

# OMS Basic

## Scope

OMS basic is one of the main module of OMS, following functionality is covered by the OMS Basic module:

- user account management
- group management
- roles management

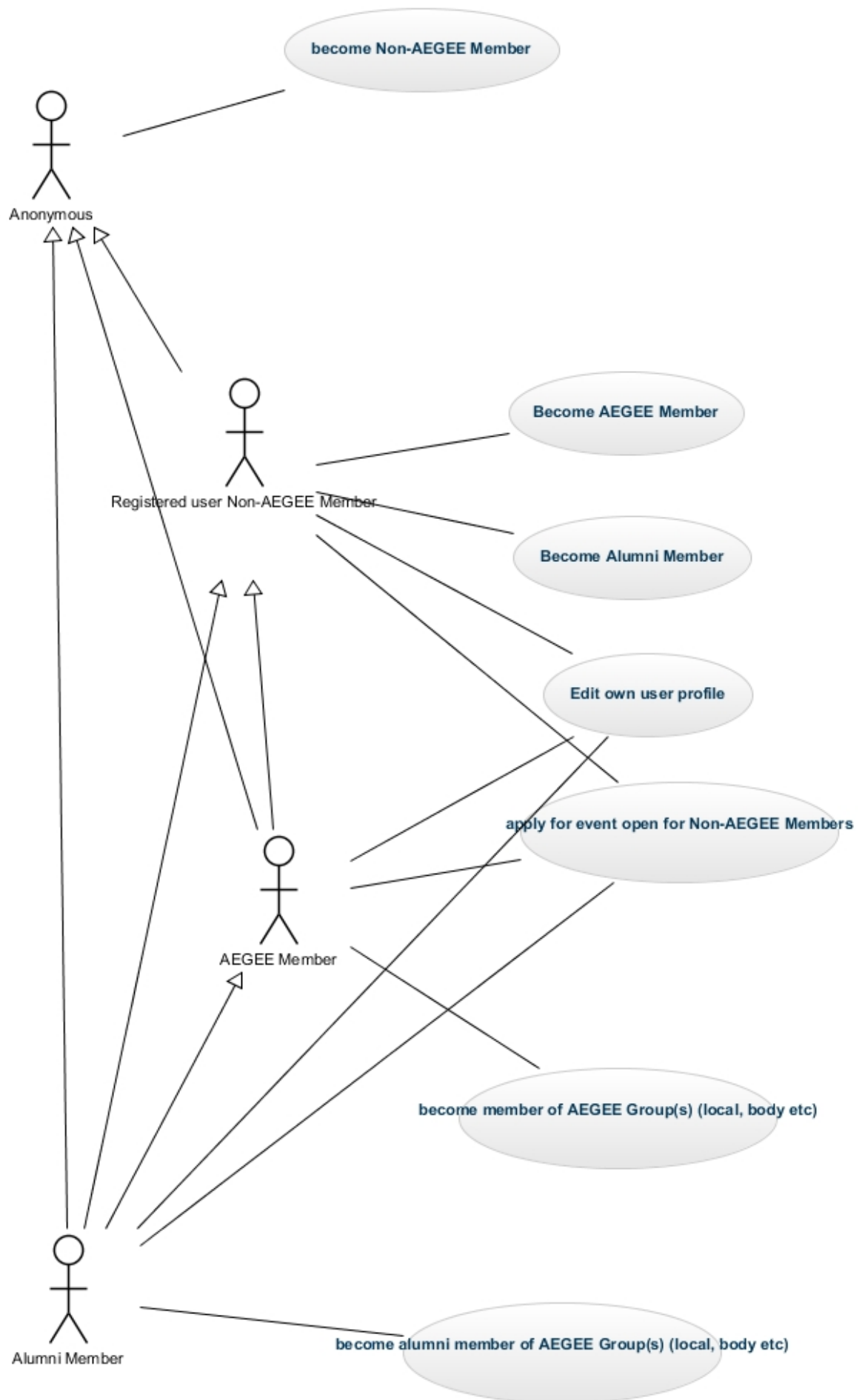
## Pre-requisite

## Data structure

Needs to be added

## Type of user

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## Global Types

### **Type 1: Anonymous**

view public content and register

available function:

- Read public content
  - list of locals and contact details
  - view list of events
  - view/download public documents
- Fill registration form
  - to become Non-AEGEE Member - registered user

### **Type 2: Registered user Non-AEGEE Member**

Using functions which are accessible by registered users and not exclusively for AEGEE Members

available function:

- Function of Type 1
- become AEGEE Member -> Local registration
- become Alumni Member -> Local Alumni registration
- Edit own user profile
- apply for event open for Non-AEGEE Members

### **Type 3: Registered user AEGEE Member**

use functionalities of OMS according to user role

available function:

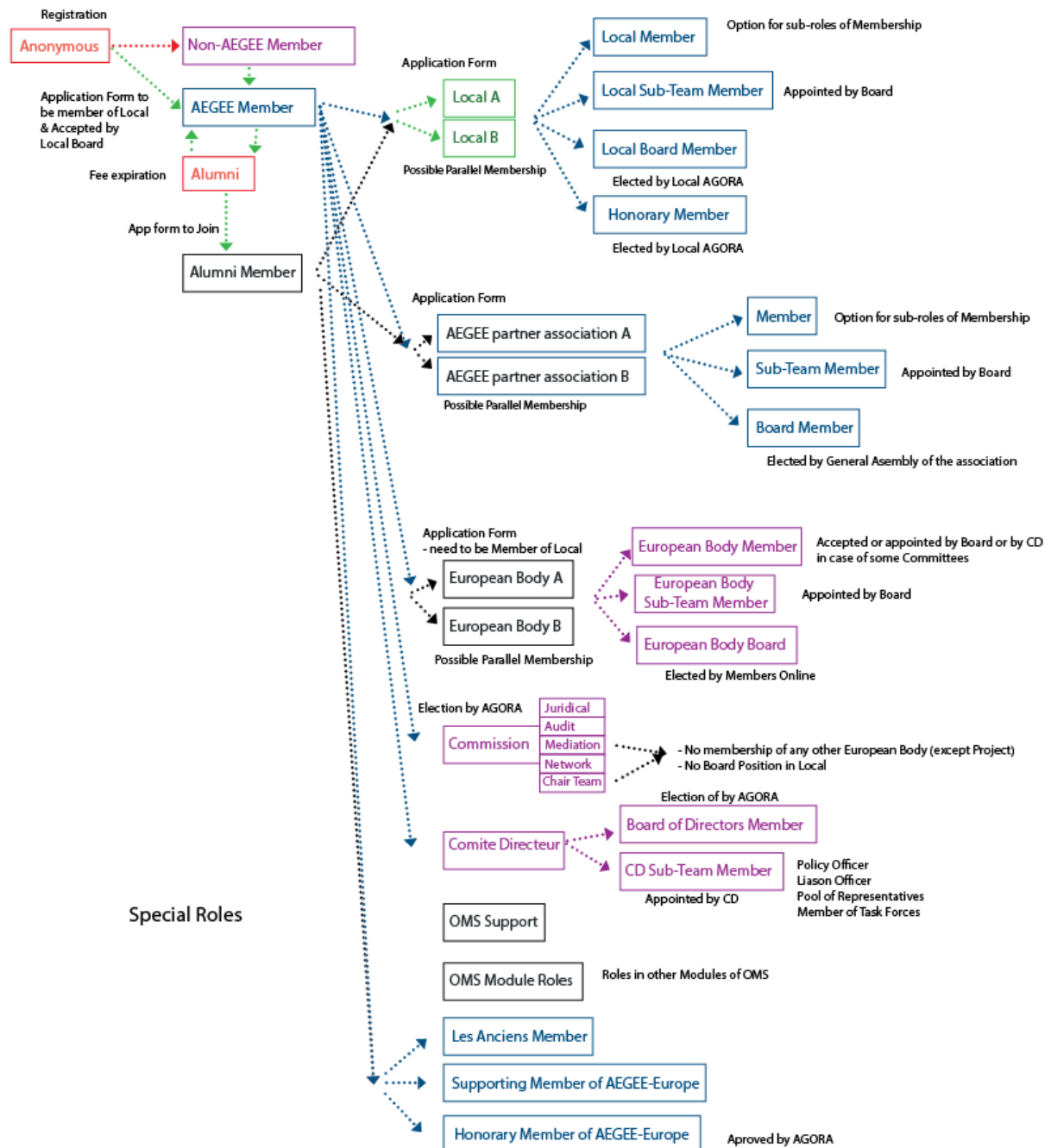
- Functions of Type 2
- become member of
  - Local - another local
  - AEGEE partner organisation
    - AEGEE Academy
  - European Body
  - Commission
  - Comite Directeur
  - OMS Support

### **Type 4: Alumni Member**

- Function of Type 1
- Edit own user profile
- apply for event open for Non-AEGEE Members
- use functionalities of OMS for Alumni members
- become Alumni Member

