



M170005 Quick Manual

Relation Manager

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Relation Manager

Objective

The objective of the relation manager is to consolidate and centralise relations (persons, companies, institutions, ...) and manage their address and communication data.

What has changed in the Relation manager?

The biggest change is in the internal, technical setup of the relation structure in the Relation Manager (Module) inside cmOffice.

Because of this major update in cmOffice also the cmHost application needed to be reworked. Covr decided to create a new cmHost application named cmRelationManager. The setup of the cmRelationManager is in line with the other cmHost applications i.e. the raw XML is extended with a GUI.

In part I+II the changes in cmOffice are described and an easy way to create manually relation records in cmOffice. The topic in part III is about the new cmHost application. It briefly explains how to create a relation record with the GUI of the cmRelationManager. Chapter IV contains a reference to a document describing the internals of the cmRelationManager aimed for a designer/configurator of the GUI.

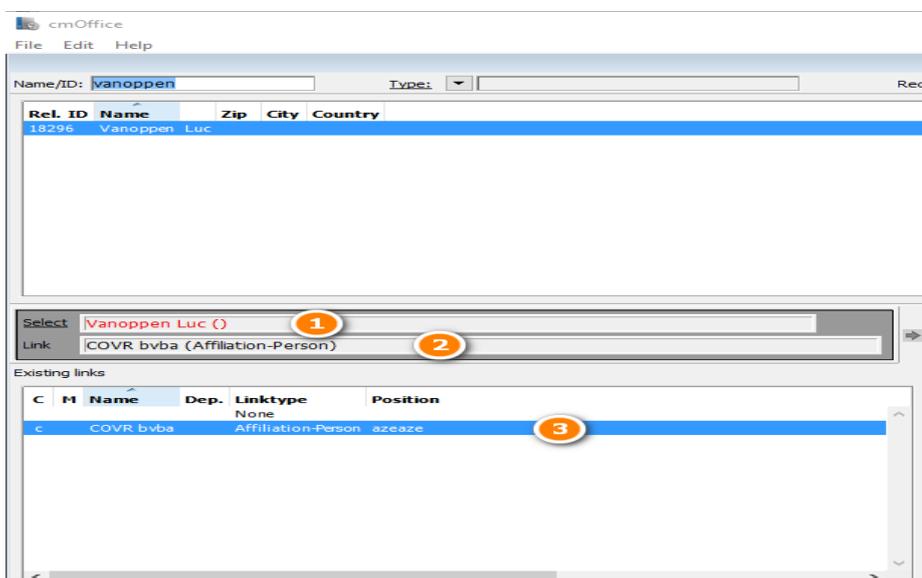
PART I: Relations in cmOffice

The Relation Module

Old Relations module (version 13)

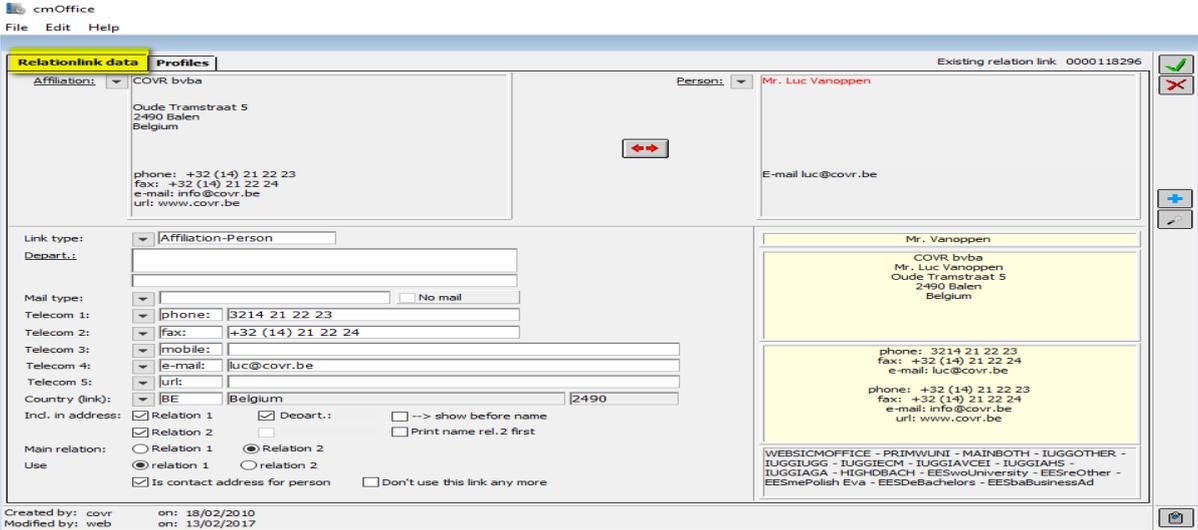
In the old relations module, the relation content was build-up with 3 components:

1. a relation record of type "Person"
2. a relation record of type "Affiliation" (optional. Alternative is the "None" record")
3. and one or more relation **link** record(s) connecting an "Affiliation record" record with a "Person" record. (several affiliation records can be linked to one person record)



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A double click on such a relation record (link) revealed the detailed info contained in that record. As an example, a double click on the relation link record  displays the next info:



cmOffice
File Edit Help

Relationlink data Profiles

Affiliation: COVR bvba
Oude Tramstraat 5
2490 Balen
Belgium
phone: +32 (14) 21 22 23
fax: +32 (14) 21 22 24
e-mail: info@covr.be
url: www.covr.be

Person: Mr. Luc Vanoppen
Existing relation link 0000118296
E-mail luc@covr.be

Link type: Affiliation-Person
Depart.:
Mail type: No mail
Telecom 1: phone: 3214 21 22 23
Telecom 2: fax: +32 (14) 21 22 24
Telecom 3: mobile:
Telecom 4: e-mail: luc@covr.be
Telecom 5: url:
Country (link): BE Belgium 2490

