**Slide 1 - Slide 1**



**Text Captions**

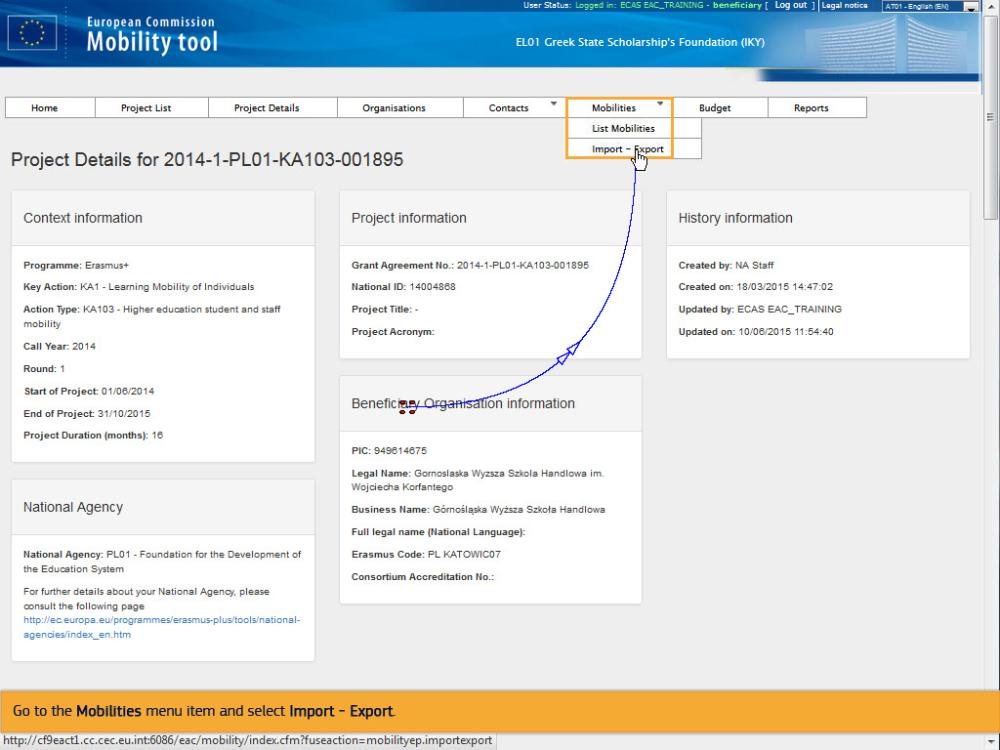
MT+

How to export and import mobilities

In this demo you will see how to export the template or the list of existing mobilities, an explanation of the format of the CSV file how to use the CSV file to update existing mobilities or add new mobilities, and how to import the CSV file.

This scenario is based on a **KA103** project and the export and import for student mobilities. This may be different for other key actions and activities.

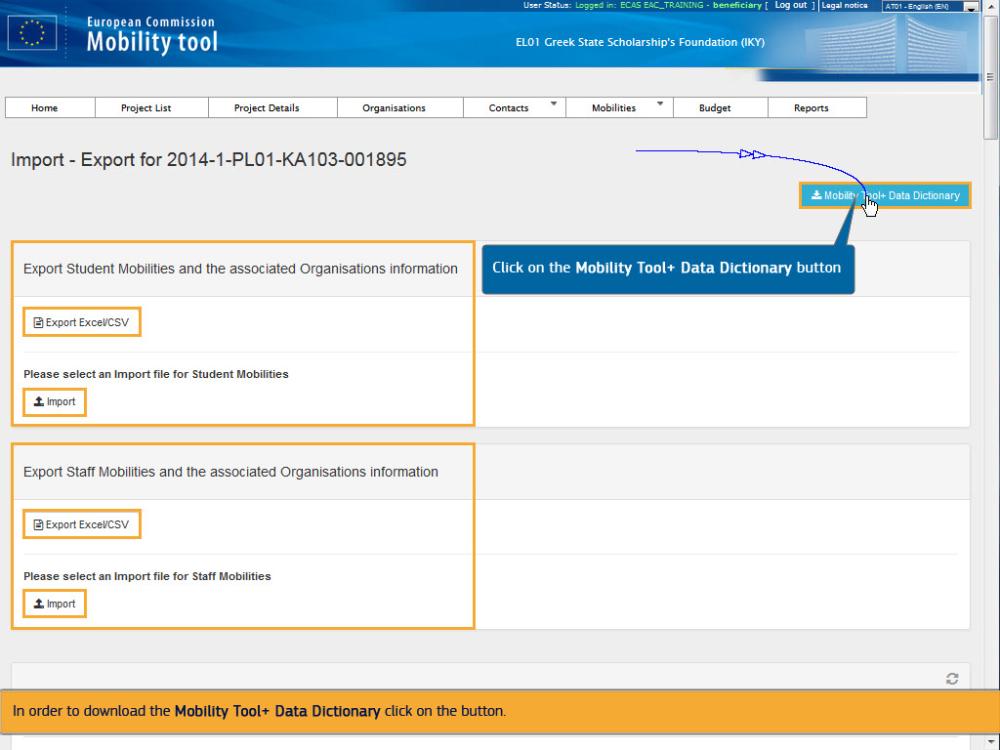
**Slide 2 - Slide 2**



**Text Captions**

Go to the **Mobilities** menu item and select **Import - Export**.

**Slide 3 - Slide 3**



**Text Captions**

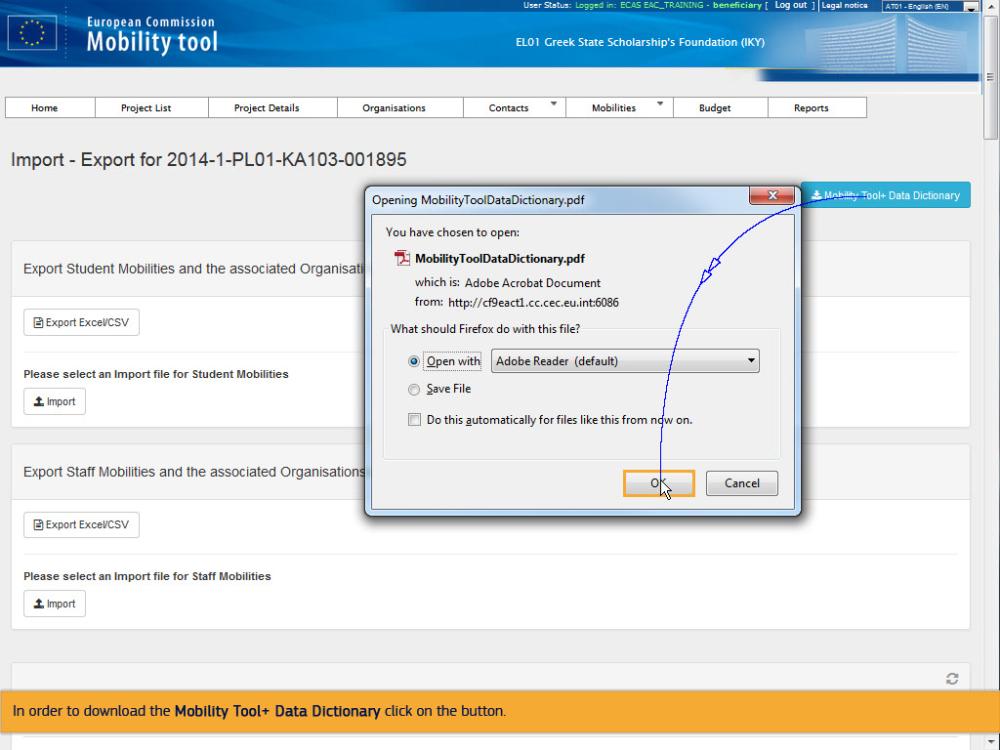
On this screen, you can perform the export and import of student mobilities and of staff mobilities.

Due to the fact that these two types of mobilities contain different fields, there are two separate functionalities which allow the import and export of these types of mobilities.

In order to download the **Mobility Tool+ Data Dictionary** click on the button.

Click on the **Mobility Tool+ Data Dictionary** button

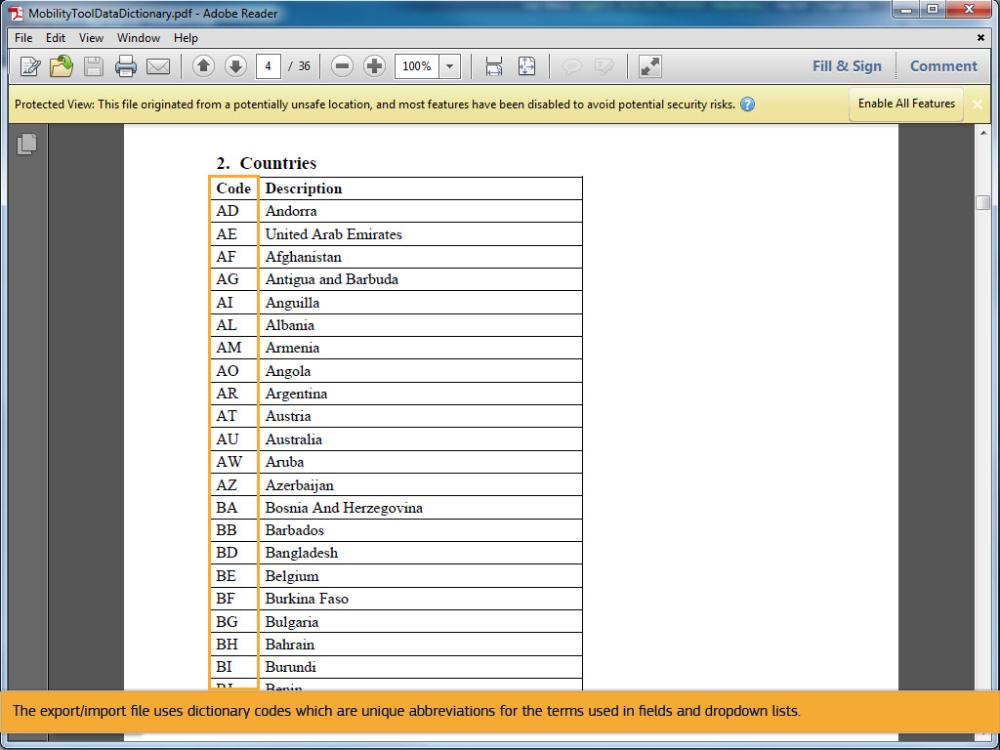
**Slide 4 - Slide 4**



**Text Captions**

In order to download the **Mobility Tool+ Data Dictionary** click on the button.

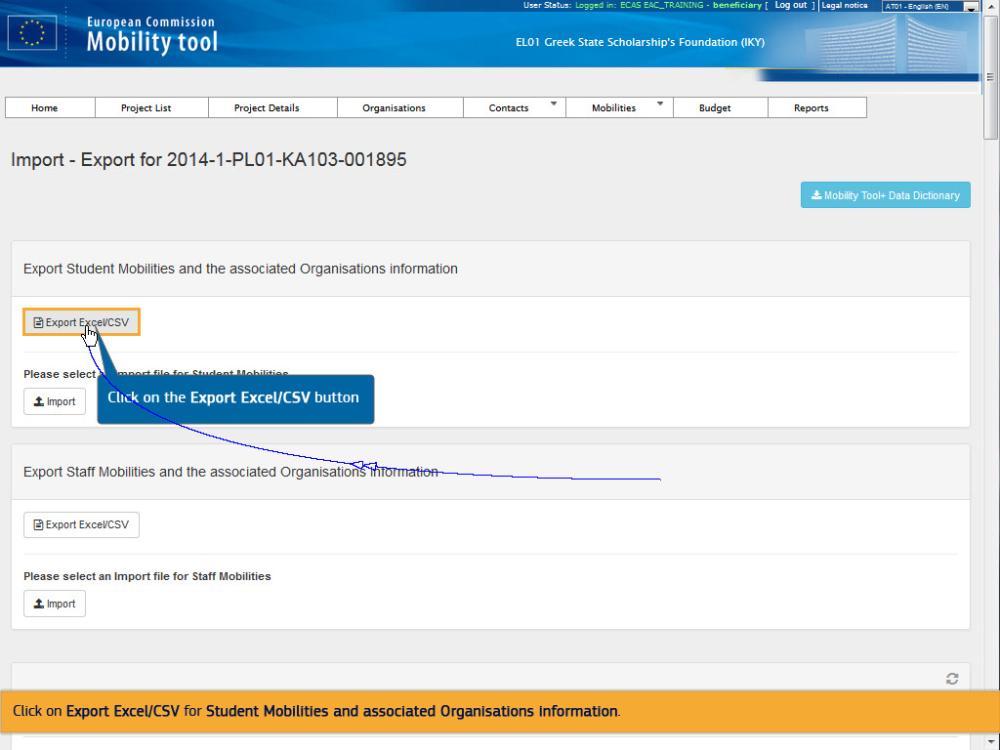
**Slide 5 - Slide 5**



**Text Captions**

The export/import file uses dictionary codes which are unique abbreviations for the terms used in fields and dropdown lists.

**Slide 6 - Slide 6**

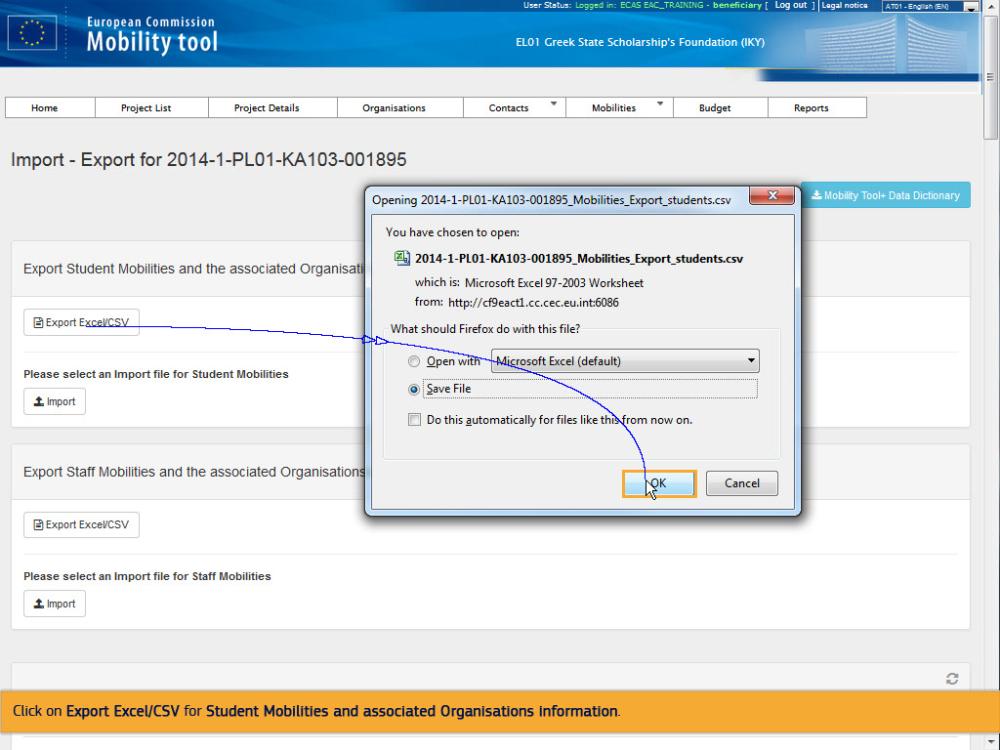


**Text Captions**

Click on the **Export Excel/CSV** button

Click on **Export Excel/CSV** for **Student Mobilities and associated Organisations information**.

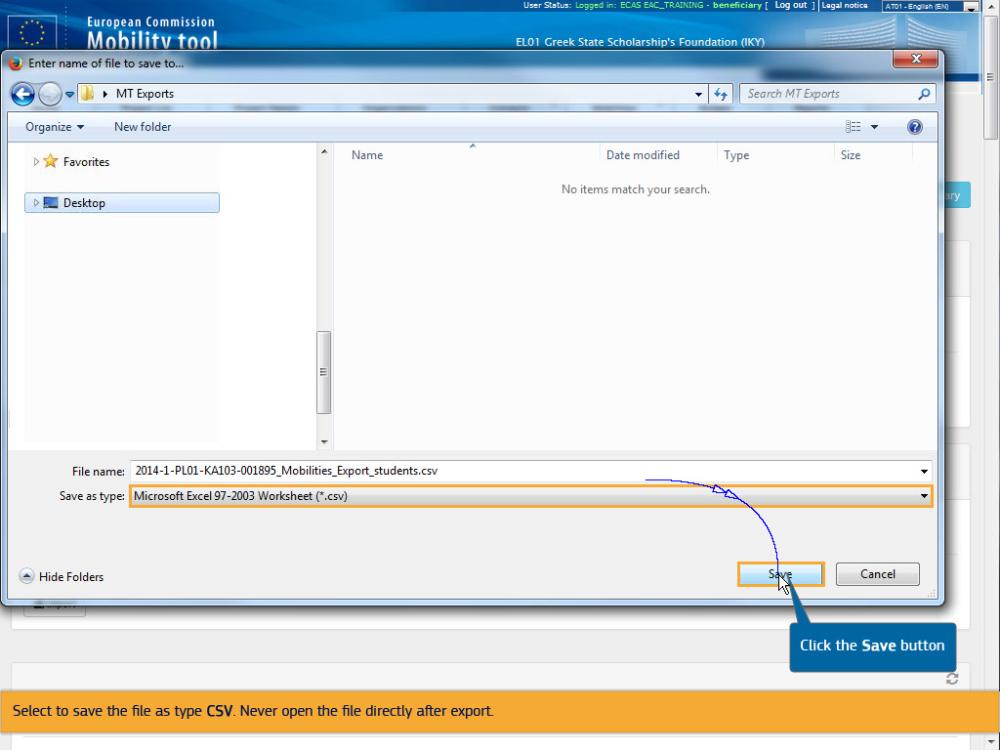
**Slide 7 - Slide 7**



**Text Captions**

Click on **Export Excel/CSV** for **Student Mobilities and associated Organisations information**.

