Guide to the TOL
Student Application Management Platform

CHARM-EU — Transnational Online Learning

1. Background

1.1 Who this guide is for

This guide is written for Transnational Online Learning (TOL) Referents - the representatives of the CHARM-EU partner universities who manage student applications on the platform - as well as for newcomers taking over or sharing the role. It explains what the platform does, how the data flows through it, and the concrete steps each referent performs at every stage of the process.

1.2 What the platform is

The Student Application Management Platform is the shared environment where all TOL student applications are collected, reviewed, validated, selected, and ultimately purged. It is built on a Microsoft SharePoint list hosted by Utrecht University, fed by a Microsoft Forms application form and connected through PowerAutomate flows that move and notify automatically.

1.3 Purpose of the platform

The platform exists to:

- Collect student applications to TOL courses through a single online form.
- Give one representative per partner university secure access to the data they need.
- Let the home university verify that its outgoing students are eligible and actively registered.
- Let the host university make the final selection of incoming students and complete their registration.
- Store data for reporting purpose
- Keep personal data minimised, secure, and retained only as long as needed.

1.4 Where the data comes from

All data originates from the TOL online application form (MS Forms), linked from the course catalogue on the CHARM-EU website. The form uses conditional (branching) fields: the student first selects their intended host university, and only the questions required by that host appear. This ensures no student submits more data than their host actually needs.

When a student submits the form, a PowerAutomate flow automatically creates a new item in the main SharePoint list (the “All” list).

1.5 Access to the platform

- One representative per participating university is granted access to the data on the SharePoint.
- A second representative can be granted access on request, if needed.
- At Utrecht University, three people have access, because UU both hosts (owns) and uses the SharePoint.

- All representatives have editing rights on the applications, used for validation and data correction.

Access is controlled at the list level, and export, share, and edit buttons are hidden via CSS where they are not needed.

1.6 Who manages the platform and where to get help

- **SharePoint host & owner:** Utrecht University, with co-owners (UU and University of Montpellier).
- **Programme lead:** Eötvös Loránd University Budapest, with Åbo Akademi University as co-lead.
- **Technical setup (flows, views, forms):** maintained by the technical support team of the JVITO
- **For questions or problems:** contact the SharePoint co-owners or the TOL working group (WP6) representative. Students are directed to the “Where can I ask a question?” section of the TOL catalogue and to their local contact person - never to reply to the automated emails.

1.7 GDPR principles

The platform is designed around GDPR compliance:

- **Lawful basis:** Article 6(1)(e) GDPR - a task carried out in the public interest.
- **Purpose limitation:** data is collected only to register students for TOL courses and the related administrative steps (access to course materials, Transcript of Records).
- **Data minimisation:** the conditional form ensures each student submits only the data their host university requires.
- **Accuracy:** referents correct errors directly in the list (or flag them for the relevant partner).
- **Storage limitation:** data is kept for the time needed to complete registration, then anonymised/purged after a six-month retention period (or by the start of the next TOL round)
- **Security & access control:** access is limited to named representatives; export/share/edit functions are restricted by view.
- **Transparency:** students accept the Privacy Statement when submitting the form.

The relevant reference documents are the TOL Privacy Statement and the Data Protection Agreement between CHARM-EU partners.
(Data_Protection_Agreement_CHARMEU_signed.pdf; https://charm-eu.eu/wp-content/uploads/2024/10/PS_TOL_Detailed_Info.pdf)

1.8 Process overview

The diagram below shows the full TOL application process, which spans three systems.

On the **CHARM-EU website**, teachers offer courses, referents review and publish them, and students browse the catalogue.

Through **MS Forms**, students apply and accept the privacy statement, which creates an entry in the application list.

In **MS application Lists**, the home referent reviews each application for eligibility (a refusal emails the student automatically; a validation passes it to the host), and the host referent makes the final selection and registers accepted students - with acceptance, rejection, or cancellation status, each triggering an automatic email.

PowerAutomate runs in the background, moving data between systems and sending all notifications.