- Local - another local
- AEGEE partner organisation
- Les Anciens

## OMS User Roles and Groups



Roles for AEGEE Member and group roles

## Example

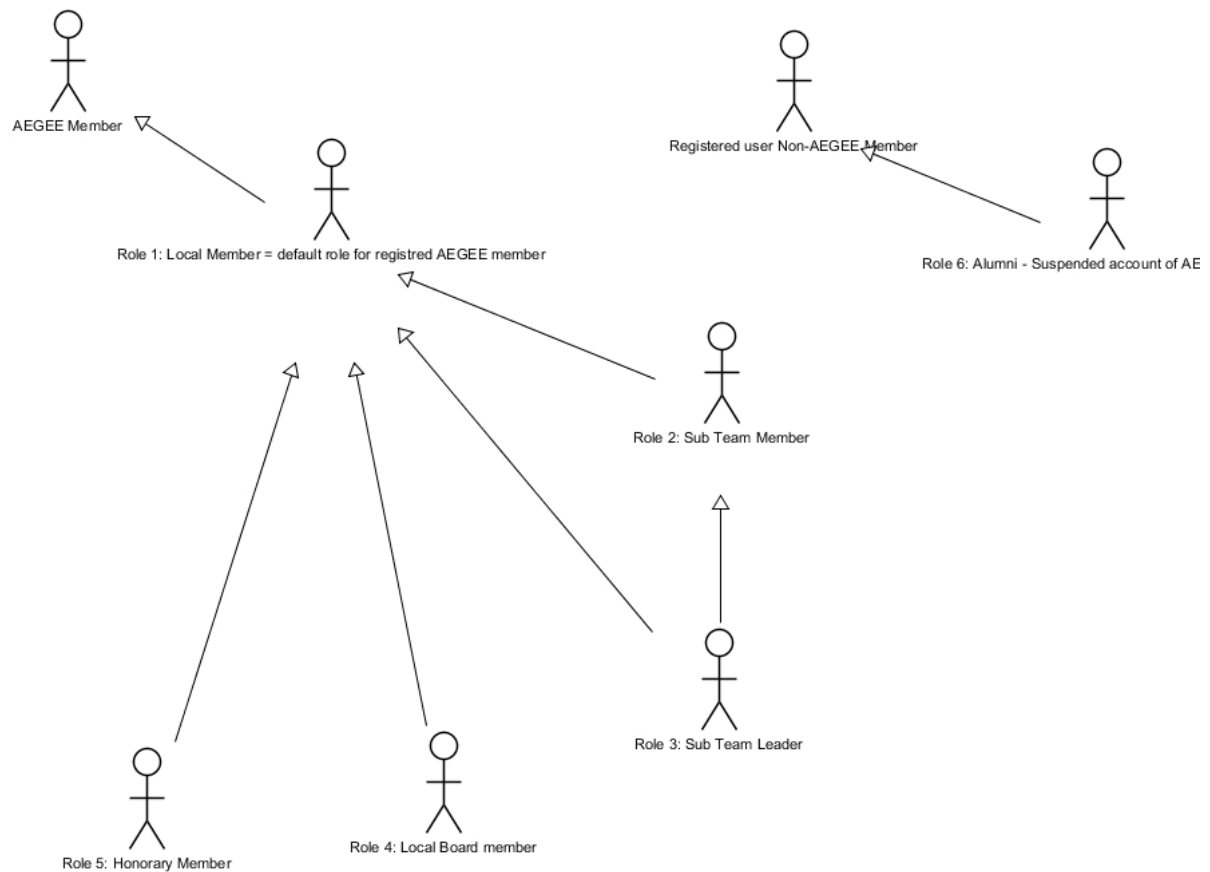
### User X

- AEGEE Member of
  - Local A
    - Role
      - Local Member
      - Board Member
  - Local B
    - Role
      - Local Member
      - Honorary Member
  - European Body A
    - Role
      - European Body Member
  - European Body B
    - Role
      - European Body Member
      - European Body Board Member

### User Y

- Alumni Member
  - Local C

### Member of AEGEE Local



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Role 1: Local Member = default role for registered AEGEE member

- Preconditions
  - Fee Status = paid
- functions
  - join Sub Team
  - edit profile info

Role 2: Sub Team Member

- Preconditions
  - user account has Role 1
- Functions
  - access sub teams details

Role 3: Sub Team Leader

- Preconditions
  - appointed by board member
  - user account has Role 1
- Functions
  - Edit Sub Team description
  - Add and Remove Sub Team members

- Suspend Sub team

#### Role 4: Local Board member

- Preconditions
  - Local Agora election of new board
    - Date of Local Agora
  - user account has Role 1
- Functions
  - View members info
  - View members list and export it
  - Add fee payment
  - Set/edit fee for subteams
  - Create/Edit Local Custom Questions for Member application form
  - Edit Members Welcome email
  - Create and Set Local Custom Roles
  - View applications to become member
  - Approve/Reject member application
  - Suspend members
  - Create Sub Team
  - Edit Sub Team description
  - Add and Remove Sub Team members
  - Suspend Sub team
  - Set dates of Local Agora and add new board members from these election
  - Add new Honorary Member(s) linked to date of Local Agora

#### Role 5: Honorary Member

- Preconditions
  - Local Agora election of new honorary member
    - Date of Local Agora
- same function as Local Member
- Can be considered as Sub Team without team leader

#### Role 6: Alumni - Suspended account of AEGEE member

- Preconditions
  - Fee status = not paid
- available function:
  - edit profile info
  - membership renewal
  - become member of Alumni

### **Member of AEGEE partner organisation**

#### Role 7: Member

- functions
  - join Sub Team

#### Role 8: Sub Team Member

- Functions
  - access sub teams details

Role 9: Sub Team Leader

- Functions
  - Edit Sub Team description
  - Add and Remove Sub Team members
  - Suspend Sub team

Role 10: Board member

- Functions
  - View members info
  - View members list and export it
  - Add fee payment
  - Set/edit fee for subteams
  - Create/Edit Custom Questions for Member application form
  - Edit Members Welcome email
  - Create and Set Custom Roles
  - View applications to become member
  - Approve/Reject member application
  - Suspend members
  - Create Sub Team
  - Edit Sub Team description
  - Add and Remove Sub Team members
  - Suspend Sub team

Role 11: Alumni - Suspended account of AEGEE member

- available function:
  - membership renewal
  - become member of Alumni

## **Member of European Body**

Role 12: European Body Member

- functions
  - join Sub Team

Role 13: European Body Sub Team Member

- Functions
  - access sub teams details

Role 14: European Body Sub Team Leader

- Functions
  - Edit Sub Team description
  - Add and Remove Sub Team members



- Suspend Sub team

Role 15: European Body Board member

■ Functions

- View members info
- View members list and export it
- Create/Edit Custom Questions for Member of the body application form
- Edit Members Welcome email
- View applications to become member
- Approve/Reject member application
- Create and Set Custom Roles for membership
- Suspend members
- Create Sub Team
- Edit Sub Team description
- Add and Remove Sub Team members
- Suspend Sub team
- Set dates of Board Elections and add new board members from these election -> should be linked with EL voting Module

## Member of Commission

Role 16: President/Speaker

○ Functions

- Manage its own members: Add. /Remove.
- Edit body info

- Automatically members of Speaker Team if exist

Role 17: Speaker Team Member - case of NetCom

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Role 18: General Member

- General Functions
- Specific Functions

Role 19: Member of Audit Commission

Role 20: Member of JC

- Functions
- Locals Elections check

Role 21: Member of NetCom

- View elections of local
- View members of local

Role 22: Member of MedCom

- Preconditions

- No Role Membership in
  - Local as
    - Local Board member
  - European Body
    - European Body Board member

Role 23: Member of Chair Team

- Preconditions
  - No Role Membership in
    - Local as
      - Local Board member
    - European Body
      - European Body Board member

