

SALTO E&T website – User manual

salto-et.net



Third edition

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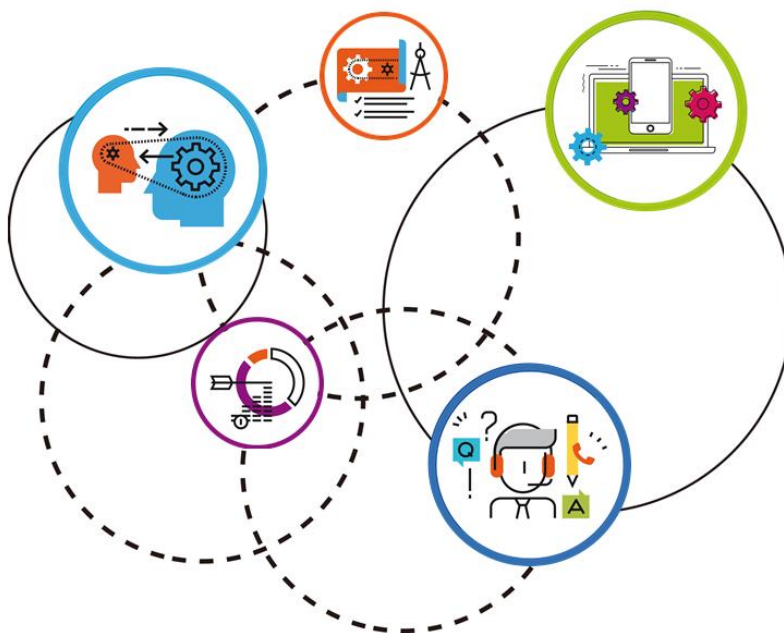
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1. Aims and objectives of the TCA Resource Centre

The EC recognised the NAs' need for an organisation supporting the entire lifecycle of TCAs and established the SALTO Education and Training TCA Resource Centre in 2018.

The aim of TCA Resource Centre is to

- **provide all information** about transnational cooperation activities (TCAs) at one place, in the IT platform;
- **provide user friendly, collaborative online working site** where NA staff can manage the entire process of TCAs from planning, through realization to evaluation;
- **offer (learning and informative) materials;** FAQs, outcomes of realized TCAs, online training documents, news etc.;
- **provide professional assistance and guidance** for a high quality realization Erasmus+ through TCAs;
- collect and analyse **NA staff training needs** and provide relevant trainings;
- explore **research needs** and execute studies.



1. Aims and objectives of TCA RC

The development of the SALTO E&T website is an ongoing, step-by-step process. The different development phases are closely related to the lifecycle of TCAs and the steps of development are taken in order of priority defined by the Commission and the TCA Working Group. Phases are the following:

- **Phase 1:** TCA initiative and NA partner search.
- **Phase 2:** TCA announcement for partner search and expression of interest by other NAs.
- **Phase 3:** TCA announcement to public, invitation of organizations or individuals.
- **Phase 4:** Selection of applicants.
- Realization of the TCA event.
- **Phase 5:** Evaluation of the TCA and event follow up with participants.
- **Phase 6:** Statistics to NA directors; to EC.

In 2018 the development of **Phase 1 and 2** were implemented. The next steps: IT development for Phase3-5 are planned for 2019, whereas the functionality to provide comprehensive statistics from the system can be expected in 2020.

2. Before use

There are preferred devices and browser to use the SALTO E&T website.

The website works the best with the newest version of *Google Chrome* (1920x1080 or 1366x720 resolution), however other browsers could be applied as well. When working on the site via Google Chrome, all operations systems (Windows, Linux etc.) are welcome. However, it is recommended to use devices with wider screens: computers, laptops and tablets. The mobile responsive version of the website is being developed.

3. Structure of SALTO E&T platform

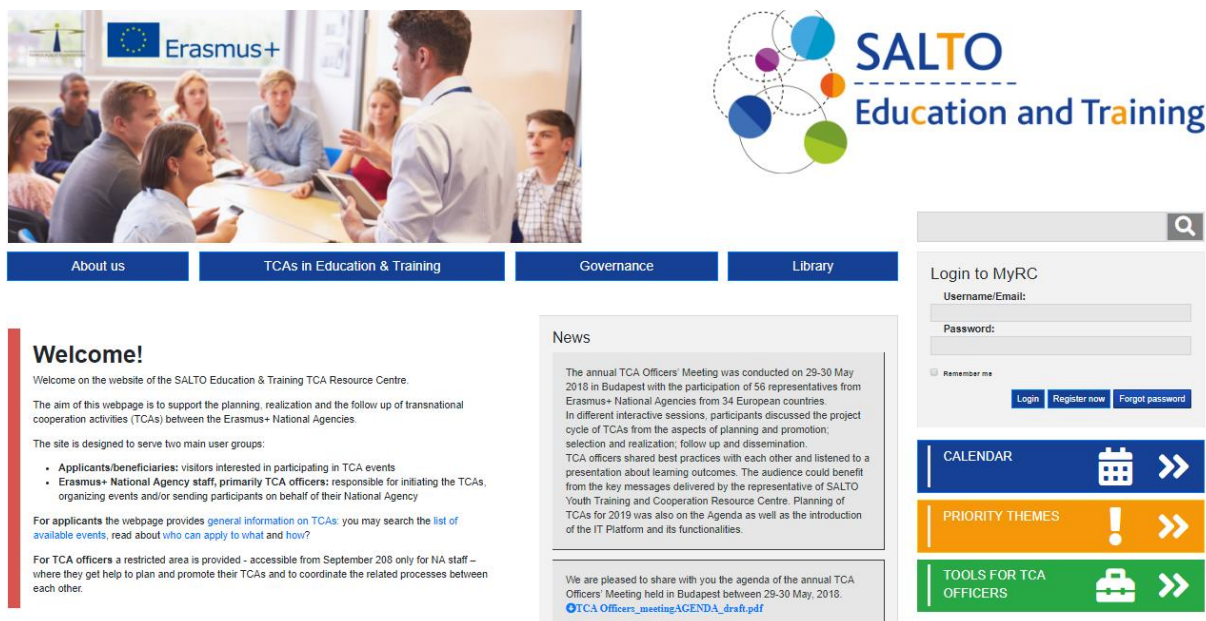
After opening the <https://salto-et.net/> website, the **Welcome** page will appear on the screen (see Figure 3. *Welcome page*). The aim of the website can be seen on the left, the news in the middle, the login and other useful buttons on the right.



2 Main menus

In the main menu of the page the following dropdown menus can be found:

- **About us:** information about the TCA Resource Centre
- **TCAs in Education & Training:** basic facts about TCAs and stakeholders; TCAs set to public status can be browsed in the Event list and Calendar
- **Governance:** European Commission, Erasmus + National Agency directors, TCA officers, Working Group and Advisory group
- **Library:** IT platform support materials (restricted), promotional materials and news section (public and restricted versions); supporting materials, contact lists, meeting minutes for TCA officers (restricted). It will also include a searchable collection of the TCA outcomes (public).
- **MyRC:** contains all (sending and/or organizing) partner applications that the user submitted or received. Moreover includes applications received as Sending or Host NA. Please see full details in chapter 9. MyRC.
- **Admin:** user modification and creation (this button appears only after logging in with the *Admin, TCA officer* or *NA staff* user role).



3. Welcome page

4. Users

4.1. User levels

The SALTO E&T website provides service to four different user groups (see Figure 4. *User levels*):

- *Admin*
- *TCA officer*
- *NA staff*¹
- *Applicant*

The *Admin* role is limited to the TCA Resource Centre and its IT department.

The *TCA officer* can create new TCA events, edit and finalize them before announcing any TCA to the wide public.

Applicants are able to register from May 2019.

¹ Not implemented yet.

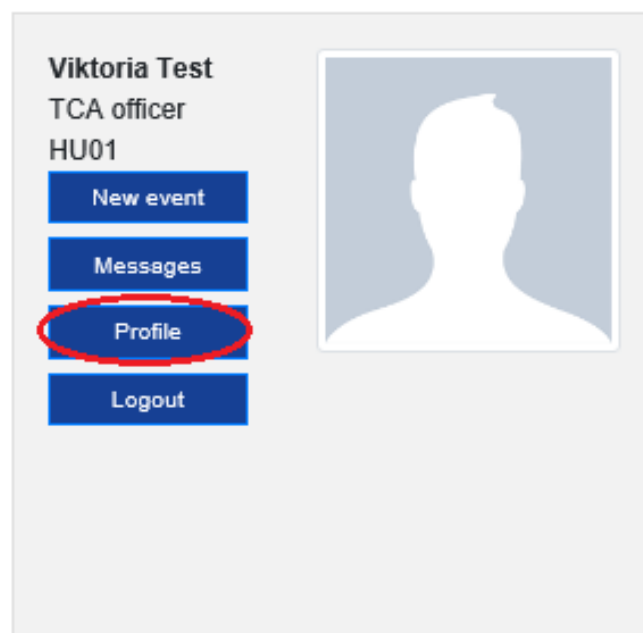


4. User levels

4.2. Registration, profile

All *TCA officers* are registered to the platform. They received their login details via email upon profile creation.² The sender of this email (and all the emails sent from the platform) is ***Salto-et.net*** and the subject is ***User registration***.