Incl. in address: Relation 1 Depart.: --> show before name
 Relation 2 Print name rel.2 first

Main relation: Relation 1 Relation 2
Use: relation 1 relation 2
 Is contact address for person Don't use this link any more

Mr. Vanoppen
COVR bvba
Mr. Luc Vanoppen
Oude Tramstraat 5
2490 Balen
Belgium
phone: 3214 21 22 23
fax: +32 (14) 21 22 24
e-mail: luc@covr.be
phone: +32 (14) 21 22 23
fax: +32 (14) 21 22 24
e-mail: info@covr.be
url: www.covr.be

WEBSICMOFFICE - PRIMWUNI - MAINBOTH - IUGGOTHER - IUGGIUGG - IUGGIECM - IUGGIAYCES - IUGGIAHS - IUGGIAGA - HIGHDBACH - EESwoUniversity - EESreOther - EESmePolish Eva - EESDeBachelors - EESbaBusinessAd

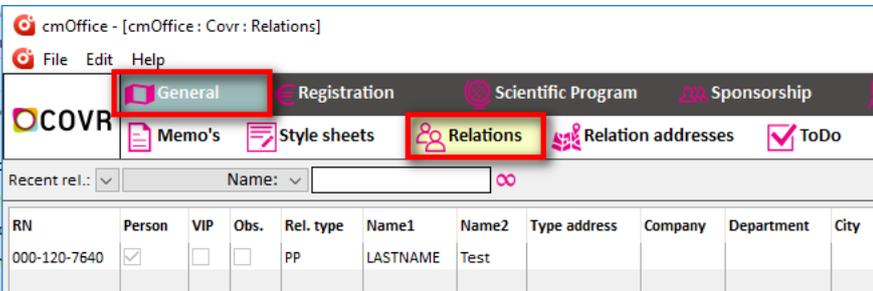
Created by: covr on: 18/02/2010
Modified by: web on: 13/02/2017

New relations module (version 15)

In the new relations module, the relation content is contained in 1 relation record. This record contains **all** the associated data of a person (also called an account in the remainder of this document) or an institute. Links are no longer used. Each relation record is self-contained. All data is bundled in that 1 record.

The main advantages are a less complex handling of the data in the cmOffice internal code and a more comprehensive overview. A disadvantage might be that the user of the system has to input more data. In part II a process is described to minimize this extra work.

Open the Relations Module in cmOffice by navigating via the “General”-icon and selecting the “Relations”-icon.



cmOffice - [cmOffice : Covr : Relations]

File Edit Help

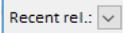
COVR

General Registration Scientific Program Sponsorship

Memo's Style sheets Relations Relation addresses ToDo

Recent rel.: Name: ∞

RN	Person	VIP	Obs.	Rel. type	Name1	Name2	Type address	Company	Department	City
000-120-7640	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PP	LASTNAME	Test				

Lookup a relation record either via a name selected out of the “Recent relation”-list  or via selecting a relation field (name, Rel. ID., City, ...) and filling out a corresponding value in the text window

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Name: ▾	LastName	∞
Name:	type	Name1
Rel. ID.:		Name2
Old Rel. ID.:		LASTNAME
City:		Test
Countrycode:		
Comm.:		
Deleted date:		

if a match is found in the cmOffice database the corresponding relation records and their associated data fields are displayed.



RN	Person	VIP	Obs.	Rel. type	Name1	Name2	Type address	Company	Department	City	Country	Contin...	Country zone	Nationality	Web Logon	Web Password	old Relation ID	Birthdate	Gender	Comms.	Profile	Creat. date	Creat. by	Mod. date
000-016-2920				PP	Vanoppen	Luc	Professional	COVR	Development & Support	Balen	BE			Belgian			33938	29/07/1960	Male			24/04/2003	Iherman	

The functions available in the Relations module did not change. Only the icons have been “modernised”. A brief overview of the functions and the new icons:

	add a new relation record
	edit an existing relation record
	delete a relation record
	lookup: search for a relation record
	store/restore a set of selected relation records
	omit: removes a set of selected records out of the relation overview window
	select: the selected relation records are retained in the relation overview window. All others are removed.
	sort the relation records in the overview window based on criteria set by the user.
	print/export
	export directly to an excel file
	extra (not yet in use)
	mailing: initiate a mail merge from within the relation module
	extra functions that allow the user to “manipulate” a set of selected records like creating registrations or deleting a profile for all selected records.

More detailed info on these functions will be provided in the cmOffice Relation module training.

The Relation Manger

The Relation Manager (version V15)

Relation records (of the relation module) are managed in the relation manager. The relation manager is a simple graphic interface to display all the fields of a relation record.