### **Member of Comite Directeur**

Role 24: President

Role 25: Secretary General

Role 26: Treasurer

Role 27: General Board Member

Role 28: Assistant of Comite Directeur

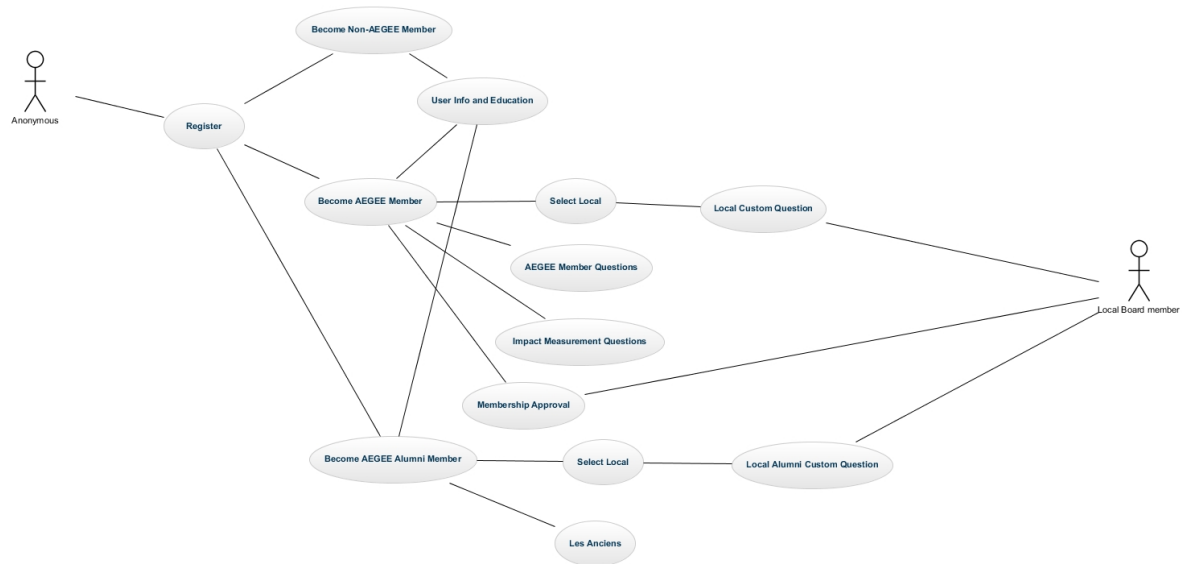
### **Member of OMS Support**

Role 29: Senior Administrator

Role 30: Junior Administrator

## **Use Case**

Account registration



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### Variant 1: Become an AEGEE member

Preconditions: none

1. WHEN user clicks "Create Account" and SELECT "Become AEGEE Member"
2. Page "Become AEGEE Member" is shown
3. User fill "User info and education form"
4. User SELECT Local from list and fill "New AEGEE Member form". this will lead to another page
5. Page with "Local Custom Questions form" is shown if exist - bord added them
6. Page is "Impact Measurement Questions form" is the last one.
7. Registration is finished and Two emails are sent:
  1. To the board to which the member has requested to become a member. This email will contain a link to confirm approval.
  2. To the member to inform him/her about his/her status: pending of approval by local board.
8. When the board confirms approval an email is sent to the new member to notify it.
  1. Template email + local content
9. Set Payment Expected and date 1 month from date of acceptance

### **Variant 2: Become an Non-AEGEE member**

Preconditions: none

1. WHEN user clicks "Create Account" and SELECT "Create only account in the system"
2. Page "Become Non-AEGEE Member" is shown
3. User fill "User info and education form"
4. Registration is finished and confirmation email is sent

### **Variant 3: Become an AEGEE Alumni member**

Preconditions: none ( be member of AEGEE in the past)

1. WHEN user clicks "Create Account" and SELECT "Become AEGEE Alumni Member"
2. Page "Become Alumni Member" is shown
3. User fill "User info and education form"
4. User SELECT Local from list and fill "New AEGEE Alumni Member form". this will lead to another page
5. Page with "Local Alumni Custom Questions form" is shown if exist - bord added them
6. Page "Impact Measurement Alumni Questions form" is the last one.
7. Registration is finished and Two emails are sent:
  - a. To the board to which the member has requested to become an Alumni member. This email will contain a link to confirm approval.
  - b. To the Alumni member to inform him/her about his/her status: pending of approval by local board.
8. When the board confirms approval an email is sent to the new Alumni member to notify it.
  - a. Template email + local content

### **Variant 4: Become a Les Anciens member**

Preconditions: none ( be member of AEGEE in the past)

1. WHEN user clicks "Create Account" and SELECT "Become AEGEE Alumni Member"
2. Page "Become Alumni Member" is shown
3. User fill "User info and education form"
4. User SELECT Les Anciens from list and fill "New Les Anciens Member form". this will lead to another page
5. Page with "Les Anciens Custom Questions form" is shown if exist - bord added them
6. Page "Impact Measurement Alumni Questions form" is the last one.
7. Registration is finished and Two emails are sent:
  - a. To the board to which the member has requested to become member. This email will contain a link to confirm approval.
  - b. To the member to inform him/her about his/her status: pending of approval by local board.
8. When the board confirms approval an email is sent to the new Alumni member

to notify it.

- a. Template email + local content

## Upgrade Account

### **Variant 1: Become AEGEE member from Non-AEGEE member**

Preconditions: User Type Non-AEGEE Member

1. WHEN user clicks "Become AEGEE Member"
2. Page "Become AEGEE Member" is shown
3. User SELECT Local from list and fill "New AEGEE Member form". this will lead to another page
4. Page with "Local Custom Questions form" is shown if exist - bord added them
5. Page is "Impact Measurement Questions form" is the last one.
6. Registration is finished and Two emails are sent:
  - a. To the board to which the member has requested to become a member. This email will contain a link to confirm approval.
  - b. To the member to inform him/her about his/her status: pending of approval by local board.
7. When the board confirms approval an email is sent to the new member to notify it.
  - a. Template email + local content
8. Set Payment Expected and date 1 month from date of acceptance

### **Variant 2: Become an AEGEE Alumni member from Non-AEGEE Member**

Preconditions: User Type Non-AEGEE Member ( be member of AEGEE in the past)

1. WHEN user clicks "Become AEGEE Alumni Member"
2. Page "Become Alumni Member" is shown
3. User SELECT Local from list and fill "New AEGEE Alumni Member form". this will lead to another page
4. Page with "Local Alumni Custom Questions form" is shown if exist - bord added them
5. Page "Impact Measurement Alumni Questions form" is the last one.
6. Registration is finished and Two emails are sent:
  - a. To the board to which the member has requested to become an Alumni member. This email will contain a link to confirm approval.
  - b. To the Alumni member to inform him/her about his/her status: pending of approval by local board.
7. When the board confirms approval an email is sent to the new Alumni member to notify it.
  - a. Template email + local content

### **Variant 3: Become a Les Anciens member from Non-AEGEE Member**

Preconditions: User Type Non-AEGEE Member ( be member of AEGEE in the past)

1. WHEN user clicks "Become AEGEE Alumni Member"
2. Page "Become Alumni Member" is shown
3. User SELECT Les Anciens from list and fill "New Les Anciens Member form". this will lead to another page

4. Page with "Les Anciens Custom Questions form" is shown if exist - bord added them
5. Page "Impact Measurement Alumni Questions form" is the last one.
6. Registration is finished and Two emails are sent:
  - a. To the board to which the member has requested to become member. This email will contain a link to confirm approval.
  - b. To the member to inform him/her about his/her status: pending of approval by local board.
7. When the board confirms approval an email is sent to the new Alumni member to notify it.
  - a. Template email + local content

## Suspend account of AEGEE Member

### Variant 1: Automatic suspension

Preconditions: User Type AEGEE Member & Fee Status = Not paid

1. When Fee Status = Not Paid (see Membership fee flow) for User Type AEGEE Member Role 1
2. Set User Role 6 = Alumni

### Variant 2: Suspension of member by Board Member via Suspend Form

Preconditions: User Type AEGEE Member Role Board Member

1. When Board Member clicks on "Suspend member(s)"
2. Suspend Member(s) page shows
3. Board member selects from list of active members person which wants to suspend - selection of several people is allowed
4. Board Member ads info in text box "Reason for suspension" - required
5. When text is present in text box "Reason for suspension" button "Suspend" is allowed
6. By clicking "Suspend" set User Role 6 = Alumni for selected accounts

### Variant 3: Suspension of member by Board Member in Members Profile

Preconditions: User Type AEGEE Member Role Board Member

## Recover own password

1. Provide E-Mail of registration
2. An email with a link to a page where the password can be changed is sent to his/her email.

## Recover user name

1. Provide email of registration
2. Email with the user name is sent to his/her email.

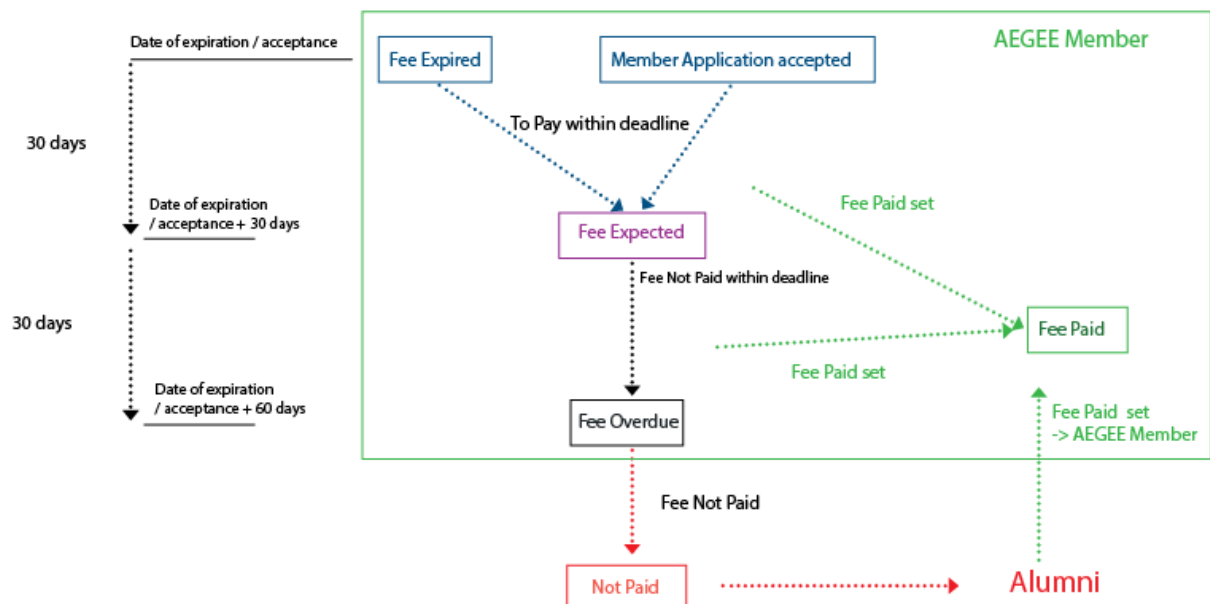
## Membership fee flow

1. Fee Status Payment Expected - Current Date < Date till when to pay
2. Fee is paid by cash or bank transfer
3. Fee status is set to Paid