To finish the registration process, the user should login to SALTO E&T website with the login details provided in the registration email. Upon first login the user should change the default password by clicking on the Profile button (see Figure 5. *Shortcut to Profile menu*) on the right side of the page.



5. Shortcut to Profile menu

² If the registration email was not received, the TCA officer should [contact](#) the TCA Resource Centre Unit.

In this page the user can edit the profile's data (see Figure 6. *Profile page*), however the **Username**, the **Group** and the **Authority** fields cannot be changed. All the required fields are marked with red asterisk *. After clicking on the [Submit](#) button the modifications will be saved.

About us

TCA's in Education & Training

Governance

Library

MyRC

Admin

Admin >> [Users](#)

Username*

anett.almassy

Email*

anett.almassy@tpf.hu

Sex*

Female

Title

First name*

Anett

Last name*

Almassy

Date of birth

mm/dd/yyyy

WG

☐ Yes
☒ No

Additional info

Password

Confirm password

Group*

* HU01

Authority*

* TCA officer

Sector*

☒ AE
☒ HE
☒ SE
☒ VET
☒ YH

GDPR

Your personal data (name, e-mail address) and TCA activity are processed by Tempus Public Foundation in comply with the Regulation (EU) 2016/679 (General Data Protection Regulation, GDPR) and the Hungarian legal basis. The data processing is based on the data processor's and your employer's legitimate interest (see GDPR Art. 6 1/f) as the processing is necessary for their contractual obligations regarding Education and Training TCA management. These obligations state the duty of creating a network between the National Agencies who fulfil their project tasks with the contribution of their competent employees.

☒ I understood.

Cookies

We use cookies on your browser to optimize site functionality and provide service based on your preferences (e.g. remembering your login and password).

☒ I understood.

6. Profile page

The **Username** and the **Email** address are unique in the system. The **Username** contains the first name, a dot and the last name without special characters.

4.3. Userlist

After logging in NA members will be able to view and browse registered NA & SALTO users by clicking on the main menu's [Admin](#) button, and select [NA & SALTO members](#) submenu. To see the userlist of applicants, please select **Admin >> [Registered applicants](#)**. (See Figure 7. *Registered applicants*)

All registered Admins, TCA officers and NA staff and EC members are included in the NA & SALTO members.

By default, the NA & SALTO members userlist shows "Active" users (see under **Admin >> [NA & SALTO members](#)** button). "Inactive" users are those colleagues who are temporarily not using the platform, e.g. during maternity leave.

As presented on Figure 8. , there is a search bar above each column of the userlist, where it is possible to search by letters or full words.

You may also arrange data by arranging a column by ascending or descending order by clicking on the double arrow icon next to the column name. At one time, only one column can be sorted by order, which is shown by a dark grey colour of the arrow. If you wish to modify the sort order, simply click on another arrow.

Admin >> [Registered applicants](#)

Sector	First name	Last name	Email	User status	Action
HE AE	Kovács	Norbert	quinley.sophiya@sellcow.net	pending	View
SE AE	Norbi	DG felhasználója	ddkovi1@gmail.com	active	View

7. Registered applicants

Admin >> [NA & SALTO members](#)

☒ Active ☐ Inactive ☐ All

			ane	a				
Sector	Group	Authority	First name	Last name	Email	WG	Additional info	Action
SE VET HE AE YH	DE03, HU01, IE01, UK01, UK02	TCA officer	Anett	Almassy	aaanett.almassy@tpf.hu		i	Edit

Showing 1 to 1 of 1 entries (filtered from 24 total entries)

Previous **1** Next

8. NA & SALTO members

5. Login and logout

Once the user is registered, the TCA Officers tools can be accessed by logging in to the **SALTO E&T** website. Either the username or the email address can be used for login.

Login to MyRC

Username/Email:*

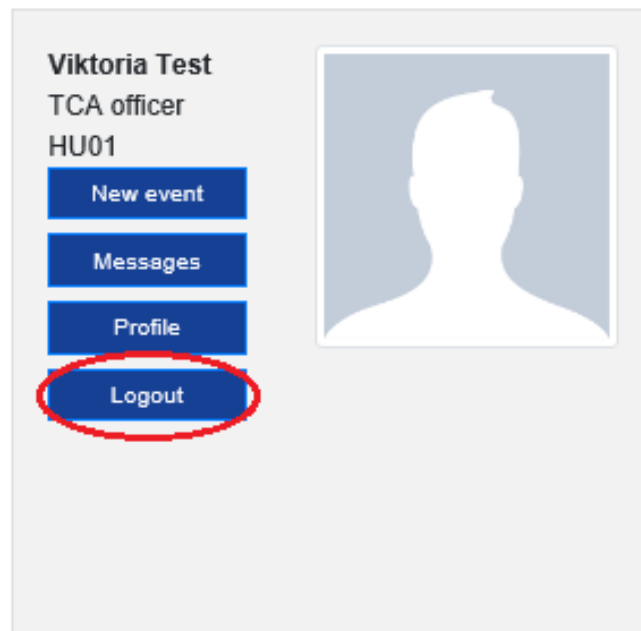
Password:*

☐ Remember me

[Login](#)
[Register now](#)
[Forgot password](#)

9. Login

If the user would like to log out, should do it by clicking on the **Logout** button (see Figure 10. *Logout*) in the top right corner, below the SALTO logo.



10. Logout

5.1. Request new password

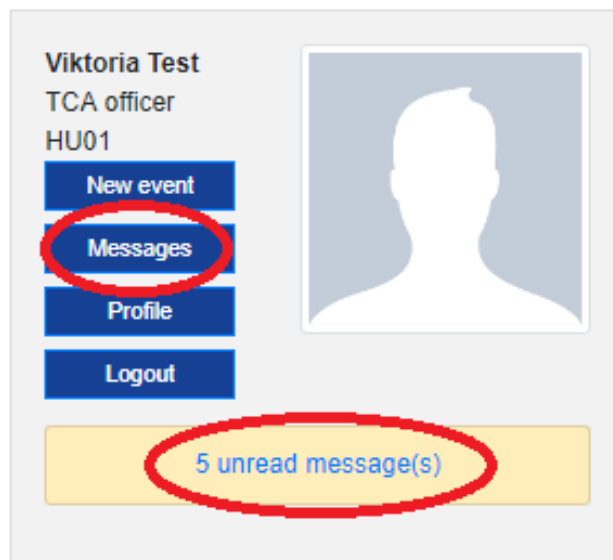
In case of a lost password, the user should click on the **Forgot password** button and request a new password by giving the **Username** or the **Email** and clicking on the **Request new password** button. Then an automatic email will be sent to the email address. The password request has to be confirmed (in 24 hrs) by clicking on the link in the email. Afterwards the new password will be sent. It is recommended to change the new password upon first login.

A screenshot of a login form titled 'Login to MyRC'. It contains two input fields: 'Username/Email:*' and 'Password:*. Below these fields is a checkbox labeled 'Remember me'. At the bottom of the form are three blue buttons: 'Login', 'Register now', and 'Forgot password'. The 'Forgot password' button is circled in red.

11. Forgot password

6. Messages

After logging in to the SALTO E&T site the [Messages](#) button appears (see Figure 12. *Shortcut to Messages*) in the top right corner, below the SALTO logo. If the user has any unread messages, the site shows a notification under the **Logout** button (see below). Either clicking on the Messages button, or the notification sign the user can open the messages.



12. *Shortcut to Messages*

After clicking on either of them, a list of the messages can be seen sorted by **Time** in ascending order (see Figure 13. *Messages*). The following columns are on the page:

- **From:** the sender of the message
- **Time:** the time when the message was sent
- **Title:** the subject of the message
- **Status:** if the message is *Read* or *Unread*
- **Priority:** *Normal* or *Important*

A message can be opened by clicking on any of its column's data, then the text will be visible under the given row.

