

EDUCATIONAL PARTNERSHIPS REGISTER

Creating New Agreements

Contents

New Agreements
Agreement Types
Navigation Tabs
Creating a new Agreement4
Agreement Examples
Articulation Agreements
Consortium Agreements
Workflow Example1
Approval Requests12
Approved Requests
Rejected Requests18

New Agreements

The EPR allows users to record formal Agreements with partners.

Agreement Types

There are several agreement types you can select when creating a new agreement in the EPR, such as:

- Articulation
- Cotutelle
- Course Agreement
- Course Agreement and Detailed Schedule
- Credit Arrangement
- Internship Agreement
- Memorandum of Understanding (MOU)
- Research
- Scholarship Agreement

- Self-Placement Agreement Letter
- Student Exchange
- Student Placement
- Student Placement -International
- Student Placement -Agreement Individual Organisation
- Study Abroad

Navigation Tabs

When creating a new agreement, the navigation tabs will adjust based on the agreement type. For instance, in the example below, if you choose **Articulation** as the agreement type, the navigation tabs will display the following:

- General
- Articulation
- Agreement Schedule Details
- External Organisations

- External Contact
- ACU Staff
- Supporting Documents
- Related

rticulation - Saved greement	0		O	EPR-00043 Proposed Under Review Agreement his Agreement Status Action	Owner
ve for 14 days eneral Articulation	Draft (14 D) Agreement Schedule Details External Organisations	External Contacts	Under Review ACU Staff Supporting Documents Related ~	Fingt	
Agreement Type	· D Articulation X P	Primary External Organisation	" 🖪 Test University	🛆 External Source 🛛	
International Agreement Indicator	* Domestic	Primary External Contact	-	A External ID	
3 Consortium	Yes			Associated External Organisations	
Physical Copy Required Indicator	In No	Previous Version Agreement	2.000	Test number 2 Domustic	
External Organisation Agreement Scope	8 <u>12</u>	Overarching Agreement Indicator	No No	Test University International	
Agreement Can be Published to Website	• Na	Oversiching Agreement	-	1-2012	HE + Page 1 -

Ensure that you fill in the necessary fields within the individual navigation tabs for the chosen agreement type. The fields within the navigation tabs will correspond to relevant business process requirements.

Creating a new Agreement

To create a new Agreement, using the left navigation bar, navigate to Agreements. On the top menu, click wew:

III 🔮 ACU	ACUI	Educational Partne	erships Register	٩,	Search					(SANDB	SX S	+ 🐵 ?
=	← 17	Show Chart	+ New 🗓 Delete ∣	✓ Č) Refresh <u></u> ^d Visualize this	view 🛛 🕄 Email a	Link 🗸 – 🔊 F	low 🗸 🗐 Run	Report 🗸	🖷 Excel Templates 🗸	Export to Ex	ccel 🗸 🛛 🖏 Im	port from Excel	~
 ↔ Home (*) Recent 	All	Agreements	~							📆 Ed	lit columns 🛛 🍸 I	dit filters Quie	k find
🖉 Pinned 🗸 🗸	\bigcirc	Agreement \downarrow \checkmark	Organisation Name \curlyvee	Name ~	International $$	Agreement Ty 🗸	Agreement St ~	Action ~	Agreement St ~	Agreement E 👻	Agreement R 👻	Created On ~	Modified On Y
Dashboard		EPR-00043	123 Grow Child Care	Articulation	Domestic	Articulation	Proposed	Under Rev				12/04/2023 1	12/04/2023 1
🕷 My Dashboard		EPR-00042	St Patrick's College	Articulation	Internatio	Articulation	Proposed	Inactive (N.				1/12/2022 11	1/12/2022 11
External Organisation	1	EPR-00041	Caritas Institute of	Memorandum of Understanding	Internatio	Memorandu	Proposed	Draft Awai	. 21/04/2022	21/04/2027		22/11/2022 2	28/11/2022 2
External Organisations	1	EPR-00040	ABC University	Memorandum of Understanding	Internatio	Memorandu	Current	Approved	. 25/09/2022	28/04/2023	5/12/2022	28/10/2022 1	30/11/2022 4
A Contact Persons		EPR-00039	Boston College	Cotutelle	Internatio	Cotutelle	Proposed	Draft Awai				28/10/2022 1	25/11/2022 1
Agreements & Activities	1	EPR-00038	ABC University	Memorandum of Understanding	Internatio	Memorandu	Proposed	Under Rev				28/10/2022 1	2/11/2022 2:
Agreements		EPR-00037	ABC University	Articulation - Overarching - 27/1	Domestic	Articulation	Proposed	Under Rev	. 26/10/2022	2/11/2022	29/10/2022	27/10/2022 1	27/10/2022 1
Agreement Schedules	0	EPR-00036	Torrens University	Cotutelle - 01/09/2022	Domestic	Cotutelle	Current	Do Not Re	. 1/09/2022	30/09/2022	7/02/2023	27/10/2022 1	28/11/2022 1
🔀 Activities		EPR-00035	Brisbane Catholic	Articulation	Domestic	Articulation	Proposed	Draft Awai				26/10/2022 1	28/10/2022 1