**If Not**

- i. Payment Overdue – Current Date > Payment Expected < Payment Expected+30 days
- ii. Not paid – after one month, automatic expiration and setting role Alumni

## Membership Fee Flow



Content organizer  
Local organizer  
Participant  
Event creator  
Use case  
Event creation  
Event creation Functions  
Concept Note creation  
Concept Note listing  
Concept Note approval  
Concept Note to Event  
Event modification  
Event approval  
Event evaluation  
Application to event  
Application modification  
Application approval  
Application removal  
Notify applicant  
Evaluation submission  
Evaluation comment  
Evaluation reporting

## Specifications of OMS-basic Module

### General functionality

**OMS-basic is the core of the system. It basically needs to replace the aegee.org accounts that AEGEE used to have till summer 2009, the list of bodies including all data that was present of bodies in the old Address Book, provide a members management tool for locals, replace the working groups portal and access groups.**

The bodies are maintained by the CD. For that a team of people taking care of the data should be introduced. Next to the possibility for CD and ABC to modify and create bodies, also board members of the bodies will have the possibility to edit the data of the body.

**Every member will get only one single account** that is valid for all his/her memberships. All **memberships are linked to the account**. As long as there are



active memberships connected to an account, the person is considered AEGEE member, with the related access. The person can of course be a member of more than one local and have them both under the same account.

**New members can be added to the system by board members** of their local, or people can **apply themselves for membership**, after which **board approval is required**. **The members data is solely accessible by the local** to which the membership applies. It is up to the local to decide if only the board has access, or if all members have access to (part of) the data. **For Eurolevel bodies**, only **statistical data** is provided if their work requires this. **No access is available to the data of the members, except when required by CIA.**

**Board can define access groups**, and if only the board can edit them, or also people in the access group. Certain access groups will be compulsory, like the 'board' or 'SU-outgoing', others can be freely created.

**Logging of when a person logs in** and from where needs to be done to see which accounts are active, and to show the user when he did log in last.

**Password recovery functionality** is needed so people can recover their own passwords.

Local board should be able to **import and export data** from and to common formats. This provides them with possibilities to mass-import new members, as well as generating offline access to the data.

### **Functionality for different groups**

Below the required functionality of the system will be described for different groups of people. Each functionality is followed by a step-by-step structure suggested for implementation.

#### **Anonymous**

- Apply as member for a certain local:
  1. Fill in the "Apply as a New Member" formulary.
  2. There you select the body to which you want to belong. But you don't provide here any info for the body, just for your membership to aegee.org.
  3. In the second step a customized formulary appears. This formulary is made by the board of the body to which the new user apply.
  4. Lastly Impact Measurement Questions are shown.
  5. Two emails are sent:
    1. To the board to which the member has requested to become a member. This email will contain a link to confirm approval.
    2. To the member to inform him/her about his/her status: pending of approval by local board.
  6. When the board confirms approval an email is sent to the new member

to notify it.

- View list of all bodies and their contact information:
  - An index page in alphabetical order is showed at the beginning.
  - Search:
    - Filters by different topics are allowed:
    - Country:
      - Body
      - Year of foundation
      - ...
    - Key words search is allowed. The search not only looks for in antennae names but also in the public contact information.
- Recover own password:
  1. Provide:
    1. E-Mail of registration and date of birth or
    2. User name and date of birth.
    3. If none of this possibilities satisfies the supposed member he/she is asked to contact his/her board through the public list of bodies information.
  2. An email with a link to a page where the password can be changed is sent to his/her email.
- Recover user name:
  1. Provide email of registration and password. If none of this possibilities satisfies the supposed member he/she is asked to contact his/her board through the public list of bodies information.
  2. Email with the user name is sent to his/her email.

### **Members control panel**

All members have a common control panel. The different options are enabled (visible) or disabled (invisible) according to their characteristics.

To increase usability the listing of things, e.g. List of Members, must always have the options to set how long the list has to be paginated.

### **Non-confirmed members**

- Apply for SU (to prevent waiting for board approval of their newly created account):
  1. Only the SU Application form should be enabled in the control panel of this member. He/she must be informed before sending the application

that the application will not be processed to preselection unless a board member approves his/her membership before the deadline for approval of SU applications by boards.

- Apply to another body than he/she previously did while he/she is still a non-confirmed member.
- Cancel his/her pending membership application (to one body or all the bodies he/she applied).

### **AEGEE members**

- Data. Related options in "members control panel":
    - View profile.
    - Edit own data (possibly only after board approval).
  - List of members of own local (if enabled by board). Option to filter by board member, honorary, or other special conditions. Data of other members that can be shown are enabled by the board.
  - Send messages to other members (board can set that only is possible to board members).
  - Apply to WGs: a special formulary is provided for by each WG.
1. Customized application for each WG.
  2. Two emails are sent:
    1. To the board of the WG to which the member has requested to become a member. This email will contain a link to confirm approval.
    2. To the member to inform him/her about his/her status: pending of approval by the WG board.
  3. When the board of the WG confirms approval an email is sent to the new member to notify it.
    - Apply to other locals: special application formulary, only field "antennae" needed.
1. Two emails are sent:
    1. To the board to which the member has requested to become a member. This email will contain a link to confirm approval.
    2. To the member to inform him/her about his/her status: pending of approval by the board.
  2. When the board confirms approval an email is sent to the new member to notify it.

### **Local boards**

- Own body information:
  - View data.
  - Edit data. Stacked fields: antennae name, past organized events.
- Adding, editing, archiving members. The local board has the option to enter in the section "Edit Profile" of the member to edit everything that is related to the body.
- Mass import. From common formats: .xls, .ods, .csv, .txt.
- Export of data into common formats for offline use: .pdf, .xls, .ods, .csv, .txt.
- Changing member status (applicant, member, former member, alumni, honorary).
  - An explanation of each status has to be provided to avoid mistakes:
    - Conceptual explanation. E.g. difference between former member and alumni.
    - Technical explanation: what options and privileges will have each member status in the OMS. E.g. different privilege options that a member and an alumni can have.
  - The board can:
    - Approve.
    - Reject.
    - Delete applicants rejected (delete the history of rejected applicants).
- Contacting members (mass e-mail, also HTML allowed). Send to:
  - All.
  - Board.
  - Access group.
  - Filtered search.
- Create and edit their own "new member formulary".
- Create/edit access groups:
  - Create.
  - Modify.
  - Delete.
  - Add members.
  - Delete members.

- Send mass e-mail.
  - Search members:
    - Filters by different topics are allowed:
      - Members of a concrete access group.
      - Members of a WG or project.
      - Year of birth.
      - Date of joining.
      - Studies.
      - Events attended.
      - Events applied.
      - ...
    - Key words search is allowed. The search not only looks for in members names but also in all their data.
  - Recover passwords for people being only member of that body (and not for other bodies as well).
1. Search for the member.
  2. Send email to the member containing a link to change the password.

### **European boards (WGs, projects, committees)**

- Own body information:
  - View data.
  - Edit data. Stacked fields: WG name, past organized events.
- Application formulary to the WG:
  - Create
  - Edit
- Adding a member by the WG:
  1. Search for a member in the whole network.
  2. Add as a member (member have to approve this adhesion).
- Applicants management:
  - Approve.
  - Reject.
  - Delete applicants rejected.

- Cancel membership of person for own body.
- Editing personal data of members (stored inside the body).
- Contacting members (mass e-mail):
  - Send to:
    - All.
    - Board.
    - Access group.
    - Filtered search.
- Create/edit access groups.
- Search members/label printing:
  - Filters by different topics are allowed:
    - Subscribed to a concrete mailing list.
    - Members of a concrete access group.
    - Year of birth.
    - Date of joining.
    - Studies.
    - Events attended.
    - Events applied.
    - ...

### **Specific access rights -in addition**

#### **Quality Assurance Committee**

- Create/edit event concept and description.
- View all event sub-pages

#### **Summer University Coordination Team**

- Create/edit event concept and description.
- View all event sub-pages

#### **Information Technology Committee**

#### **Chair Team**

- Create statutory event.