**Slide 8 - Slide 8**

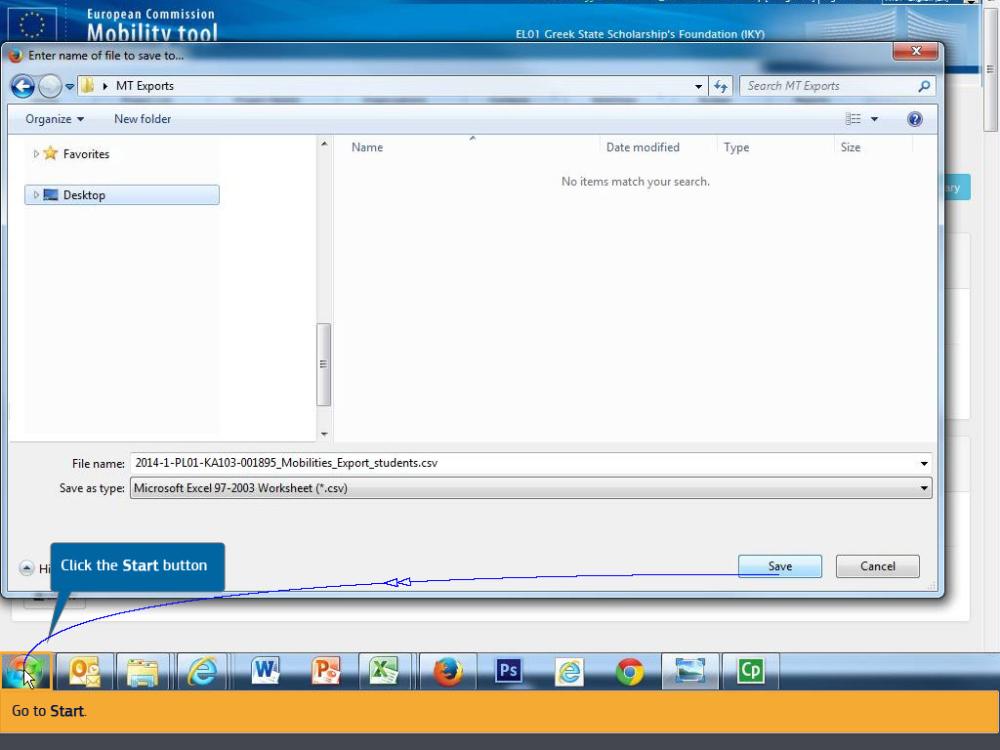


**Text Captions**

Select to save the file as type **CSV**. Never open the file directly after export.

Click the **Save** button

**Slide 9 - Slide 9**

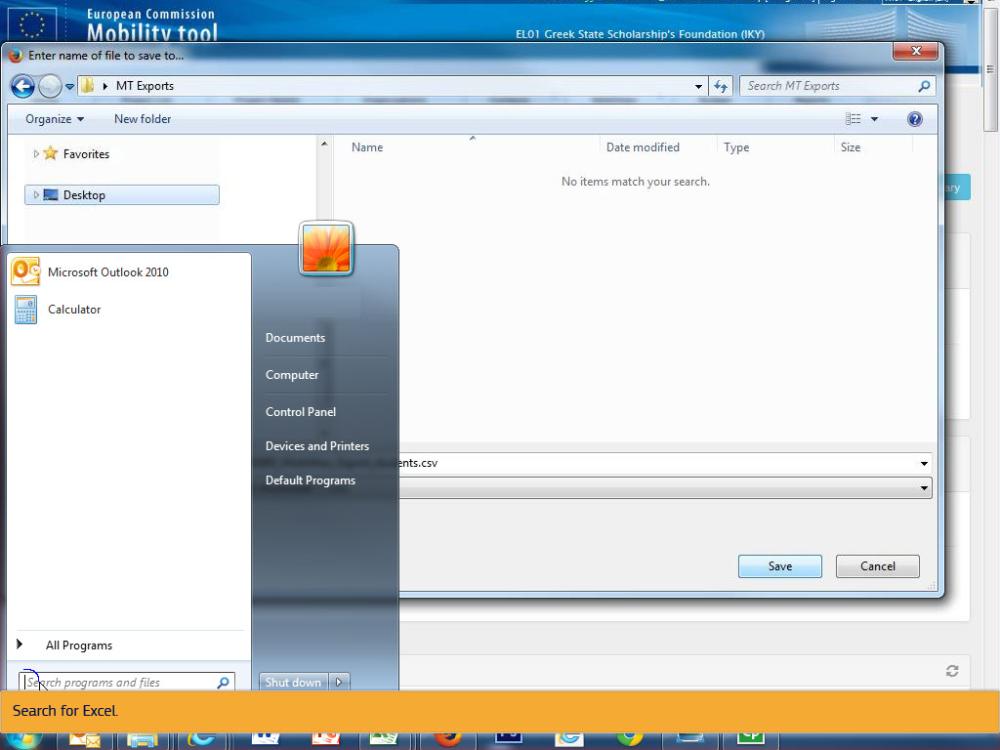


**Text Captions**

Click the **Start** button

Go to **Start**.

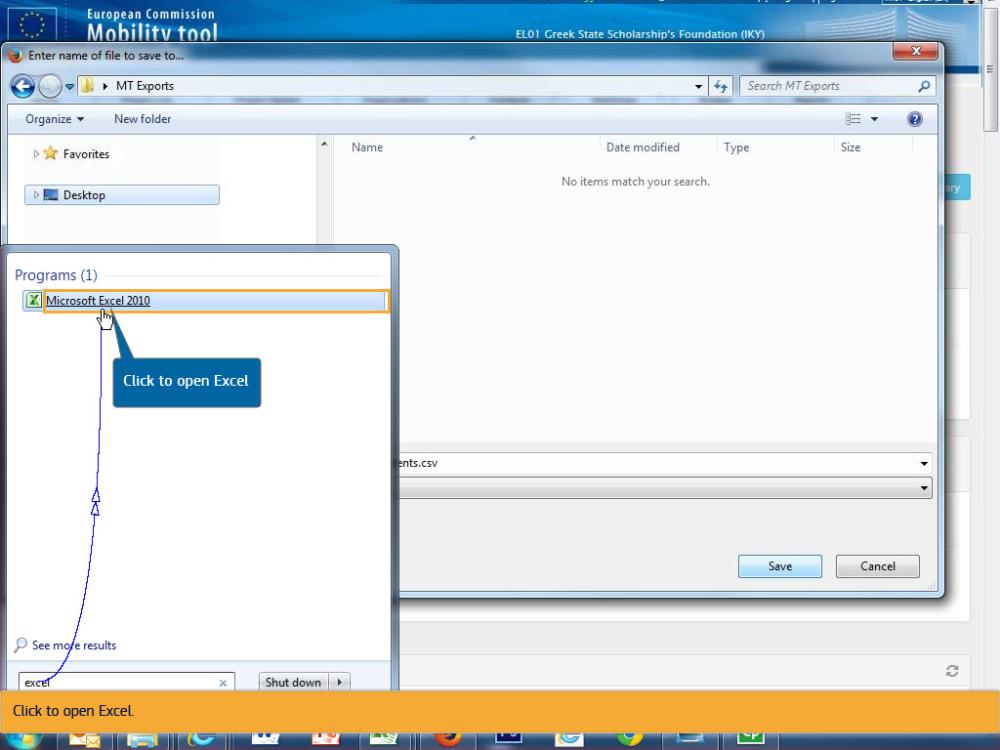
**Slide 10 - Slide 10**



**Text Captions**

Search for Excel.

**Slide 12 - Slide 12**

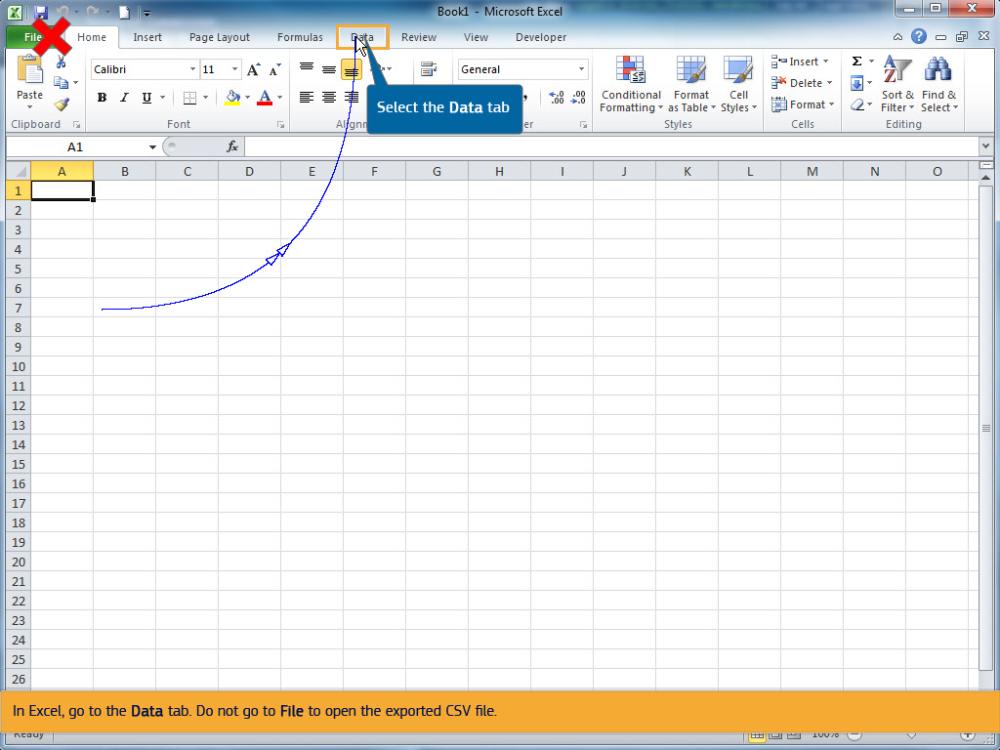


**Text Captions**

Click to open Excel

Click to open Excel.

**Slide 13 - Slide 13**

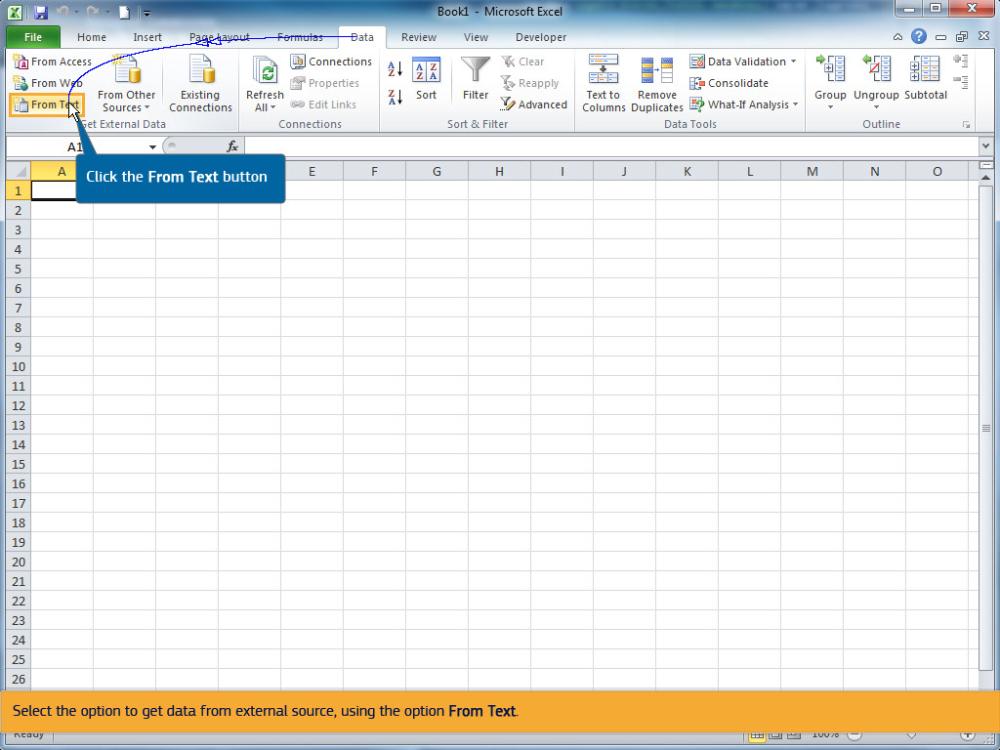


**Text Captions**

Select the **Data** tab

In Excel, go to the **Data** tab. Do not go to **File** to open the exported CSV file.

**Slide 14 - Slide 14**

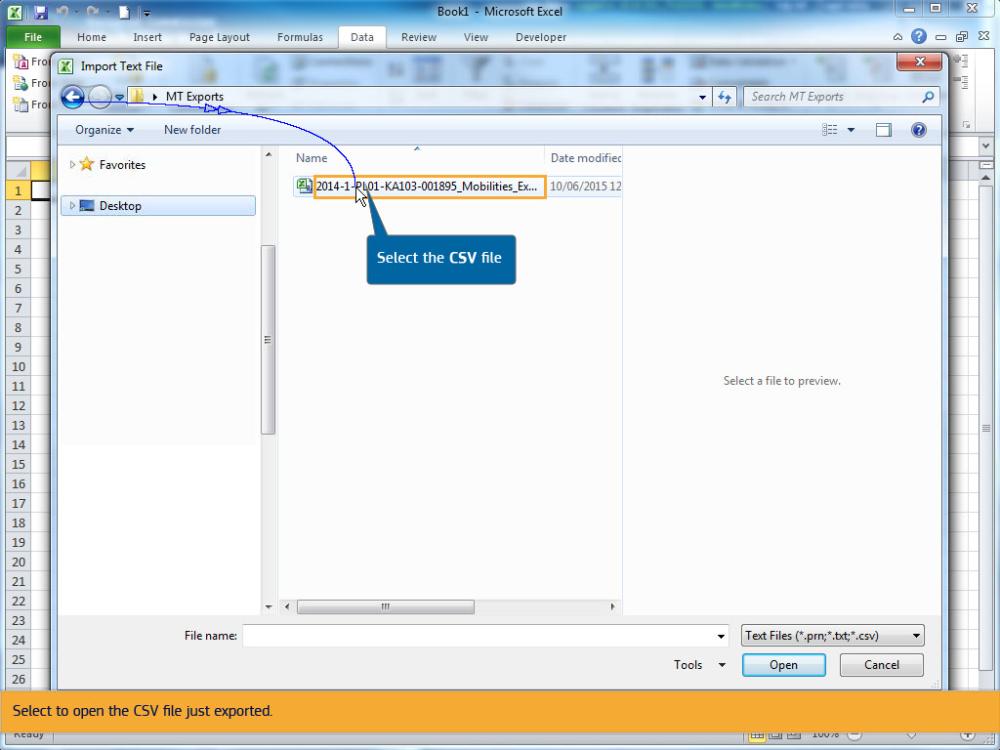


**Text Captions**

Click the **From Text** button

Select the option to get data from external source, using the option **From Text**.

**Slide 15 - Slide 15**

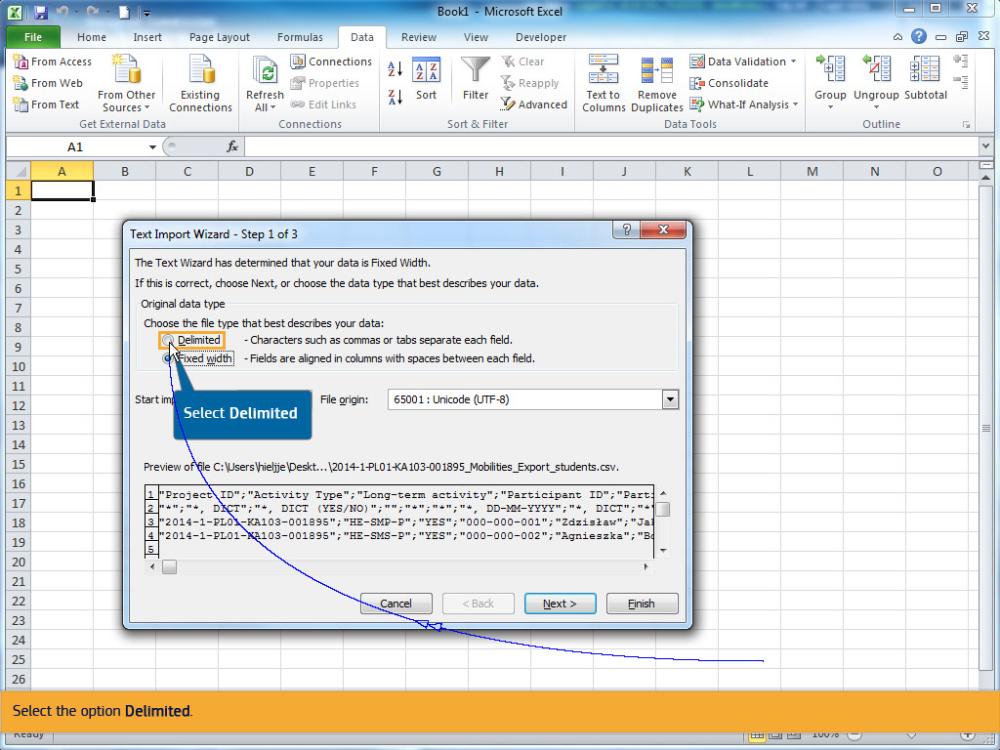


**Text Captions**

Select the **CSV** file

Select to open the CSV file just exported.

**Slide 17 - Slide 17**

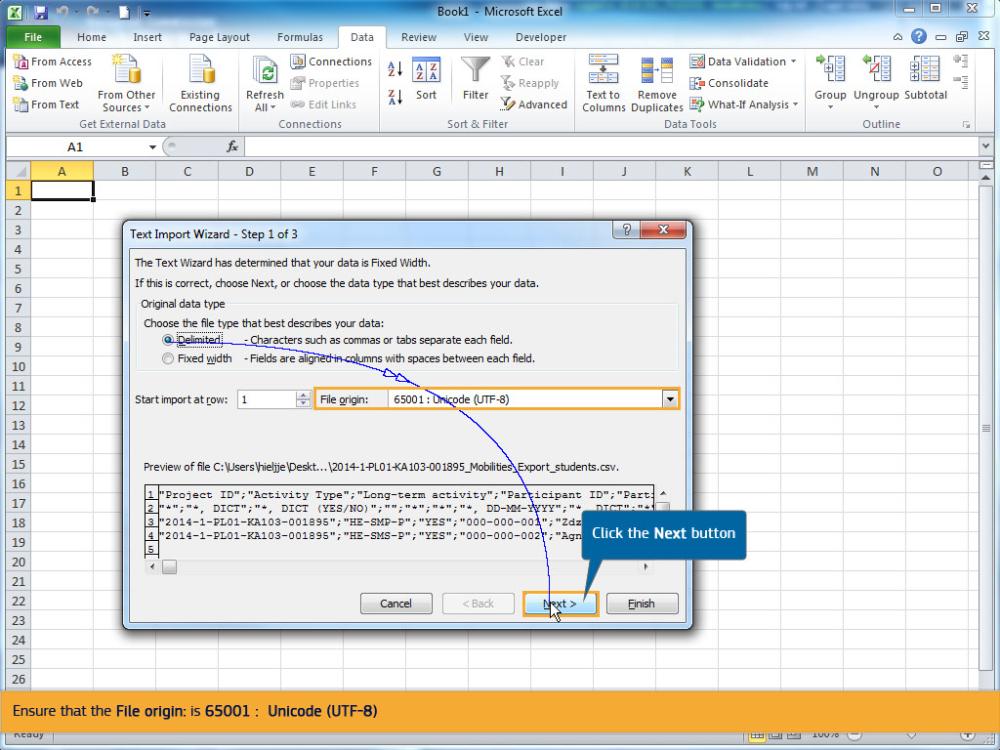


**Text Captions**

Select the option **Delimited**.