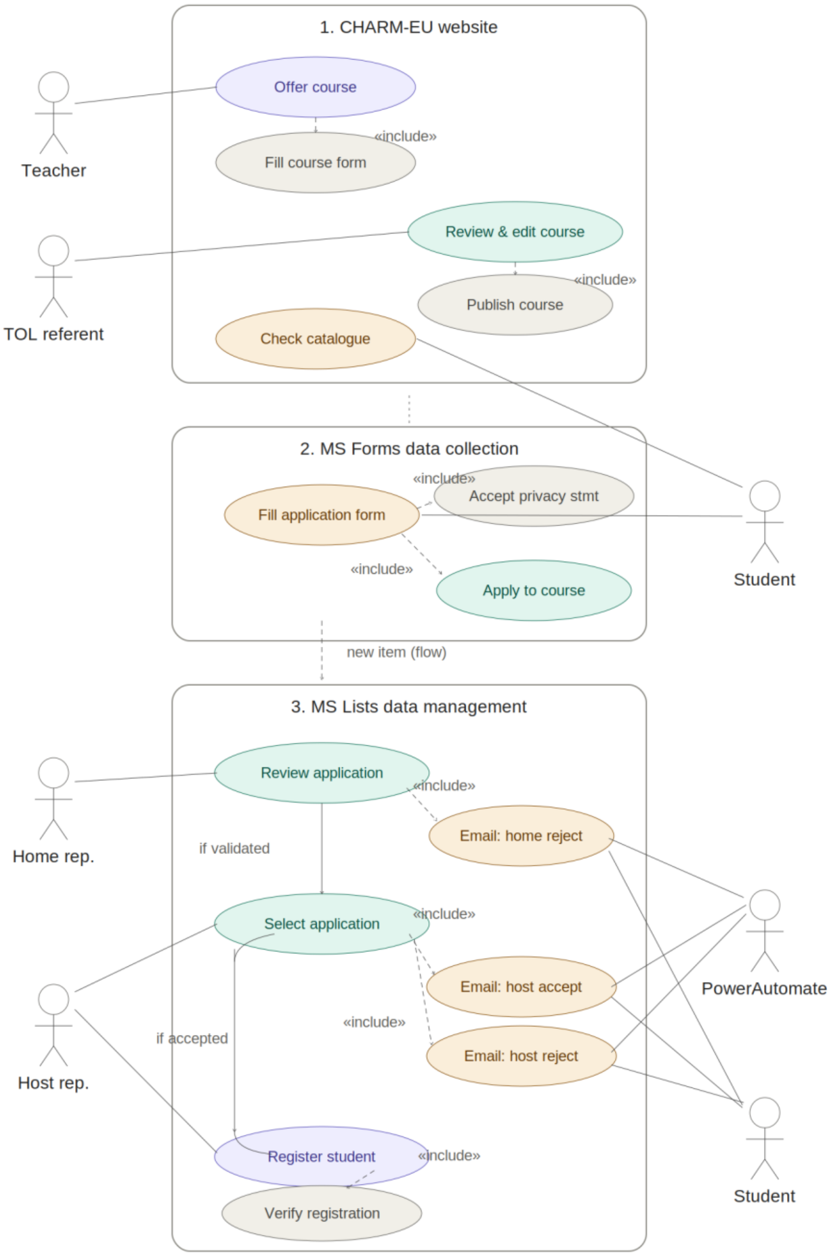

Figure 1 - TOL student application process: use case diagram.

2. Overview of the registrations

2.1 Structure of the database (columns)

All applications live in the main “All items” list on the SharePoint. Each row is one application (one student → one course). The main columns are:

Column group	Contents
Student identity	First name, last name (as written in passport), student email.
Educational data	Home university, current study level, study programme.
Course choice	Intended host university, selected course(s).
Motivation	Free-text motivation provided by the student.
Host-specific fields	Extra data required only by the chosen host (e.g. date of birth, address, phone, citizenship, ID number, mother’s maiden name). These appear per host because of the conditional form.
Home validation status	Choice column: pending / validated / refused / duplicate.
Host validation status	Choice column: accepted / rejected / course cancelled
Reason for rejection	Choice column: course being full / eligibility

Note: exact field names vary by host university because of the conditional form. Host-specific columns are prefixed with the host’s name (e.g. ELTE_date of birth, selected course-ELTE).