- View all event sub-pages

## **Commissions**

These apply for all commissions:

- Edit own body information.
- Manage its own members:
  - Add.
  - Remove.

Also commissions must be consulted to add special or concrete functionalities.

## **Audit**

- Autocollect and check of financial reports of AEGEE locals.

## **JC**

- Check membership status and duration (one by one, by name).
- Check nationalities for candidates.
- Check "AEGEE CV" of candidates.
- Check boards of locals (to see if board is complete).
- Overview about elections status (when did the respective local/WG had elections and who was elected there)
- Automatic checking of requirements for CIA compliance of locals. This operation has to process a huge amount of data so it must be queued and the JC can consult the result after some minutes or, if the server has not a big amount of load, in few seconds.

## **NetCom**

- Notification of board changes in locals (with contact data of old and new boards).
- Automatic checking of requirements for CIA compliance of locals. (activity reports, activity plans, board announcements, organisation of event once per year, board elections once a year)

## **MedCom**

- (information gathered by other commissions)

## **Comite Directeur (CD)**

- Edit own body information.
- Print address labels of bodies.

- Statistics on locals and members (e.g. nr. of members of a single local).
- Autocollect number of members per local and calculate money that locals have to pay to AEGEE-Europe according to each concrete membership fee.
- Autocollect number of applications for SU per local and calculate money that locals have to pay to AEGEE-Europe according to size of application fee in CIA.
- Advanced mass mailing (to all boards, or members who want to receive certain information).
- Headhunting: search in personal data and send message to search results (only if person agrees to this).
- Notification of board changes in locals and WGs (with contact data of old and new boards).
- Checking membership status of certain person.
- Create new bodies.

### **OMS Support**

- Have access to all the information of the local bodies.
- Can set members as board members of a body in case all board members of this body are unapproachable.
- Manage bodies:
  - Create.
  - Edit.
- Edit personal data of any person in the OMS.
- Edit the belonging of any person to any body or access group.

## **Added Specifications**

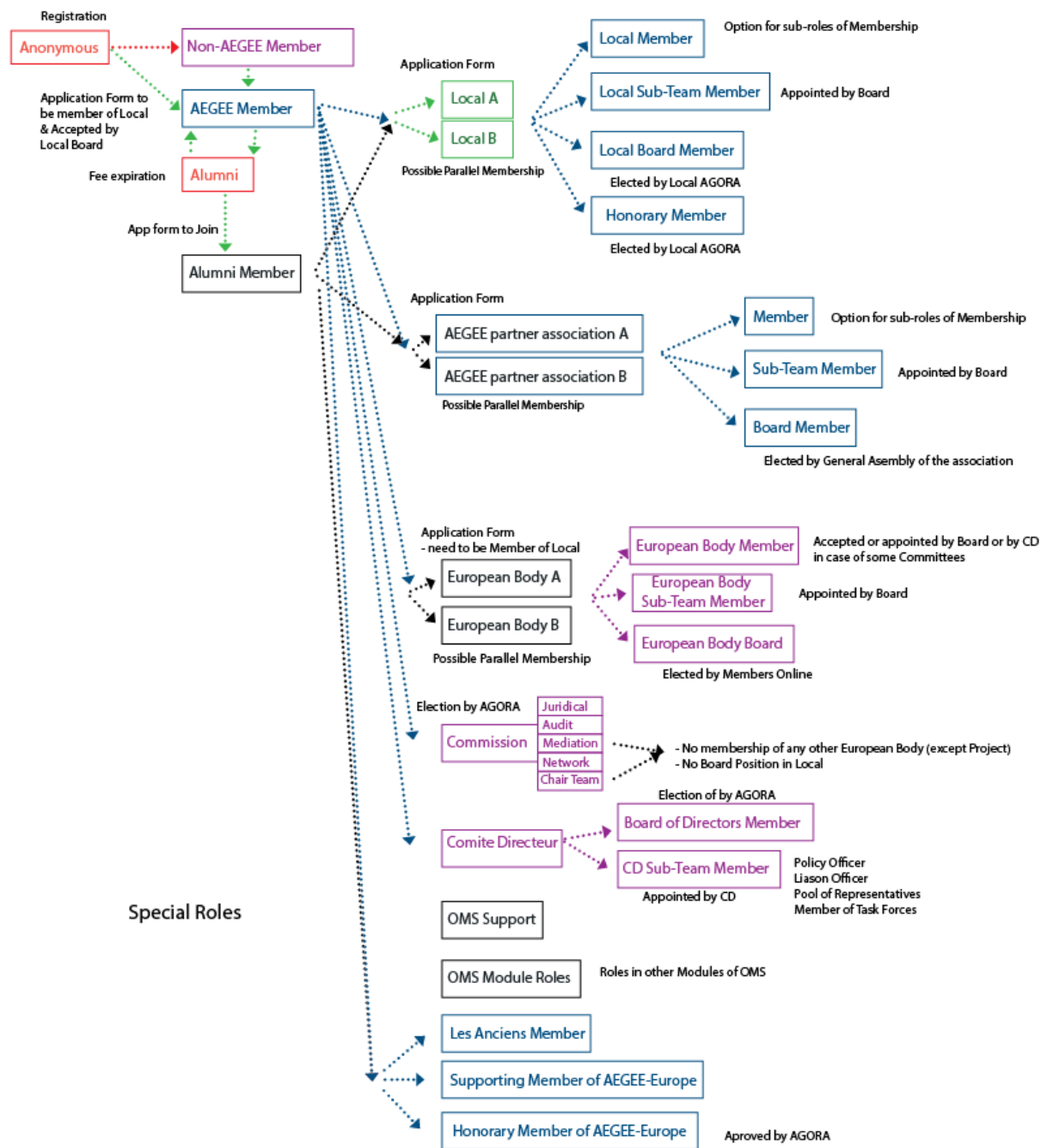
### **Type of Bodies in OMS Core**

- o Contact of AEGEE-Europe
- o AEGEE Local
- o Commission
- o Committee
- o Working Group
- o Project
- o Comité Directeur
  - CD Sub Team
    - Have special status
    - Policy officers, Liaison Officers, Pool of Representatives etc.
- o AEGEE Partner Organisation
- o OMS Support
- o Supporting Member of AEGEE-Europe