Select **Delimited**

**Slide 18 - Slide 18**



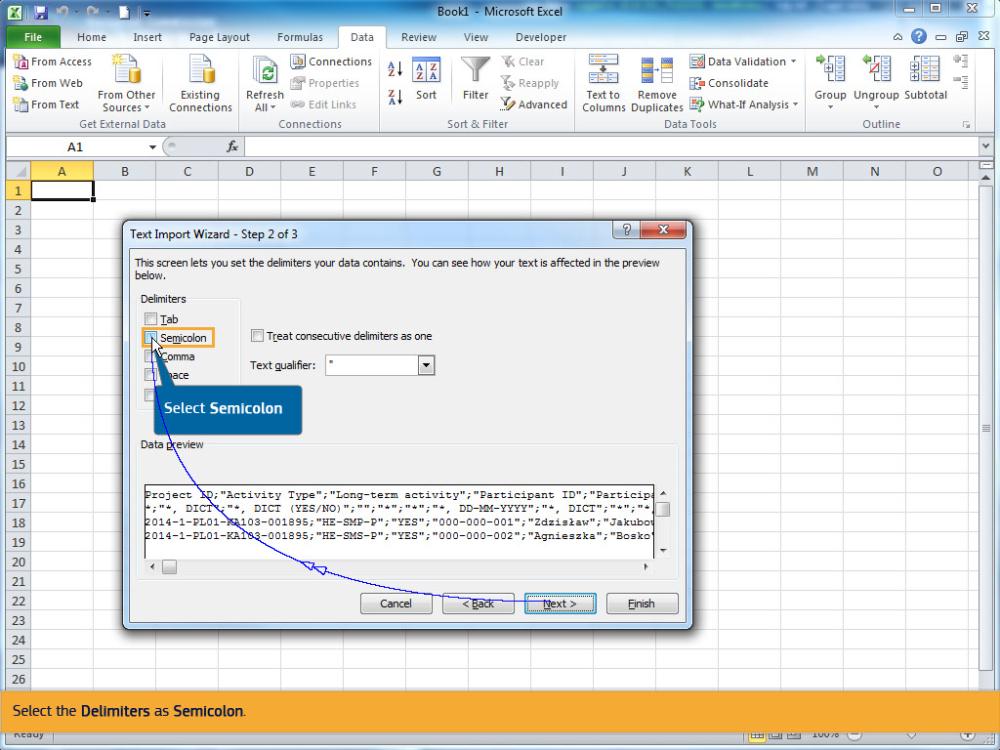
**Text Captions**

Click the **Next** button

Ensure that the **File origin:** is **65001 : Unicode (UTF-8)**

Click on **Next**.

**Slide 19 - Slide 19**

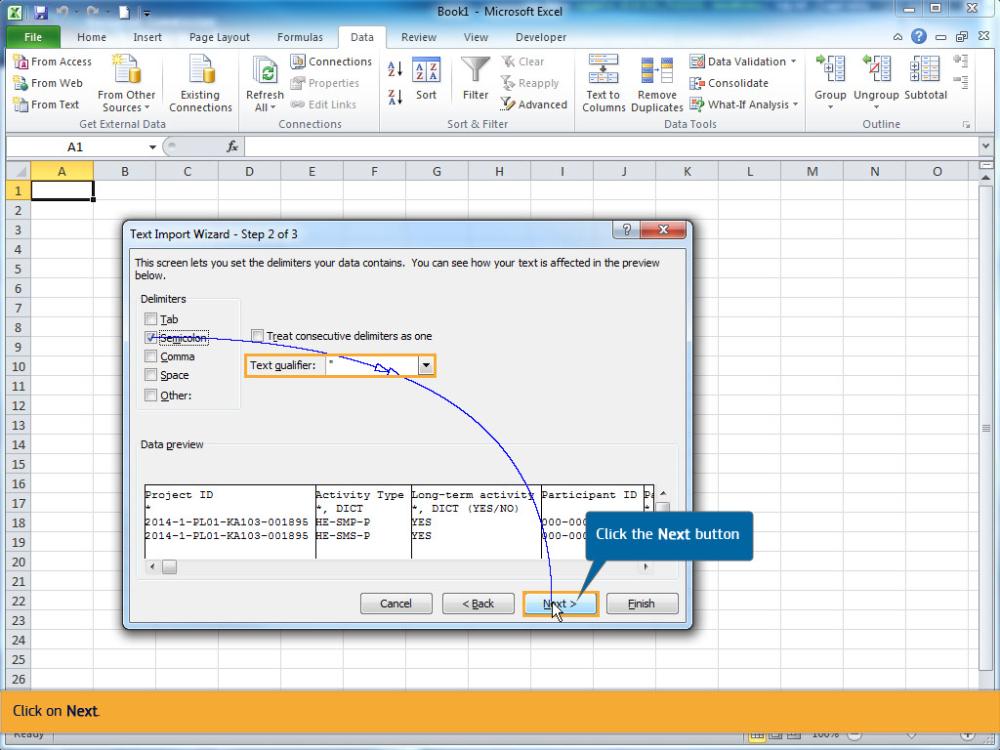


**Text Captions**

Select **Semicolon**

Select the **Delimiters** as **Semicolon**.

**Slide 20 - Slide 20**



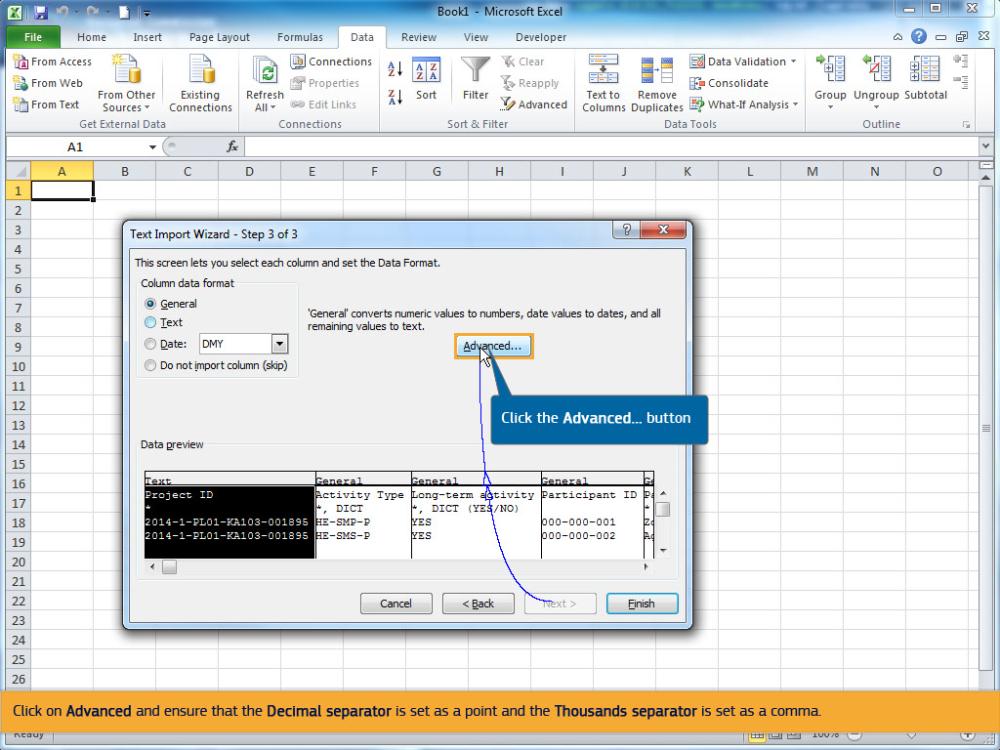
**Text Captions**

Click the **Next** button

The text qualifier as a **"** quotation mark.

Click on **Next**.

**Slide 21 - Slide 21**

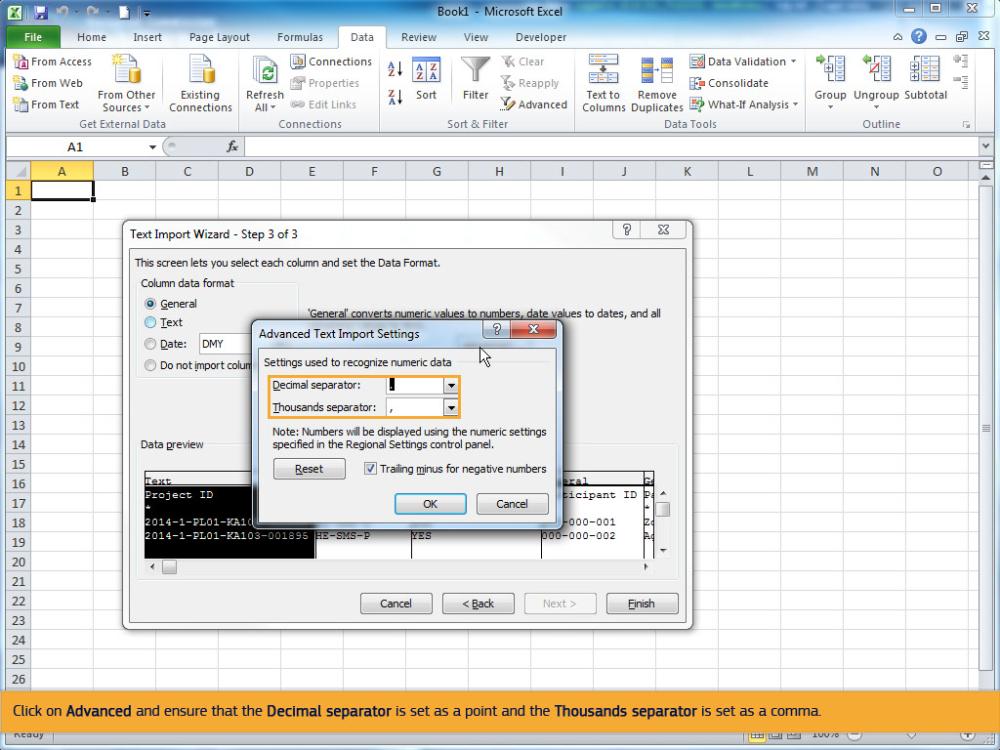


**Text Captions**

Click the **Advanced...** button

Click on **Advanced** and ensure that the **Decimal separator** is set as a point and the **Thousands separator** is set as a comma.

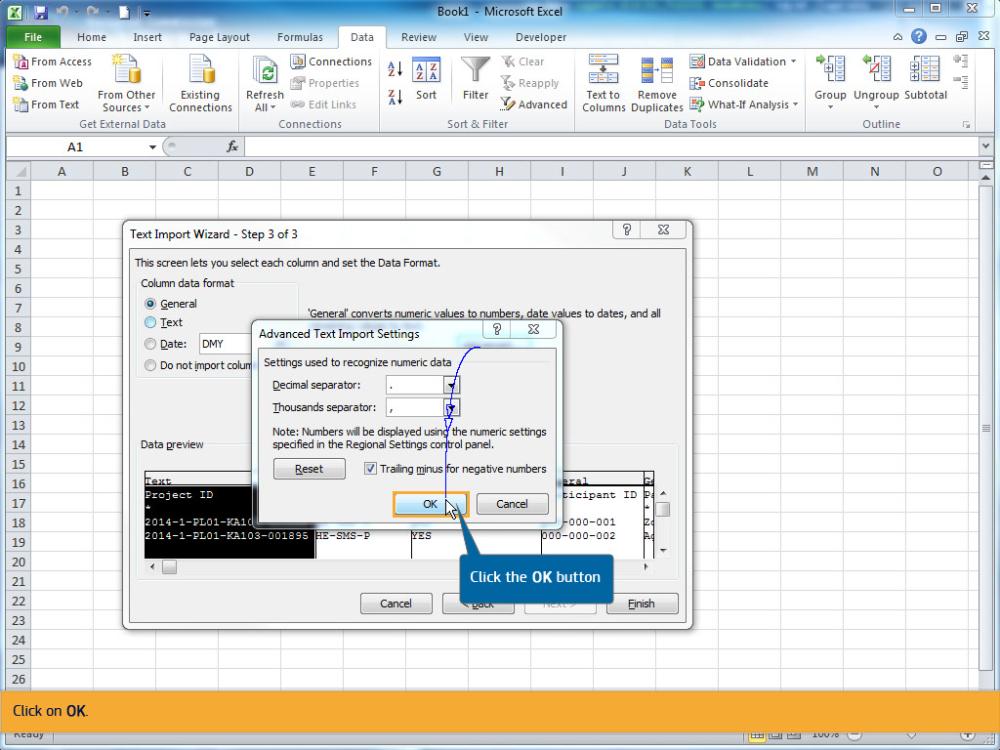
**Slide 22 - Slide 22**



**Text Captions**

Click on **Advanced** and ensure that the **Decimal separator** is set as a point and the **Thousands separator** is set as a comma.

**Slide 23 - Slide 23**

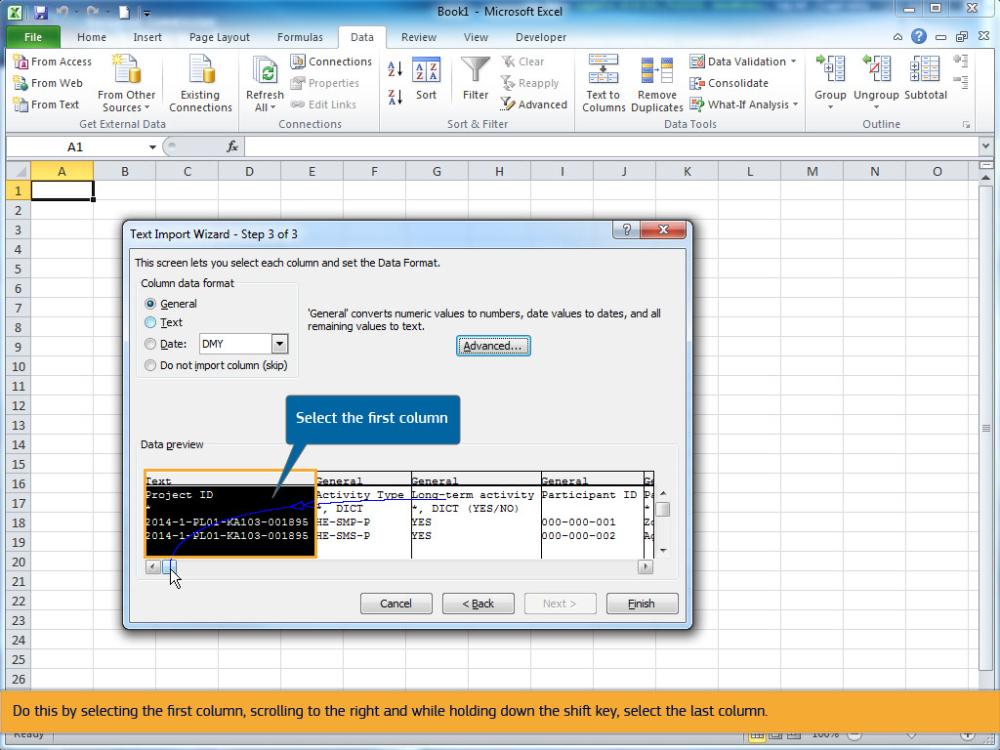


**Text Captions**

Click the **OK** button

Click on **OK**.

**Slide 24 - Slide 24**



**Text Captions**

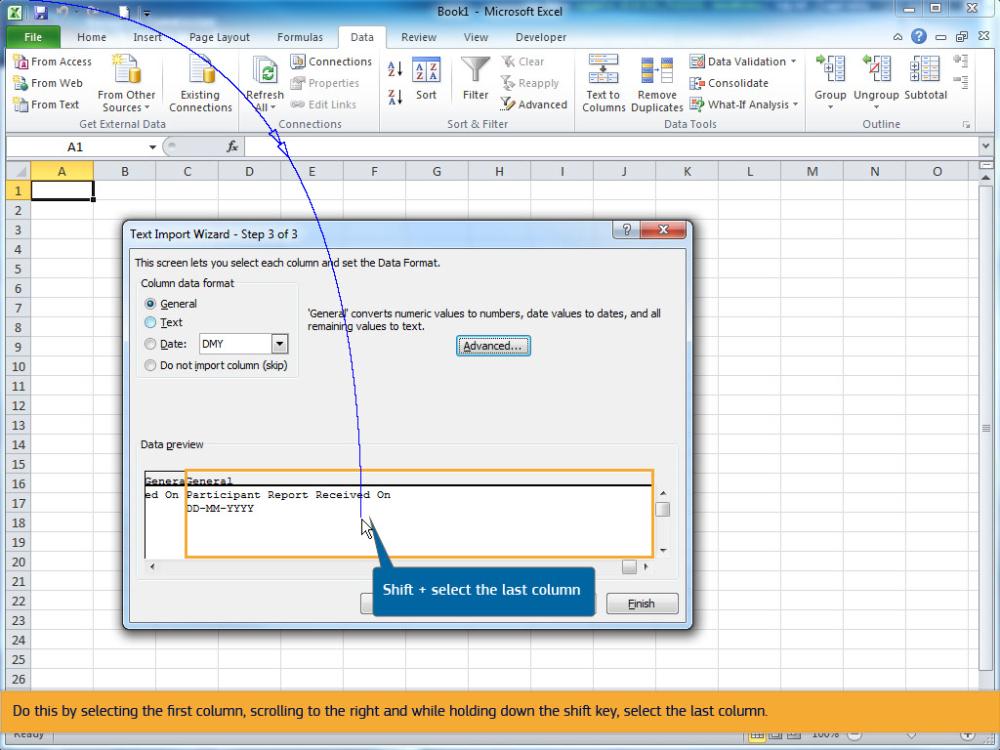
In the **Data preview**, select all columns.

Do this by selecting the first column, scrolling to the right and while holding down the shift key, select the last column.

