



M170005 Quick Manual

Relation Manager

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Contents

Relation Manager	3
Objective	3
What has changed in the Relation manager?	3
PART I: Relations in cmOffice	3
The Relation Module	3
Old Relations module (version 13)	3
New relations module (version 15)	4
The Relation Manger	6
The Relation Addresses Module.....	13
Other changes in the relations module.....	13
Relation Identifier	13
Biography and photo	13
Audit logging	13
Graph Manager.....	13
PART II How to create a relation record in cmOffice?	14
Step A: Create/Select an Institute	14
Step B: Create a Person.....	15
PART III: How to create a relation record with the cmHost application cmRelationManager.....	16
Relation Manager host application (cmRelationManager)	16
Create an Account: the steps	16
PART IV: The cmHost application cmRelationManager.....	21
Appendix 1: Relation Record Free fields.	22
Appendix 2 Reference list	23

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.

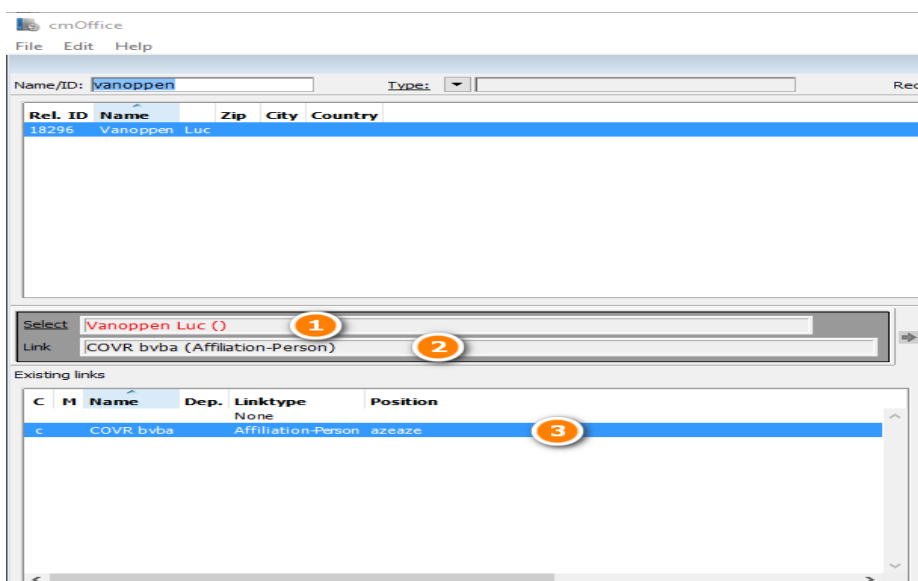
PART I: Relations in cmOffice

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)