From	Time	Title	Status	Priority
system - MK01 applied for partner to TesztHU7	2018-09-06 16:17:26	New partner application	Read	Normal
event. Application has been accepted by Anett Almassy on 2018-09-06 16:18:54.				
system -	2018-09-06 16:22:57	New partner application	Unread	Normal
system -	2018-09-07 09:49:29	New partner application	Unread	Normal
system -	2018-09-07 11:16:17	New partner application	Unread	Important
system -	2018-09-12 12:40:28	New partner application	Unread	Normal

13. Messages

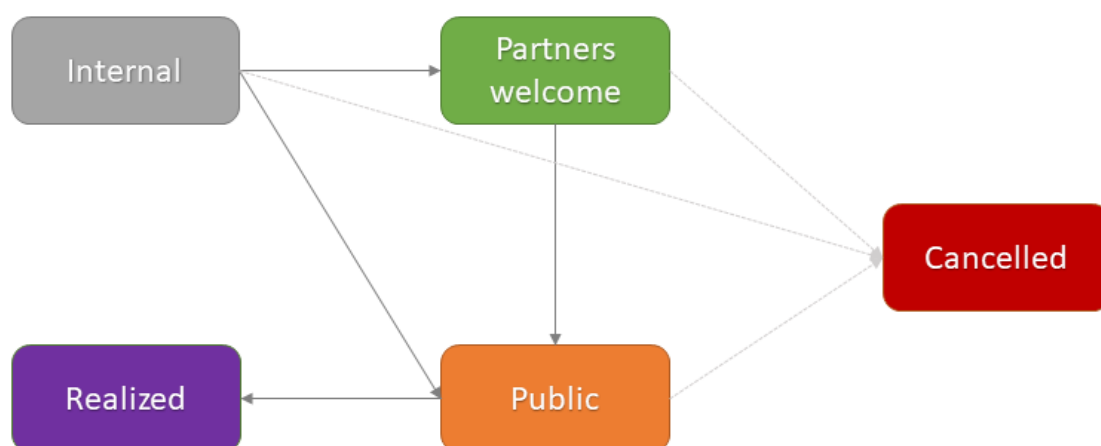
If the user has one or more unread messages, the system sends an automatic email to the user's email address (from Salto-et.net with New message subject), if the following conditions are met:

- the message is unread
- the message was sent more than 5 minutes ago
- the system hasn't sent an automatic email about this message yet

7. TCA lifecycle

7.1. Introduction to event statuses

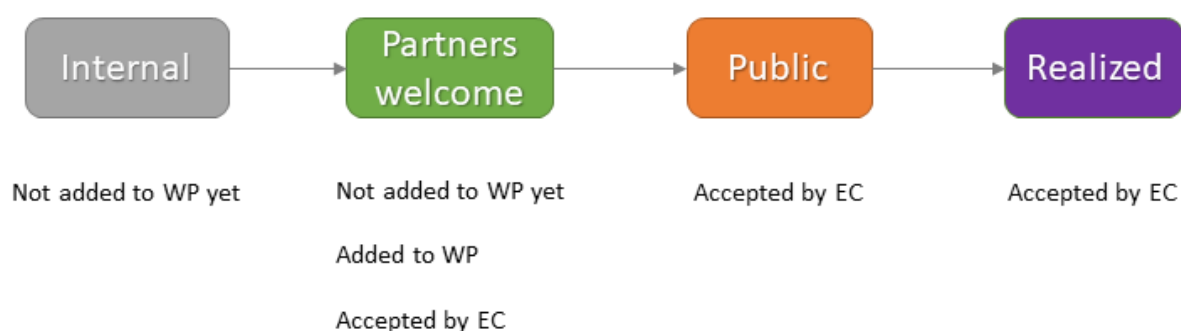
The TCA lifecycle is meant to be reflected by statuses on the Platform. There are five statuses – 1. *Internal*, 2. *Partners welcome*, 3. *Public*, 4. *Realized*, 5. *Cancelled* – which can be linked to each event on the Platform. Each status has to be linked with a WP (work programme) phase. Statuses and phases shall be updated frequently by the Host on the Platform. The use of statuses and phases is intended to inform other NAs about the updates of the TCA planning process. The use of statuses and phases is mandatory, however, not all of them. There are number of variations how TCA statuses can follow each other (see Figure 14. *Cycle of event statuses*).



14. Cycle of event statuses

Please see below the cycle of the event statuses with all possible scenarios.

Possible event scenario **a) Regular TCA lifecycle**



15. Regular TCA lifecycle

Possible event scenario **b) TCA lifecycle without open partner application**



16. TCA lifecycle without open partner application

Possible event scenario **c) Cancelled TCA lifecycle**

The following table shows entire list of event statuses and their WP phases. In case of Partners welcome status, the ideal TCA event has gone through all WP phases before launching it to the public. When using Cancelled status, it should be decided which WP phase is relevant.



17. Cancelled TCA lifecycle

Status	WP phase	Real time activities
Internal	Not added to WP yet	Offline and/or online event planning
Partners welcome	Not added to WP yet/ Added to WP/ Accepted by EC	Planning continuation and dividing tasks between partners (status modification on Platform). The planned event is included in the WP submitted to the EC (WP phase modification on Platform). EC accepts the

		WP (WP phase modification). Inviting NAs to send participants. Most details are finalised, the event organization is progressing well.
Public	Accepted by EC	The event is open for visitors to apply (status modification). Assessment of applications, selection of applicants, grant agreements, travel arrangements. Preparation of participants. Implementation of the event.
Realized	Accepted by EC	Results upload to the Platform (status modification). Event follow up.
Cancelled	Added to WP but cancelled/ Was not added to WP	Event planning/organization failed or Event was not accepted by EC or Event was finally not added to the WP.

18. Statuses and WP phases

7.2. Internal status

Internal status is the default status for creating a new event. This status is the least visible from all the event statuses, as only the NAs involved (Host and Coordinating NA, Partners) see its content. It is important to know, that **only the Host NA can make edits**. Internal status is marked with a grey label on the event card (see Figure 19. *Internal status appearance on the event card*).

19. Internal status appearance on the event card

7.3. Partners welcome status

This status is optional to use. If agencies wish to find partners for their TCAs, by selecting Partners welcome status, all National Agencies will see the event.

It is important to know, that **only the Host NA can make edits**. Partners welcome status is marked with a green label on the event card (Figure 20. *Partners welcome status appearance on the event card*).

When using this status, it is possible to open an event to for other NAs to join as organizing and/or sending partners.

The screenshot shows an event card titled "Partner application platform test TCA". It features a green diagonal label in the top right corner that reads "PARTNERS WELCOME". The card is divided into two columns of information. The left column contains: "Event date: 2019-01-01 - 2019-01-01", "Event venue: Budapest, Hungary", and "Deadline of booking places: 2018-10-22". The right column contains: "WP phase: Not added to WP yet", "Sector: AE" (where "AE" is in a green box), and "Language: English". At the bottom left is a red "Edit" button with a pencil icon, and at the bottom right is a green "View >>" button.

Partner application platform test TCA	
Event date: 2019-01-01 - 2019-01-01	WP phase: Not added to WP yet
Event venue: Budapest, Hungary	Sector: AE
Deadline of booking places: 2018-10-22	Language: English
Edit	View >>

20. Partners welcome status appearance on the event card

7.4. Public status

After the EC has approved the TCA and the Host NA would like to make the event public, it will be visible for visitors (without logging in) from those countries where the NA is a sending partner. These event cards are marked with orange label. (See Figure 21. *Public status appearance on the event card*.)

There will also be a public and restricted version of the event template, so that personal information of TCA officers and NAs will not appear to the wide public. The main action in this status is the online application of potential beneficiaries.³

The screenshot shows an event card titled "Test TCA". It features an orange diagonal label in the top right corner that reads "PUBLIC". The card is divided into two columns of information. The left column contains: "Event date: 2019-01-25 - 2019-01-28", "Event venue: Budapest, Hungary", and "Application deadline: 2019-01-01". The right column contains: "Sector: AE" (where "AE" is in a green box), "Priority: Impact", and "Language: English". At the bottom left is a red "Edit" button with a pencil icon, and at the bottom right is a green "View >>" button.

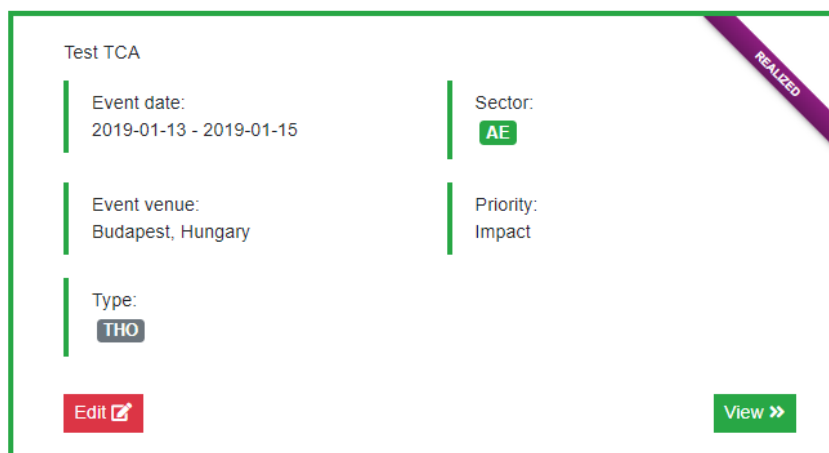
Test TCA	
Event date: 2019-01-25 - 2019-01-28	Sector: AE
Event venue: Budapest, Hungary	Priority: Impact
Application deadline: 2019-01-01	Language: English
Edit	View >>

21. Public status appearance on the event card

³ Available from Q2 2019

7.5. Realized status

After the event has ended, its status automatically changes to “Realized” (event card marked with purple label – see Figure 22. *Realized status appearance on the event card*). The only field that can be edited by the Host NA is the “Additional info” section. Host NA will be requested to upload TCA results to the platform⁴.