Select the first column

Select the first column

**Slide 26 - Slide 26**

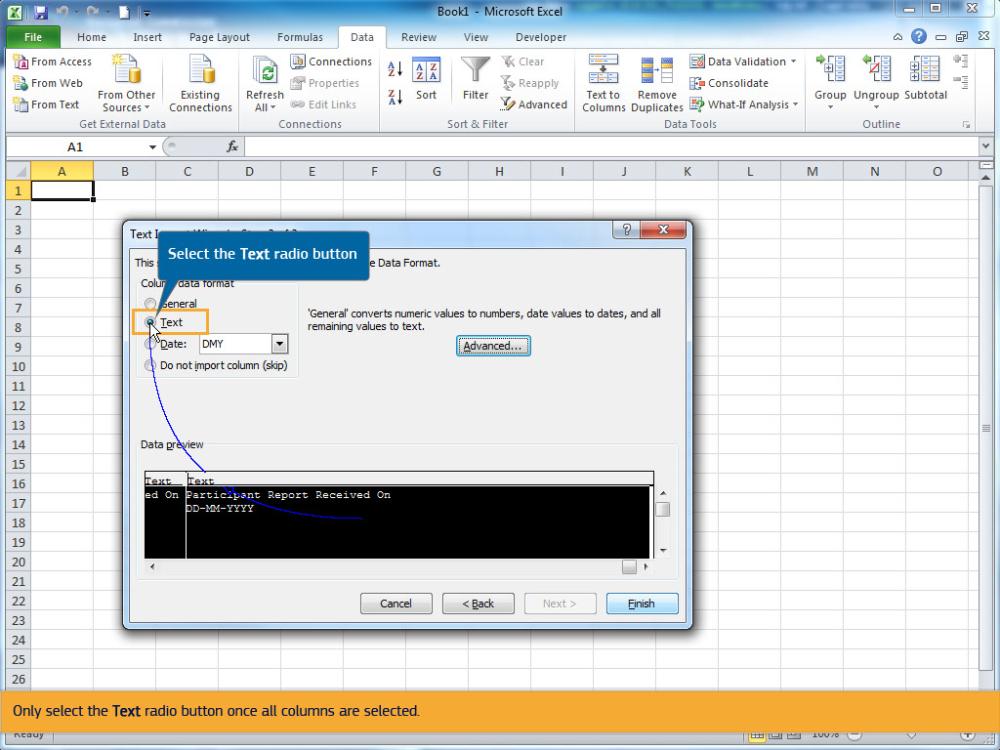


**Text Captions**

Shift + select the last column

Do this by selecting the first column, scrolling to the right and while holding down the shift key, select the last column.

**Slide 27 - Slide 27**

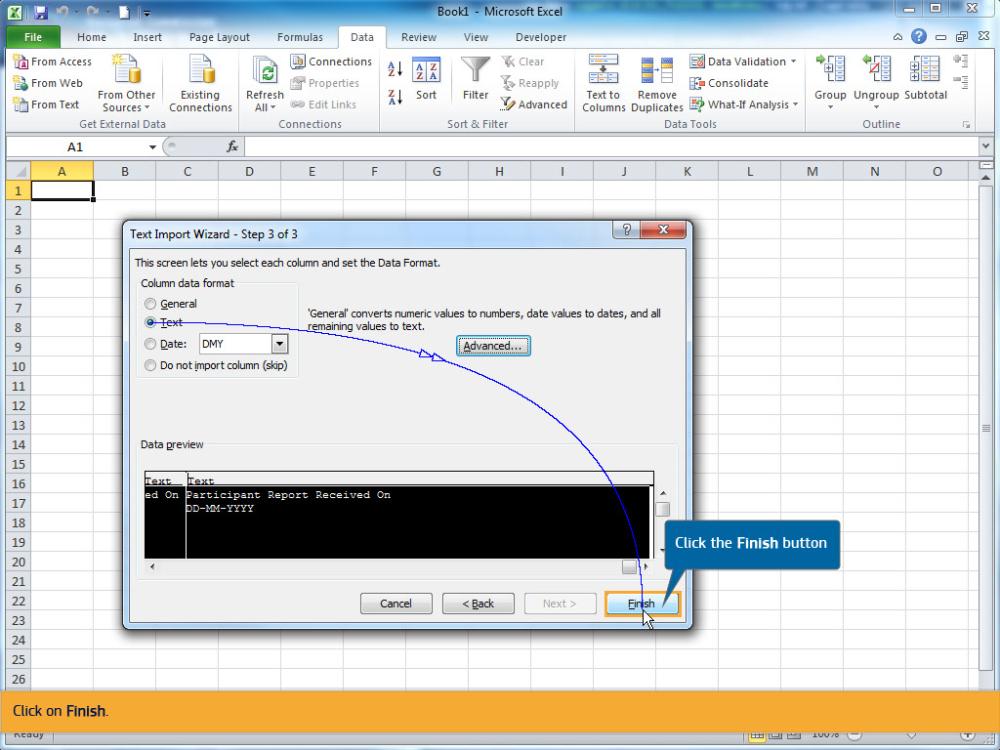


**Text Captions**

Select the **Text** radio button

Only select the **Text** radio button once all columns are selected.

**Slide 28 - Slide 28**

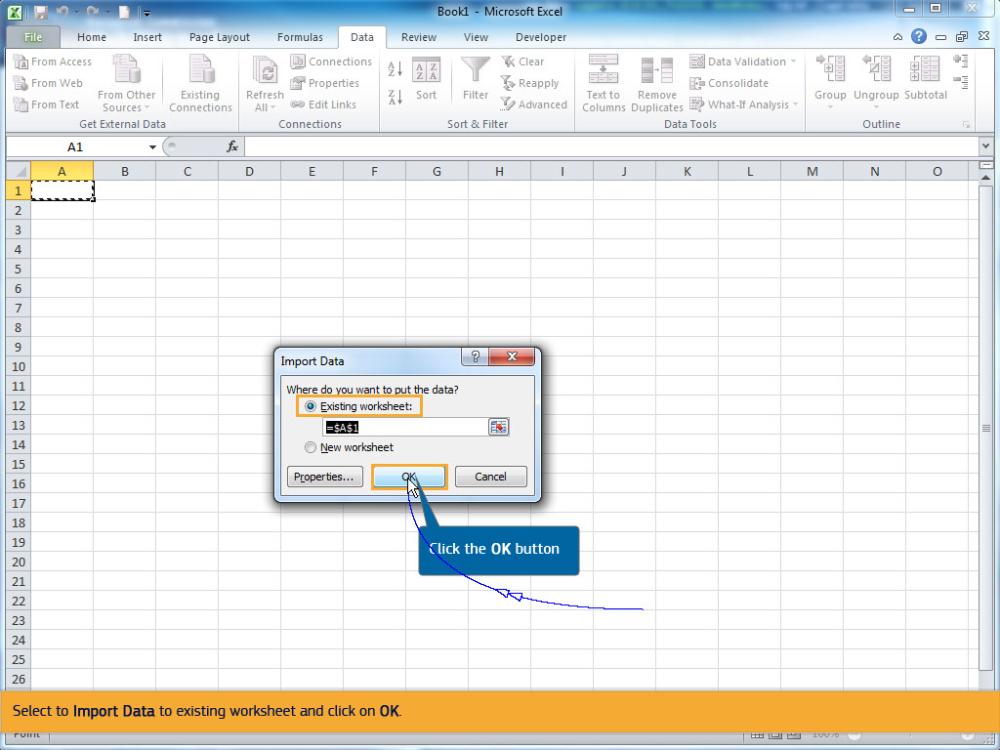


**Text Captions**

Click the **Finish** button

Click on **Finish**.

**Slide 29 - Slide 29**



**Text Captions**

Click the **OK** button

Select to **Import Data** to existing worksheet and click on **OK**.

**Slide 30 - Slide 30**



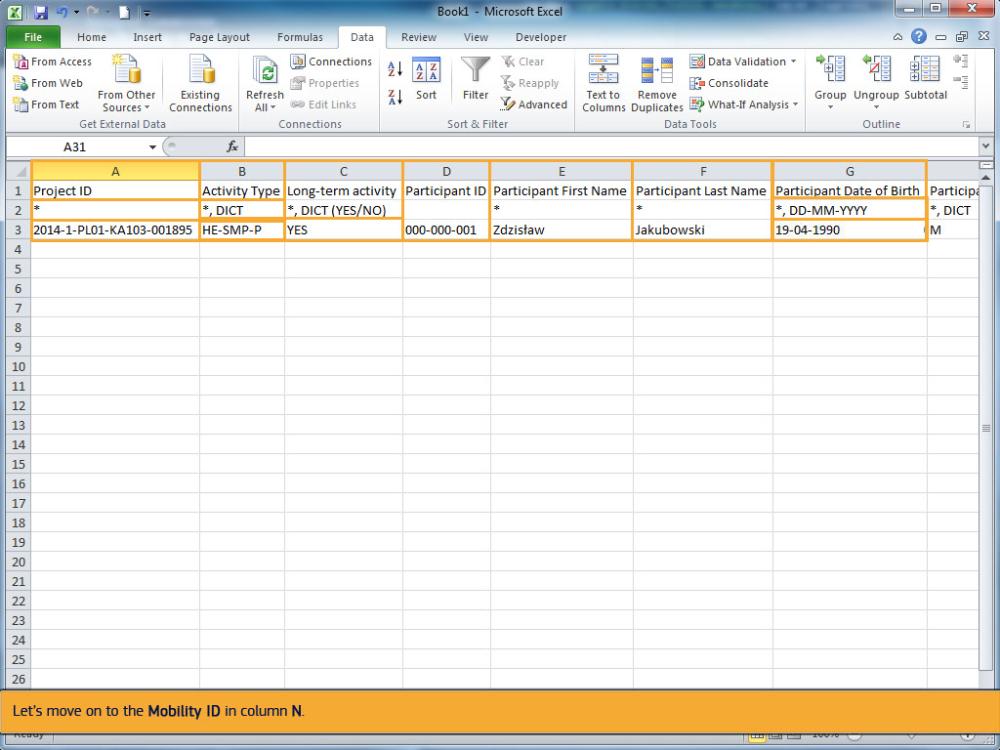
**Text Captions**

In this example, there is already one mobility added. The first row details the names of the fields.

The second row indicates if the field is mandatory, by the presence of an asterisk. It also indicates if a dictionary value is required or whether special formatting, such as the format for dates or decimal places, is required.

Each mobility will be listed per row.

**Slide 31 - Slide 31**



**Text Captions**

The first column shown is the **Project ID**. You can note that this is a mandatory field by the presence of an asterisk in the 2nd row.

The second column, **Activity Type**, is also mandatory and must contain a valid dictionary value.

In this case, it indicates **HE-SMP-P** for **Student mobility for studies between Programme Countries**.

The **Long-term activity** column uses the dictionary value (**YES/NO**).

Only **YES** or **NO** can be used in this cell to indicate if the mobility is a long term activity or not.

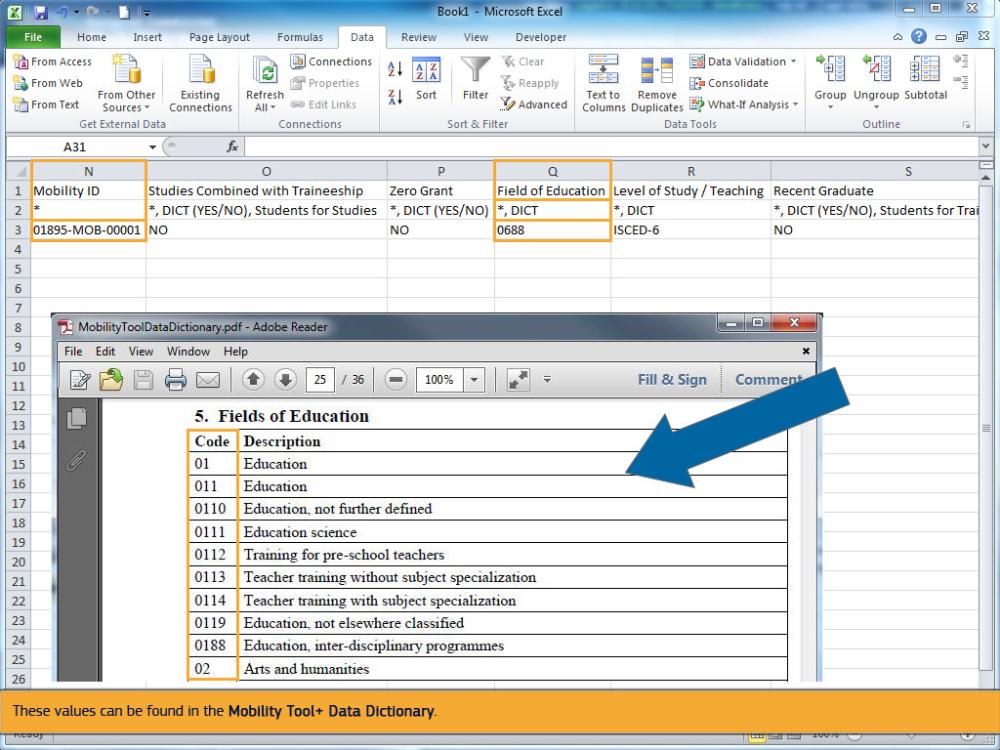
The **Participant ID** column is neither mandatory and no dictionary value or special formatting is required.

The next columns deal with the participant details, **First Name**, **Last Name** and **Date of Birth**.

The **Date of Birth** field indicates that the value must be entered in the format **DD-MM-YYYY**.

Let’s move on to the **Mobility ID** in column **N**.

**Slide 32 - Slide 32**



**Text Captions**

This field is mandatory and must be unique for each mobility entered in the Excel file and for the project.

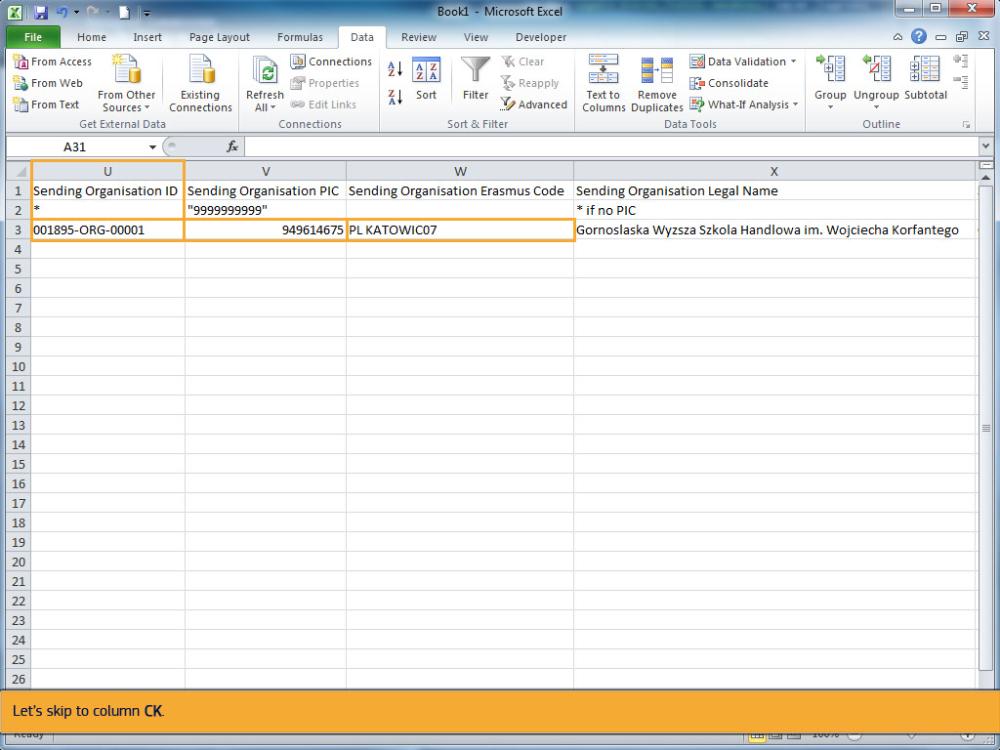
Changing the Mobility ID slightly, for example replacing the dash with a dot, will create a new mobility.

Changing all other details of the mobility: participant's name, address, etc., but keeping the Mobility ID the same, will overwrite all previous details for that Mobility.

The **Field of Education** in column **Q**, is mandatory, and only accepts the dictionary value.

These values can be found in the **Mobility Tool+ Data Dictionary**.

**Slide 33 - Slide 33**



**Text Captions**

All organisations that have been created in MT+ will have an **Organisation ID**.

If the Organisation ID is not changed or updated in the project in MT+, then the system will automatically generate the Organisation ID.

It will be composed of the Project ID, the letters ORG and a sequential number. The Organisation ID must be unique for each organisation in the project.

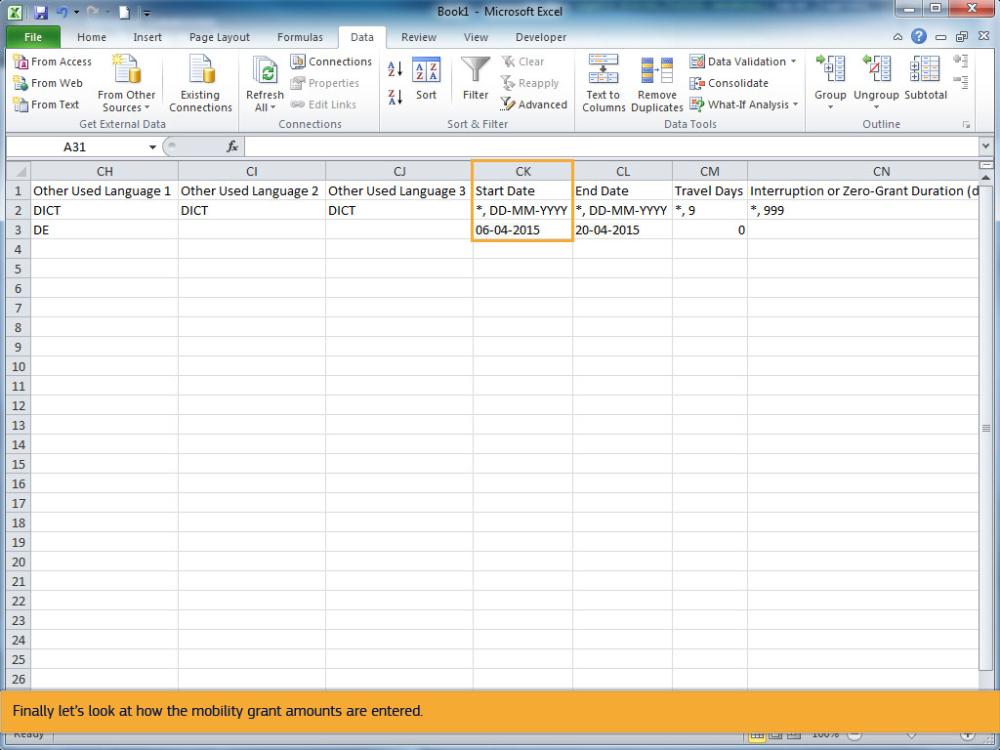
The Organisation ID is linked with both the Erasmus Code and the PIC.