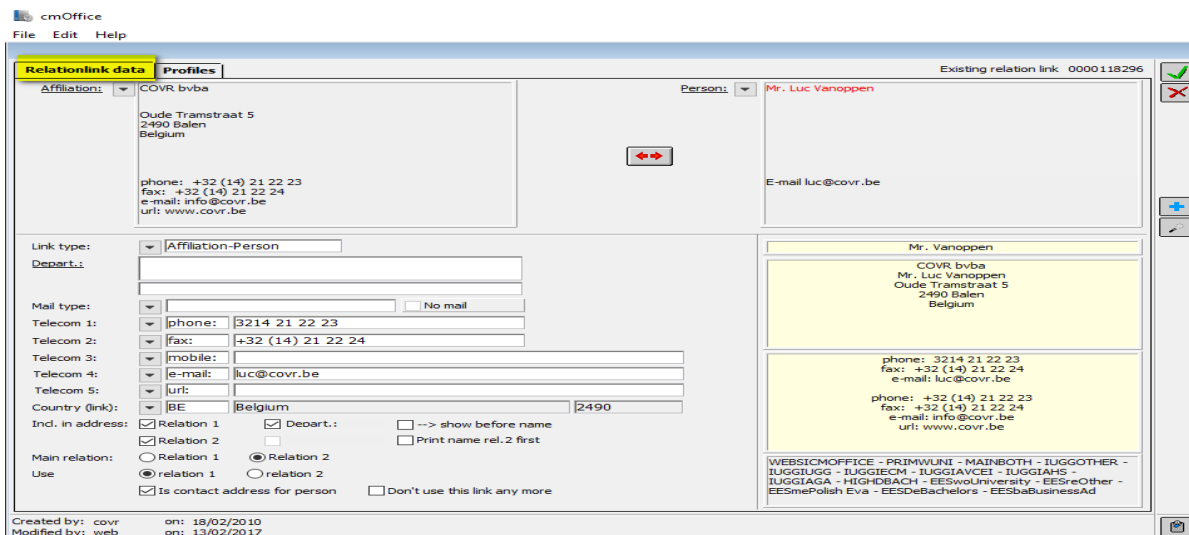


Rel. ID	Name	Zip	City	Country
18296	Vanoppen Luc			

C	M	Name	Dep.	Linktype	Position
c		COVR bvba		Affiliation-Person	azeaze

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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 - IUGGECM - IUGGIAYCEJ - IUGGIAHS -
IUGGIAGA - HIGHDBACH - EESwvUniversity - EESreOther -
EESmePolish Eva - EESDeBachelors - EESbaBusinessAd

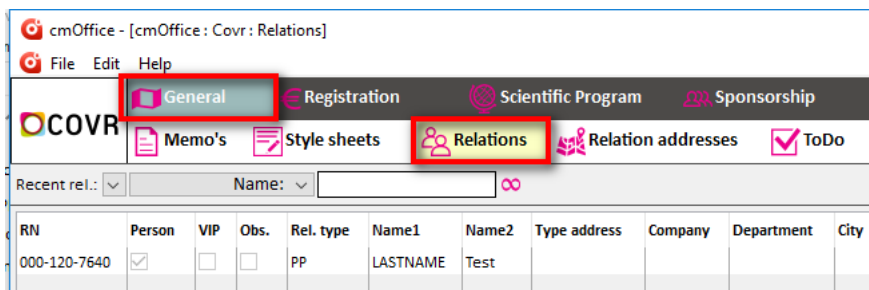
Created by: covr on: 18/02/2010
Modified by: web on: 13/02/2017

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

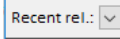
COVR

General Registration Scientific Program Sponsorship

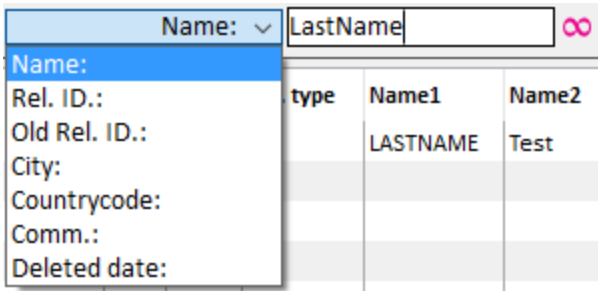
Memo's Style sheets Relations Relation addresses ToDo

Recent rel.: Name: ∞

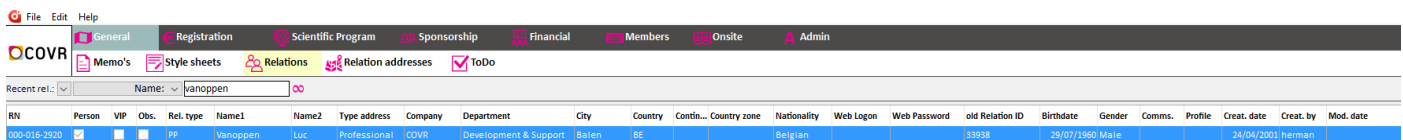
RN	Person	VIP	Obs.	Rel. type	Name1	Name2	Type address	Company	Department	City
000-120-7640	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PP	LASTNAME	Test				

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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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	Belien	BE			Belgian			33938	29/07/1960	Male			24/04/2003	herman	

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.