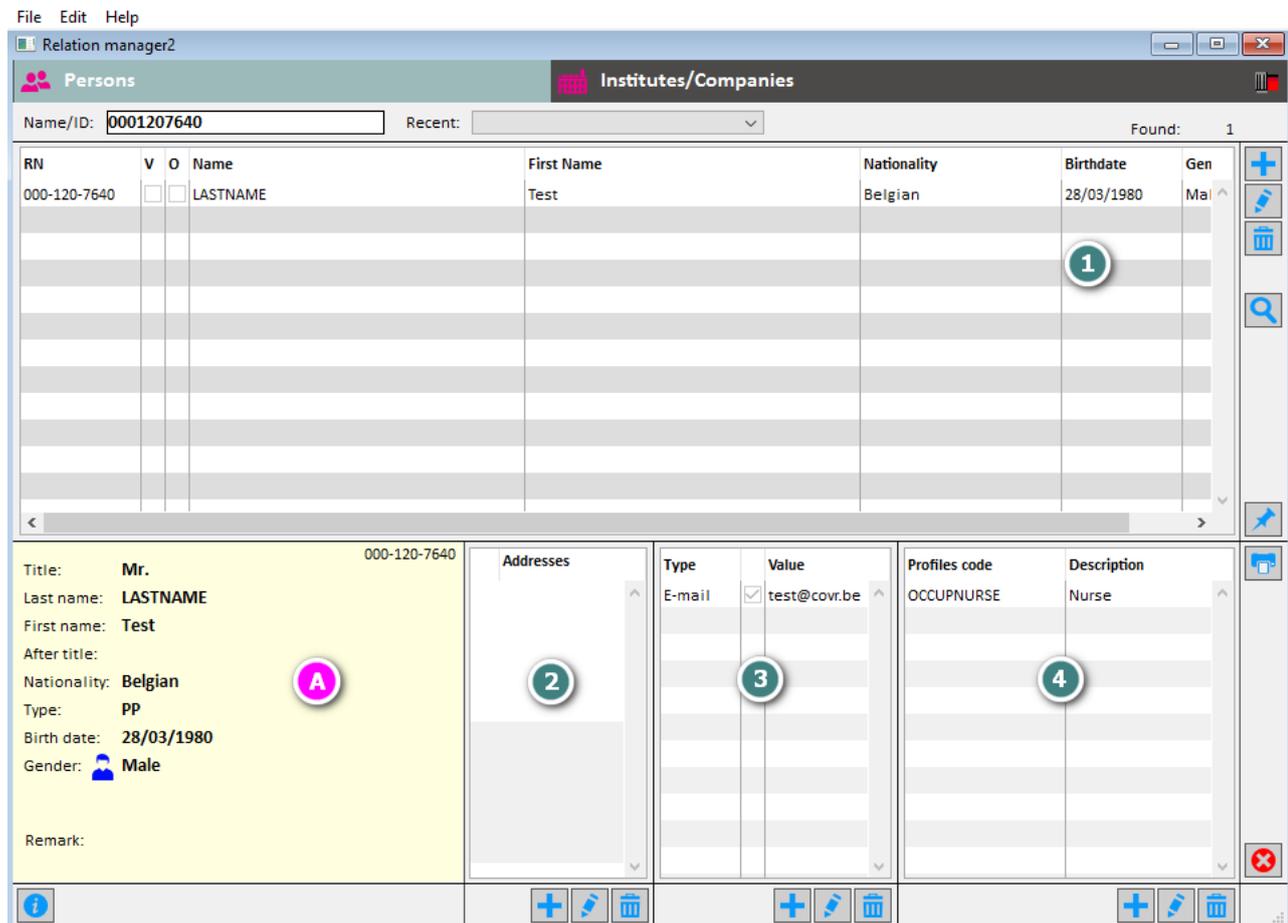
The user enters the Relations Manager either by selecting the edit icon; by a double click on a displayed relation record in the Relation module or just by clicking the Relation Manager icon  at the bottom of the screen.

The relation manager is split up in two parts: one containing the “person” relation records and one that contains the “Institues/Companies” relation records. By default, the “Persons” part is selected. the user can switch to the “Institues/Companies” part by a mouse click.



The user can look up any existing relation record either by entering a name, entering a relation ID or by selecting one of the names in the “Recent” list.

A single click on one of the displayed relation records will open a “Show relation info” window.



File Edit Help

Relation manager2

Persons Institues/Companies

Name/ID: 0001207640 Recent: Found: 1

RN	V	O	Name	First Name	Nationality	Birthdate	Gen
000-120-7640	<input type="checkbox"/>	<input type="checkbox"/>	LASTNAME	Test	Belgian	28/03/1980	Ma

1

Title: Mr. 000-120-7640

Last name: LASTNAME

First name: Test

After title:

Nationality: Belgian

Type: PP

Birth date: 28/03/1980

Gender: Male

Remark:

2

Addresses

3

Type	Value
E-mail	<input checked="" type="checkbox"/> test@covr.be

4

Profiles code	Description
OCCUPNURSE	Nurse

The user can distinguish 4 blocks in the relation manager:

- 1 The relation details block
- 2 The addresses block
- 3 The communication block
- 4 The profiles block

PS: The block labelled  is another representation of a subset of the fields contained in the relation details block. 

Each of these blocks has an “Add” function , an “edit”  and a “Delete” function . With the “general” functions in the relation module (right hand side of the picture), the user can “search” , “Merge” , “Print” , Inform”  and last but not least “Exit”  the relations module.

A double click on one of the relation records will open an “Edit relation” window.

The “Edit relation” window contains 4 tabs

- A. The Relation details tab
- B. An addresses tab,
- C. a communication tab and
- D. a logon details tab.

The first 3 tabs gives the user another representation and another way to manage account details. The fourth tab – logon details – is new. In the next paragraph all tabs are briefly described.

The relation details tab (Edit/ Add new person)

Within this tab the user can create a new - or edit an existing account. The user should fill out personal details of the account. Most of the fields are self-explanatory. Nevertheless, I would like to highlight some “special” fields:

- Field Gender: The user has now the possibility to add another type of gender next to male and female.
- Field Nationality (instead of Country)
- Field Accounting ID
- Field Old RN relation detail: is filled out when a conversion is performed from the V13 relation module data into the V15. It will then contain the RN number of the V13 version for the relation record.
- Field External database key: reference to an external database
- Field Main Address: Relation ID of the main contact address
- Passport Name
- Passport /ID card number
- Each account can be associated with a picture and a biography
- Do know that one has the possibility to define 6 free text fields. These fields can hold information content defined by the user. In the example below one of the free fields is used to fill out an external relation id. Another fields is used to hold the nationality. If you do want to use one of these free text fields, please contact Covr.

