

USER MANUAL FOR OLIVE

<http://studyvisits.cedefop.europa.eu>



CHAPTER 2 Participant Management (manual for organisers)

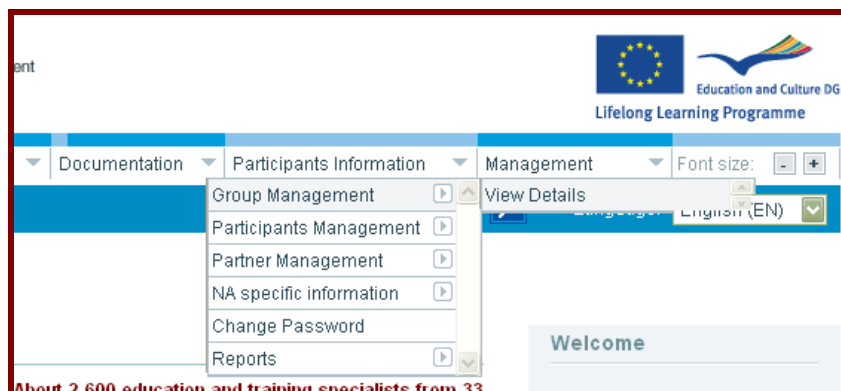
CHAPTER		PAGE
2.1.	Participants Management	2
2.1.1	Searching of applicants (update participants data)	2 - 3
2.1.2	Viewing the application's data	3 - 4
2.1.3	Data Exporting	5

2.1. Participants Management

This section provides the ability to authorized organisers to access information related to applicants assigned to their study visit(s). It is a combination of a search facility, a data retrieval process and a data presentation interface.

In order to select/open the menu “update participants data” the following steps must be performed:

- Move the cursor over the ‘**Management Door**’ and wait for the menu option for this door to become visible.
- Point the cursor on top of the menu and move it over the menu option ‘**Participants Management**’. When the background color of the menu option changes to light yellow (current selection indicator), the submenu “**Update Participant’s Data**” appears.
- Click on “**Update Participant’s Data**” in order to open this menu.



Picture 2-1: Selecting of the category ‘Update participants data’

2.1.1. Searching of applicants (Update participants data)

After clicking on Update Participants Data, the window called “Participants search” will be opened and by default the participants of the study visit(s) which you are organising in this academic year will be displayed (picture 2-2).

For those among you who organise(d) more than one study visit it might be interesting to know that you are able to search applicants who are assigned to your study visits according to different criteria. You can narrow the results of your search by choosing pre-specified options indicated in the drop-down boxes and writing relevant information in the free text fields before clicking on Search.

Participants search

Code:

First name:

Family name:

Sending country:

Country of the visit:

Selection Status:

Participation status:

Year:

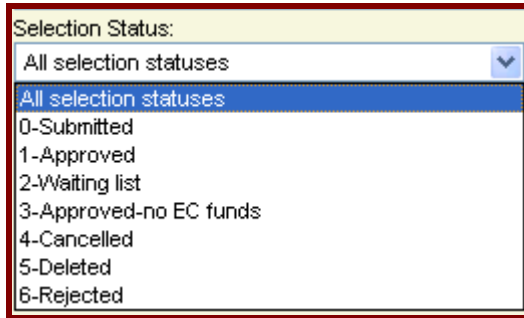
Group: All records

Showing 1 - 100 of 267 (total records) participants

Code	Group	Participation status	Selection Status	Participant
2008-SV-01-IT-LLP-03077	173		0-Submitted	SMALDONE VILLANI Carlo
2008-SV-01-CZ-LLP-03068	174		0-Submitted	KUTRA Milan
2008-SV-01-TR-LLP-03179	175		0-Submitted	ARSLAN Banu

Picture 2-2: List of “Participants”

- ✚ **The Selection Status** shows the result of the selection at national level. A drop-down box, which contains a list of all the available selection statuses (see picture 2-3). In order to select a status from this drop-down box click on the flash at the right side of the box and select in the appearing list a status by clicking on it.



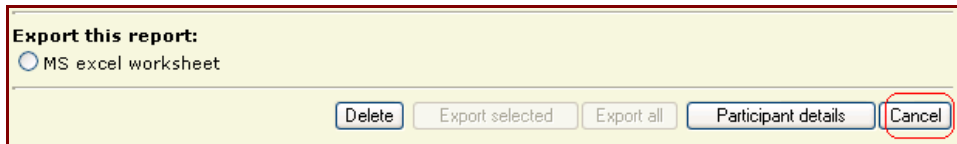
Picture 2-3: Selection Status

Note

Only the candidates who have the Selection Status Status “1-approved” or “3-Approved-no EC funds” will participate in your study visit.