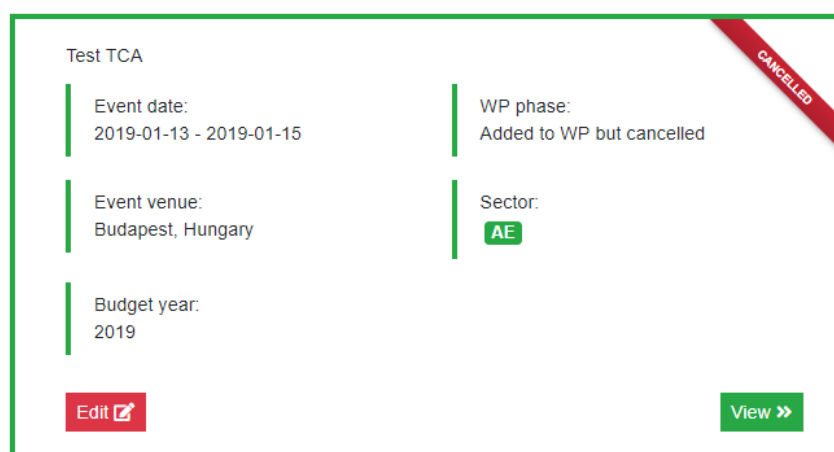


Test TCA	
Event date: 2019-01-13 - 2019-01-15	Sector: AE
Event venue: Budapest, Hungary	Priority: Impact
Type: THO	
Edit	View >>

22. Realized status appearance on the event card

7.6. Cancelled status

In case of the TCA can't be realized, it is obligatory to change the event status to „Cancelled” (event card marked with red label – see Figure 23. *Cancelled status appearance on the event card*), so interested parties will be informed⁵. TCA is visible for users in all NA groups.



Test TCA	
Event date: 2019-01-13 - 2019-01-15	WP phase: Added to WP but cancelled
Event venue: Budapest, Hungary	Sector: AE
Budget year: 2019	
Edit	View >>

23. Cancelled status appearance on the event card

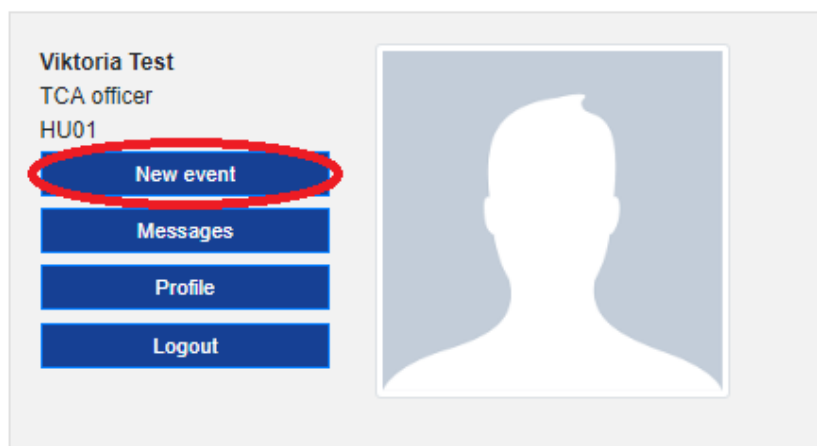
⁴ Not implemented yet.

⁵ Not implemented yet.


8. Events and actions

8.1. New event

To create a new event, the user should click on the  button (see Figure 24. *Shortcut to New event*) in the top right corner, below the SALTO logo.



24. *Shortcut to New event*

The user will be directed to a new page (see Figure 25. *Creating new event*), where all the fields marked with red asterisk * has to be filled in. After clicking on the  button (at the top or bottom section), the edits will be saved.

[Save](#) [View](#)

MAIN INFO

Event statusⁱ*

Internal

WP phaseⁱ*

Not added to WP yet

Priority*

Choose

Type of eventⁱ*

Choose

Sector*

Venue (country)*

Choose

Venue (city)*

Choose

Working language*

Choose

Event fee (€)ⁱ:

Travel cost paid by Host NA:

☐ Yes ☐ No




Event fee explanationⁱ:

TCA DESCRIPTION

Themes and goals*

25. Creating new event

There are different data fields: drop down lists, radio buttons, multiple choice boxes, calendars for date selection, number and text fields. If a field is marked with an information sign ⁱ, a tooltip will appear when the user holds the mouse over the field's name. By the **Number of participants per country** field the user can create multiple rows by clicking the [Add](#) button, and can remove them by clicking on the [Remove](#) button.

The [View](#)  button can be used if the event has been already saved. By clicking this button the edited event's page will be visible (by clicking the [Save](#)  button the user stays on the event creation page). If the user hasn't saved the edits yet and clicks on the [View](#)  button, a pop-up window will be displayed in which the user has to confirm, that really would like to leave the current page. In this case the edits are lost and there will be an error message on the page [Event not found](#).

8.2. Editing events

Once an event is created its host NA can edit the event template by clicking on the Edit button either on the event card or page.

Impact+ Exercise Seminar

Event date:

2019-02-27 - 2019-02-28

Event venue:

Budapest, Hungary

Application deadline:

2018-12-10

Sector:

VET

AE

Priority:

Impact

Language:

English

Edit

View >>

26. Edit event from event card

TCAs in Education & Training >> Events

[Main info](#) / [TCA description](#) / [Dates and deadlines](#) / [Partners and participants](#)

[Edit](#)
[Manage partner application\(s\)](#)

Testing online application

27. Edit event from event's template

8.2.1. Dates and deadlines

Start and end date: usually when the TCA event is being held. When an event is in an early planning stage, a longer interval can be set. (Events longer than 7 days are not displayed in the Calendar.) In Public status the event duration must be redefined. For EBAR type TCAs the duration of the event is when the research project lasts.

Budget year: each year, the NA shall prepare the planning of Transnational Cooperation Activities to be realised in the following yearly period of 1 January N till 30 June N+1. The TCA Planning shall be drafted following the template and the Specifications for the NA Work Programme provided by the Commission for the given budget year.

Deadline of organizing partner application: if the budget year is set to N, the deadline of organizing partner application is automatically set to 15 October N-1. This is when NAs have to submit their Work Programme. The pre-set deadline of organizing partner application can be modified.

Deadline of booking places: this date is usually between the „Deadline of organizing partner” and the „Start date”.

Deadline of application: this date is usually between the „Deadline of booking places” and the „Start date”.

8.2.2. Changing event status

To change the actual status of an event to a new one, two conditions shall be met in order to save successfully the event with its new status.

1. All mandatory fields need to be filled in which are required for the new status.
2. The WP phase is set accordingly (see Figure 18. *Statuses and WP phases*).

8.3. Partner application

8.3.1. Opening TCAs for partner application (Host NA)

In order to enable the Apply as partner function for an event, the following criteria shall to be met:

1. The status of the event is set to Partners welcome.
2. The Budget year field is correctly set.
3. The date set for Deadline of organizing partner application has not passed yet. (If the event is open for such partners.)
4. The date set for Deadline of booking places has not passed yet. (If the event is open for such partners.)

The abovementioned settings will enable the partner application feature and the Apply as partner button will appear on the event card and template as well.

8.3.2. Submission of partner application (applicant NA)

National Agencies can apply as organizing and/or sending partner either directly from the event card by clicking on the **Apply as partner** button or from the event page (see Figure 28. *Apply as partner (event card)* and 29. *Apply as partner (event template)*).

The screenshot shows an event card titled "Test TCA". It contains the following information:

- Event date: 2019-01-25 - 2019-01-28
- Event venue: Budapest, Hungary
- Deadline of booking places: 2019-01-17
- WP phase: not added to WP yet
- Sector: AE
- Language: English

At the bottom of the card, there are three buttons: "Edit" (with a pencil icon), "Apply as partner" (with a person icon and highlighted by a red circle), and "View" (with a right arrow icon). A green diagonal banner in the top right corner reads "PARTNERS WELCOME".

28. *Apply as partner (event card)*

PARTNERS AND PARTICIPANTS

Host NA:*	NL01 - National Agency Erasmus+ Education and Training		
Coordinating NA:*	NL01 - National Agency Erasmus+ Education and Training		
Contact person of Host NA:*	Contact email of Host NA:*		
Phone number of Host NA:*			
Legend	<input type="checkbox"/> Pending organizing partner applications(s) <input type="checkbox"/> Pending booked places	<input checked="" type="checkbox"/> Accepted organizing partner(s) <input checked="" type="checkbox"/> Accepted places	
Organizing partners	Apply as partner		
<input checked="" type="checkbox"/> Pending organizing partner application(s):	0		
<input checked="" type="checkbox"/> Accepted organizing partner(s):	0		
Estimated number of participants:*	40		
Number of participants per country:	ANY - 3		
Profile of participants:*	Teachers and other staff (e.g. team leaders, HR professionals) in universities of applied sciences, with a special focus on teacher training institutes		
Is NA staff welcome?*	Yes		
Role of NA staff :*	Active role in the organisation and/or execution of the TCA (facilitator)		
Sending partners	Apply as partner		

29. Apply as partner (event template)

By clicking on the Apply as partner button, a partner application window will pop up.