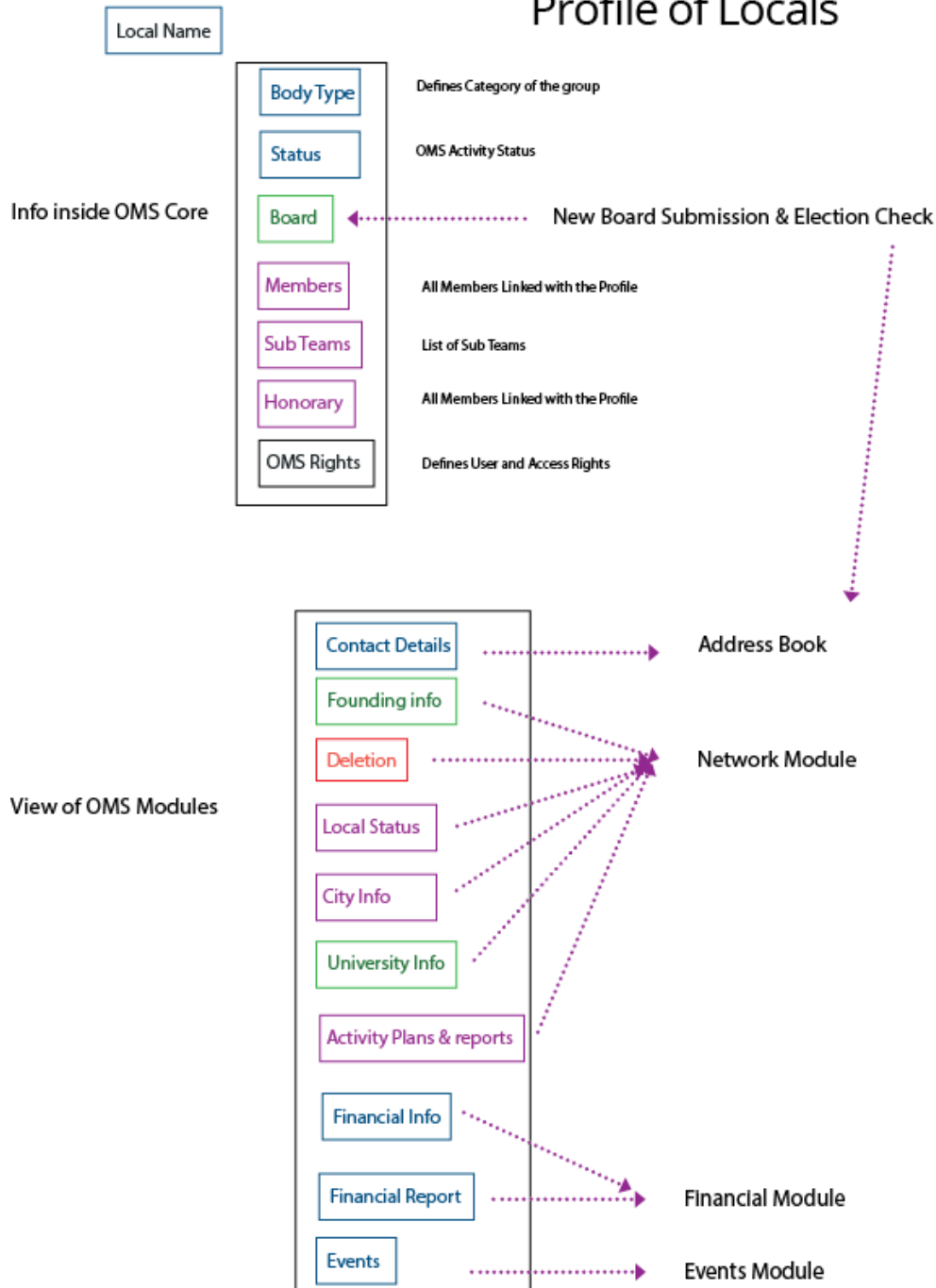
o Honorary Member of AEGEE-Europe

## OMS User Roles and Groups



## AEGEE Local Profile

# Profile of Locals

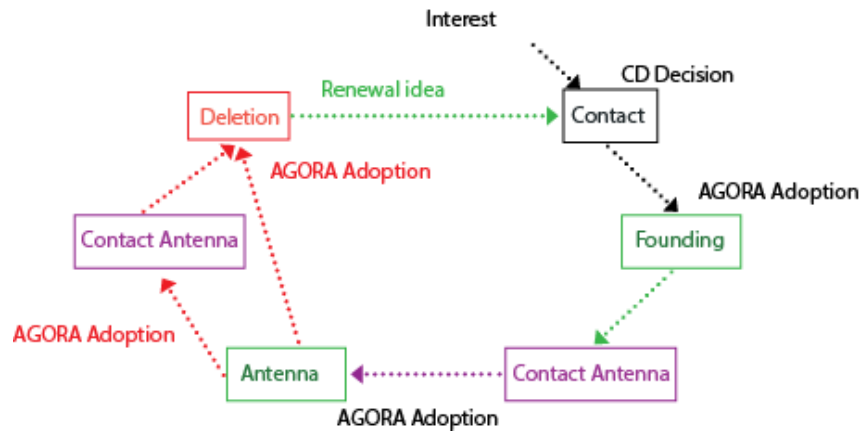


- Local Name - (without AEGEE-)
  - o Name
  - o BodyCode
- Type of Body
  - o Contact of AEGEE-Europe
  - o AEGEE Local
- Status
  - o Active
  - o Suspended
- OMS Access Rights – defines Global user roles for All OMS Module
  - o Rights

- View
  - Edit
  - Delete
- o Module – List of Modules
  - List of Items and actions in the module
- o Group Rights
  - Board
  - Sub Team
  - Member
  - Honorary
- Contact Details
  - o City
    - Name – Text Box
    - GPS
  - o Country –list of countries
  - o Email
  - o Phone
  - o Fax
  - o VoIP
  - o Website
  - o Social Media
    - Facebook
      - Page
      - Profile
    - Twitter
    - Foursquare
  - o Office
    - No
      - Personal Address for General mailing
        - o Address
        - o ZIP
        - o City –prefilled based on local city
        - o Country -prefilled based on local city
    - Yes
      - Address
      - City –prefilled based on local city
      - ZIP
      - Country -prefilled based on local city
      - Room Number
      - Opening Hours
  - o Social Meeting
    - No
    - Yes
      - Location
      - Days and Hours
      - Remarks
- Founding –
  - several founding items possible, newest item is the valid one,
  - if deletion date < founding -> current local ELSE -> former local

- o Contact Establishment
  - Date
  - CD Decision – reference
- o Local Founding
  - Date
  - Signing at
    - Agora – link to Events Module list of all Agorae
    - NWM - link to Events Module list of all Agorae
    - Other – text box
  - Comments - text box
  - CdA - link to Documents Module
    - Doc of the contract
    - Scanned contract
- Deletion – several deletions items possible, newest item is the valid one
  - o Date
  - o Deletion at
    - Agora – link to Events Module list of all Agorae
    - Other – text box
  - o Comments - text box
- Statutes – several items can exist, newest is the valid one. Shared with JC Module
  - o Date – automatic date of JC approval
  - o Document - link to Document store
  - o Approved by JC – link to JC Module
    - Yes
      - Item with Status Valid set Status-> Outdated
      - Submitted item set Status-> Valid
    - No
  - o Status – automatic statuses based on JC Approval
    - Valid
    - Submitted to JC – when submitted
    - Outdated
- Local Status – several items exists, read from Network Module
  - o Status
    - Contact
    - Contact Antenna
    - Antenna
    - Deleted

# Local Life Cycle



- o Status change – List previous statuses between periods
- o Period – reads from Event Module
  - Period definition
    - Previous Agora – Upcoming Agora
- o Antenna Criteria reads Network module
  - Fulfilment: X/Y
  - Details – view on demand
    - List of criteria's and status of each
- Netcom
  - o Link to responsible NetCom for this local
- Financial Info
  - o Fee
    - Currency and Size
      - European Currency list
      - Number double digit
      - If not EUR, convert to EUR and show
    - Date of Change
  - o Bank Account
    - Exist
      - No
        - o Explanation – text box
      - Yes
        - o Account Holder
        - o Bank
          - Name
          - Address
        - o IBAN
        - o SWIFT/BIC
- o Board
  - Positions
    - President
      - o Name - link to user profile
    - Secretary
      - o Name - link to user profile

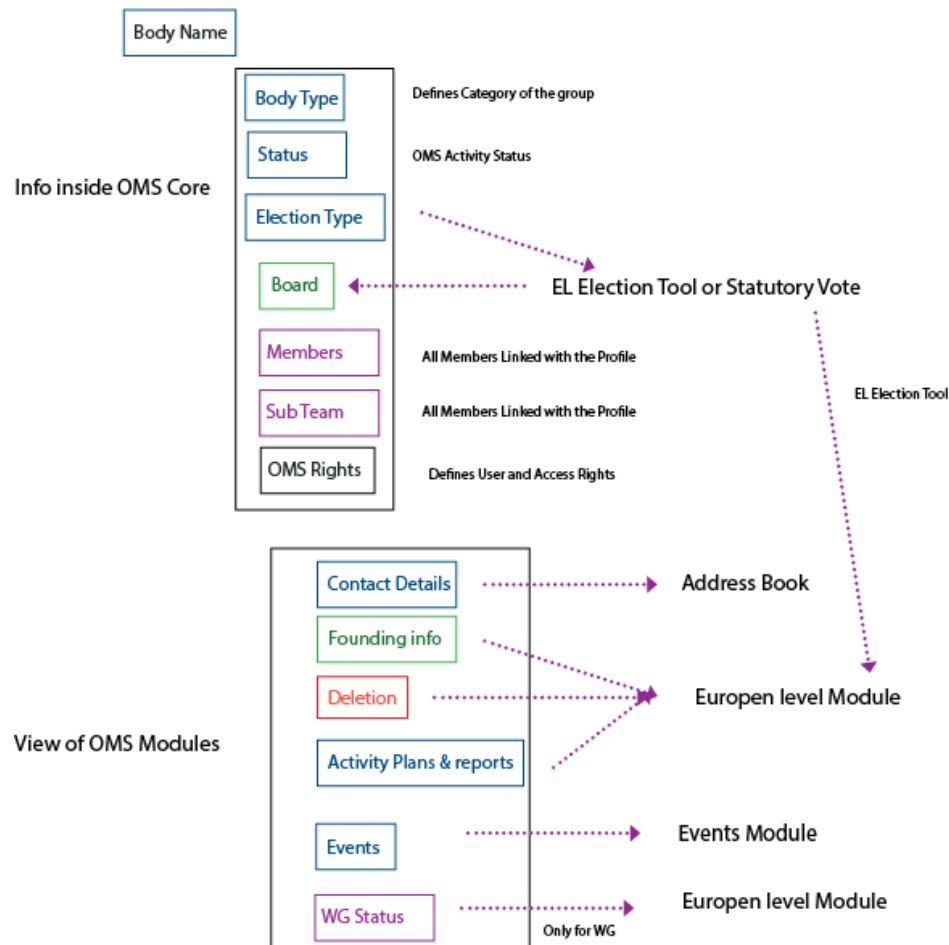
- Treasurer
    - o Name - link to user profile
  - Other Board Members – option to add up to 10 items
    - o Position name
      - Text Box
    - o Name - link to user profile
  - Board Period – Link to Network Module
    - From – Election date
    - Till – Check of date for next election
  - Number of Members
    - Count of members from same group if membership fee expiration is in future
- o Events Organised
  - Event Name
  - Dates
  - Number of Pax
  - Evaluation ranking
- o City Info
  - Population
  - Official languages of the city
  - Number of students in the city
  - Universities in the city
    - Full Name
    - Website
    - Total number of students
    - Percentage of foreign student (0-100)
    - Fields of Study
      - o List of fields based on [http://en.wikipedia.org/wiki/List\\_of\\_academic\\_disciplines\\_and\\_sub-disciplines](http://en.wikipedia.org/wiki/List_of_academic_disciplines_and_sub-disciplines)
    - Compulsory additional activities to the curriculum
    - Bologna process
      - o Yes
      - o No
      - o Comments
    - Cooperation
      - o No cooperation
      - o They know about us
      - o Good cooperation
      - o Co-organisation of events
    - Support to the local
      - o Own office
      - o Shared office
      - o Free Printing
      - o Free mail
      - o Free telephone calls
      - o Direct Financial Support
      - o Grants for students organisation (project support)
      - o No support

