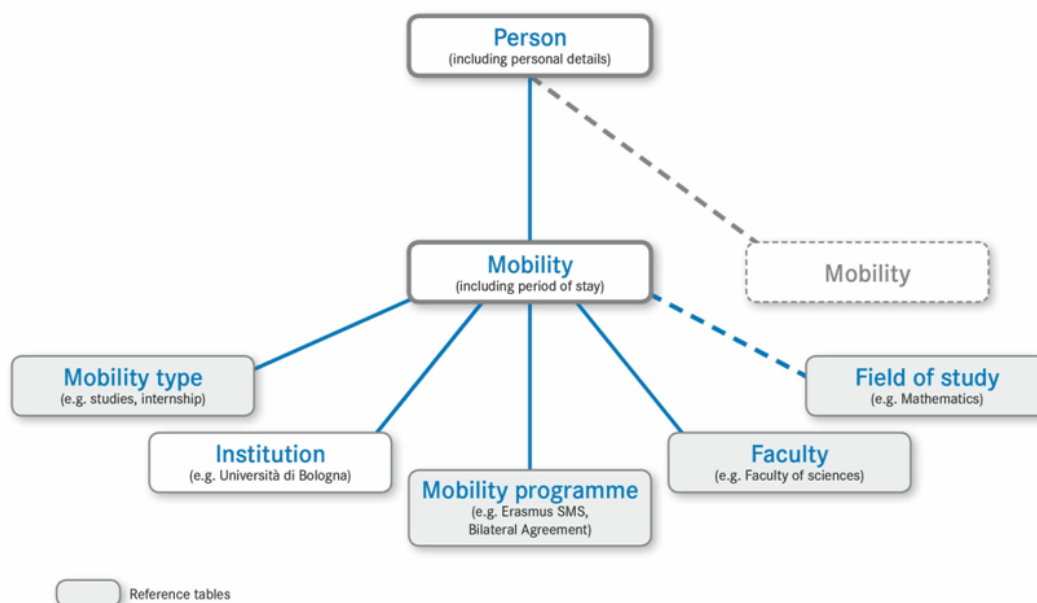


Fig. 6: Concepts - managing mobilities

Person

A person is someone wishing to undertake, undertaking or having undertaken a mobility (see definition of this term).

A person is identified by a last name, first name, person type and attachment faculty (see definitions of these terms).

Additional information can be included to describe a person in detail (personal details, addresses, bank details, etc.).

An unlimited number of mobilities (see definition of this term) can be associated with a person.

Examples of persons:

Last name	First name	Person type	Faculty
Dupont	Jeanne	Outgoing student	FSS
da Silva	Inácio	Incoming student	M

Person type (non-configurable reference table)

A person type is an element which can be used to categorise persons according to their type. The list of person types is not configurable.

Available person types: outgoing student, incoming student, outgoing staff, incoming staff.

Mobility

A mobility is a period spent by a person in an external institution in the case of a person from your institution (outgoing mobility) or in your institution in the case of a person from an external institution (incoming mobility).

A mobility is associated with a person. It is identified by a person type, a mobility type, a mobility programme, a country, an institution and a status (see definitions of these terms).

The possible values for the status of the mobility are: applicant, selected, accepted, completed, not accepted, cancelled, interrupted.

The mobility can be included as part of an exchange if the existence of a mobility agreement justifies this mobility, as is the case with Erasmus SMS mobilities, for example. The mobility can also exist outside an exchange if there is no mobility agreement, as is the case with "Free mover" or work placement mobilities, for example.

In some cases the exact mobility destination is unknown at the time the mobility is being prepared, for example if the student is looking for a host institution for a work placement mobility. In this case the institution can be left blank.

Examples of mobilities:

Person	Person type	Mobility in connection with an exchange	Mobility type	Mobility programme	Institution	Faculty	Field of study
Jeanne Dupont	Outgoing student	Yes	Study	Erasmus	Gutenberg Universität Mainz	Faculty of Social Sciences	Sociology
Inácio da Silva	Incoming student	No	Study	Free mover	Universidade de São Paulo	Faculty of Social Sciences	Sociology

Mobility type (configurable reference table)

A mobility type is an element which can be used to categorise mobilities according to their type.

A mobility type is identified by its name.

The list of mobility types is one of the moveon reference tables. This list must be configured prior to using moveon. For each mobility type you must specify the type of persons concerned, choosing from outgoing students, incoming students, outgoing staff and incoming staff.

Examples of mobility types:

Study, work placement, teaching, research, training

7- Financial management

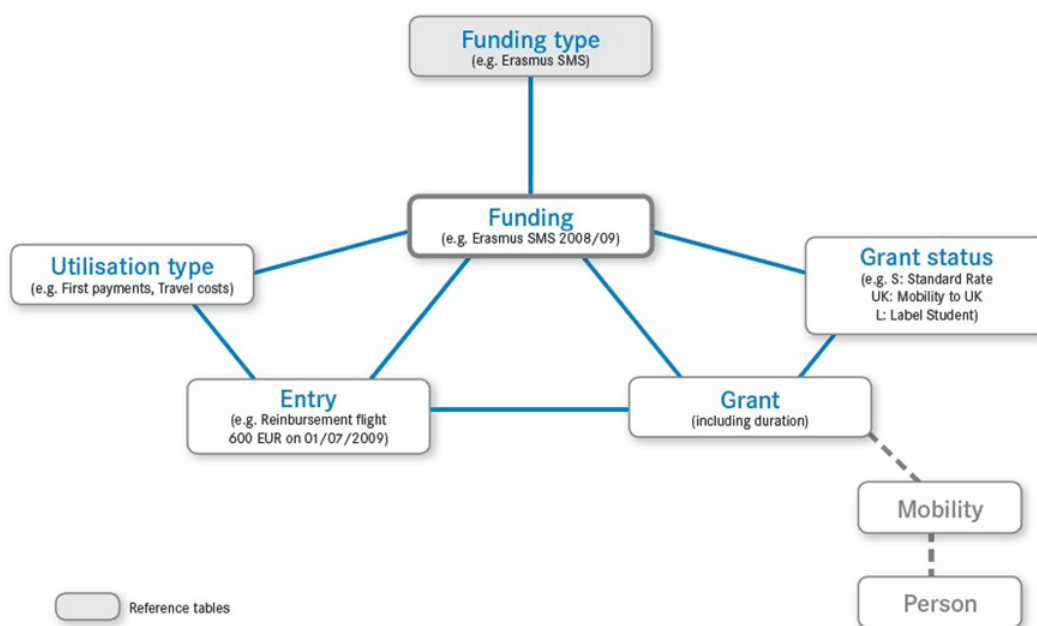


Fig. 7: Concepts - financial management

Funding

A funding is a set of financial resources allocated to an institution by a funding institution for a given year. A funding can be used for operating expenses involving suppliers, for grants to persons on mobility, or for a combination of these uses.

A funding is associated with a funding type and with an academic or calendar year of use.

An unlimited number of entries and grants (see definitions of these terms) can be associated with a funding. Utilisation types and grant statuses have to be configured separately for each funding (see definitions of these terms).

Examples of fundings:

Funding type	Year	Name
Erasmus SMS	2010/11	Erasmus SMS 2010/11
Budget RI	2012	Budget RI 2012

Funding type (configurable reference table)

A funding type is an element which can be used to categorise fundings according to their origin.

A funding type is identified by its name.

The list of funding types is one of the moveon reference tables. This list must be configured prior to using moveon. For each funding type you must specify the possible use, choosing from grants to outgoing students, incoming students, outgoing staff, incoming staff and operating expenses.

Examples of funding types:

Erasmus SMS, Erasmus OM, Regional grant, State grant, etc.

Entry

An entry is the transcription of a one-off financial operation allocating a funding.

An entry is associated with a funding and is identified by an object, date, amount and where applicable by a utilisation type. An entry can be associated with a grant if the entry involves the recipient of a grant.

Financial operations can be divided into resources and utilisations.

- An operation involving the funding agency is a resource.

- An operation involving a recipient or a supplier is a utilisation.

At the same time, financial operations can be divided into receipts and expenses.

- An operation in favour of the institution is a receipt. The amount of the associated entry is positive.

- An operation in favour of the funding agency, a recipient or a supplier is an expense. The amount of the associated entry is negative.

The table below shows the four possible types of operations using the two classifications outlined above.

	Receipts (in favour of the institution)	Expenses (in favour of the funding agency, a recipient or a supplier)
Resources (involving the funding institution)	Payments made by the funding institution in favour of the institution	Repayments made by the institution to the funding institution
Utilisations (involving a recipient or a supplier)	Repayments made by recipients or suppliers in favour of the institution	Payments made by the institution in favour of recipients or suppliers
	Positive entry amount	Negative entry amount

Examples of entries for a single funding:

Date	Description	Amount	Comment
01/09/2010	Initial payment by funding institution	+125,420.00 EUR	Receipt/Resource
15/11/2010	Reimbursement of plane ticket for Prof. Dupuis	- 620.00 EUR	Expense/Utilisation
15/06/2010	Repayment of grant from Luc Dupont, mobility abandoned	+600 EUR	Receipt/Utilisation
15/08/2010	Repayment of unused funds to funding institution	- 32,000.00 EUR	Expense/Resource

Utilisation type

A utilisation type is an element which can be used to categorise the entries associated with a funding according to their type.

A utilisation type is associated with a funding and is identified by its name. The utilisation types are configured separately for each funding.

Examples of utilisation types:

Erasmus SMS funding: 1st payment, 2nd payment, Redistribution, Repayment, etc.

Erasmus OM funding: language course, student reception, etc.

Erasmus STA funding: travel expenses, stay expenses, etc.

Grant

A grant is the right allocated to a person to benefit from a funding in connection with a mobility. A grant is associated with a funding and a mobility and is identified by a duration (e.g. 3 months) and a grant status (e.g. A-Standard rate recipients, see below).

There is no limit to the number of grants associated with a mobility. A person can thus benefit from multiple fundings for the same mobility (e.g. Erasmus student mobility funded by Erasmus SMS and another grant). There is no limit to the number of grants associated with the same funding and with different mobilities for the same person. A person can thus benefit from the same funding for different mobilities (e.g. multiple mobilities for a teacher during a single year funded by Erasmus STA).

An unlimited number of entries can be associated with a grant, corresponding to the different financial operations involving the recipient of the grant.

Example of grants for a single funding:

Funding	Mobility	Duration	Status
Erasmus SMS 2009/10	Luc Dupont in connection with his Erasmus mobility to Florence	12 months	A

Grant status

A grant status is an element which can be used to categorise the grants associated with a funding according to the rules of assignment and the rules for calculating the amount of the grant.

A grant status is associated with a funding and is identified by a code and a name. The grant statuses are configured separately for each funding.

The amount of a grant is calculated automatically on the basis of the duration of the grant and fixed rules relating to the grant status (e.g. monthly or fixed amount).

Examples of grant statuses for a single funding:

Code	Name
A	Standard rate recipients
A+	Full rate recipients
AN	Recipients holding a national grant