MAIN INFORMATION

Event:*	Enhancing capability of teachers and schools in planning and implementing their projects in order to have positive effect on ea	Link to event
National Agency:*	DE03 - Nationale Agentur für EU-Programme im Schulbereich im Pädagogischen Austauschdienst der Kultusministerkonferenz	
Deadline of booking places	2019-04-29	

ORGANIZING PARTNER APPLICATION

Apply as organizing partner?	<input type="radio"/> Yes <input type="radio"/> No		Organizing partner request from other NA
Accepted as organizing partner?	<input type="radio"/> Yes <input type="radio"/> No		Place of decision making for Host NA

SENDING PARTNER APPLICATION


Apply as sending partner?	3		Sending partner request from other NA
Booked places:			
Accepted places :			Place of decision making for Host NA
			Can be done anytime!

[Submit](#)


30. Partner application window

The “Event” and applying “National Agency” fields are already filled in.

National Agencies can **join as organizing partner** by selecting “Yes” as presented below. Submitting organizing partner application is open until the “Deadline of organizing partner application”. Organizing partner application is evaluated by the Host NA.

Apply as organizing partner?  ☒ Yes ☐ No

It is also possible to **join as sending partner and book places** by adding a number in the grey field as below. It is possible to show participation interest before the “Deadline of booking places”. Sending partner application can be evaluated by the Host NA.

Apply as sending partner? 

Booked places:

4

Submit

To finish the partner application, click on the blue **Submit** button. To read more about the evaluation and follow up of partner applications, please see chapter 8.3.3. Managing partner application as applicant NA.

Please note that depending on the Host NA’s preferences the possibilities for partner application can be limited (i.e. sending partner application might not be available upon the Host NA’s decision).

8.3.3. Managing partner applications as Host NA

Host NA will receive a **system message** called New partner application (see Figure 31. *New partner application system message*), where they have to click on the “application” link to decide whether they accept the application or not.

From	Time	Title	Status	Priority
system - RO01 applied to Partner application platform test TCA event. Please open application to see more details. Deadline of organizing partner application: 2018-11-09 Deadline of booking places: 2018-11-09	2018-11-09 10:45:52	New partner application	Read	Important

31. New partner application system message

A new window will pop up (see Figure 32. *Managing partner applications (as Host NA)*), where the Host NA fills in the two bottom rows regarding the partner application:

- Accepted as organizing partner? Yes/No
- Accepted places: The number of places to be accepted once the Deadline of booking places has expired

Host NA can accept organizing partner applications before and after the Deadline of organizing partner application.

The Host NA can accept sending partner applications before and after the Deadline of booking places.

MAIN INFORMATION

Event:*

Enhancing capability of teachers and schools in planning and implementing their projects in order to have positive effect on ea

Link to event

National Agency:*

DE03 - Nationale Agentur für EU-Programme im Schulbereich im Pädagogischen Austauschdienst der Kultusministerkonferenz

Deadline of booking places

2019-04-29

ORGANIZING PARTNER APPLICATION

Apply as organizing partner?

☐ Yes
☐ No

Organizing partner request from other NA

Accepted as organizing partner?

☐ Yes
☐ No

Place of decision making for Host NA

SENDING PARTNER APPLICATION

Apply as sending partner?

3

Sending partner request from other NA

Booked places:

Accepted places:

Place of decision making for Host NA

Can be done anytime!

Submit





32. Managing partner applications (as Host NA)

If the **organizing partner application** has been **accepted**, the NA group will be marked with a **green crown icon** at the Partners section, at the bottom of the event template.

If the **organizing partner application** has been **rejected**, the NA group **won't have a crown icon** at the Partners section, at bottom of the event template.

If the **sending partner application** has been **accepted**, the NA group will be marked with a **green participant icon**.

If the **sending partner application** has been **rejected**, the NA group **won't have a participant icon** at the Partners and participants section, at bottom of the event template. See Figure 33. *Legend of partner applications* for partner application icons and explanations.

Legend		Pending organizing partner applications(s)		Accepted organizing partner(s)
		Pending booked places		Accepted places

33. Legend of partner applications

8.3.4. Managing partner applications as applicant NA

The applicant NA will receive a **system message** about the decision called Evaluation of partner application (see Figure 34. *Partner applications system message (as applicant NA)*). To view the decision, click on the hyperlinked word. Please note that **Sending partner application can be judged before and after the Deadline of booking places. Organizing partner application may be evaluated prior to the Deadline of organizing partner application or afterwards.**

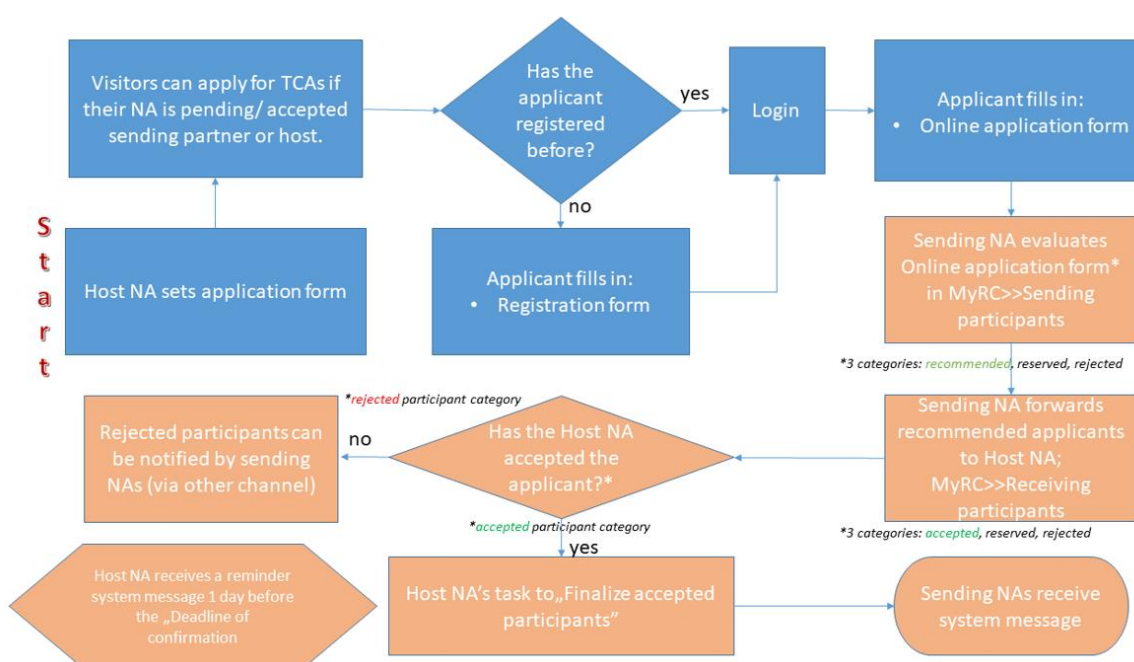
From	Time	Title	Status	Priority
system -	2018-11-09 13:28:40	Evaluation of partner application	Read	Important
Your partner application to Partner application platform test TCA has been evaluated. Please click on the link to see the result.				

34. Partner applications system message (as applicant NA)

The applicant NA may also check its organizing and/or sending partner applications in **MyRC>>My Bookings** menu (see more at chapter 9 [MyRC](#)). Please note that NAs can apply once as organizing and/or sending partner to a TCA.

8.4. Online application for participation

8.4.1. Process of online application



35. Process of online application

8.4.2. Criteria of online application

- Event status: **Public**
- Created and **set application form** by *Host NA*
- **Application deadline:** future date

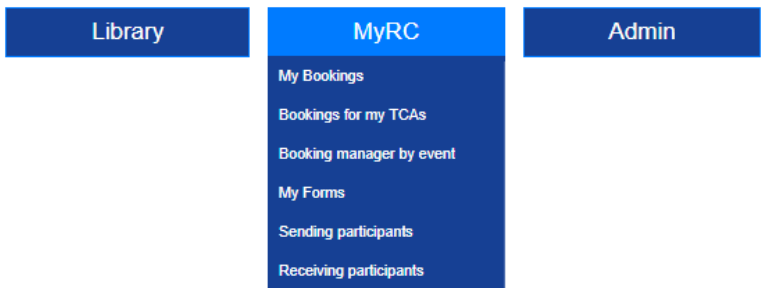
The „Apply” function appears to visitors if:

- Above criteria is valid plus
- Their background (country, sectors) matches their **sending National Agency that has pending/accepted booked places for the event.**

To read more about Online application, please read chapter 9.4 My Forms, 9.5 Sending participants and 9.6 Receiving participants.