2.2 Different views

The “All” list is never edited directly - it is the reference and the starting point for everything. The working lists are views built on top of it:

View	Purpose & configuration
All items	The full list. Edit, export, and share are hidden for everyone. Grouped by home university, filterable by host university. Used only as a reference.
Home university views	One per home university. Show the columns a home referent needs to verify outgoing students. Filtered so each referent sees only their own students.
Host university views	One per host university. Show the columns a host needs to register incoming students (including that host’s specific fields). Filtered by host.

Colour coding is applied to key fields (Validation by Home University, Accepted by Host University, Reason for rejection) to make navigation easier.

2.3 Filtering

Views are filtered using the “Show items only when the following is true” condition. Home views filter on Home university equals [your university]; host views filter on Intended host university equals [your university].

2.4 Grouping

The “All” list is grouped by home university, then filtered by host university, so the overall set of applications can be scanned at a glance.

2.5 Exporting

To keep data manipulation to a minimum, export lists are created per home and host university. The home university exports contain only the fields needed for verification: first name, last name, email, home university, current level/programme, selected course. The host university export contains student data needed for registration. Exports are otherwise hidden on the main list.

3. Data correction

When: during the validation stage, whenever a referent spots an incorrect or missing value in an application.

Who: the referent reviewing the application. Home referents correct their outgoing students’ data; if the error sits in a field owned by another partner, they flag it for that partner’s attention.

How: referents have editing rights on the home and host views, so corrections are made directly in the list. Only the editing function is enabled on these views for this purpose.

In case of a flow failure that leaves missing data, a recovery script can be used to backfill from the MS Forms results - Contact JVITO.

4. Validation of the students

4.1 Who validates

The home university referent validates their own outgoing students.

4.2 Criteria for validation

The home referent checks that the student is:

- **Actively registered** at their home university, and
- **Eligible** for the programme (correct study level and meeting registration requirements).

4.3 How to handle duplications

If the same application appears more than once (a student applying twice, or a row duplicated by a flow issue), the home referent sets the validation column to "duplicate" rather than rejecting it. This keeps the duplicate flagged and out of the validated flow without deleting data or sending automatic rejection emails.

4.4 Where to record the outcome

In the home validation column, a choice field with the values:

- **Pending** - not yet reviewed (default).
- **Validated** - student is eligible and actively registered.
- **Refused** - student does not meet the criteria.
- **Duplicate** - flagged duplicate application.

When an application is set to **validated**, it is automatically added to the host university's list of incoming applicants.

4.5 Justification / comments

The Validation By Home column itself carries the outcome. When a home referent needs to record a justification or comment about an application (for example, why it was not validated), this is written as free text in the student's ID 'Title' column in the list. The Title column serves as the place for internal notes.

The student themselves is not sent these internal comments. They are only contacted in the case of refusal, via the automatic email, which gives the general reason (eligibility, study level or home university registration) without the detailed internal justification.

4.6 Notifications - automatic emails

When a home referent sets an application to 'Refused', an automatic email is sent to the student via PowerAutomate.

Home rejection email

> Dear Student,
>
> We regret to inform you that your Transnational Online Learning application at [host university] has been refused.
>
> This is related to your eligibility for this programme (study level or your home university registration).
>
> Please reach out to your local contact person if you have questions - contact information can be found on the "Where can I ask a question?" section of the TOL catalogue.
>
> This is an automated message to which you cannot reply.
>
> Best regards,
>
> The CHARM-EU TOL Team

There is no automatic email for "validated", a validated student next hears from the host university at the selection stage. "Duplicate" does not trigger an email.

4.7 Timeline

Validation deadlines are set by the TOL Referents working group (WP6).

5. Selection of the students

5.1 Who selects

The host university referent makes the final selection from the validated applicants on their host list.

5.2 Criteria for selection

Selection is currently based on:

- available seats in the course
- the student's motivation (as given in the application)
- the course preference of the students
- the number of applications a specific student has (in order to involve as many students in the programme as possible)
- any course prerequisites/requirements
- the balance between partner universities, so that places are distributed fairly across the applying institutions rather than concentrated in one
- confirmation from the teachers or educationalists responsible for the course.

The exact weight given to each factor is at the host's discretion and may vary from one course to another.