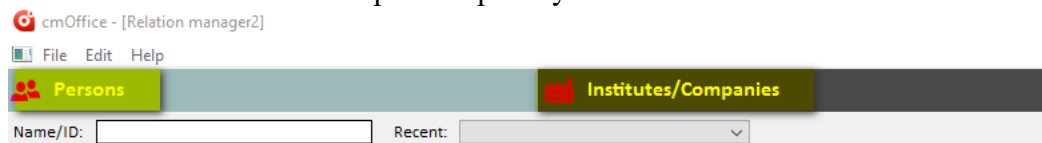
The Relation Manger

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.

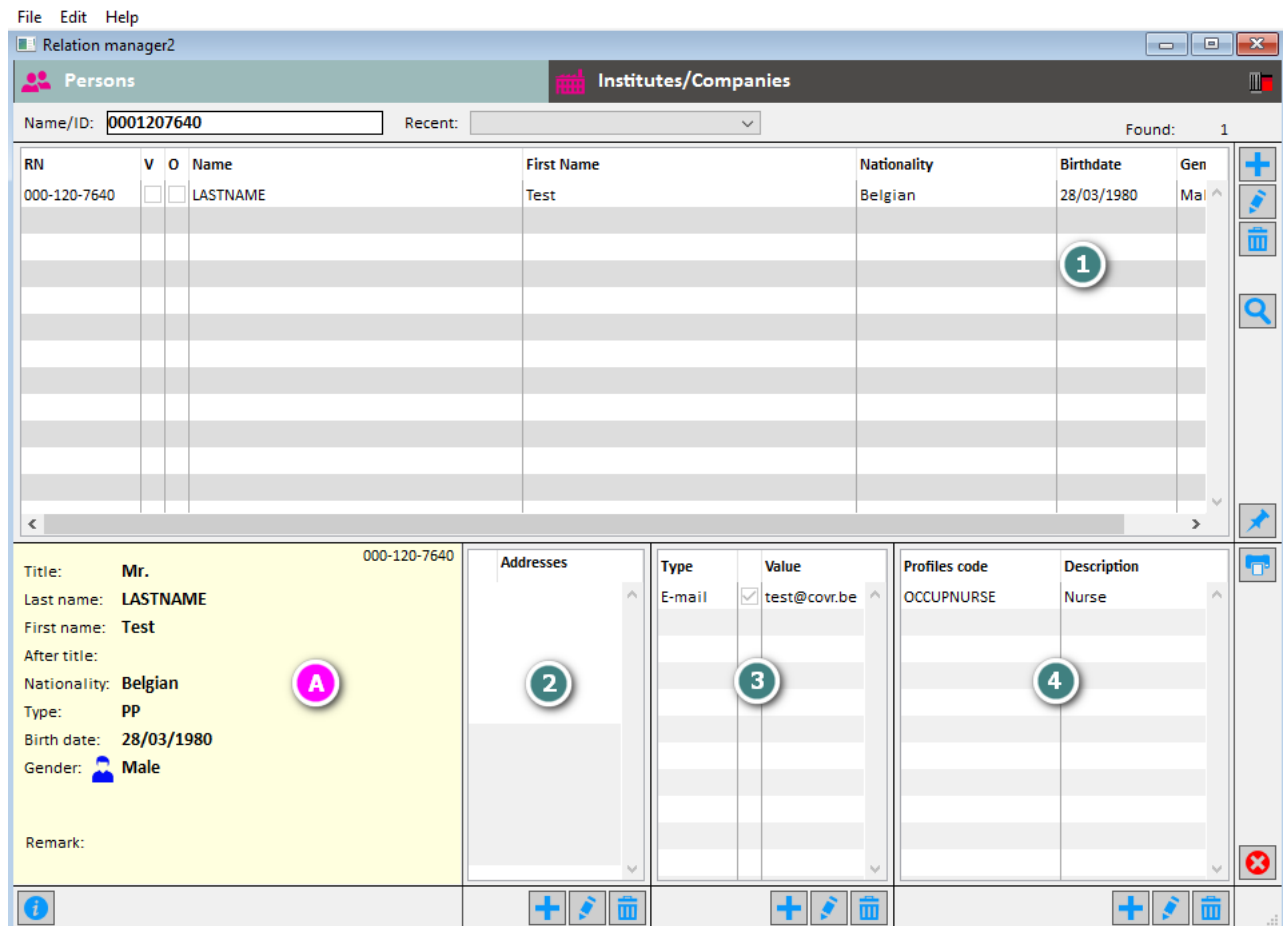
The user enters the Relations Manager either by selecting the edit icon; by a double click on a displayed relation record in the Relation module or just by clicking the Relation Manager icon  at the bottom of the screen.