9. MyRC

To view “My Bookings”, “Bookings for my TCAs” and “Booking manager by event”, “My Forms”, “Sending participants” or “Receiving participants”, click on the **MyRC** menu and select the relevant button in the drop down list.



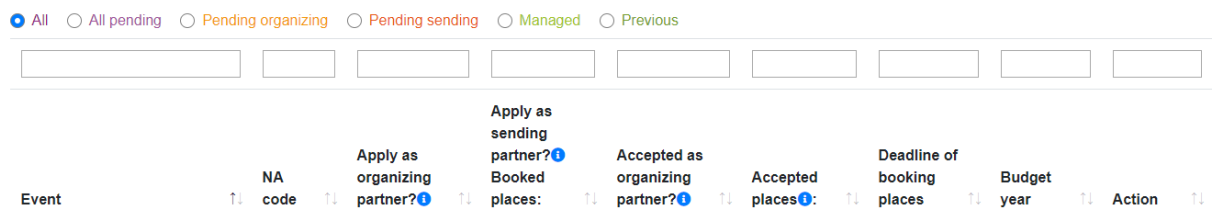
366. MyRC menu

“My Bookings”, “Bookings for my TCAs” and “Booking manager by event” menus in MyRC have the same header section. TCA events and the related partner applications are grouped into six categories per below (see Figure 377. Search bar in MyRC).

- **All:** all TCAs that have at least one partner application.
- **All pending:** all TCA that have at least one (organizing and/or sending) partner application to be evaluated (accept/deny) by the Host NA.
- **Pending organizing:** TCAs that have organizing partner application to be evaluated (accept/deny) by the Host NA.
- **Pending sending:** TCAs that have sending partner application to be evaluated (accept/deny) by the Host NA.
- **Managed:** upcoming TCAs without any pending partner applications.
- **Previous:** realized TCAs’ partner applications.

There is a search bar above each column, where it is possible to search by letters or full words.

You may also arrange data by arranging the columns by ascending or descending order by clicking on the double arrow icon next to the column name. At one time, only one column can be sorted by order, which is shown by a dark grey colour of the arrow. If you wish to modify the sort order, simply click on another arrow.



377. Search bar in MyRC partner managing menus

9.1. My Bookings

My Bookings means “My applications as sending partner”, other words the “Booked places” for TCAs (see Figure 388. *MyRC>>My Bookings*).

To view and manage “My Bookings” to TCAs organized by other NAs, go to the “MyRC” menu and click on “My Bookings” from the dropdown menu.

You cannot edit your organizing and/or sending partner application, as it is allowed to apply as partner once. If you need to modify your partner application, please contact the Host NA or SALTO E&T.

MyRC >> My Bookings

☒ All ☐ All pending ☐ Pending organizing ☐ Pending sending ☐ Managed ☐ Previous

show

Event	NA code	Apply as organizing partner?	Apply as sending partner? Booked places:	Accepted as organizing partner?	Accepted places:	Deadline of booking places	Budget year	Action
Showing and Identifying Impact of Erasmus+ on EU and National Level	HU01	Yes	1			2019-05-18	2019	Edit

388. MyRC>>My Bookings

Please note the difference between **Apply as partner** and **My Bookings** functionalities is that Apply as partner can be used for submitting new partner applications, while already submitted partner applications can be monitored in My bookings menu.

9.2. Bookings for my TCAs

As a Host, to view and manage “Bookings for my TCAs”, go to the “MyRC” menu and click on “Bookings for my TCAs”.

You may edit the “Accepted as organizing partner” and “Accepted places” data. To modify partner application(s), click on the [Edit](#) button (see Figure 399. *Using Bookings for my TCAs menu*).

MyRC >> Bookings for my TCAs

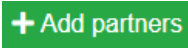
[+ Add partners](#)

☒ All ☐ All pending ☐ Pending organizing ☐ Pending sending ☐ Managed ☐ Previous

PW


Event	NA code	Apply as organizing partner?	Apply as sending partner? Booked places:	Accepted as organizing partner?	Accepted places:	Deadline of booking places	Budget year	Action
PW Test Title event	BE02	Yes	1			2019-01-20	2019	Edit
PW Test Title event	HU01	Yes	20	Yes	0	2019-01-20	2019	Edit
PW Test Title event	AT01	Yes	8	Yes	7	2019-01-20	2019	Edit

399. Using Bookings for my TCAs menu

If a Host NA wishes to submit new partner application to its TCA(s), it is possible by clicking on the  button.



9.3. Booking manager by event

Host NA can view and manage partner applications by TCAs in “Booking manager by event”, go to the “MyRC” menu and click on “Booking manager by event”.


By default, “All pending” TCAs are selected, as they need action from the Host NA; decision on organizing and/or sending partner applications. To open submitted applications for a TCA, click on the  button (see Figure 40. *Using Booking manager by event*).

MyRC >> Booking manager by event

☐ All
 ☒ All pending
 ☐ Pending organizing
 ☐ Pending sending
 ☐ Managed
 ☐ Previous

Title	Deadline of organizing partner application	Deadline of booking places	Start date	End date	Action
Contact Seminar on Developing e-Twinning KA2 projects for language development	2017-10-15	2018-09-03	2018-10-15	2018-10-18	
Test partner_21	2017-10-15	2019-01-11	2019-01-14	2019-01-17	

40. Using Booking manager by event

After selecting the  button, the following window will appear. See Figure 41. *Using Booking manager by event (2)*.

NA code: the applicant NA.

Apply as organizing partner: if the applicant NA applied as organizing partner, it shows “Yes”. If the NA only applied as sending partner, it shows “No”.

Apply as sending partner? Booked places: if the applicant NA applied as sending partner, it shows “Yes”. If the NA only applied as organizing partner, it shows “No”.

Accepted as organizing partner?: this column contains the latest accepted version by the Host NA. If the Host NA prefers to modify the data, can do it in the “New decision on organizing partner application” column.

Accepted places: this column contains the latest accepted version by the Host NA. If the Host NA prefers to modify the number of accepted places, can do it in the “New decision on accepted places” column.

Test partner_21


Deadline of booking places: 2019-01-11

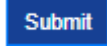
NA code	Apply as organizing partner?	Apply as sending partner?	Accepted as organizing partner?	Accepted places	New decision on organizing partner application	New decision on accepted places
AT01			Yes	0	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="text" value="0"/>
BE01		10	Yes	3	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="text" value="3"/>

Participants	Estimated	Accepted
	50	3
Free places	47	

411. Using Booking manager by event (2)


9.4. My Forms


Host NA user can create Application forms for the public in **MyRC >> My Forms** menu by clicking on the  button. (See Figure 422. MyRC>>My Forms; Add new form)


- To create a form, it is necessary to give a Form name.
- It is optional to include five additional questions.
- To finish creating the form, the Host NA user need to click on the blue  button.

National Agency* HU01 - Tempus Public Foundation your National Agency

Form name*

Please give a short summary of your professional background, interests and present role in your organization.*  Standard questions, can't be edited

What professional benefits do you hope to obtain from participating in this activity at personal level?*  Standard questions, can't be edited

What professional benefits do you hope to obtain from participating in this activity at institutional and higher levels? *  Standard questions, can't be edited

You may give an additional question (No. 1).

You may give an additional question (No. 2).

You may give an additional question (No. 3).

You may give an additional question (No. 4).

You may give an additional question (No. 5).

422. MyRC>>My Forms; Add new form

Forms can be *edited*, if it hasn't been set to the event yet.

Forms can only be *viewed* once its set to an event.

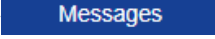
MyRC >> My Forms

<input type="button" value="+ New form"/>						
Form name	You may give an additional question (No. 1).	You may give an additional question (No. 2).	You may give an additional question (No. 3).	Edit	Delete	Duplicate
Ez a bemutató űrlap	Első kérdés	Második	És nincs több	<input type="button" value="View"/>		<input type="button" value="Duplicate"/>
Social Inclusion - equal opportunities	Why do you..?	How..?		<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	<input type="button" value="Duplicate"/>

433. MyRC>>My Forms; Editing forms

9.5. Sending participants

This menu appears, if your National Agency has pending/accepted booked places for the event on the salto-et.net page and **your agency has received at least one application.**

Once your NA has received a new application, you will receive a **system message** ( Messages menu) with the subject „**New received application**“. As usual, you receive an email notification of the new system message.

This menu shows applications per TCA. To view individual applications, click on the orange

 **Manage** button.


You may **open submitted applications** by clicking on the  icon under „Details“ column.

Your National Agency has to **categorize applications** into three categories by clicking on the relevant icon under the „Manage column.