Relation details		✓
Type person: <input type="text" value="Persons"/>	<input checked="" type="checkbox"/> is a person	<input type="checkbox"/> VIP
Title: <input type="text"/>		<input type="checkbox"/> Obsolete
(Family/Sur) Name: <input type="text"/>		<input checked="" type="checkbox"/> Allow publication of info
First name: <input type="text"/>		<input type="checkbox"/> Export as customer
After title: <input type="text"/>	Initials: <input type="text"/>	
Gender: <input type="radio"/> Male <input type="radio"/> Female <input checked="" type="radio"/> Other	<input type="text"/>	
Birth date: 00 / 00 / 0000		
Nationality: <input type="text"/>		
Accounting ID: <input type="text"/>	Old RN relation detail: <input type="text"/>	External database key: <input type="text"/>
Passport Name: <input type="text"/>		Record color: <input type="text" value="0"/>
Passport/ID card No: <input type="text"/>		Main Address: <input type="text"/>
VAT number: <input type="text"/>		
<div style="display: flex; justify-content: space-between;"> <div> <p>External rel ID <input type="text"/></p> <p>Nationality <input type="text"/></p> </div> </div>		
Biography: <input type="text"/>	Remark: <input type="text"/>	
Conflict of interest: <input type="text"/>		
Created by: on: 00/00/00	Modified by: on: 00/00/00	

The addresses tab (Edit/ Add new person)

The address tab has 2 panels. The left-hand side panel depicts the addresses assigned to the account where the right-hand side panel displays the information of the selected address.

The user can add a new address by clicking on the plus icon .

The most important address fields are:

- The type of address field: The user can choose between an “Home address” and a “Professional address (also named Work address)”
- The main contact address field: tick mark the checkbox if you want the address to be your main contact address. **The checkbox can only by tick marked for one of the addresses.** It is this address that will be used (by default) in the cmHost applications (like the registration pages, the abstract submission pages, ...)

Edit person

Relation details **Addresses** Communications Logon details 000-000-0160 

Addresses

Prof Rudi STANS
Covr BVBA
Quality & Support
Servant
Oude tramstraat 5
2490 Balen

Prof Rudi STANS  

Type of address: Home Professional Sort order:

Use company:

Company / institute:

Department:

Position:

Address line:

Address line2:

Zip - city - extension :

State:

Country:

Remark:

Main contact address

Obsolete

Created by: Web on: 22/02/2017
Modified by: Web on: 09/05/2017

Created by: Web on: 00/00/00
Modified by: Web on: 00/00/00

000-000-0160 

Note that all addresses are also stored in the Relation Addresses Module (in the “General” part of cmOffice). Once can compare the Relation Addresses Module with the Participant module that is coupled to the registration Module i;e the Relation Addresses Module is connected to the Relation Module.

The Profile tab (Edit/ Add communication means)

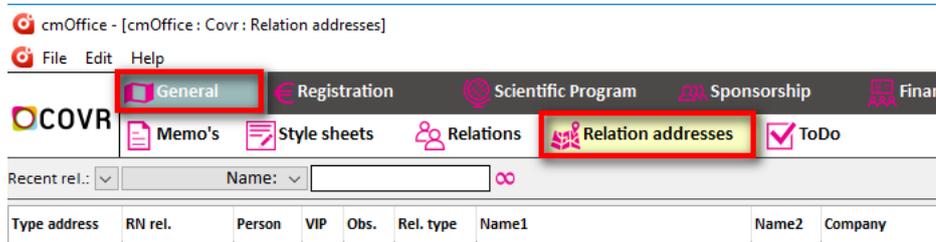
Profiles can only be managed in the “Show relation info” window. If the user clicks on the “Plus”  or edit  button then a window appears in which profiles can be managed.

Relation Profile		
Profile group:	<input type="text"/>	
Level 1:	<input type="text"/>	
Level 2:	<input type="text"/>	
Selected profile:		
Created by: covr on: 19/05/2017 000-000-0160		
Modified by: on: 00/00/00		

Notice the extra feature of grouping profiles. The user can assign a group name to a level 1 profile. This allows the user to “bind” several level 1 profiles with the same group name to be treated as a group of profiles.

The Relation Addresses Module

The relation addresses module is a container of all the addresses created in the “person” and the “Institute/Company)” relation records.



Basically, the user can perform the same functions on the relation addresses module as on the relations module. Selecting a relation address record brings the user into either the “Show relation info” window or the “Edit relation” window. See the previous paragraphs for a more detailed explanation on the functionality of these windows.

Other changes in the relations module

Relation Identifier

The relation identifier grew from 5 to 10 numeric characters (it used to be alfa-numeric)

Biography and photo

One can now attach a biography and a photo to an account.

Audit logging

Graph Manager

PART II How to create a relation record in cmOffice?

Step A: Create/Select an Institute

- Select the relations manager module in the “General” tab
- Click on the Relation Manager icon 
- Select “Institutes/Companies” in the banner on top of the page
 - if the institute already exists then, lookup the “Institutes/Companies” and select it. Proceed with step B.
 - In case the Institute does not exist, create it by a
- Click on the Add icon
- Fill out the relation details of the institute/affiliation/company and save
- Fill out an address (click on the plus icon underneath the address box) and save
- Fill out communication means (phone number, email address, skype ID, ...) and save
- Fill out a profile (optionally, click on the plus icon underneath the profiles box)

Add company / institute

Relation details

Type relation: <input type="text" value=""/>	<input type="checkbox"/> Not a company		<input type="checkbox"/> VI institute/company	
Company / institute Name: <input type="text" value=""/>			<input type="checkbox"/> Obsolete	
Name 2: <input type="text" value=""/>			<input type="checkbox"/> Export as customer	
Country: <input type="text" value=""/>				
VAT number: <input type="text" value=""/>				
Accounting ID: <input type="text" value=""/>	Old RN relation detail: <input type="text" value=""/>		External database key: <input type="text" value=""/>	
			Record color: <input type="text" value="0"/>	
			Main Address: <input type="text" value=""/>	
Job Title: <input type="text" value=""/>	FR. VAT NR.: <input type="text" value=""/>			
Freefield 2: <input type="text" value=""/>	Medium 1: <input type="text" value=""/>			
ESHRE ID: <input type="text" value=""/>	Medium 2: <input type="text" value=""/>			
Company profile: <input type="text" value=""/>	Remark: <input type="text" value=""/>			