The relation manager is split up in two parts: one containing the “person” relation records and one that contains the “Institutes/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.








The user can distinguish 4 blocks in the relation manager:

-  The relation details block
-  The addresses block
-  The communication block
-  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

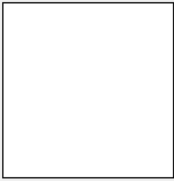
- A. The Relation details tab
- B. An addresses tab,
- C. a communication tab and
- D. a logon details tab.

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:	Persons <input 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> <div>External rel ID <input type="text"/></div> <div>Nationality <input type="text"/></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	Login details
000-000-0160			
<div> <div> Addresses  Prof Rudi STANS Covr BVBA Quality & Support Servant Oude tramstraat 5 2490 Balen </div> <div> Prof Rudi STANS Type of address: <input type="radio"/> Home <input checked="" type="radio"/> Professional <input type="text" value="0"/> Sort order: <input type="text" value="0"/> Use company: <input type="text"/> Company / institute: <input type="text"/> Department: <input type="text"/> Position: <input type="text"/> Address line: <input type="text"/> Address line2: <input type="text"/> Zip - city - extension : <input type="text"/> <input type="text"/> <input type="text"/> State: <input type="text"/> Country: <input type="text"/> <input type="text"/> Remark: <input type="text"/> <input type="checkbox"/> Main contact address <input type="checkbox"/> Obsolete </div> </div>			
Created by: Web on: 22/02/2017 Modified by: Web on: 09/05/2017			

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.

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The communications tab (Edit/ Add communication means)

The communication tab has 2 panels. The left-hand side panel depicts the communication means already assigned to the account where the right-hand side panel gives the user the opportunity to add another communication item.

[illegible]

Notice that the main communication can only be set in the edit mode or creation of a communications item. It is not a tickmark box.



The Logon tab (Edit logon details)




- ❖ add/edit/delete a logon
- ❖ reset the password to the initial value
- ❖ copy the logon name or the password.

[illegible]

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The Profile tab (Edit/ Add communication means)

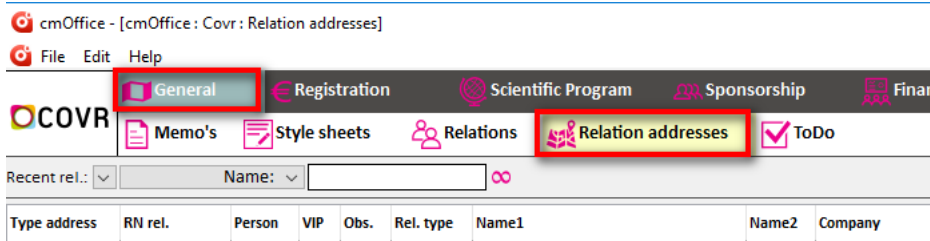
Profiles can only be managed in the “Show relation info” window. If the user clicks on the “Plus”  or edit  button then a window appears in which profiles can be managed.