When the **Organisation ID**, and either the **PIC** or **Erasmus Code** are entered, the organisation's remaining details are not required to be completed

in the Import file. This is true for both the sending and receiving organisations details.

Let’s skip to column **CK**.

**Slide 34 - Slide 34**

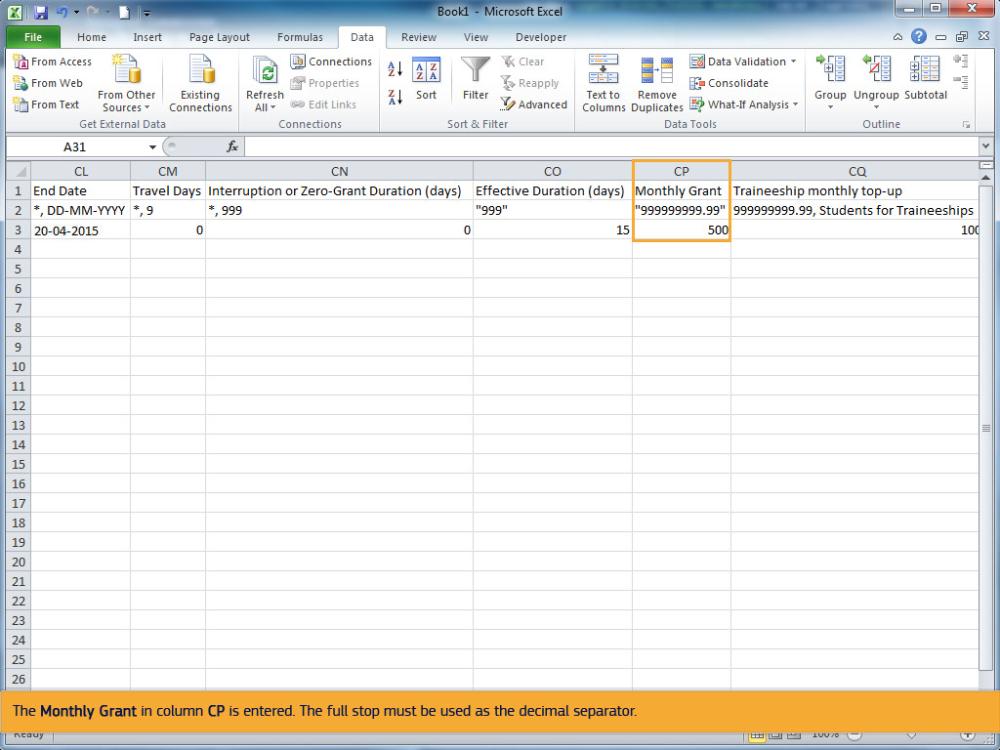


**Text Captions**

The **Start Date** of the mobility must have the format **DD-MM-YYYY**, using a dash as separator.

Finally let’s look at how the mobility grant amounts are entered.

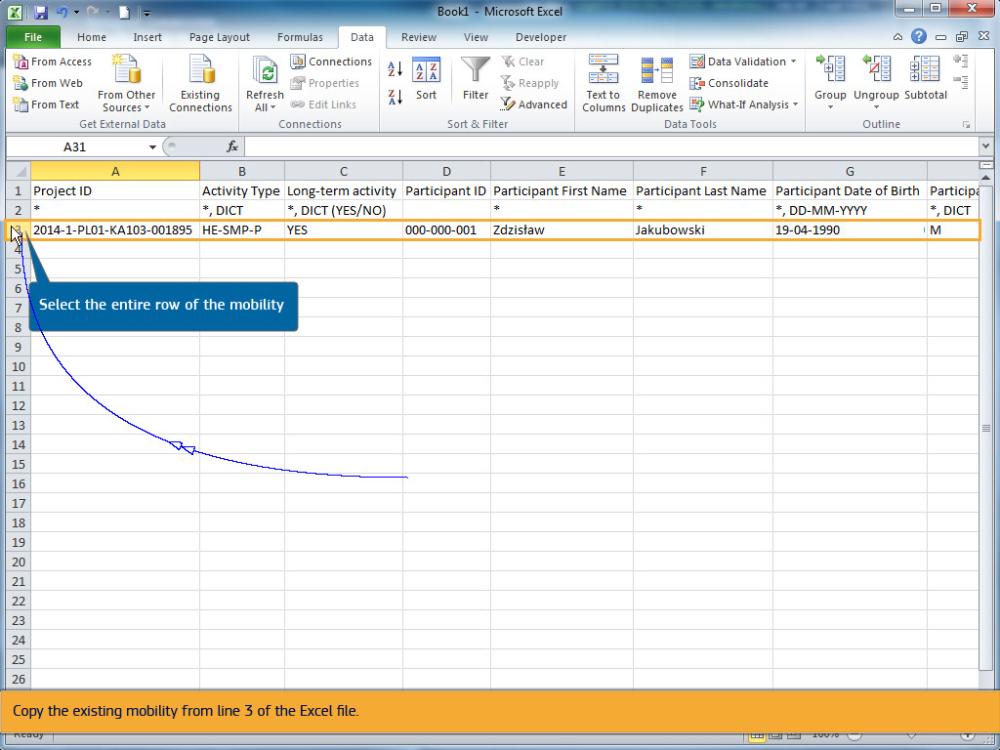
**Slide 35 - Slide 35**



**Text Captions**

The **Monthly Grant** in column **CP** is entered. The full stop must be used as the decimal separator.

**Slide 36 - Slide 36**



**Text Captions**

Select theentire rowof the mobility

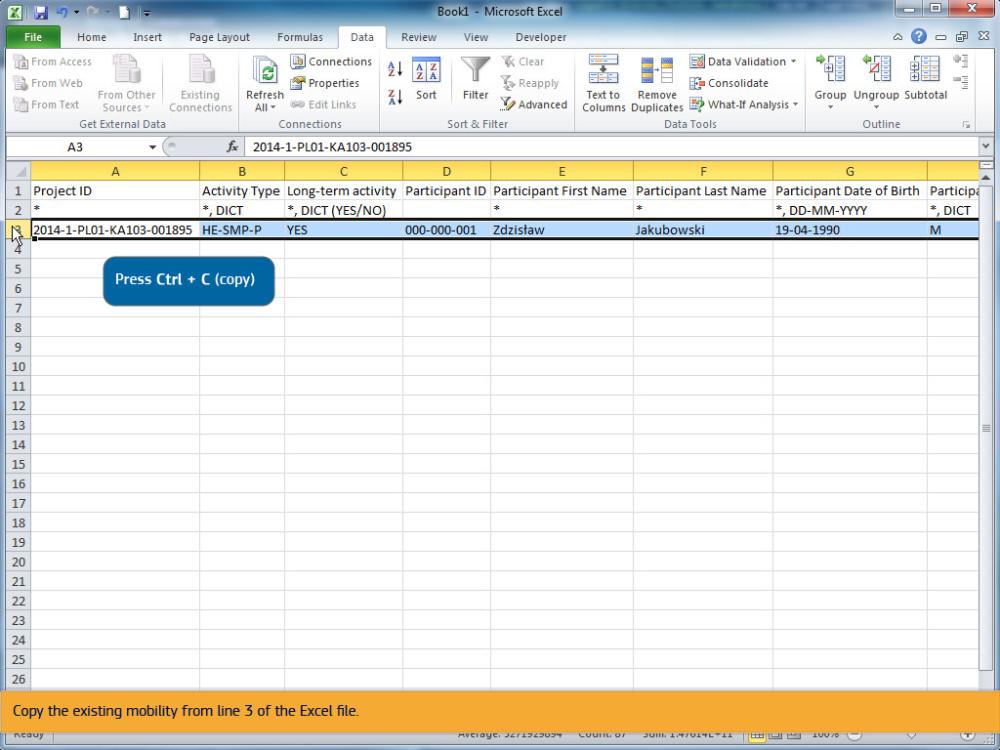
In order to explain how to add new mobilities, we will look at a simple scenario where 5 new mobilities are added.

Each mobility will have a different participant coming from the same organisation and going to the same location.

The mobility budget is also the same for each mobility.

Copy the existing mobility from line 3 of the Excel file.

**Slide 37 - Slide 37**

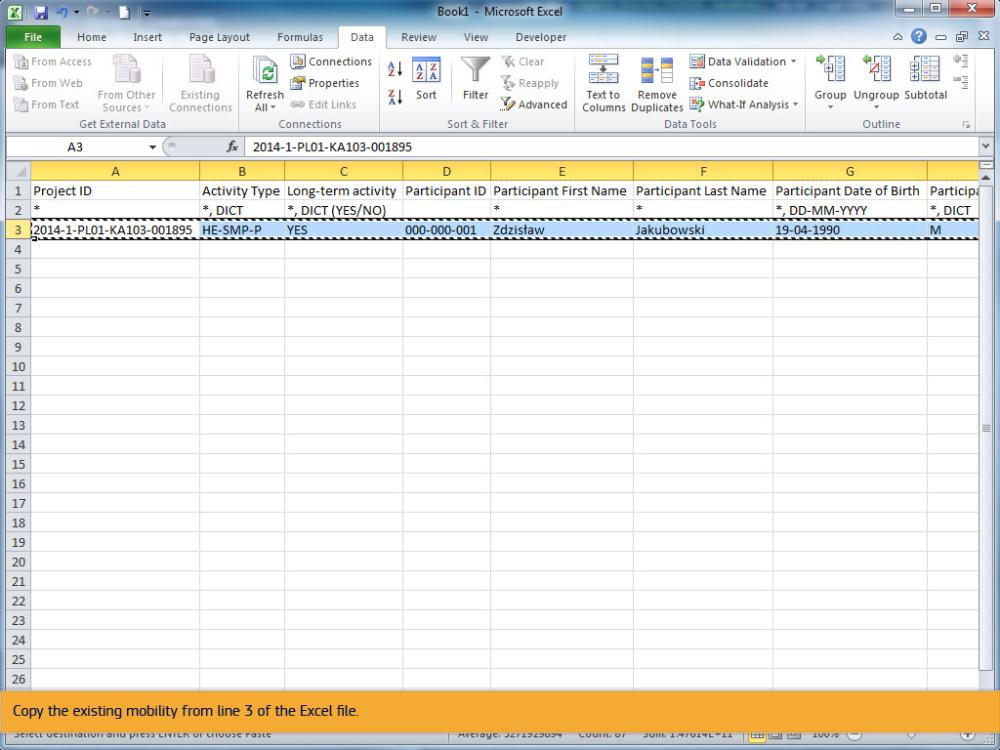


**Text Captions**

Press **Ctrl + C** (copy)

Copy the existing mobility from line 3 of the Excel file.

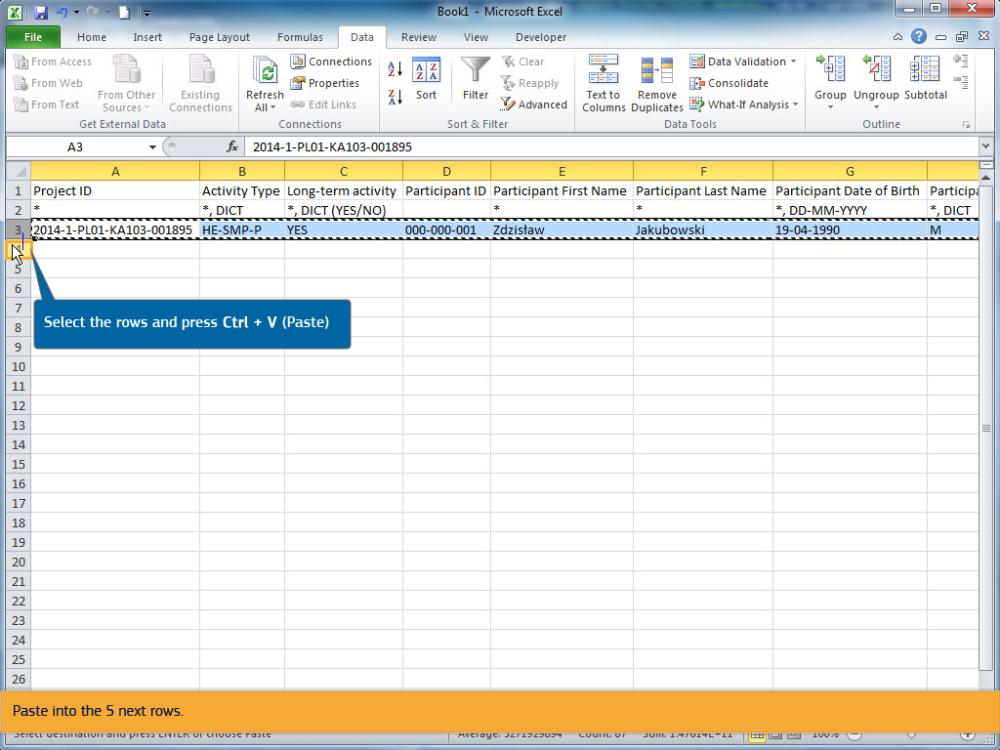
**Slide 38 - Slide 38**



**Text Captions**

Copy the existing mobility from line 3 of the Excel file.

**Slide 39 - Slide 39**

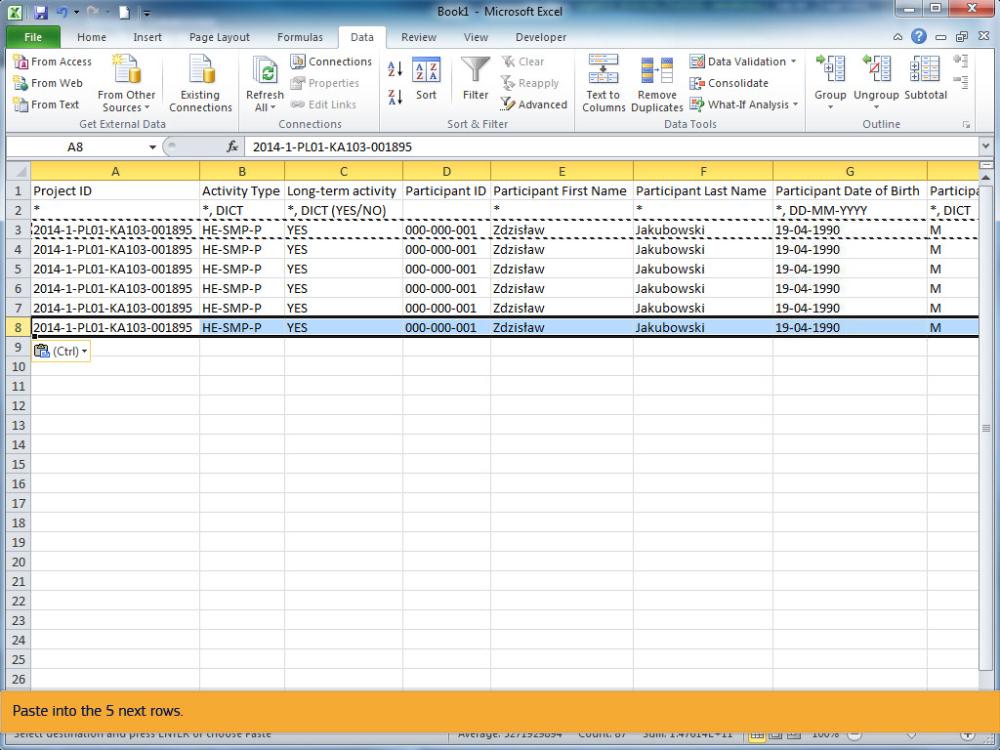


**Text Captions**

Select the rows and press **Ctrl + V** (Paste)

Paste into the 5 next rows.

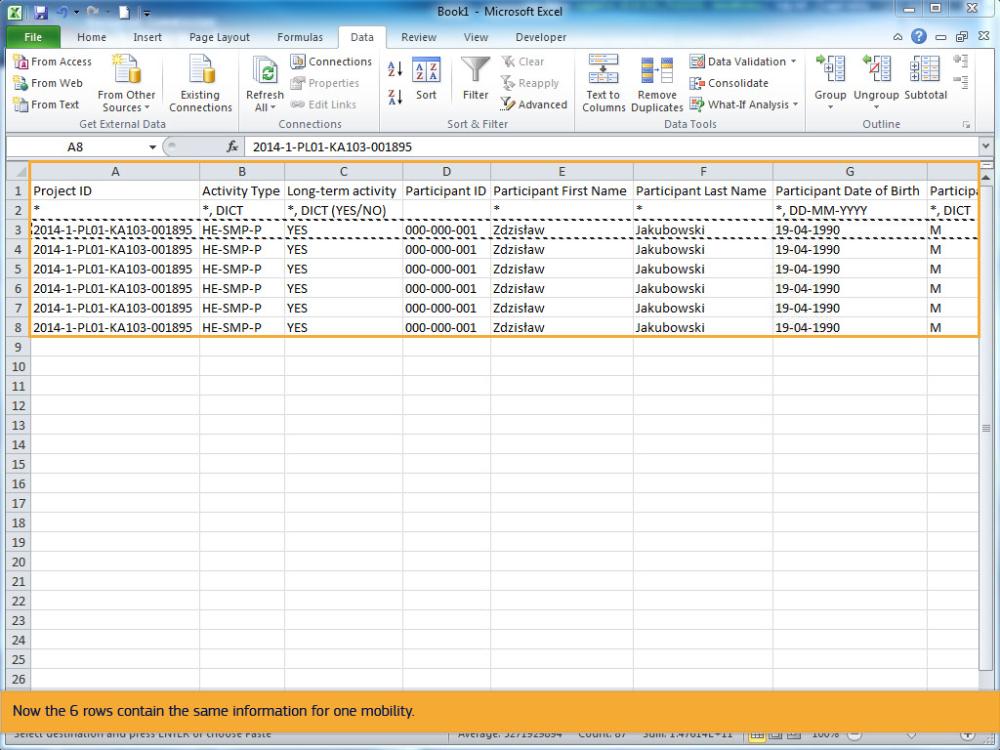
**Slide 42 - Slide 42**



**Text Captions**

Paste into the 5 next rows.