- o Other
- o Student life
  - International student associations Present
    - Matrix
      - o Top row
        - Does not exist
        - Exist but no cooperation
        - Exist and we cooperate a bit
        - Exist and we cooperate a bit
        - Exist and we compete against each other
      - o Column
        - AIESEC - International Association of Students in Economic and Commercial Sciences
        - BEST - Board of European Students of Technology
        - EESTEC - Electrical Engineering Students' European Association
        - ELSA - European Law Students' Association
        - EMSA - European Medical Students' Association
        - ESN - Erasmus Student Network
        - ESTIEM - European Students of Industrial Engineering and Management
        - EYP - European Youth Press
        - IAESTE - International Association for the Exchange of Students for Technical Experience
        - IFMSA - International Federation of Medical Students' Associations
        - JADE - European Confederation of Junior Enterprises
        - JEF - Young European Federalists
        - Other
          - Text Field
  - Erasmus Responsible
    - Yes, we are recognised by university as provider of services for Erasmus students
    - 
    - Yes, we sometimes organise activities for Erasmus students
    - 
    - Yes, but we only organise parties for Erasmus students
    - 
    - Not any more, we were responsible for Erasmus students in the past
    - No
  - Events for students by university/student council
    - Top Row

- o Doesn't exist
- o Exist, we don't take part
- o Exist, we participate in
- o Exist, we coorganise it with university/student council
- o Exist, we organise it
- Column
  - o Recruitment week
  - o Job fair
  - o International week
  - o Music festival
  - o Other

## European Body Profile

### Profile of European Bodies



- Body Name
  - o Name
  - o BodyCode
- Type of Body
  - o Commission



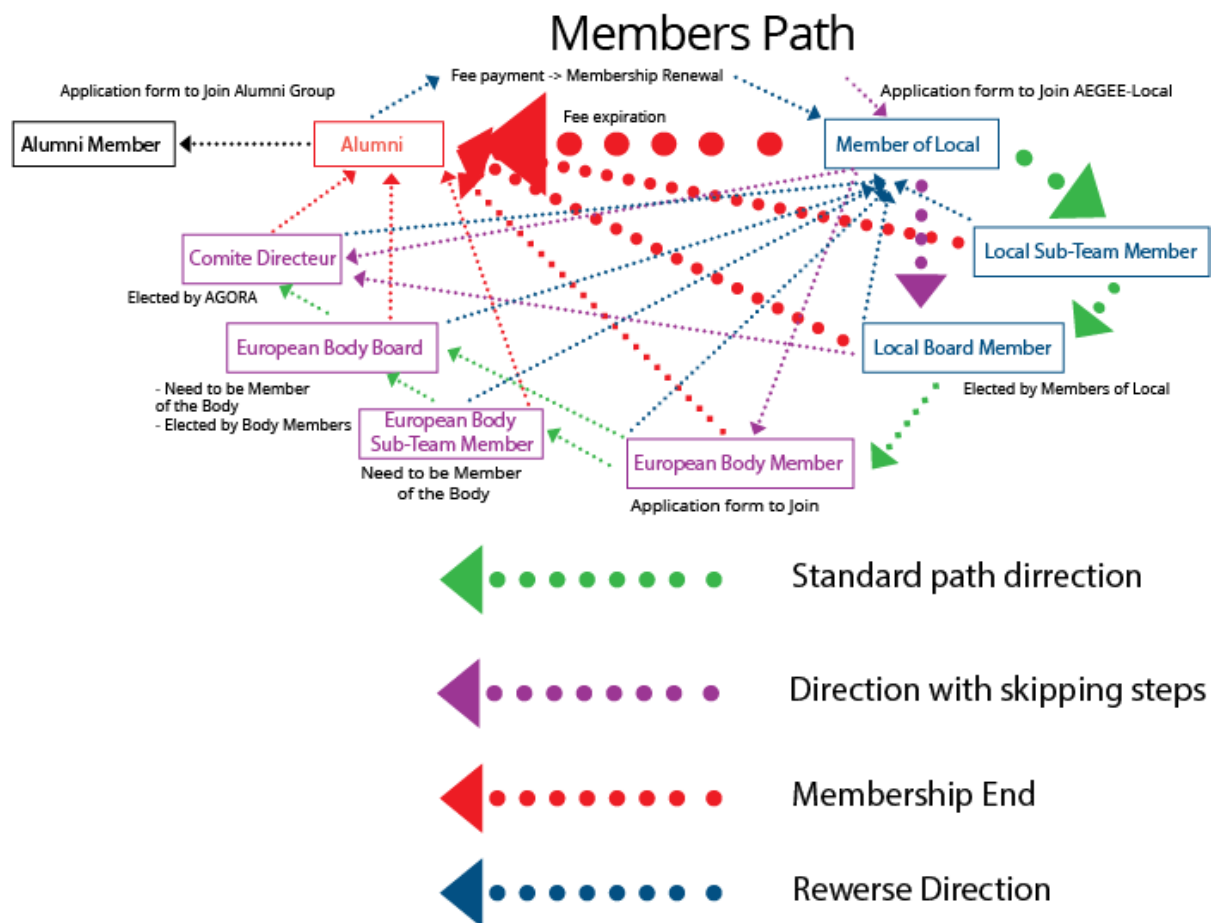
- o Committee
  - o Working Group
  - o Project
  - o Comité Directeur
    - CD Sub Team
      - Have special status
      - Policy officers, Liaison Officers, Pool of Representatives etc.
  - o AEGEE Partner Organisation
- Status
  - o Active
  - o Suspended
- OMS Access Rights – defines Global user roles for All OMS Module
  - o Rights
    - View
    - Edit
    - Delete
  - o Module – List of Modules
    - List of Items and actions in the module
  - o Group Rights
    - Board
    - Sub Team
    - Member
- Contact Details
  - o Email
  - o Website
  - o Social Media
    - Facebook
      - Page
      - Profile
    - Twitter
- Founding –
  - several founding items possible, newest item is the valid one,
  - if deletion date < founding -> current local ELSE -> former local
  - Creation – for all bodies except AEGEE partner association and commissions
    - Date
    - CD Decision – reference
    - Agora Ratification – list of Agorae
  - AEGEE partner association
    - Date
    - CdA Signing at
      - o Agora – link to Events Module list of all Agorae
      - o Other – text box
    - Comments - text box
    - CdA - link to Documents Module
      - o Doc of the contract
      - o Scanned contract
  - Commissions

- Agora
    - o Agora – link to Events Module list of all Agorae
    - o Other – text box
  - Comments - text box
- Deletion – several deletions items possible, newest item is the valid one
  - o Date
  - o Deletion at
    - Agora – link to Events Module list of all Agorae
    - Other – text box
  - o Comments - text box
- Working Format or Statutes – several items can exist, newest is the valid one. Shared with JC Module
  - o Date – automatic date of JC approval
  - o Document - link to Document store
  - o Approved by JC – link to JC Module
    - Yes
      - Item with Status Valid set Status-> Outdated
      - Submitted item set Status-> Valid
    - No
  - o Status – automatic statuses based on JC Approval
    - Valid
    - Submitted to JC – when submitted
    - Outdated
- Working Group Status – several items exists, read from EL Module
  - o Status
    - Working Group
    - AEGEE Working Group
    - Deleted
  - o Status change – List previous statuses between periods
  - o Period – reads from Event Module
    - Period definition
      - Previous Agora – Upcoming Agora
  - o WG Criteria reads EL module
    - Fulfilment: X/Y
    - Details – view on demand
      - List of criteria's and status of each
  - o Board
    - Election Type –pre-defines for each body
      - By members of the body
        - o Standard setting
      - Appointed by CD
      - Elected by Agora
        - o Commissions
        - o SUCT
      - Elected by General Assembly of the body
        - o AEGEE Partner Organisations
    - Based on Group Type
      - Working Group
        - o Positions