Created by: on: 00/00/00
Modified by: on: 00/00/00

Step B: Create a Person

- Select the relations manager module in the “General” tab
- Click on the Relation Manager icon 
- Select “Persons” in the banner on top of the page
- Click on the Add icon
- Fill out the relation details of the person and save
- Fill out an Home address (click on the plus icon underneath the address box) and save
- Fill out a professional address
 - click on the plus icon underneath the address box
 - Select Professional
 - Use prefilled Institute/Company data by selecting a company out of the list
The items in the list of companies do contain the recent opened Institutes/Companies in the relation manager. Since we created a new institute in step A, this institute will be visible as one of the selectable items in the list.
 - Fill out remaining fields – if needed – and Save
- Fill out communication means (phone number, email address, skype ID, ...) and save
- Fill out a profile (optionally, click on the plus icon underneath the profiles box) and save
- Save the new created “Person” relation.

PART III: How to create a relation record with the cmHost application cmRelationManager

Relation Manager host application (cmRelationManager)

cmRelationManager is the WEB interface tool with which one can execute the next functions

- create an account (a relation record in cmOffice) and
- manage an account
- forgot password
- change password

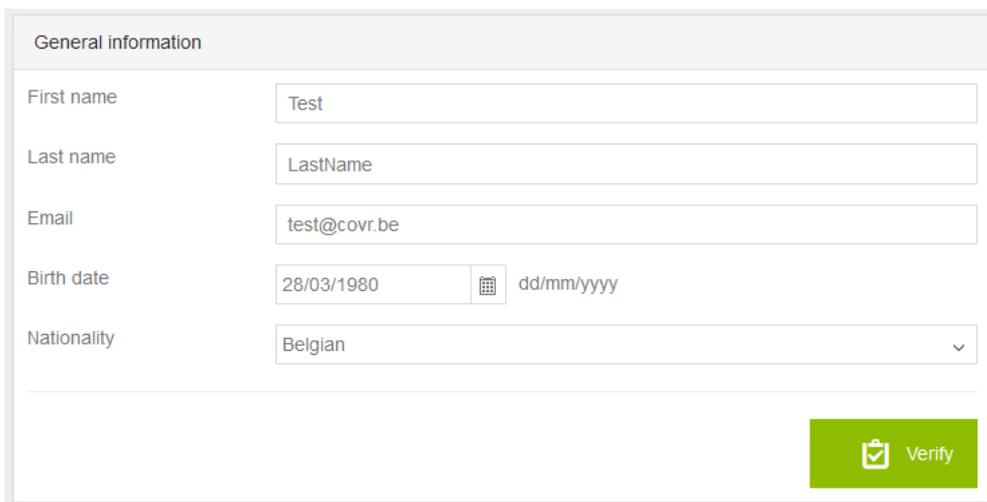
ps: the fields, buttons and text shown in the upcoming pictures are based on the settings in the configuration file of the cmRelationManager cmhost app. How these settings can be adapted is described in chapter IV.

Create an Account: the steps

1. VERIFY - 2. REGISTER - 3. MANAGE

1. VERIFY - General account information *

Fill out the general account information and click on “Verify”. The verification function checks - in first instance - whether the email address is already used in another relation record in the cmOffice database. (duplicate check)



General information	
First name	<input type="text" value="Test"/>
Last name	<input type="text" value="LastName"/>
Email	<input type="text" value="test@covr.be"/>
Birth date	<input type="text" value="28/03/1980"/> <input type="text" value="dd/mm/yyyy"/>
Nationality	<input type="text" value="Belgian"/>
<input type="button" value="Verify"/>	

If the email address is found in the cmOffice database, a pop-up window appears with all the relation records that match the email address (ps: note that the e-mail in the pop-up window is not scrambled). If the user selects one relation record out of the list and clicks on “I am this person” then a pop-up appears indicating an email is send with the account details. Apparently, the user forgot that he/she already has an account registered.

You have duplicates ×

Please review duplicate accounts below:

Name	Firstname	City	Email
Stans	Rudi		rudi@covr.be



**Not scrambled,
record selected**

When selecting 'I am this person', you will be redirected to forgot password:


Back to create account


My name is not in the list


I am this person

If the email address is **not** found but there is a match in the relation database with the first name and/or last name, a pop-up window appears with all matching names. Note that in this case the e-mail is scrambled. The user gets now the possibility to select “My name is not in the list”. This will result in the creation of a new relation record.

The “Back to create account” button, will guide the user back to the “VERIFY” window (in step 1).

You have duplicates ×

Please review duplicate accounts below:

Name	Firstname	City	Email
Stans	Rudi		r**i@**vr.*e



Scrambled

When selecting 'I am this person', you will be redirected to forgot password:


Back to create account


My name is not in the list


I am this person

2. REGISTER - account information *

If the email address is not in use, the user will be asked to fill out other account details like

- Gender
- Biography
- Password
- Profiles and
- an agreement statement (optionally)
- etcetera

General information
Restart

First name	Test
Last name	LastName
Email	test@covr.be
Birth date	28/03/1980
Nationality	Belgian
Title	<input type="radio"/> Ms. <input checked="" type="radio"/> Mr. <input type="radio"/> Mrs. <input type="radio"/> Dr <input type="radio"/> Professor <input type="radio"/> Professor Dr <input type="radio"/> Sir
Gender	Male
Passport number	123654
Biography	Not yet
Logon name	test@covr.be
Password	<div style="border: 1px solid #ccc; padding: 2px;"> </div> <p style="font-size: 0.8em; color: red; margin-top: 5px;">The password should contain minimum 8 characters, at least 1 Alphabet, 1 Number and 1 Special Character (\$, @, !, %, *, #, ?, &, _)</p>
Repeat password	<div style="border: 1px solid #ccc; padding: 2px;"> </div>

Member Occupation

<input type="radio"/> Basic (research) scientist	<input checked="" type="radio"/> Nurse
<input type="radio"/> Clinician	<input type="radio"/> Pharmacist
<input type="radio"/> Company representative	<input type="radio"/> Psychologist/Counsellor
<input type="radio"/> Embryologist	<input type="radio"/> Resident/student
<input type="radio"/> Lab technician	<input type="radio"/> Other Occupation
<input type="radio"/> Midwife	

I agree that ...