2. A New Agreement window opens:

New Agreement - Unsa			0	Agreement No Agreement Status Under Review Review Owner
Agreement Workflow Active for less than one mi	C Draft (< 1	Min)	Under Review	Finish
General External Organis	ations External Contacts ACU Staff	Supporting Documents		
Agreement Type *		Primary External Organisation	·	습 External Source
International * Agreement Indicator		Primary External Contact		🛆 External ID
☐ Consortium	No			
Physical Copy Required Indicator	No No	Previous Version Agreement		Timeline
External Organisation Agreement Scope		Overarching Agreement Indicator	No No	
Agreement Can be Published to Website Indicator	No No	Overarching Agreement		Almost there Select Save to see your timeline.
Project	Look for Project	Q		Sciel date to see your unterne.
Agreement Start Date		Agreement End Date		
Agreement Review Date		Agreement Term (Years)		

- 3. Fill in the following required fields:
 - $\circ~$ Agreement Type There is a list of agreement types for you to search on, click \checkmark to look up the applicable agreement type.

	Look for Agreement Type	Q
Agreement Type *	Agreement Types	
International * Agreement Indicator	Articulation 1/09/2022 12:19 PM	I
≜ Consortium	Cotutelle 1/09/2022 12:19 PM	
Obviced Come	Course Agreement 14/10/2022 10:32 AM	

• International Agreement Indicator – this is a drop-down field:

Agreement Type	*	Articulation
International Agreement Indicator	*	Domestic V
		International
A Consortium		Domestic

• Primary External Organisation – Click $\stackrel{\frown}{\sim}$ to search for the Organisation:

	test	Q
Primary External * Organisation	Organisations	
-	Test number 2 Domestic	
Primary External Contact	Test University International	
	+ New Organisation	Advanced lookup

4. Once you have filled in the required fields, click \square Save :

🗄 🖬 Save	🛱 Save & Close 🕂 New 🔂 Deactivate	🗓 Delete 🖒 Refresh 🔍 Check Acce	ss 🗄 Process ∨ 🤒 Assign 🖾 Flow	🗸 🖷 Word Templates 🗸 🗐 Run Report 🗸	🛃 Sha
Articulation - Saved Agreement				EPR-00043 Agreement No Agreement Status Action Michelle	Walford
greement Workflow ctive for 23 minutes	C Draft (23 M	lin)	Under Review	Finish	
Seneral Articulation	Agreement Schedule Details External Or	ganisations External Contacts ACU S	taff Supporting Documents Related	~	
Agreement Type	Articulation	Primary External Organisation	Test University	A External Source	
International Agreement Indicator	Domestic	Primary External Contact		🗄 External ID	
	Yes			Associated External Organisations	
Physical Copy		Previous Version		Organisation Name 1 ~ International	
Required Indicator	No	Agreement		Test University Internation	h
External Organisation Agreement Scope		Overarching Agreement Indicator	No No		
Agreement Can be Published to Website Indicator	No No	Overarching Agreement			_
Project				1-1of1 I4 ← Pag	µ1 →