Meanings of the icons:

 : recommended application

 : reserved application

 : rejected application















MyRC >> Sending participants


Event				Applications	Action
Anything International!?- Building the Foundation for International Mobility				2	
EuroApprentices Network Meeting "Go. Learn. Share"				2	

MyRC >> Sending participants

Anything International!?- Building the Foundation for International Mobility


Sending NA fills in

Title	First name	Last name	Details	Manage	Host decision
anettt		test		  	  
Edina		Applicant		  	  

 **Submit to Host** by the Deadline of confirmation, submission only once!

444. MyRC>>Sending participants

To **send a recommended list of participants** to the Host National Agency, click on the blue **Submit to Host** button **before the „Deadline of confirmation“**. Please note that you can **submit the list only once**. The Host NA will receive a system message of the submitted participant list.

With the  **Export** function, an Excel file will be exported to your computer's Download folder. It will include applicants Name, Email, Decision (accepted/pending), Event title and Event link.

9.6. Receiving participants

This menu appears, if your National Agency is hosting a TCA and **your agency has received at least one recommended list of participants from a sending NA**.

Once your NA has received a new list, you will receive a **system message** (**Messages** menu) with the subject „**Received list of participants**“. As usual, you get an email notification of the new system message.

This menu shows applications per TCA. To view individual applications, click on the orange



button.

You may **open submitted applications** by clicking on the  icon under „Details“ column.

Your National Agency has to **categorize applications** into three categories by clicking on the relevant icon under the „Manage column.

Meanings of the icons:



: accepted application





: reserved application







: rejected application

MyRC >> [Receiving participants](#)

Event	Applies	Action
Anything International!?- Building the Foundation for International Mobility	1	
EuroApprentices Network Meeting "Go. Learn. Share"	1	

MyRC >> [Receiving participants](#)

[Anything International!?- Building the Foundation for International Mobility](#)

Title	First name	Last name	Details	Send NA	Manage
	anettt	test		IE01	  



Only recommended participants info can be exported

Applicant and decisions by National Agency


Sending NA	Applicants	Rejected	Reserved	Accepted
IE01	1	0	0	0



by the Deadline of confirmation, can be done only one time!

455. MyRC>>Receiving participants

To **finalize the list of participants**, click on the blue **Finalize** button **before the „Deadline of confirmation“**. **Please note that you can finalize the list only once**. All Sending NAs will receive a system message of the finalized list of participants.

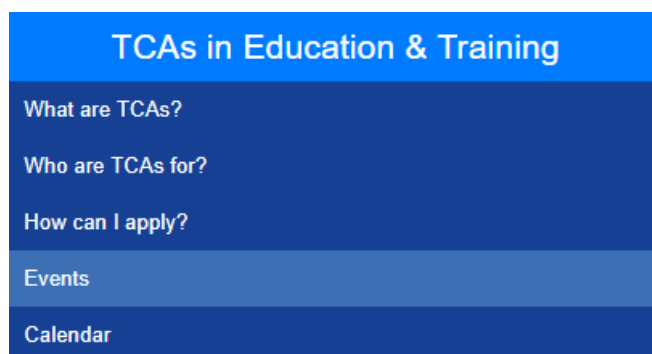
With the  function, an Excel file will be exported to your computer's Download folder. It will include Sending NA, applicants Name, Email, Decision (accepted), Event title and Event link.

10. Search activities

The user can filter and browse the activities in the **Events** and the **Calendar** section.

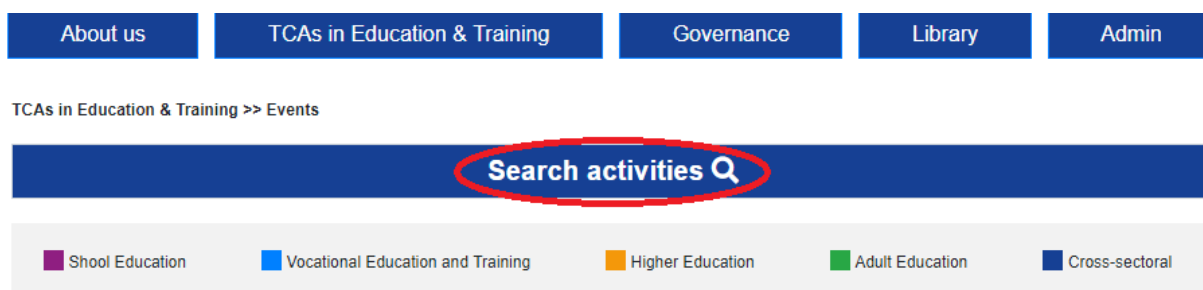
10.1. Events

After clicking on the **TCAs in Education & Training** menu and selecting **Events** button in the drop down list the user can search activities.



466. TCAs in Educations & Training menu

The user can search activities by different criteria, which can be displayed by click on the **Search activities** button (see Figure 477. *Search activities button*).



477. Search activities button

The user can add one or more criteria to filter. The result of the search will be visible after clicking on the **Search** button in the middle of the **Search activities** table. Please note that event search is filtered to Coming up events by default (for more info, see Figure 488. *Search and advanced search*).

On the page the number of the result will be visible (e.g. **>> 9 RESULTS FOUND**) and the events can be browsed. The results are displayed in ascending order based on their start date.

If there is no event matching the criteria, the **>> NO RESULTS FOUND** warning will be displayed.

The system remembers the selected criteria. If the user would like to restart the search, the searching table can be reset by clicking on the **Clear search criteria** button.

Search activities

Title	Theme	Profile
Sector	Priority	Type
	Choose...	Choose...
Country	Start	End
Choose...	dd/mm/yyyy	dd/mm/yyyy
Event status	Deadline of organizing partner application	Deadline of booking places
Choose...	dd/mm/yyyy	dd/mm/yyyy
Budget year		
	Search	Clear search criteria
Advanced search		
Hosting National Agency	Deadline of application	NA staff welcome
Choose...	dd/mm/yyyy	<input type="radio"/> Yes <input type="radio"/> No
Upcoming/Archived events		
Coming up		
	Search	

488. Search and advanced search

The **Advanced search** button is located under the **Search activities** table. By clicking on this button a drop down section with additional criteria will be visible (see Figure 488. Search and advanced search): **Host National Agency**, **Deadline of application** and **NA staff welcome**, **Upcoming/Archived events**.

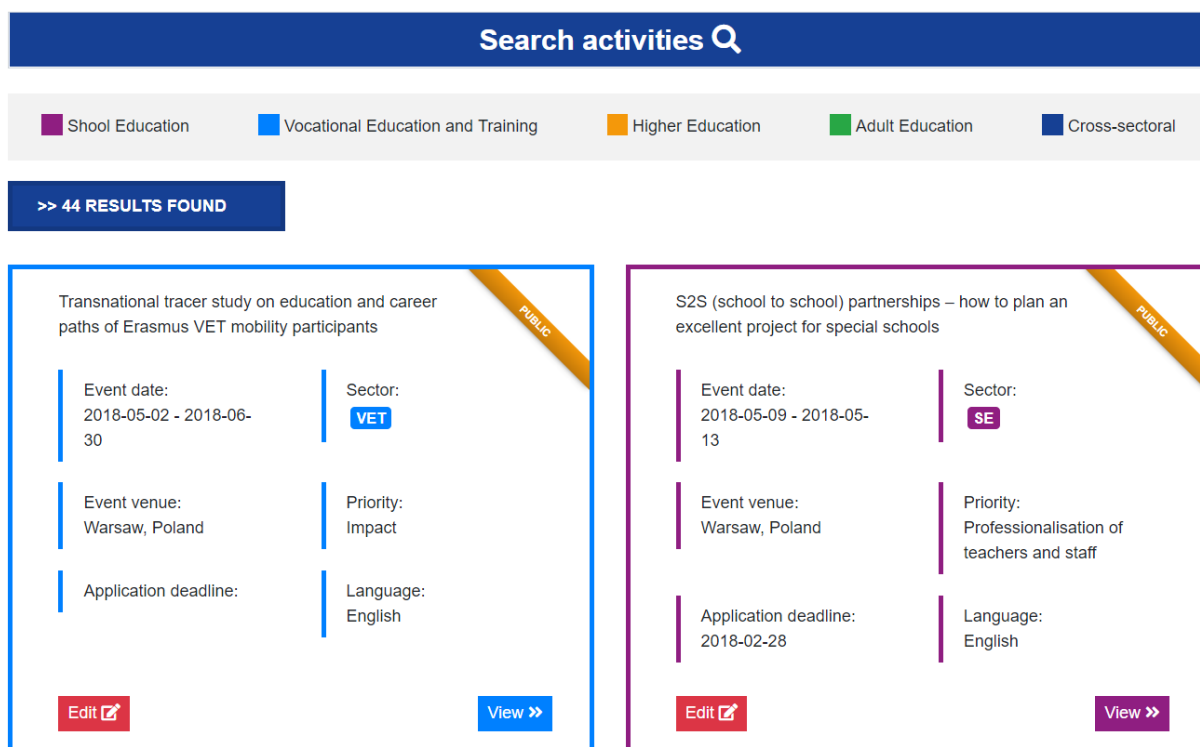
On the platform **upcoming events are listed as default**. If you wish to browse events by time, use the Advanced search function. At the Upcoming/Archived section, you may set a filter for three categories:

- Upcoming events
- Passed events
- All events.