- Speaker
    - Name - link to user profile
  - Secretary
    - Name - link to user profile
  - Human Resources Responsible
    - Name - link to user profile
  - Public Relations Responsible
    - Name - link to user profile
- Committee
  - Speaker
    - Name - link to user profile
  - Vice Speaker
    - Number of Vice Speakers
      - o Name - link to user profile
      - o Name - link to user profile
      - o ...
- Project – Core Team
  - o Project Manager
    - Name - link to user profile
  - o Other Core Team Members – option to add up to 10 items
    - Position name
      - Text Box
    - Name - link to user profile
- Commissions - elected members are considered in OMS as board members
  - o Positions Defined by JC Module
    - Name - link to user profile
- Board Period – Link to EL Election Module
  - From –
    - o Election date
    - o Agora Election Date – list from Statuary Vote
  - Till –
    - o Date for next election
    - o Autumn Agora Date for WG
    - o End of Mandate linked with Agora
      - list from Statuary Vote
- o Membership
  - Sub Teams
  - Number of Members
    - Count of members from same group
- o Events Organised
  - Event Name
  - Dates
  - Number of Pax
  - Evaluation ranking

## User Profile

- Name
- Surname
- Password
- OMS User Role
  - o Non-AEGEE Member – after registration
  - o Applicant
    - To become member of local
      - Non-AEGEE Member which filled application form of the local
    - To become member of body
      - AEGEE Member which filled form of the body
  - o AEGEE Member – application to become member of local, local board has to approve it
    - AEGEE Member Roles
      - Member of local
      - Local Sub-Team Member
      - Local Board Member
      - European Body Member
      - European Body Sub-Team Member
      - European Body Board
      - Comité Directeur
  - o Alumni – previous member, when we expire or when set suspend
  - o Alumni Member – pervious member which joined alumni group



- Fee for AEGEE Members
  - Type of Payment
    - In Cash
    - Bank transfer – generate payment identification
  - Status
    - Payment Expected
      - Date till when to pay
    - Paid
    - Payment Overdue – within 1 month after date of expiration
    - Not paid – after one month, automatic expiration and setting role Alumni
- Membership Info
  - CSN
  - Member Since – Date of Board approval to become member
  - Member Until - Date of Fee expiration
- OMS Group Membership
  - Link to Body Names
- OMS Rights
  - List of rights which user has based on membership in groups or added by OMS Support Team
- Function
  - List of membership groups and roles there
- Personal Details
  - Date of Birth
  - Gender
    - Male
    - Female
    - Other
  - Nationality
- Residential Info
  - City
  - Country
- Contact Details
  - Address - when requested reimbursement or for General mailing, else hide
  - Email
  - AEGEE Email Alias
  - Mobile Phone
  - SIP Number
  - Skype
  - Facebook Profile
  - Twitter
  - Website
- Bank Details – when requested reimbursement, or fee payment by bank transfer, else hide
  - Account Holder
  - Bank Name
  - Bank Address
  - IBAN

- o BIC/SWIFT
- Profile Photo
- Student Type
  - o Student
  - o Graduated
- University Info – list from Network Module, if not in the list, option to add new University
  - o University Name – choose from list
  - o Study Cycle
    - Bachelor
    - Master
    - PhD
  - o Fields of Study
  - o Erasmus or Study exchange
    - University name– choose from list
    - Type of Study Exchange
      - Erasmus
      - Erasmus Traineeship
      - Bilateral Study Exchange
      - Athens
    - When
      - In the Past
      - Current
      - Future
- Employment – add several
  - o Company Name
  - o Position
  - o From - Till
- Comments
- AEGEE Impact on Member
  - o Answers on Questions related to Impact Measurement
- Join Info from Application form
  - o Info about AEGEE found – multiple option
    - Friend
    - Website
      - Which - Optional
    - Facebook
      - Which – Optional
    - Twitter
      - Which – Optional
    - Poster
    - Other
  - o Reason to Join
    - Improving soft-skills
    - Interest in European project
    - AEGEE mission and vision
    - Intercultural Dimension
    - Improve Language Skills
    - Traveling

- Summer Universities
  - Career Development
  - Other
- o Motivation
- o Comments
- Local Custom Questions Answers
- Local Custom User Roles – option for locals to set own roles to differentiate membership
- OMS Settings – Store OMS settings
  - o UI Language
  - o UI Theme
- Logins
  - o LoginCount
  - o lastLoginDate
  - o lastLoginIP

## Membership Management Dashboard

List of

- Applicants
- Members
- Sub Team
- Past Members
- Alumni Members
- All

Filter by:

- Items in database,
- Multiple options, like show: applicants, gender: female, interested to join: SUM, Sub Team

### **Set status**

Options

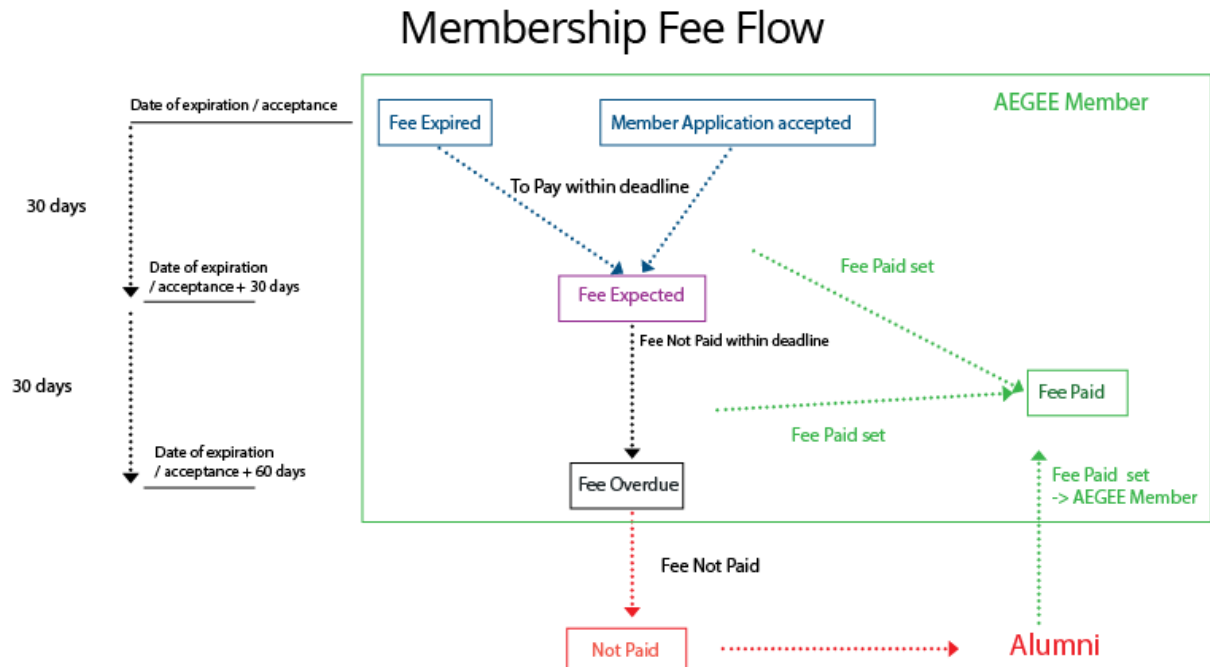
- Individually for each application
- Globally for selected items

### **For applicants**

- Pending – when application submitted – After one month with no status change -> Rejected
- Accepted -> become AEGEE Member, set Payment Expected and date 1 month from date of acceptance
- Rejected -> Non AEGEE Member role

### **For Members**

- Fee Status
  - o Payment Expected
    - Date till when to pay
  - o Paid
  - o Payment Overdue – within 1 month after date of expiration
  - o Not paid – after one month, automatic expiration and setting role Alumni



- Sub-Team Membership
- Local Custom Roles

## Fee Management

- Size
- Group
  - o Member
  - o Board member
  - o Honorary Member
  - o Sub Team Member
  - o Local Custom Role

## Sub Team Management

- Create - Form
  - o Sub Team Name
  - o Team Leader
    - List of people of the group
  - o Membership – for CD sub-teams
    - Only members from Body/local
    - Open - AEGEE Member
  - o Description
  - o Logo



- o OMS Rights – set up to the rights of body/local
- Edit
  - o Edit items
- Membership
  - o Add/remove members
- Close sub-team
  - o Set suspended status for the sub-team -> Hide from list

## Export

- Export data to csv, based on filter
- Generate PDF Report – stilled document

## OMS Body/local Management

- Create – Form
  - o Rights
    - OMS Support
    - CD
  - o Items
    - Type
      - Contact
      - AEGEE local
      - Commission
      - Committee
      - Working Group
      - Project
      - Comité Directeur
        - o CD Sub Team
          - Have special status
          - Policy officers, Liaison Officers, Pool of Representatives etc.
      - AEGEE Partner Organisation
    - Name
    - BodyCode – 3 char
    - Team Leader
      - List of people of the group
    - Membership
      - Application Form – Board of the Body Acceptance
      - Election at Agora
        - o JC Module
      - Appointment
        - o By
          - Select body from list
    - Description
    - Logo
    - OMS Rights – set up to the rights of body/local
- Edit
  - o Rights

- OMS Support
  - CD
  - Board of the Body/Local
- o Edit Items
- Suspend
  - o Rights
    - CD
    - OMS Support
    - OMS Module
      - Network
      - European level
  - o Reason
    - Agora Decisions which delete local, set status Suspended
    - CD Decision
    - Other