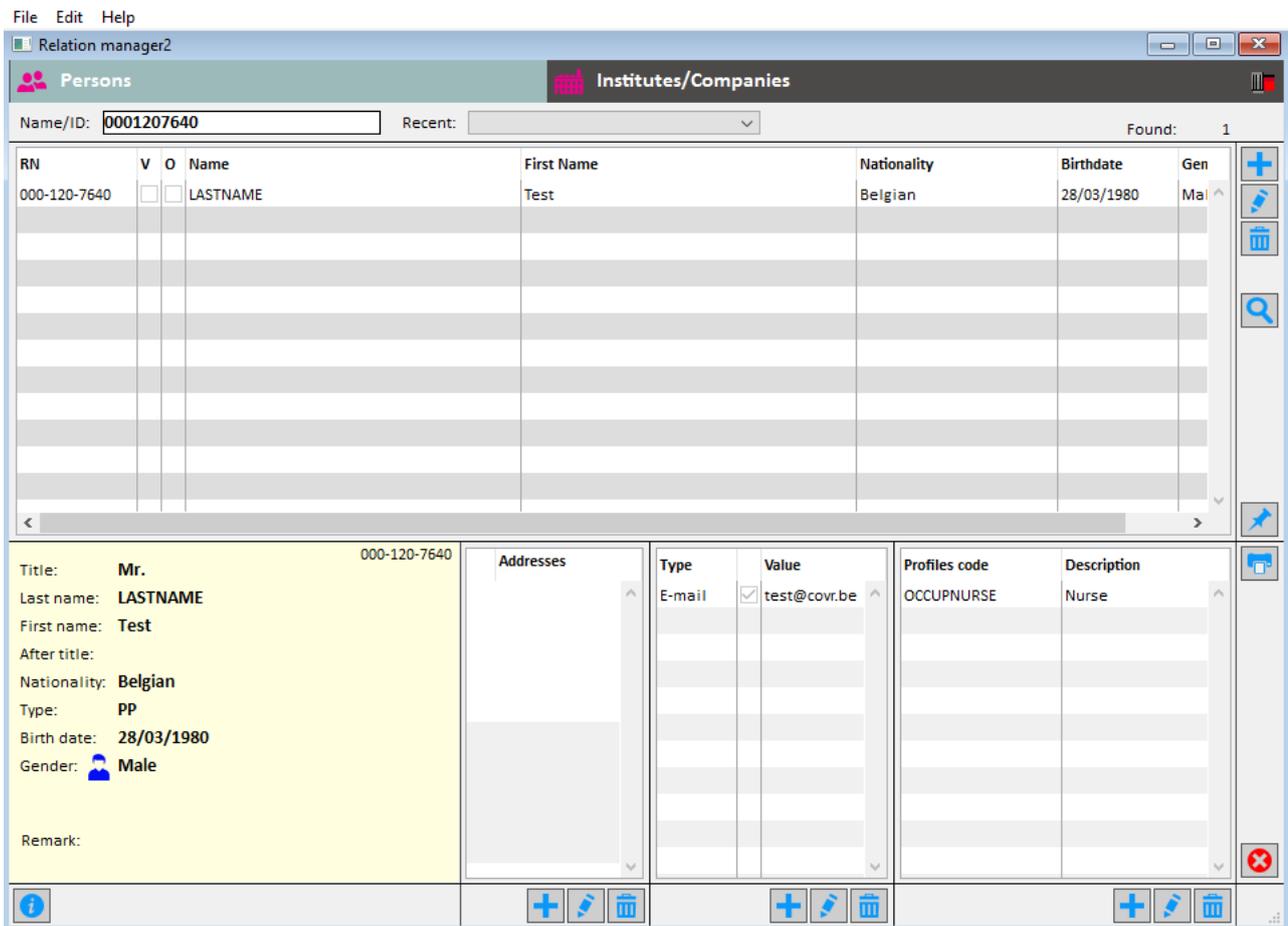
Register

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Clicking on “Register” will then create the initial relation record. The relation details, the communication and the profiles block of the relation record are created and filled out with the inputted data. The address block - although created – remains empty. (see picture)

The content of the relation record can be completed in the manageAccount function. ManageAccount is automatically started after the creation of the initial registration record. This gives the user the possibility to fill out the address details.

The initial relation record looks like this in cmOffice:



File Edit Help
Relation manager2

Persons Institutes/Companies

Name/ID: 0001207640 Recent: Found: 1

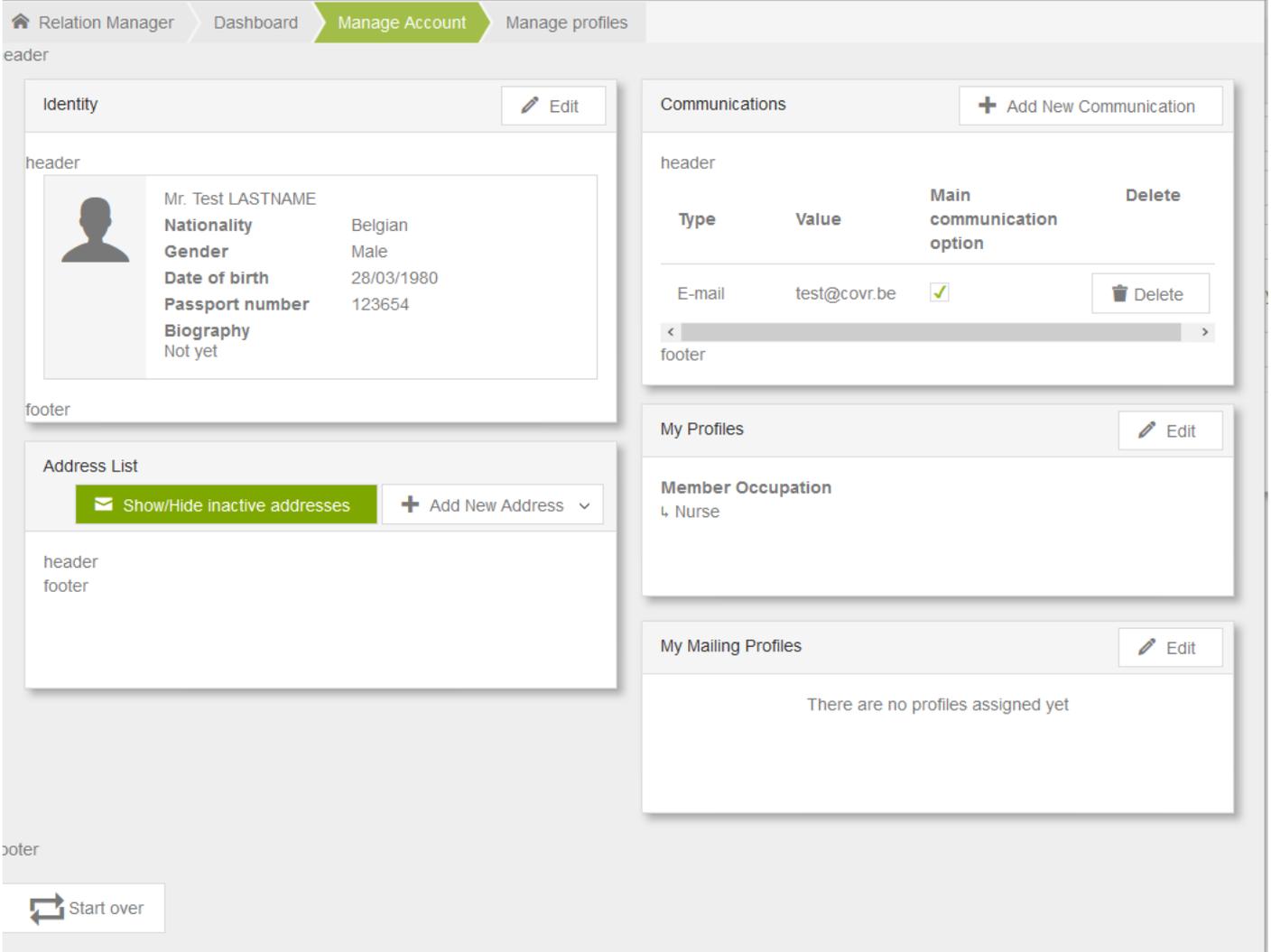
RN	V	O	Name	First Name	Nationality	Birthdate	Gen
000-120-7640	<input type="checkbox"/>	<input type="checkbox"/>	LASTNAME	Test	Belgian	28/03/1980	Ma

Title: Mr. 000-120-7640
 Last name: LASTNAME
 First name: Test
 After title:
 Nationality: Belgian
 Type: PP
 Birth date: 28/03/1980
 Gender: Male
 Remark:

Addresses		Type	Value	Profiles code	Description
		E-mail	test@covr.be	OCCUPNURSE	Nurse

3. **MANAGE** - account information *

Main purpose of this step is to complete the relation record by filling out the address information.



Relation Manager > Dashboard > Manage Account > Manage profiles

Identity Edit

header

Mr. Test LASTNAME

Nationality Belgian

Gender Male

Date of birth 28/03/1980

Passport number 123654

Biography Not yet

footer

Address List

Show/Hide inactive addresses + Add New Address

header

footer

Communications + Add New Communication

header

Type	Value	Main communication option	Delete
E-mail	test@covr.be	<input checked="" type="checkbox"/>	Delete

footer

My Profiles Edit

Member Occupation

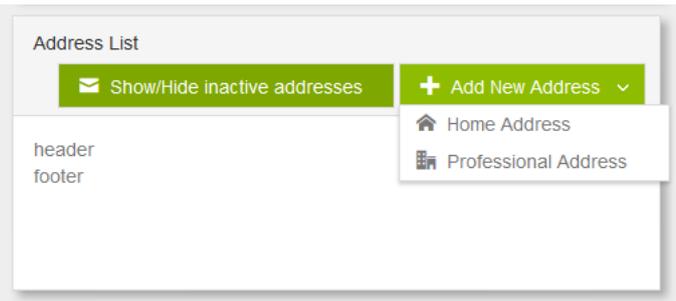
↳ Nurse

My Mailing Profiles Edit

There are no profiles assigned yet

Start over

An address can be added with the aid of the “+ Add new Address” button. The user has the choice to fill out the information for a “Home” address or a “Professional address”.



Address List

Show/Hide inactive addresses + Add New Address

header

footer

- Home Address
- Professional Address

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A pop-up window will appear in which the user has to fill out address details. Once saved the address details are added into the relation record in cmOffice.