5. Once you have saved your **Agreement** you will see a unique identifying number:

Articulation - Saved Agreement	0		R-00043 Proposed Under Review Action Michelle Walford Wire
Agreement Workflow Active for 23 minutes	Draft (23 Min)	Under Review	Finish
General Articulation Age	greement Schedule Details External Organisations Exte	ernal Contacts – ACU Staff – Supporting Documents – Related $ imes $	
Agreement Type * [mary External	Ĝ External Source Ĝ External ID
Agreement Indicator		mary External ntact	External ID
A Consortium	Yes		Associated External Organisations :

The unique identifying number has been created to make it easier for you to search on agreements when you are adding them within a searchable field. In this example, you can use the unique identifying number to search in an **External Organisation Activity**, in the **Regarding Agreement** field:

eting or Visit (in p mal Organisation Activity				ACT-0 Activity		ctive (no action required) Catherine Thomp Owner
ty Workflow leted in 1 hour eral Related ∽	< Draft	Under Review	ACU Approval	External Party Approval - Initi	ation	External Party Approval	Finish
Activity Type *	冏 Meeting or Visit (in person)			Associated External Organisations		应	Add Existing Organisa
Name *	Meeting or Visit (in person)			Organisation Name ↑ ~	External Organisation Partn.	V External Organisatio	n Relati Y International Or
Primary External * Organisation	New University	Primary External Contact		Manual Test New University	Non-Partner Partner	Inactive	Domestic
Country		Location					
Regarding Agreement	EPR-00043	Recent records		1 - 2 of 2			■ I <i>⊲ ← Page 1</i>
Start Date	Agreements EPR-00043 Test University	Kecent records	Yes	External Organisation Contacts			Add Existing Contact
End Date	+ New Agreement	Advanced lookup		External Organisation Contacts	External Contact Pers	Company Name	Status ~

Continue completing the agreement details in the different navigation tabs.

Agreement Examples

Articulation Agreements

Articulation is the process by which the external organisation matches its course credit points or requirements to coursework completed at ACU.

1. To create a new **Articulation Agreement**, click + New, in **Agreement Type**, search for **Articulation**. Fill in the required fields, click Save :

🗐 📫 🔚 Save	🛱 Save & Close 🕂 New	🗋 Deactivate 📋 Delete	🕐 Refresh 🛛 🔍 Ch	eck Access	n 🔊 Flow 🗸	🖷 Word Templates \vee 🔟 Run Report \vee	🖻 SI
Articulation - Saved greement		0		0		EPR-00043 Proposed Under Review Agreement Status Action	Wichelle Walford Owner
reement Workflow tive for 14 days	<	Draft (14 D)		Under Review		O Finish	
General Articulation	Agreement Schedule Details	External Organisations	External Contacts	ACU Staff Supporting Documents	Related $ \smallsetminus $		
Agreement Type *	· ፼ Articulation ×	م	Primary External Organisation	* 🔁 Test University		🛆 External Source	
International * Agreement Indicator	Domestic		Primary External Contact			🛆 External ID	
🛱 Consortium	Yes					Associated External Organisations	
Physical Copy Required Indicator	No No		Previous Version Agreement			Tn Test number 2 Domestic	:
External Organisation Agreement Scope			Overarching Agreement Indicator	No No		Test University International	:
Agreement Can be Published to Website	No No		Overarching Agreement			1 - 2 of 2	${\scriptstyle \triangleleft \ } \leftarrow {\scriptstyle \ {\rm Page 1} \ } \rightarrow$

- 2. Once you have saved the record, the navigation tabs will update to the following:
 - General
 - Articulation
 - Agreement Schedule Details
 - External Organisations