Please note that search criteria are saved until leaving the page.

The frames of the event cards have different colours (see Figure 499. Event cards as search results) which indicates the sector of the activity (the notation is visible above the results). The event can have a flag, its colour indicates the status of the activity (Internal is *grey*; Partners welcome is *green*).

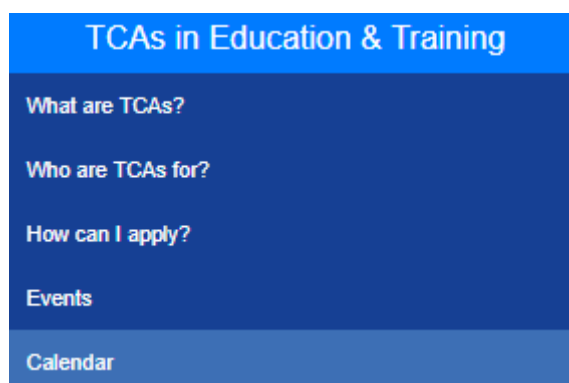
Relevant cross-sectoral events are listed as well when searching for a specific sector. To see which sectors are involved, please check the event card or the event page.



499. Event cards as search results

10.2. Calendar

After clicking on the **TCAs in Education & Training** menu and selecting **Calendar** button in the drop down list or by clicking on the **CALENDAR** button on the right side of the page the user can search activities.



50. Calendar menu

The user can search activities by different criteria, which can be displayed by click on the **Search activities** button (see Figure 477. *Search activities button*).

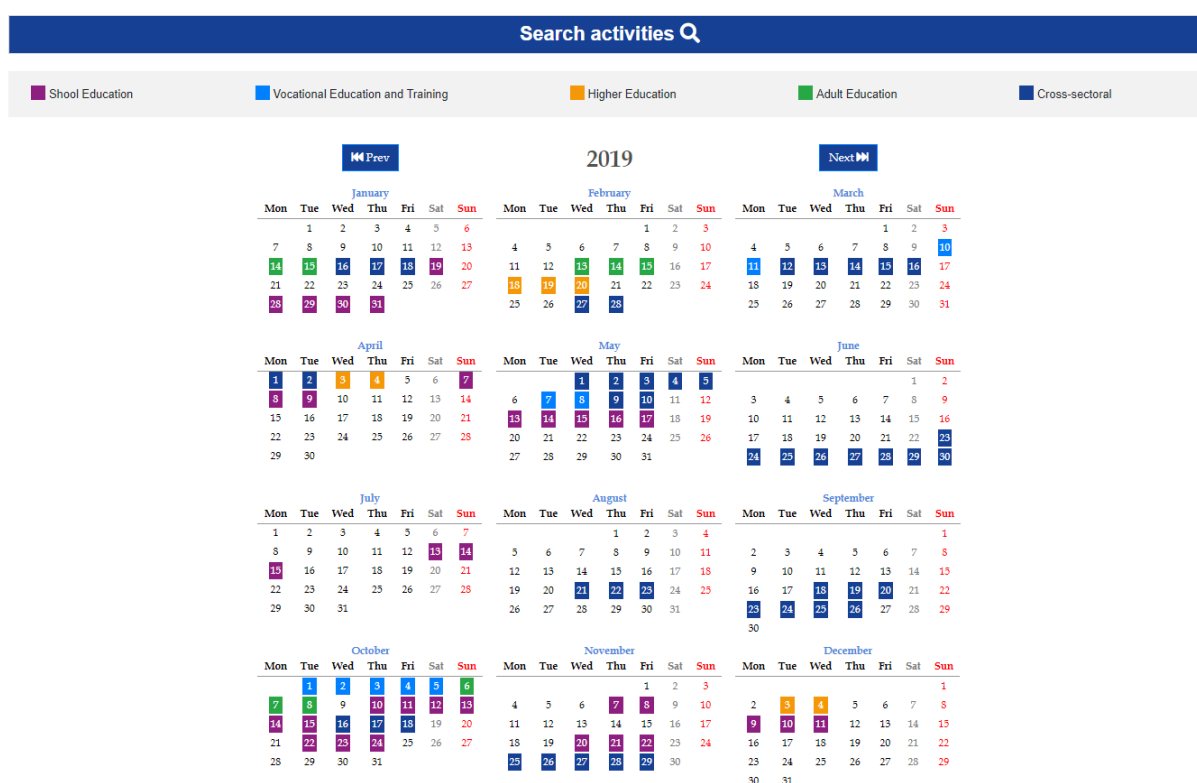
The user can add one or more criteria to filter. The result of the search will be visible after clicking on the **Search** button in the middle of the **Search activities** table.

The system remembers the selected criteria. If the user would like to restart the search, the searching table can be reset by clicking on the **Clear search criteria** button. See Figure 488. *Search and advanced search*.

The **Advanced search** button is located under the **Search activities** table. By clicking on this button a drop down section with additional criteria will be visible (see Figure 488. *Search and advanced search*): **Host National Agency**, **Deadline of application** and **NA staff welcome**.

On the page the actual year's calendar will be visible. Those days, which have an event, are marked with different colour (see Figure 51. *Calendar*) which indicates the sector of the activity (the notation is visible above the results). The system will mark those days, which have activities that are matching the set criteria. If there is no matching event, there won't be any coloured days in the calendar.

TCA's in Education & Training >> [Calendar](#)



51. Calendar

11. Frequently Asked Questions

11.1. Login and Profile

1. *I have been added as a new user but I can't login. What to do?*

If you have a question or trouble with the platform, please [contact](#) the SALTO E&T TCA Resource Centre.

2. *How can I upload a photo to my profile?*

This function is not available yet, development is in progress.

11.2. Roles

3. *Who is a "Partner"?*

Partner means organizing, co-organizing, co-hosting and sending NAs.

4. *Who is a "Sending partner"?*

NA who sends participant(s) to a TCA.

5. *Who is an "Organizing partner"?*

NA who is involved in organizing, coordinating or co-hosting tasks.

11.3. Search

6. *Where and how can I search TCAs?*

You can search in the [Events](#) or [Calendar](#) submenu. For more details, please see chapter 10. *Search activities*.

7. *Can I search by „Host National Agency“, „Deadline of application“ and „NA staff welcome“ criteria?*

Yes, you can. Please go to „TCAs in Education & Training“ menu, select „Events“ submenu and click on the grey „Advanced search“ button.

11.4. Calendar

8. *Which TCAs are included in the Calendar?*

For visitors, only public and realized TCAs are marked in the Calendar. TCAs with a duration longer than 7 days, are not presented in the Calendar.

For NA members (when logged in), their own NA's internal status TCAs, and all NAs' partners welcome status, public, realized and cancelled TCAs are marked in the Calendar.

11.5. Participation in TCAs

9. *When and how can a National Agency send participants to a TCA?*

NA can send participants to a TCA, if the Deadline of booking places hasn't expired.

The NA needs to click on the "Apply as partner" button and give the number of "Booked places" and finish the application by clicking on the "Submit" button.

10. *When and how can applicants send their application to TCAs via the platform?*

This function is live from 8 May 2019, they can submit their applications by clicking on the "Apply" button, after registering to the platform.

11.6. Edit TCAs

11. *How can I delete a TCA?*

Only SALTO E&T can remove duplicated TCAs. In case you wish to remove a duplicated event, please [contact](#) the SALTO E&T TCA Resource Centre.

12. *What to do with a cancelled TCA?*

If a TCA is cancelled, the event needs to be edited by changing its status to “Cancelled” and changing its WP phase to “Was not added to WP” or “Added to WP but cancelled”.

13. Will it be possible to export data from the events?

Yes, the exporting tool development is in progress. You will be able to export data to pdf and excel format.

At the moment, you can export data from MyRC >> [Sending participants](#) and MyRC >> [Receiving participants](#) menus.

11.7. Webinars, Guides & technical part

14. Where can I find the recording of the IT platform webinars?

You can find it in the “Library” menu, “[Platform documentary](#)” submenu.

15. Will there be other Guides?

Yes, we are sharing documents and news the whole year. Please see [Tools for TCA Officers](#) and see Library >> [News for NAs](#) for more information.

11.8. Communication & dissemination

16. Can I find a userlist of all registered NA members?

Yes, there is a dynamic userlist of all registered NA & SALTO users (Admin >> [NA & SALTO members](#)). It is possible to filter and arrange the userlist by sectors, NA group, first name, last name, email, SALTO WG membership and additional info.

17. Can I find a userlist of all registered applicants?

Yes, there is a dynamic userlist of all registered applicants in Admin >> [Registered applicants](#) menu.

18. Can we use the platform to announce other type of events for example eTwinning contact seminars? (Included in the eTwinning WP but not necessarily in the E+ WP.)

You can only upload the TCAs you are planning to add in your E+ WPs.

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