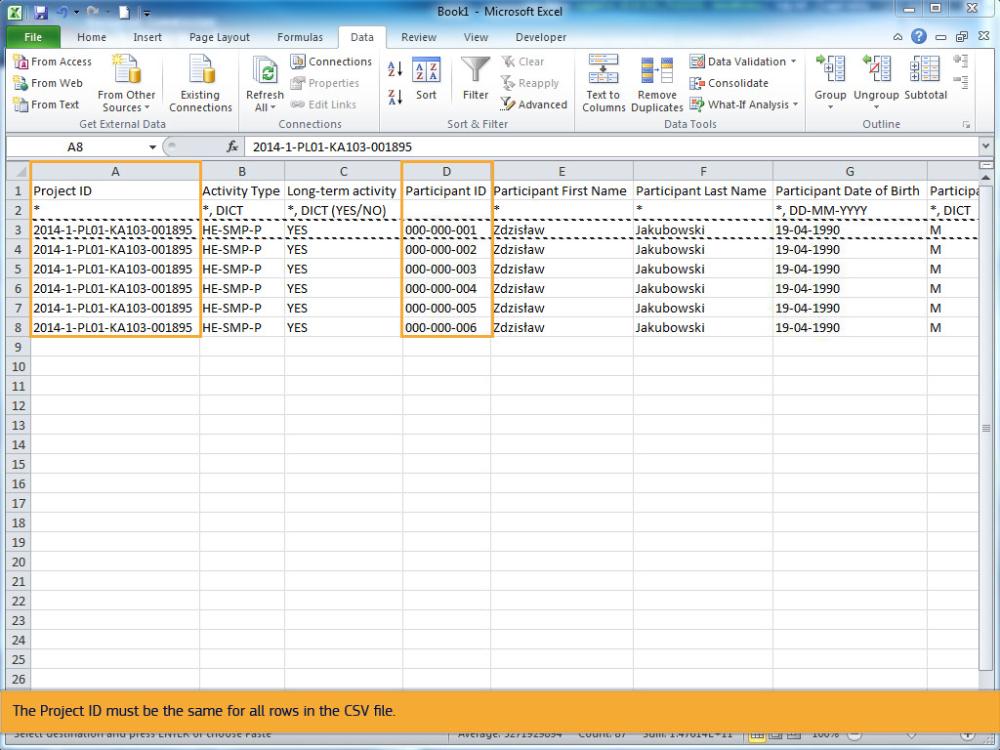
**Slide 43 - Slide 43**



**Text Captions**

Now the 6 rows contain the same information for one mobility.

**Slide 44 - Slide 44**

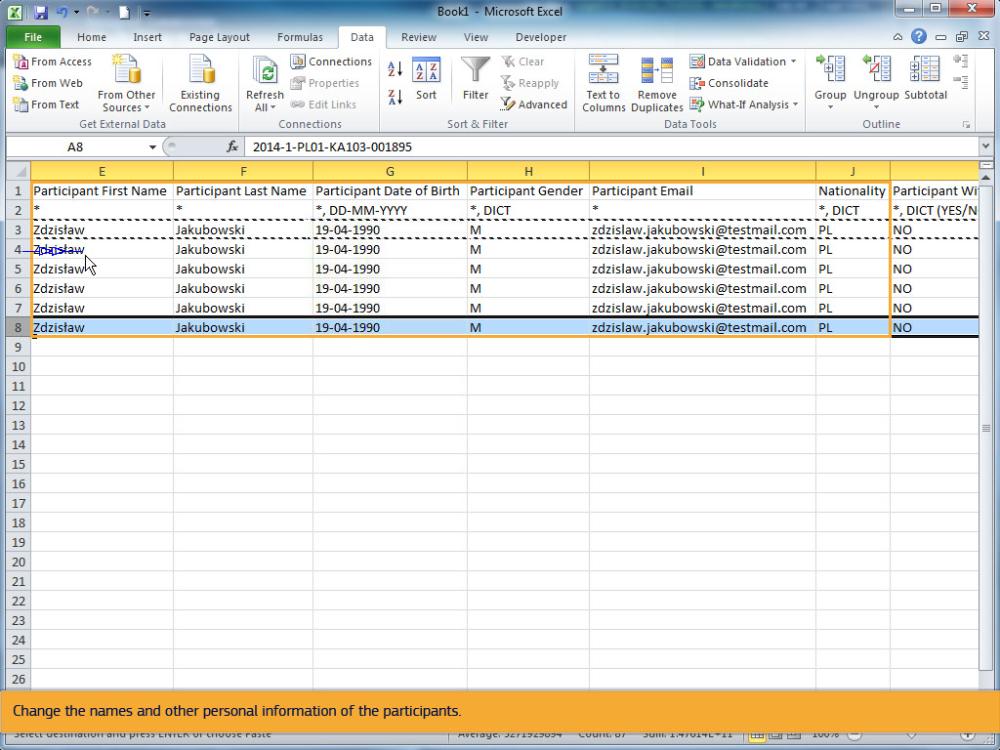


**Text Captions**

Before completing the details for each participant, update the participant ID with a unique ID or leave blank.

The Project ID must be the same for all rows in the CSV file.

**Slide 45 - Slide 45**

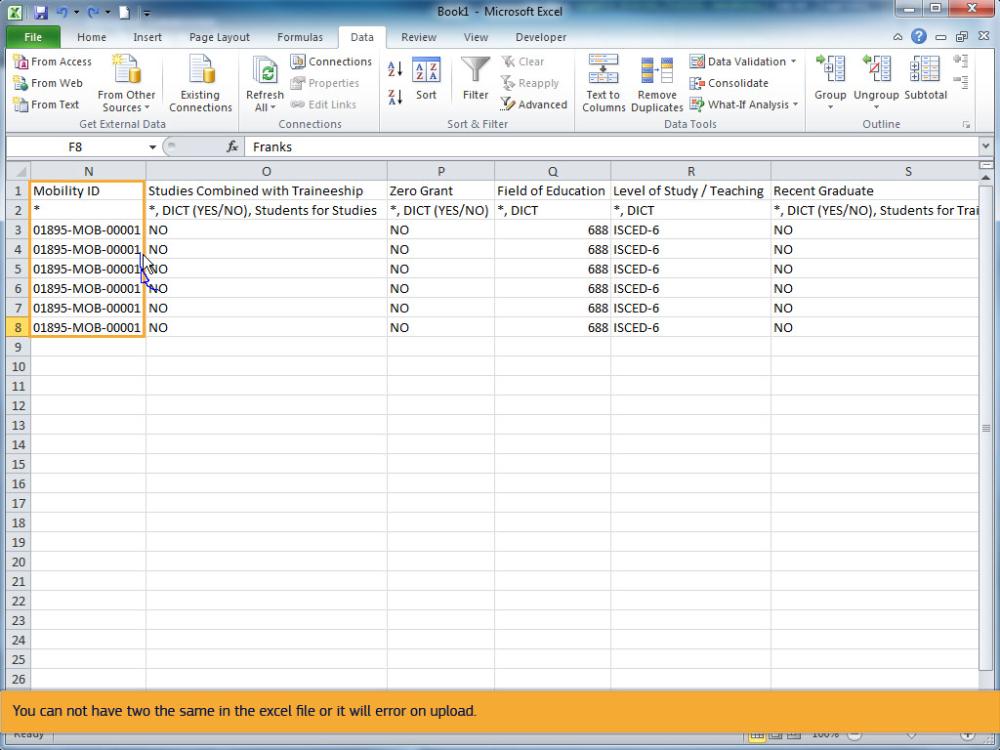


**Text Captions**

The following cells in each row, must be updated with 5 different participant details and a unique Mobility ID.

Change the names and other personal information of the participants.

**Slide 49 - Slide 49**

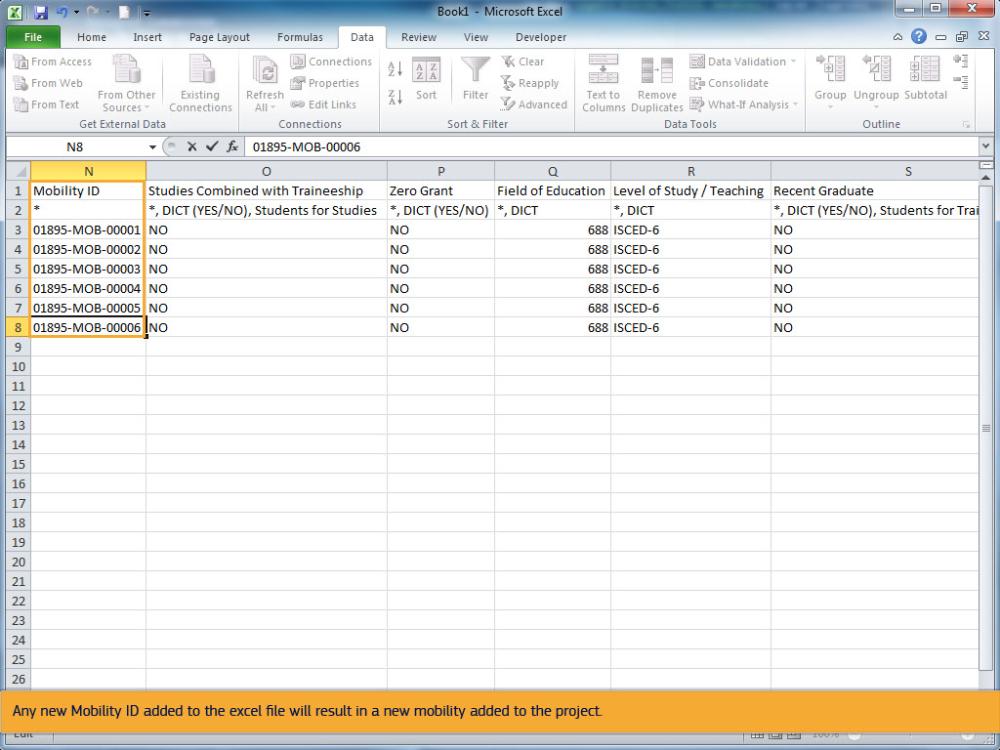


**Text Captions**

Don't forget to provide a unique **Mobility ID** for each row. This must be unique for the project.

You can not have two the same in the excel file or it will error on upload.

**Slide 51 - Slide 51**

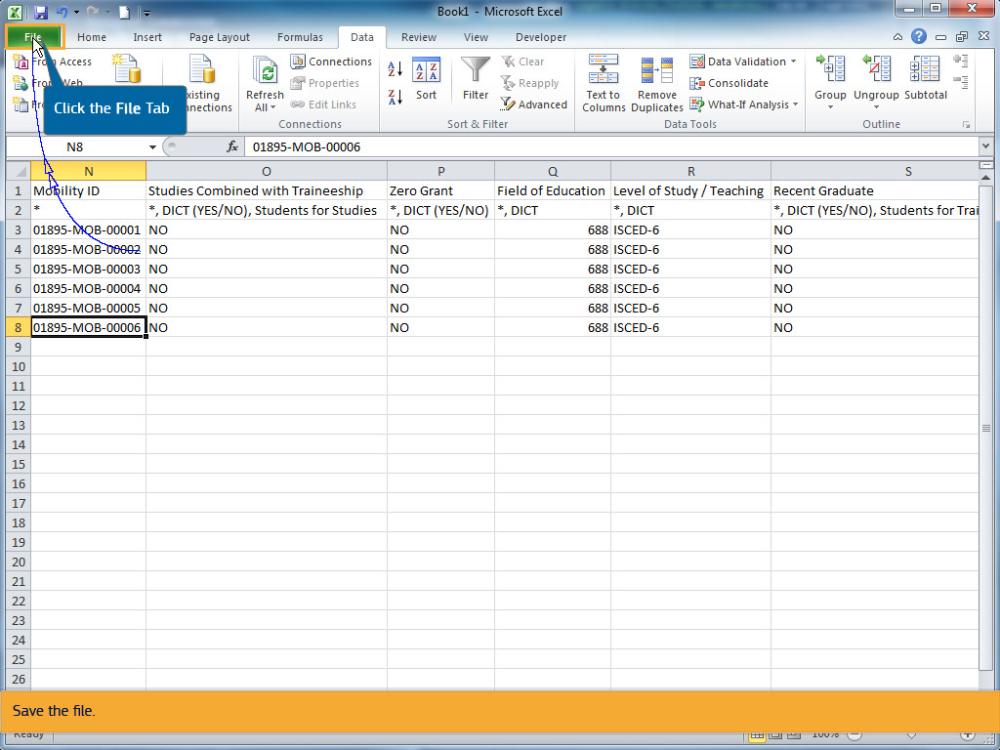


**Text Captions**

If the Mobility ID is the same as an existing Mobility ID, it will overwrite the existing mobility.

Any new Mobility ID added to the excel file will result in a new mobility added to the project.

**Slide 52 - Slide 52**

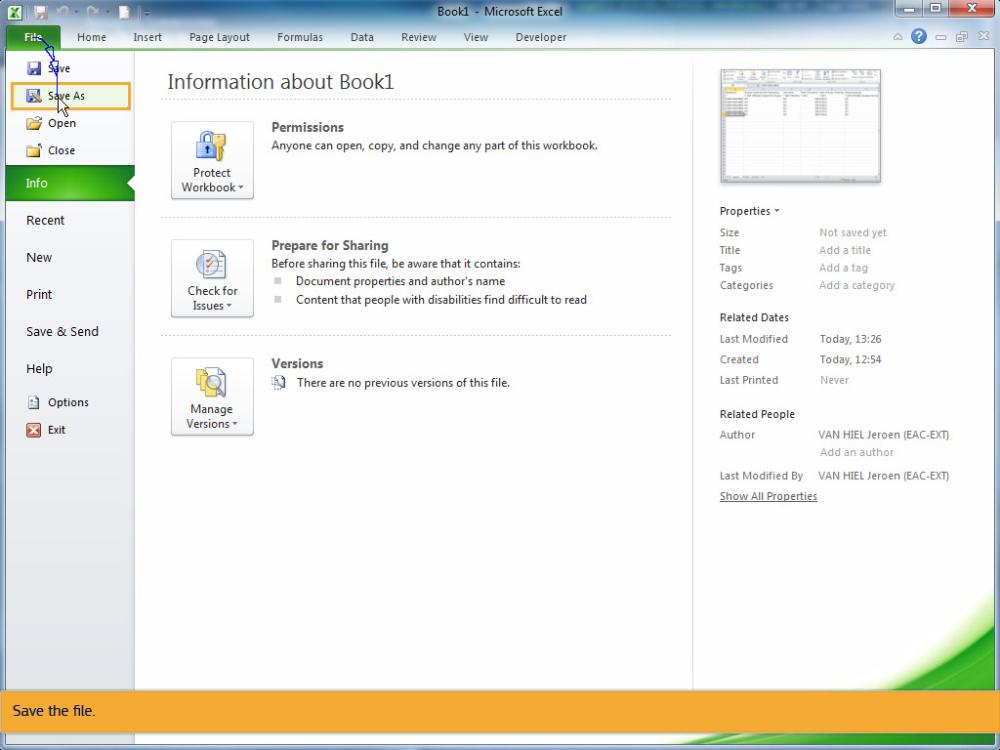


**Text Captions**

Click the **File** Tab

Save the file.

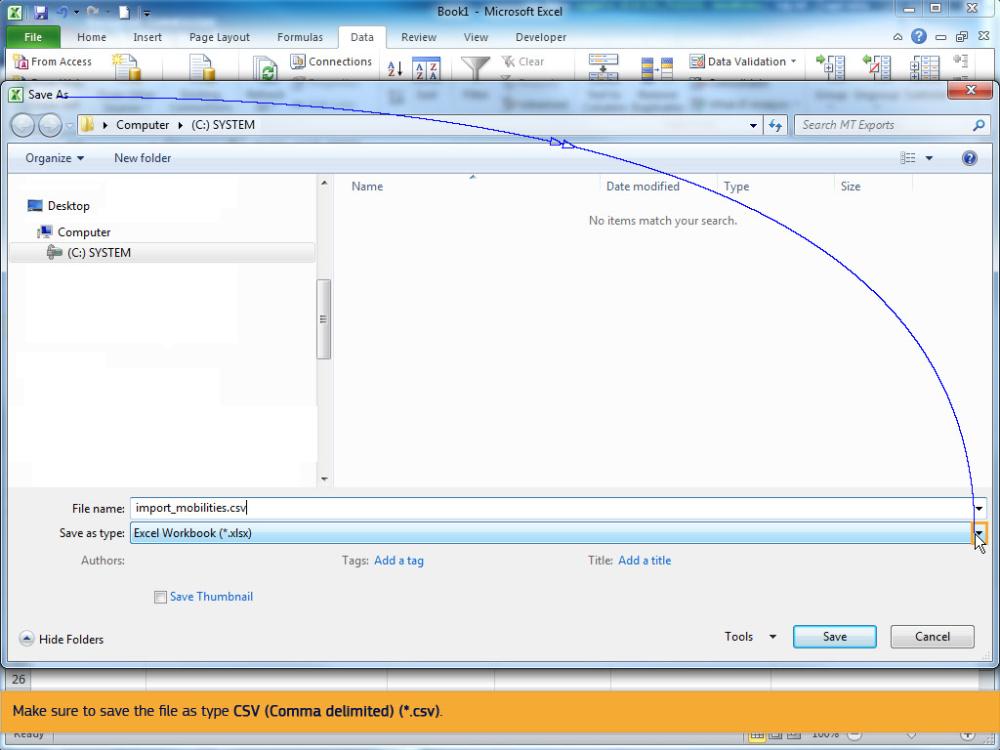
**Slide 53 - Slide 53**



**Text Captions**

Save the file.