- External Contacts
- ACU Staff
- Supporting Documents
- Related

Articulation - Saved Agreement Agreement Workflow Active for 14 days	<	Draft (14 D)			Under Review		EPR-00043 Agreement No	Proposed Agreement Status	Under Review Action Finish	Wichelle Owner	Walford N
	Agreement Schedule Details	External Organisations	External Contacts	ACU Staff	Supporting Documents	Related \vee					
Agreement Type International Agreement Indicator	Articulation × Domestic	٩	Primary External Organisation Primary External Contact	* Test	University		≙ Extern ≙ Extern	nal Source nal ID			
🛆 Consortium	Yes						Associate	ed External Organ	isations		
Physical Copy Required Indicator	No No		Previous Version Agreement				Tn	Test number 2 Domestic			÷
External Organisation Agreement Scope			Overarching Agreement Indicator		No		τυ	Test University International			÷
Agreement Can be Published to Website Indicator	No No		Overarching Agreement				1 - 2	of 2		I⊲ ← Page	e 1 →

3. Click on the **Articulation** tab to fill in the appropriate information:

Articulation - Saved Agreement							EPR-00043 Agreement No	Proposed Agreement Status	Under Review Action	Owner	Walford N
Agreement Workflow Active for 14 days	<	Draft (14 D)			Under Review	v			Finish		
General Articulation	Agreement Schedule Details	External Organisations	External Contacts	ACU Staff	Supporting Documents	Related $ \smallsetminus $					
Credit Management System Agreement No					Articualtion Agreement Type Indicator						
Articulation Agreement C	ourses										
						+	New Articulation	Agre 🖄 A	dd Existing Articula	ti 🕐 Refres	h :
Name ↑ ∽		Decisio	on ~ Total	I Credit Points	✓ Unspecified Units ✓	FACULTY_DESC (AC	 Faculty Appro 	ver ~ Owne	r×	Created On ~	
No data available											
0 - 0 of 0										Id ← Page	1 >

4. Click New Articulation Agre... to add a new course. The New Articulation Agreement Course window opens:

Ne	ew Articulation Ag	reement Course		Wichelle Walford V
Ge	neral			
	Agreement	Articulation	ACU Course	
	External Provider Course		Faculty Approver	
	Total Credit Points Offered		Decision	
	Unspecified Units	_		
A	CU Units			

5. Fill in the **External Provider Course** field and the **ACU Course** field:

w Articulation A	Agreement Course - Unsaved			Owner
neral				
Agreement	Articulation	ACU Course	🔀 Bachelor of Education (Primary – The Arts Specialisation) (Test)	
External Provider Course	ळ Advanced Diploma in Education	Faculty Approver		
Total Credit Points Offered		Decision		
Unspecified Units				

6. Fill in the other appropriate fields, click Save . The ACU Units section becomes available to update with the ACU unit information. Click Add Existing ACU Unit :

Advanced Diploma Articulation Agreement Co	nced Diploma in Education - Bachelor of Education (Primary – The Arts Specialisation) (Test) - Saved								
General Related ~									
Agreement	문 Articulation	ACU Course	🖾 Bachelor of Education (Primary – The Arts Specialisation)	(Test)					
External Provider Course	🖾 Advanced Diploma in Education	Faculty Approver	$\left[\overline{\mbox{Pl}} ight]$ Michelle (EPR-TEST) Buckley $\ imes$	م					
Total Credit Points Offered		Decision	Approved						
Unspecified Units	CREDxx3								
ACU Units									
			🖄 Add Existing ACU Unit	\circlearrowright Refresh ${}_{\mathrm{o}^{\mathrm{d}^{\mathrm{d}}}}$ Flow \checkmark :					
Name † 🗸			Code ~ Credit Points	Granted for Unit 🗠					
		No data available							

7. The **Lookup Records** window opens, search for the correct ACU unit, click Add :

ACU Educational Partnerships Register	Lookup Records Select record	×		
Advanced Diploma in Education - Bachelor of Education (Pr Articulation Agreement Course	education	9		
General Related V	EDUCATION & SOCIETY EDFD103			
Agreement 🔀 Articulation	ACU Co	rse 🔀 Bachelor of Education (Primary – The Art	EDUCATION & SOCIETY GDFD103	

8. The course unit is visible in the **ACU Units** grid:

ACU Units		
		🖄 Add Existing ACU Unit 🕚 Refresh 🧬 Flow ee :
○ Name ↑ ×	Code ~	Credit Points Granted for Unit \curlyvee
EDUCATION & SOCIETY	EDFD103	10