5.3 Where to record the outcome

In the host validation column, a choice field with the values:

- **Pending** - not yet reviewed (default).
- **Accepted** - student is selected for the course.
- **Rejected** - student is not selected.
- **Course cancelled** - the course did not run (e.g too few enrolments), so no selection applies.

5.4 Justification / comments

When an application is rejected, the host must complete the "reason for rejection" column **before** setting the application to "Rejected," since that choice immediately triggers the rejection email. The reason feeds directly into that email, so it must be set first.

The "reason for rejection" is a choice field with the values:

- **Pending** - no reason set yet (default).
- **Course full** - no places remaining on the course.
- **Eligibility** - student does not meet the eligibility requirements.

Caution: never set "Rejected" while the reason is still "Pending," or the email will be sent with no valid reason.

5.5 Notifications - automatic emails

Three host decisions trigger automatic emails via PowerAutomate: **acceptance**, **rejection**, and **course cancellation**.

Host acceptance email

> Dear Student,
> We are pleased to inform you that your Transnational Online Learning application for the course [course] at [host university] has been accepted.
> A representative from [host university] will contact you shortly to request any additional information needed to complete your registration.
> Please make sure to monitor your email inbox and respond promptly to ensure a smooth enrollment process.
> Please reach out to your local contact person if you have questions - contact information can be found on the "Where can I ask a question?" section of the TOL catalogue.
> This is an automated message to which you cannot reply.
> Best regards,
> The CHARM-EU TOL Team

Host rejection email

> Dear Student,
> We have carefully reviewed your Transnational Online Learning application for the course [course] at [host university].
> After consideration, we regret to inform you that your application has been refused by the host university due to [reason for rejection].
> Please reach out to your local contact person if you have questions - contact information can be found on the "Where can I ask a question?" section of the TOL catalogue.
> This is an automated message to which you cannot reply.
> Best regards,
> The CHARM-EU TOL Team

Host course-cancelled email

> Dear Student,
> We regret to inform you that the course **[course]** you applied for at **[host university]** has been cancelled due to a low number of participants. Although your application was carefully reviewed, we are unfortunately unable to offer you a place.
> We encourage you to consult the Transnational Online Learning course catalogue for alternative courses in the upcoming semester. We hope you will find another course that matches your interests.
> We apologise for the inconvenience.

> For further information about the TOL catalogue, please contact your local TOL representative. Contact details can be found in the *"Where can I ask a question?" section*.
>
> This is an automated message to which you cannot reply.
>
> Best regards,
> The CHARM-EU TOL Team

5.6 Timeline

Selection deadlines are set by the working group and also depend on each host course's start date (courses with earlier start dates need earlier decisions).

6. After the selection

6.1 What to keep in the Mobility Report

The data needed for reporting is preserved in the Mobility Report (a separate list/export, e.g. Mobility_report_25-26_S1). The report keeps one row per participating student and tracks both their mobility and how the course ended.

Columns retained in the report:

Field	Notes
Record ID (Title)	Internal list identifier.
First name / Last name	
Period of attendance	e.g. 2025-2026 autumn.
Home university	
Intended host university	
University email address	
Study level at home university	
Study programme at home university	
Intended course (per host)	One column per host (UB / TCD / UU / ELTE / UM / AAU / HRW / JMU / UiB); only the relevant host's column is filled.
Gender (per host)	Personal data - see note below.

It also tracks course outcome, which the application list does not:

Outcome field	Values
Learning agreement submitted	Yes / No / Pending
ToR issued (Transcript of Records)	Yes / No / Pending

Course Completion	No attendance / Course completed / Dropped out / Pending

6.2 Purging the database

Once registration is complete and the six-month retention period has passed, the data is purged.

- The purge is run through a dedicated PowerAutomate “on-click trigger” flow.
- It is triggered manually by the designated person (UU owners & UM co-owner)
- Running it deletes everything: the SharePoint application list data and the underlying MS Forms results (Excel).
- The designated person is also responsible for communicating the deletion date to the other representatives who have access.

Local follow-up of any data at the host university’s Students System is that host’s own responsibility, under their local rules.

Privacy note

After the six-month retention period, the mobility report data is anonymised. only the Internal list identifier of students, the home/host institutions, and the subject areas/courses remain - no further personal data.

A numeric reporting version is kept in a separate list/Excel file within the WP6 documentation on the ELTE MS SharePoint.