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

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

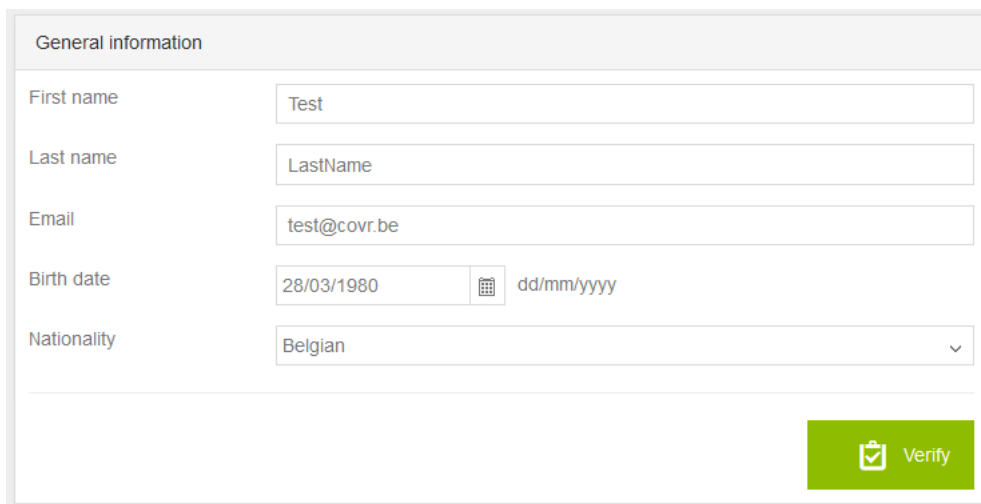
ps: the fields, buttons and text shown in the upcoming pictures are based on the settings in the configuration file of the cmRelationManager cmhost app. How these settings can be adapted is described in chapter IV.


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"/>  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> <div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> </div> </div> <div> The password should contain minimum 8 characters, at least 1 Alphabet, 1 Number and 1 Special Character (\$, @, !, %, *, #, ?, &, _) </div>
Repeat password	<div> <div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> </div> </div>

Member Occupation

☐ Basic (research) scientist
 ☒ Nurse
 ☐ Pharmacist
 ☐ Psychologist/Counsellor
 ☐ Resident/student
 ☐ Other Occupation

☐ Clinician
 ☐ Company representative
 ☐ Embryologist
 ☐ Lab technician
 ☐ Midwife

☒ I agree that ...

Register

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 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.

Last name: LASTNAME

First name: Test

After title:

Nationality: Belgian

Type: PP

Birth date: 28/03/1980

Gender: Male

Remark:

Addresses

Type

E-mail

☒

Value

test@covr.be

Profiles code

OCCUPNURSE

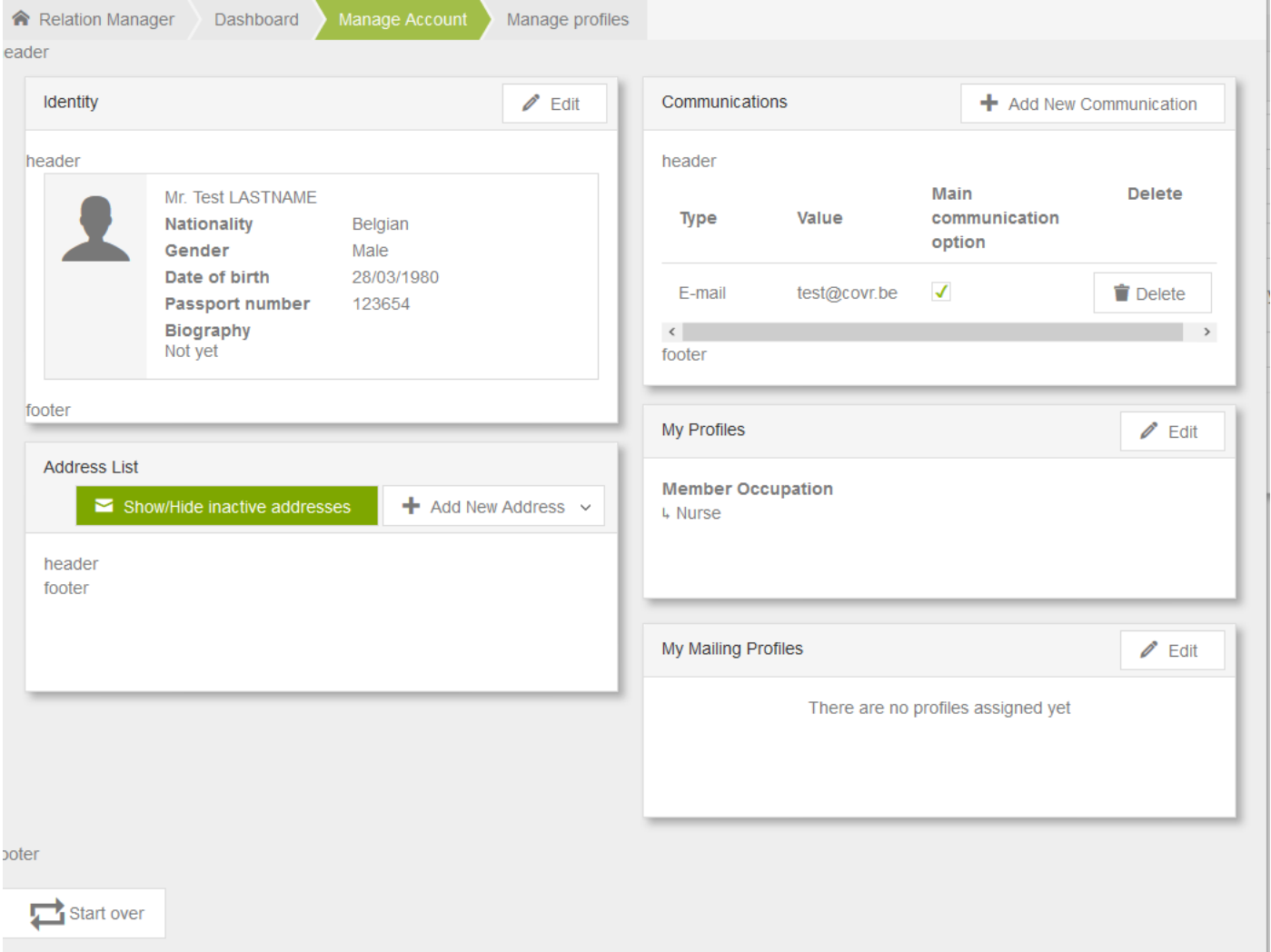
Description

Nurse

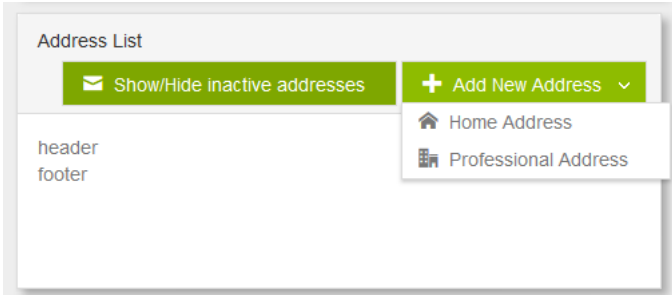
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3. **MANAGE** - account information *

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



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”.



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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.