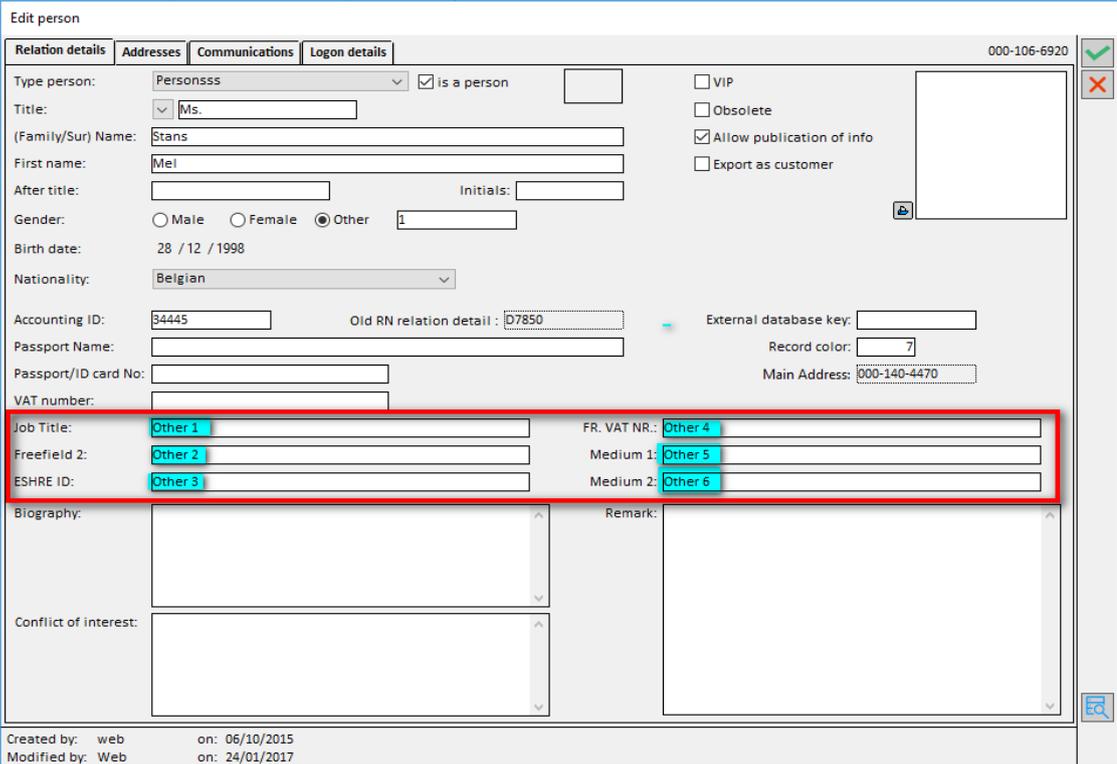
Once these 3 steps are performed, the new relation record is ready to be used to login in one of the cmHost applications.

PART IV: The cmHost application cmRelationManager.

A separate document has been created to describe the cmRelationManager. See {Ref 2}: Create/manage an account within the cmConfigurationManager (COVR document)

Appendix 1: Relation Record Free fields.

The free fields in the relation record can be configured in cmOffice. definition



000-106-6920

Type person: Personssss is a person VIP

Title: Ms. Obsolete

(Family/Sur) Name: Stans Allow publication of info

First name: Mel Export as customer

After title: Initials:

Gender: Male Female Other 1

Birth date: 28 / 12 / 1998

Nationality: Belgian

Accounting ID: 94445 Old RN relation detail: D7850 External database key:

Passport Name: Record color: 7

Passport/ID card No: Main Address: 000-140-4470

VAT number:

Job Title: Other 1 FR. VAT NR.: Other 4

Freefield 2: Other 2 Medium 1: Other 5

ESHRE ID: Other 3 Medium 2: Other 6

Biography:

Remark:

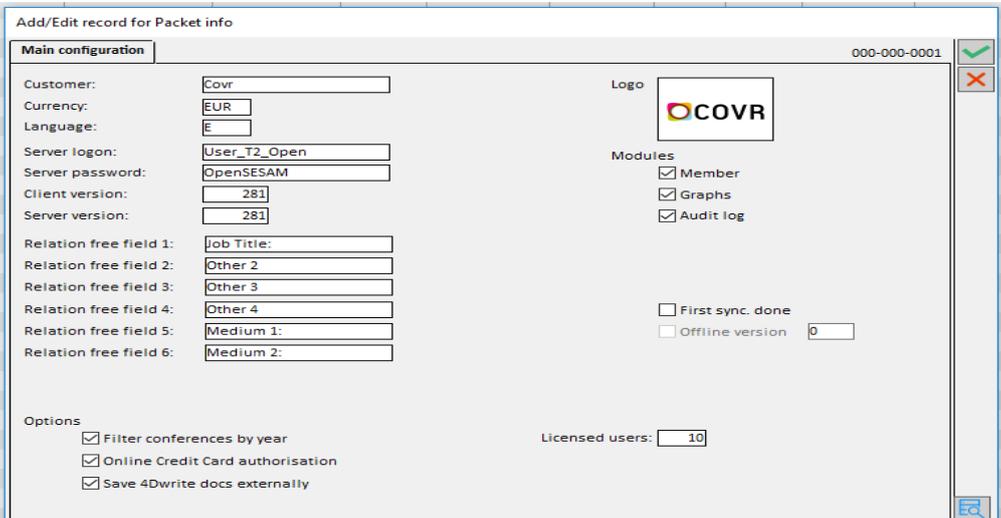
Conflict of interest:

Created by: web on: 06/10/2015

Modified by: Web on: 24/01/2017

The name settings can be changed in the secured Admin table “Packet Info”

Table group: * Master admin Table: Packet info



000-000-0001

Customer: Covr Logo: 

Currency: EUR Modules: Member Graphs Audit log

Language: E

Server logon: User_T2_Open

Server password: OpenSESAM

Client version: 281

Server version: 281

Relation free field 1: Job Title:

Relation free field 2: Other 2

Relation free field 3: Other 3

Relation free field 4: Other 4

Relation free field 5: Medium 1:

Relation free field 6: Medium 2:

First sync. done

Offline version 0

Options: Filter conferences by year Licensed users: 10

Online Credit Card authorisation

Save 4Dwrite docs externally

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Appendix 2 Reference list

{M160039} The framework of the configuration Manager (COVR document, M160039)

{Ref 2}: Create/manage an account within the cmConfigurationManager (COVR document)