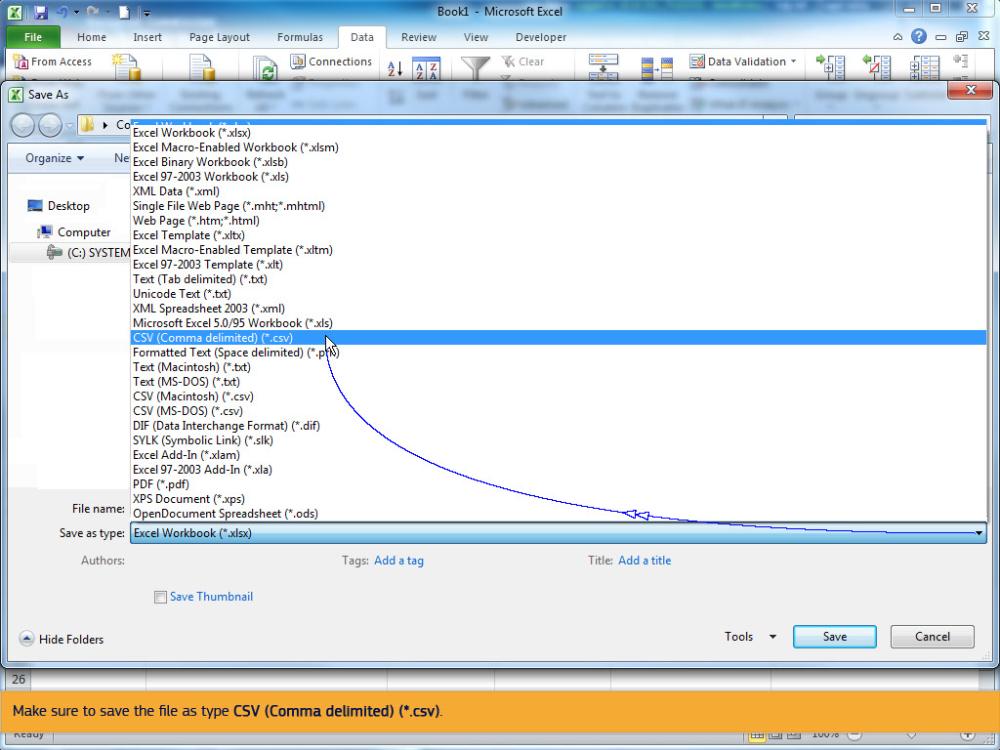
**Slide 54 - Slide 54**



**Text Captions**

Make sure to save the file as type **CSV (Comma delimited) (\*.csv)**.

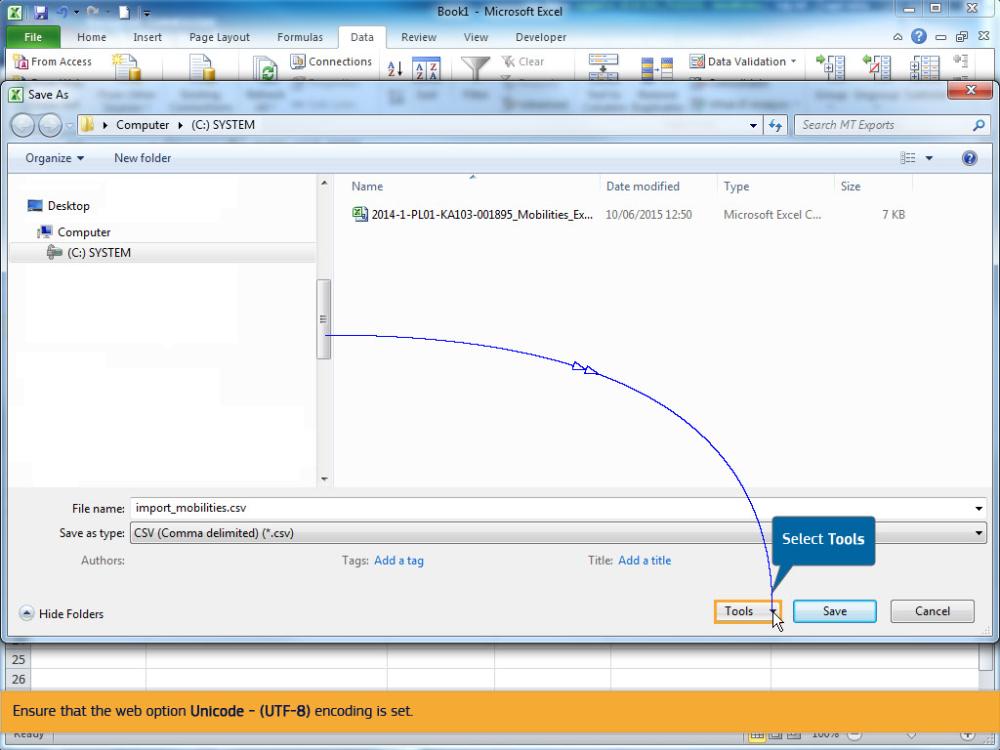
**Slide 55 - Slide 55**



**Text Captions**

Make sure to save the file as type **CSV (Comma delimited) (\*.csv)**.

**Slide 56 - Slide 56**

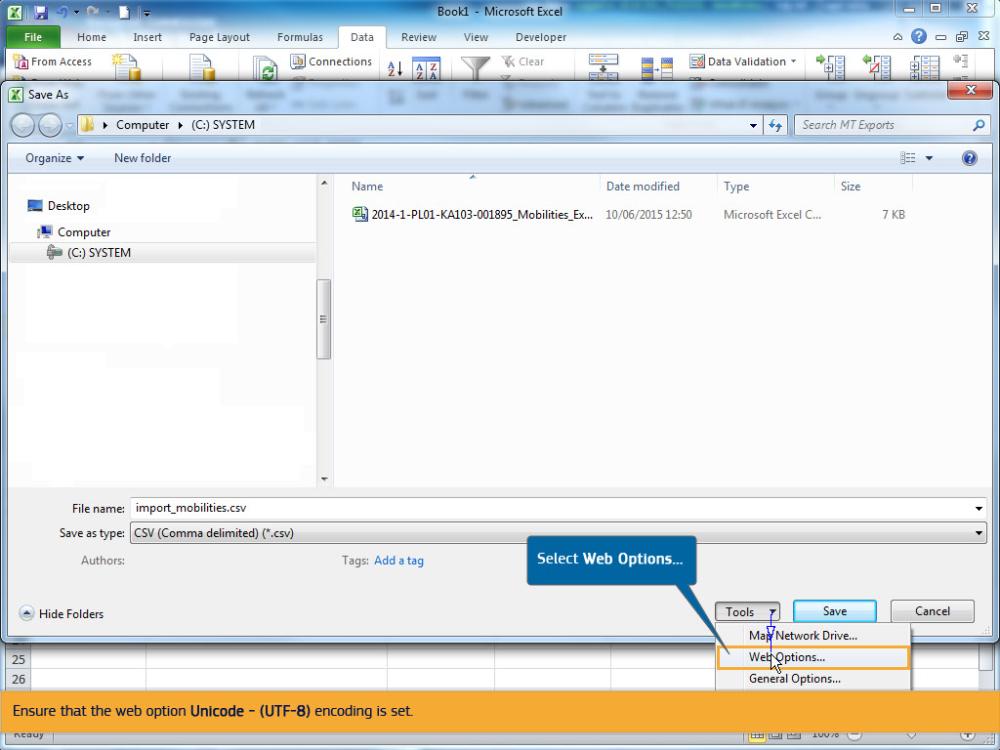


**Text Captions**

Select **Tools**

Ensure that the web option **Unicode - (UTF-8)** encoding is set.

**Slide 57 - Slide 57**

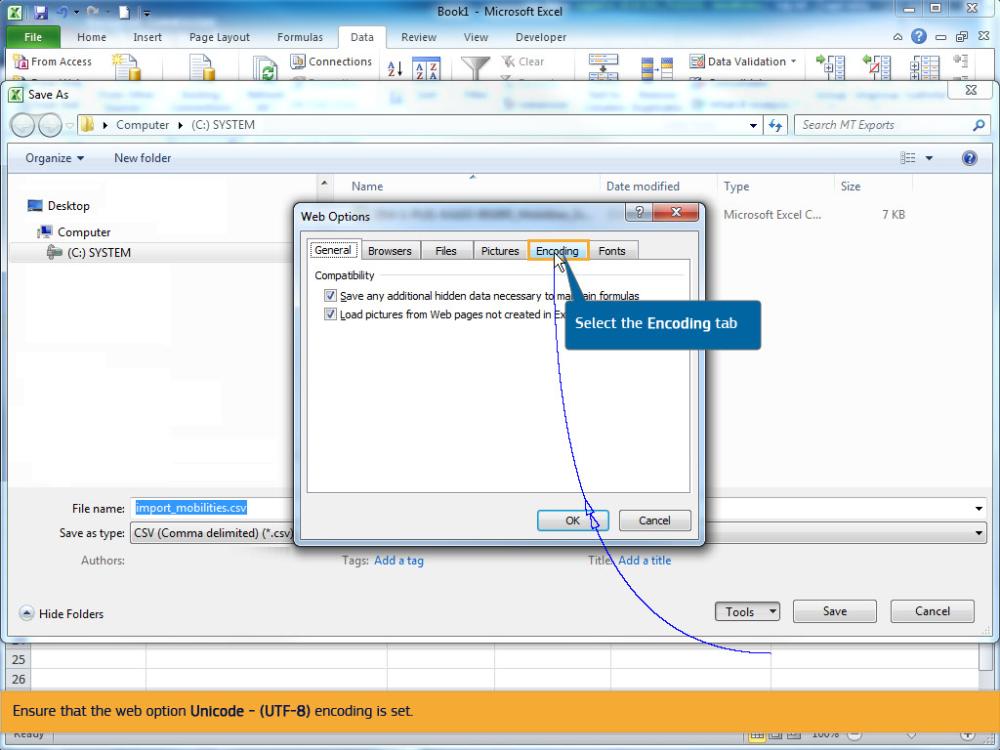


**Text Captions**

Select **Web Options...**

Ensure that the web option **Unicode - (UTF-8)** encoding is set.

**Slide 58 - Slide 58**

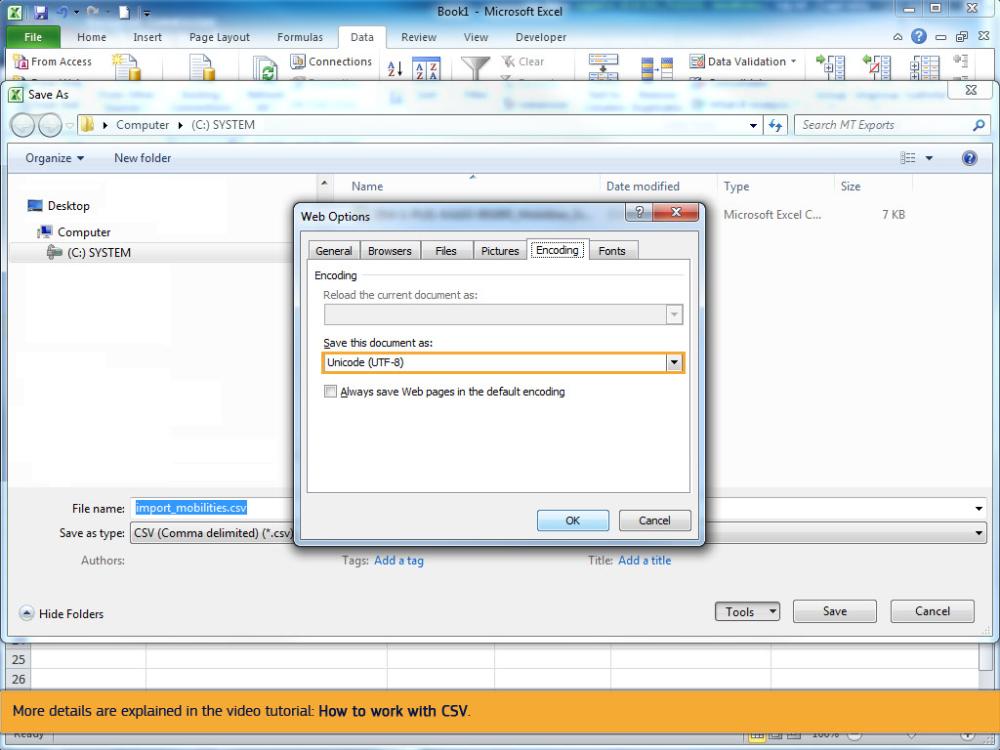


**Text Captions**

Select the **Encoding** tab

Ensure that the web option **Unicode - (UTF-8)** encoding is set.

**Slide 59 - Slide 59**



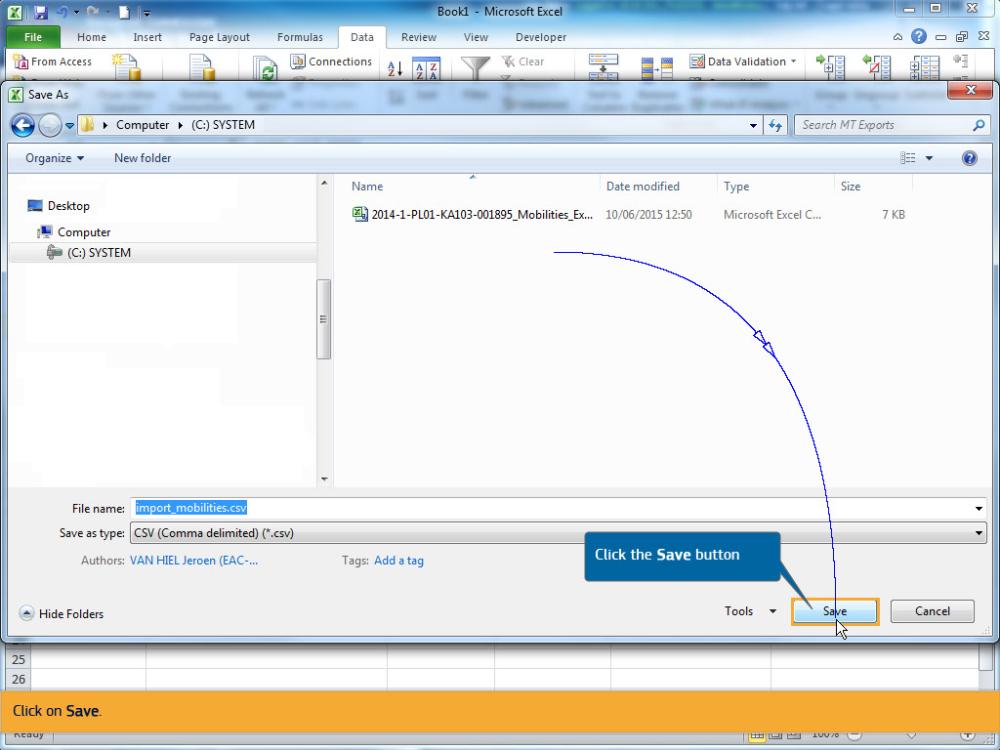
**Text Captions**

Please note, that even though UTF-8 is selected, MS Excel will not save the characters correctly for most of the 27 alphabets used by National Agencies and participant of the Erasmus+ programme.

In this case use an alternative tool such as LibreOffice Calc, Apache Open Office Calc or iworks Numbers.

More details are explained in the video tutorial: **How to work with CSV**.

**Slide 60 - Slide 60**

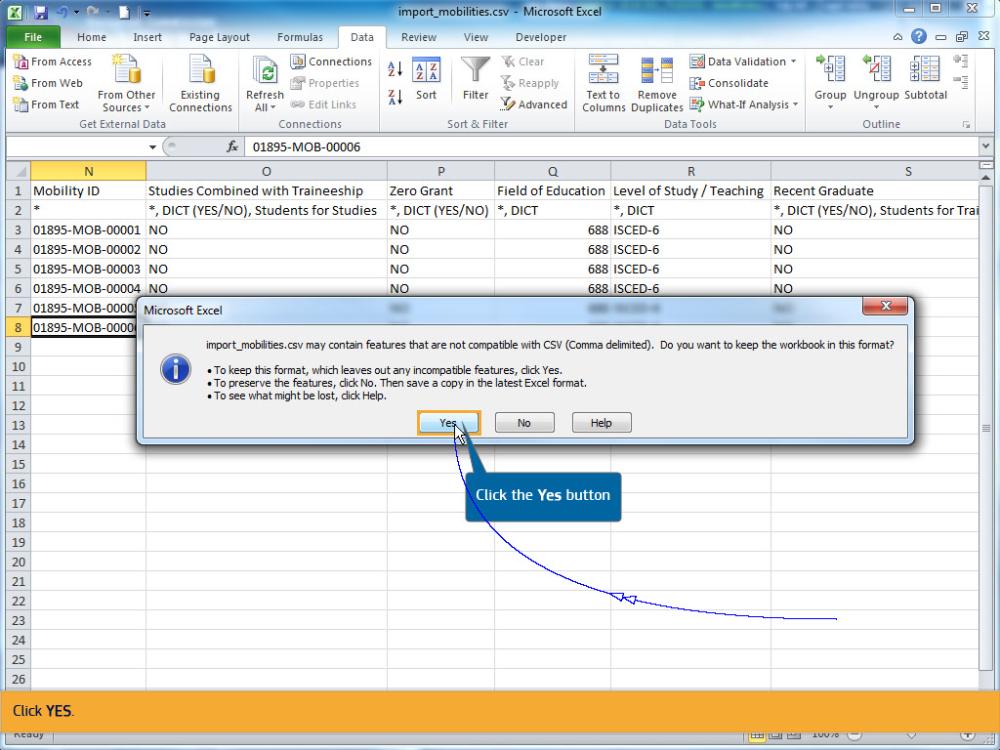


**Text Captions**

Click the **Save** button

Click on **Save**.

**Slide 61 - Slide 61**

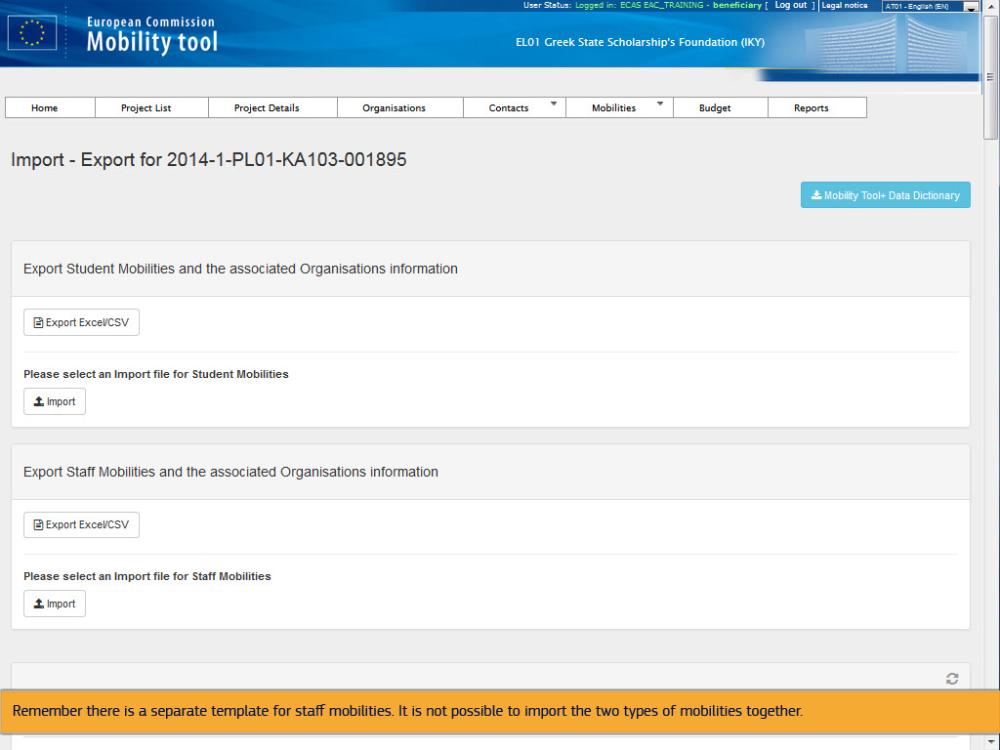


**Text Captions**

Click the **Yes** button

Click **YES**.