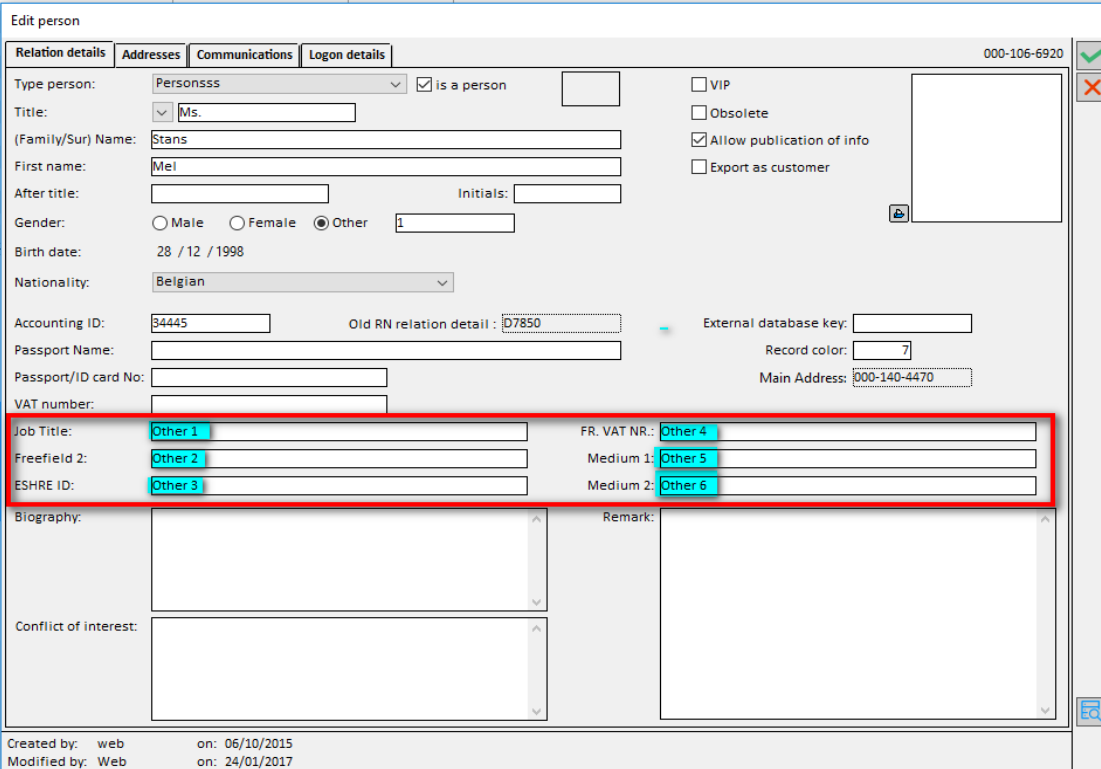
Once these 3 steps are performed, the new relation record is ready to be used to login in one of the cmHost applications.

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)

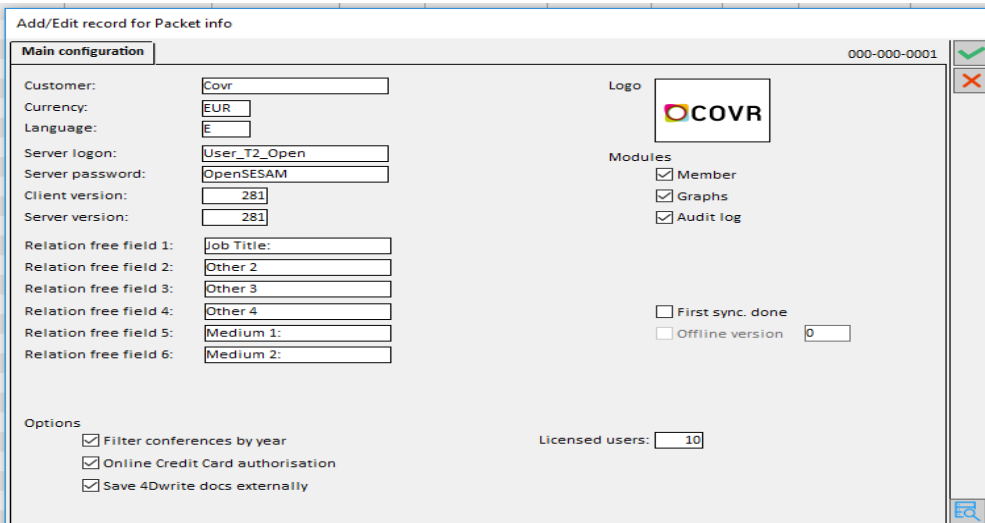
Appendix 1: Relation Record Free fields.

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



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

Table group: *** Master admin** Table: **Packet info**



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)