- ✚ **Participants Status:** For the applicants who applied for a study visit after 2007, this status is not relevant for the time being. Please don't change this default option and keep the option “All participants statuses”. For the participants before 2008 this status is used to indicate their participation status, which is either active cancelled, replaced, transferred or cancelled and replaced.

To close the window ‘Participants search’ click on ‘cancel’ on the lower right of the page (picture 2.4) and the main window (starting page) will appear again.

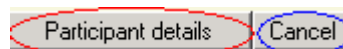


Picture 2-4: Close the window participants search

2.1.2. Viewing applicant's data

To see the application form of a chosen applicant the following steps must be followed:

While being in the window “Participants Search” select an applicant from the available list displayed in the grid by **clicking on top of the record** (selected record/applicant is identified by a light yellow background). Click on the **“Participant Details”** button, which is located on the right bottom of the page (picture 2-5). The current window (pop up) will close and you will enter the application form of the selected applicant.



Picture 2-5

Note

The data's of the application forms which were filled out online (starting for study visits taking place in 2008) are differently displayed in the participants details than the data of the applicants who applied for a study visit taking place until the end of 2007 (no online application was used at that time).

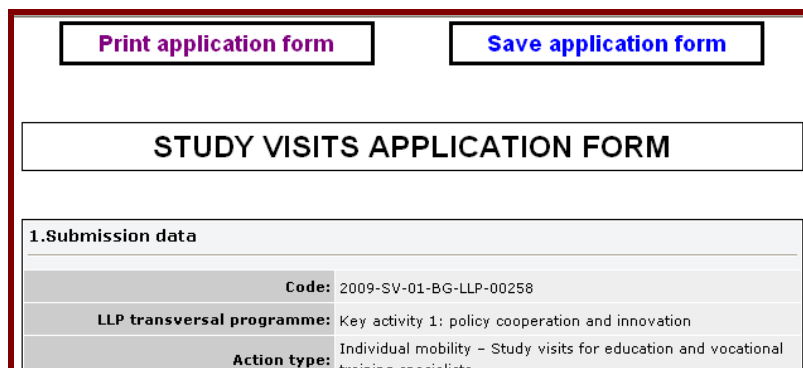
When entering the application form of an applicant, the participant's data will be presented like shown in the picture 2-6.



Picture 2-6: View of applicant's details

The applicant's data are divided into 3 pages (Applicants, Additional Information and Choices). When being in the application form of an applicant, you have the following options:

- ✚ **Print application form:** If you click on this button a new window will come up (picture 2-7) and you will have the option to **print** and to **save** the application form in a proper form.



Picture 2-7 Print and save of applicant's details for those application forms which were inserted online

- ✚ **Search:** If you click on this button you will come back to the window 'Participant's search' where you can search applicant according to different criteria.
- ✚ The button "Update" and "Actions" are not functional for organizers

2.1.3. Data Exporting

While being in the window “Participants search” you can export all the data of applicant’s application forms in an Excel file. So apart from personal and employer’s data, also the description of the applicant professional function, motivation and so on will be exported.

✚ **To initiate the export into an excel file the following actions must be performed:**

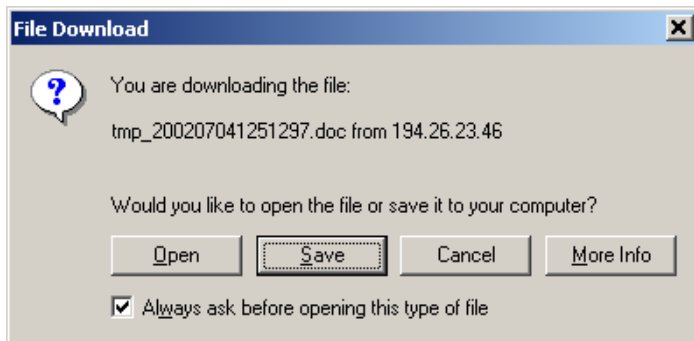
Select the excel file format by clicking inside the corresponding little circle. A little green dot appears inside the circle (picture 2-8). **You have now two different options to define the data’s which you want to export: By clicking on the button**

- 1) **‘Export all’**, you will export the data of all records.
- 2) **‘Export selected’**, you will export the data of those applicants which you have selected (the selected records are highlighted by a light yellow background). Please note you can select the data of more than one applicant by using the ‘CTRL’ key in order to select several applicants in a random order or by using the ‘SHIFT’ key in order to select several applicants who are following each other (one behind the other)



Picture 2-8: Select Excel file format

- ✚ After the initiation of the export utility a new pop-up window with a dialog box as illustrated in picture 2-9, is activated by the application. It allows the user either to open, to save or to cancel the file or to get more information.



Picture 2-9: Indicator for file downloading & Available option for the desired document