**Slide 62 - Slide 62**



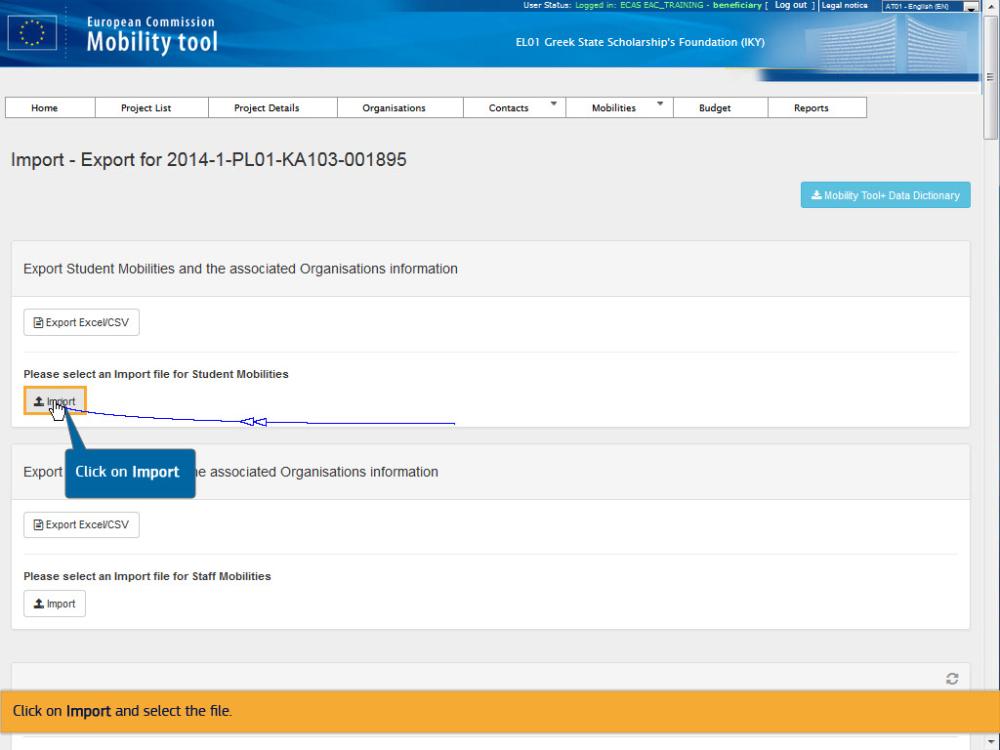
**Text Captions**

Return to the **Import - Export** mobilities screen of your project.

Now you are ready to import the list of **Student Mobilities and the associated Organisation information**.

Remember there is a separate template for staff mobilities. It is not possible to import the two types of mobilities together.

**Slide 63 - Slide 63**

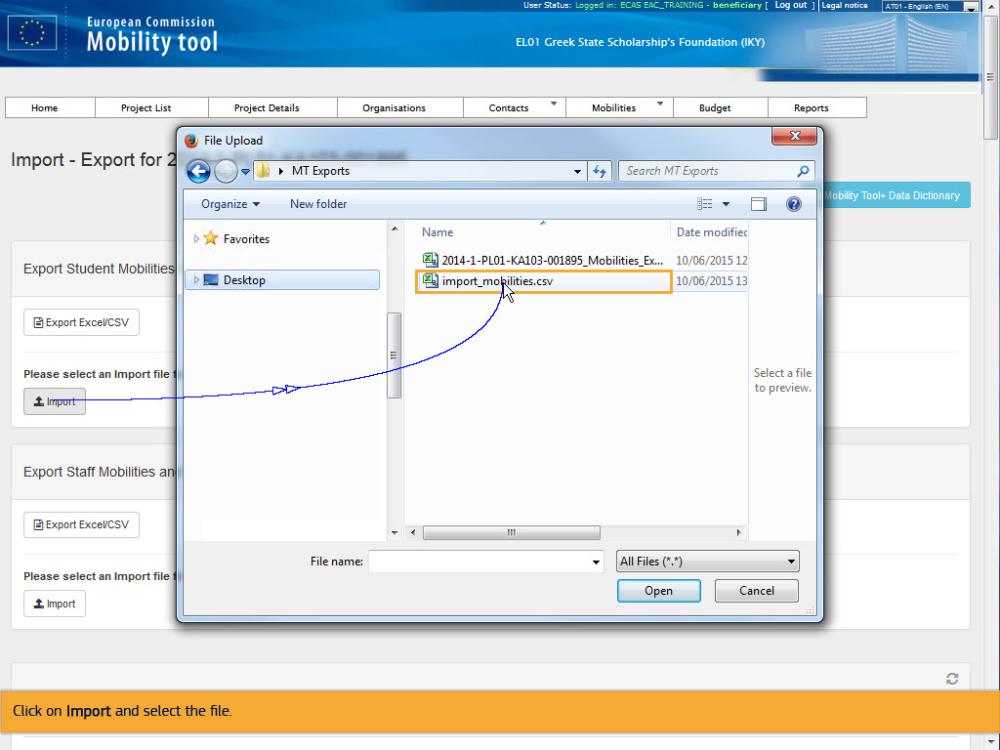


**Text Captions**

Click on **Import**

Click on **Import** and select the file.

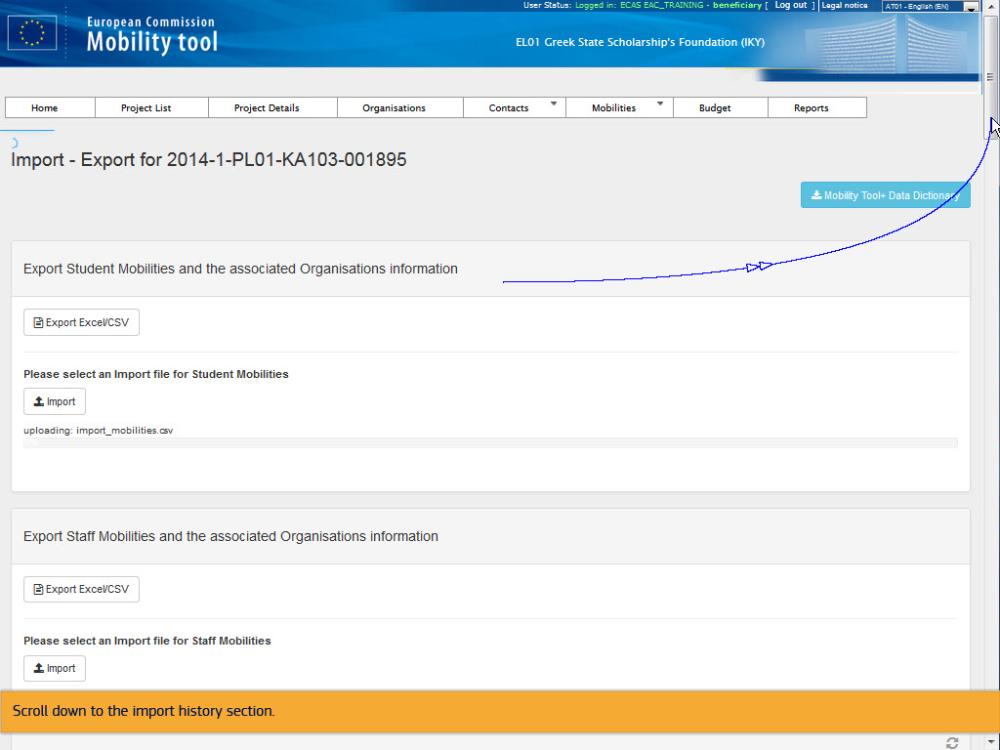
**Slide 64 - Slide 64**



**Text Captions**

Click on **Import** and select the file.

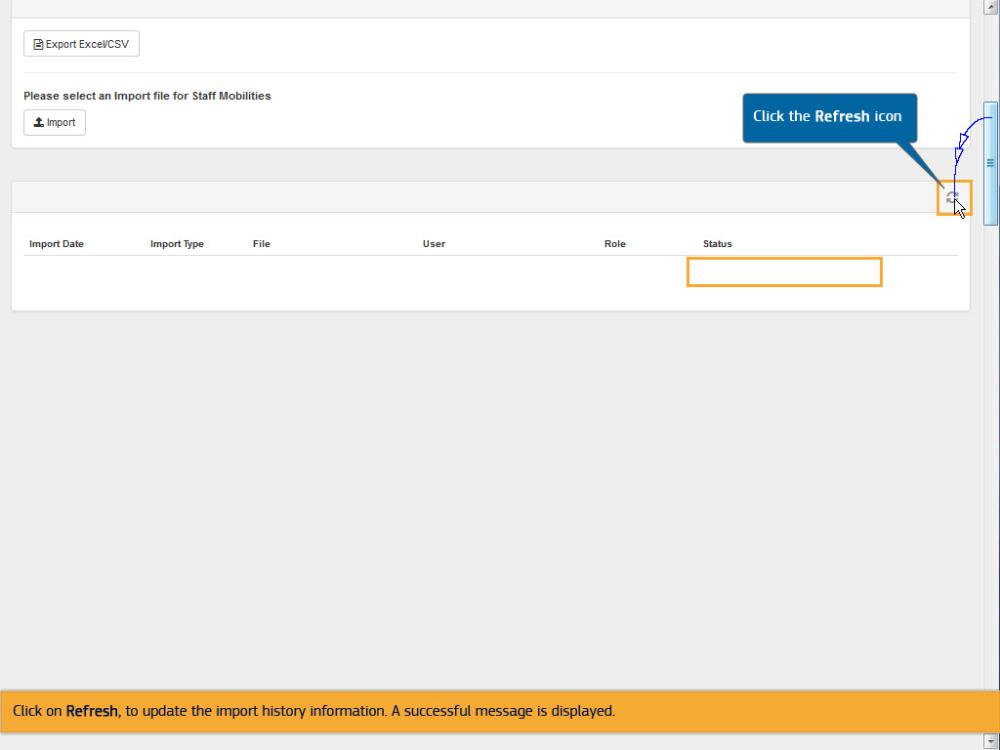
**Slide 65 - Slide 65**



**Text Captions**

Scroll down to the import history section.

**Slide 66 - Slide 66**

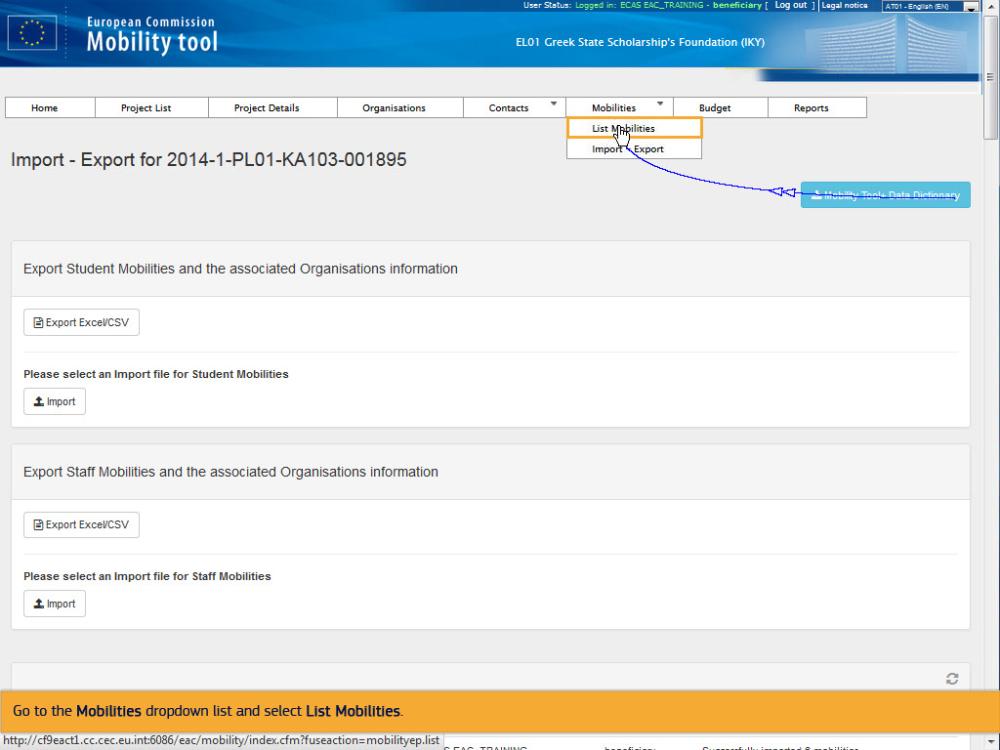


**Text Captions**

Click on **Refresh**, to update the import history information. A successful message is displayed.

Click the **Refresh** icon

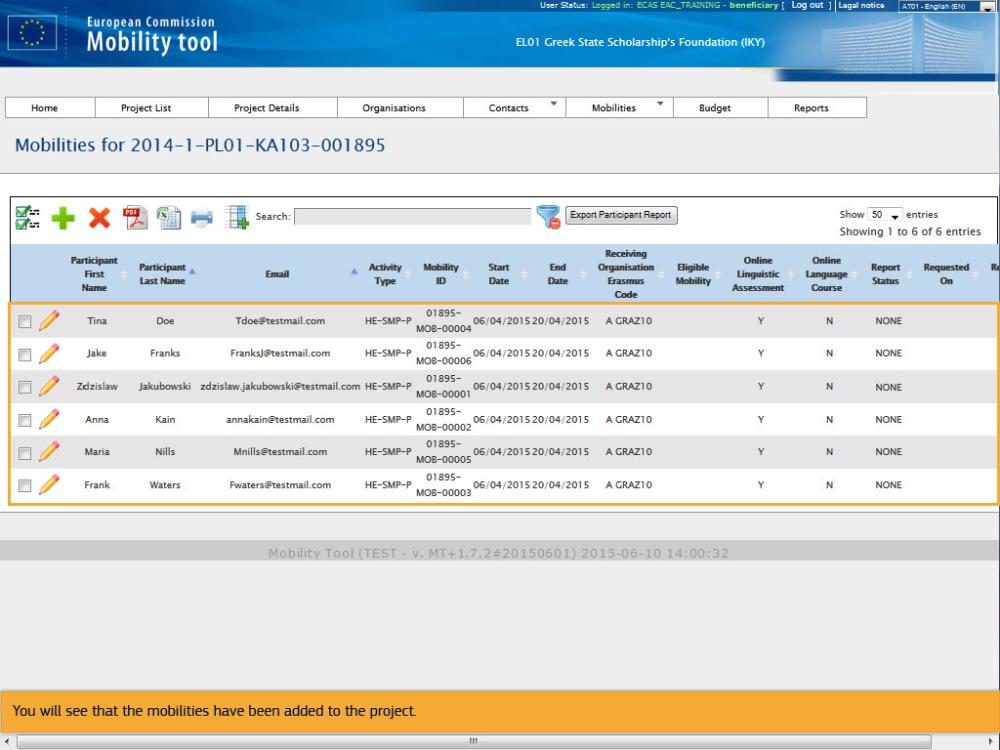
**Slide 67 - Slide 67**



**Text Captions**

Go to the **Mobilities** dropdown list and select **List Mobilities**.

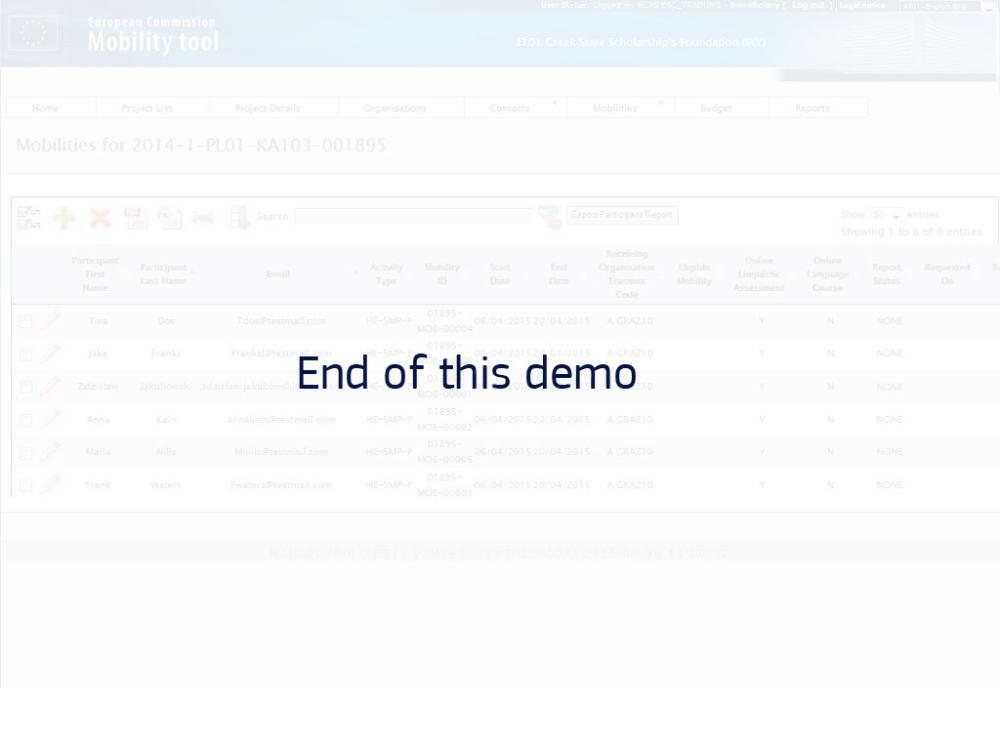
**Slide 68 - Slide 68**



**Text Captions**

You will see that the mobilities have been added to the project.

**Slide 69 - Slide 69**



**Text Captions**

End of this demo