9. Once you have completed the relevant information click Save & Close, this will bring you back to the main Articulation screen:

rticulation - Saved greement				Proposed Under Review Igreement Status Action Owner
veement Workflow < D	eaft (14 D)	Under Revi	ew	Finish
eneral Articulation Agreement Schedule Details Ext	ernal Organisations External Cor	ntacts ACU Staff Supporting Document	s Related \vee	
Credit Management System Agreement No		Articualtion Agreement Type Indicator		
Articulation Agreement Courses				
			+ New Articulation Ag	re 🖄 Add Existing Articulati 🖒 Refresh
○ Name ↑ ~	Decision ~	Total Credit Points $$ Unspecified Units $$	FACULTY_DESC (AC Y Faculty Approver	✓ Owner ✓ Created On ✓
Advanced Diploma in Education - Bachelor of Education (Primary – T Approved	CREDxx3	Michelle (EPR-	TES (Michelle Walford (26/04/2023 1:34 PM

Consortium Agreements

A **Consortium Agreement** indicates an agreement with two or more **External Organisations**. **Consortium** is a read only field activated when more than one **External Organisation** is added to an Agreement. Users are unable to update this manually:

Articulation - Unsaved Agreement Agreement Workflow Active for 13 days	Oraft (13 D)	Under Review	EPR-00043 Proposed Under Review Agreement No Agreement Status Action Owner
General Articulation Agreement Schedule Details	External Organisations External Contacts	ACU Staff Supporting Documents Related $ \smallsetminus $	
Agreement Type * 🐼 Articulation International * Domestic	Primary External Organisation Primary External Contact	Test University	A External Source A External ID
🗄 Consortium No			Associated External Organisations
Physical Copy Required Indicator No	Previous Version Agreement		Organisation Name ↑ × International × Iest University Internation

1. To add another organisation to an **Agreement**, navigate to the relevant **Agreement** and click **External Organisations**:

Artice Agreem	ulation - Unsave	9							Proposed Agreement Status	Under Review Action	W Michelle Walfo Owner	rd N
Agreem Active for	e nt Workflow r 13 days	<	Draft (13 D)			Under Review				Fini) sh	
Genera	al Articulation	Agreement Schedule Details	External Organisations	External Conta	cts ACU Staff	Supporting Documents	Related $ \smallsetminus $					
								🖄 Add Existing C	Organisa (🖒 Refresh 🖇	치 Quick Campaign 🗸	
C	Organisation Nan	ne ↑ ∽	External Organisation Partnership St	atus 🗠	External Organisation	n Relationship Status ~	International Organi	sation Indicator \checkmark	Cour	ntry ~	Partnership First Est ~	
	Test University		Partner		Inactive		International		Afgl	hanistan	25/10/2022	

2. Click Add Existing Organisa... to add an additional organisation:

Articula Agreement	tion - Unsaved				EPR-0004 Agreement		\sim
Agreement Active for 13		<	Draft (13 D)	Under Rev	iew	Finish	-
General	Articulation	Agreement Schedule Details	External Organisations Externa	al Contacts ACU Staff Supporting Documen	ts Related \vee		
					2 Add Ex	isting Organisa ひ Refresh �� Quick Campaign ∨ : Add Existing Organisation	
\bigcirc	Organisation Name	† ~	External Organisation Partnership Status \vee	External Organisation Relationship Status \curlyvee	International Organisation Indicator		cing with.
	Test University		Partner	Inactive	International	Afghanistan 25/10/2022	

The **Lookup Records** window opens, search on the organisation:

ACU Educational Partnerships Register	✓ Search	S/	Lookup Records
← 🗄 🗂 🖬 Save 🛱 Save & Close + New	🗅 Deactivate 🛍 Delete 🖒 Refresh 🔍 Check Access	🕽 Process \vee 🛛 💫 Assign 🛛 🔊 Flow \vee 🖷 Word Templates \vee 🗌	Select record
Articulation - Unsaved Agreement		EPR-00043 Propose Agreement No Agreement	*test* O
Agreement Workflow Active for 13 days	Draft (13 D)	Under Review	CAll Organisations
General Articulation Agreement Schedule Detail	s External Organisations External Contacts ACU Staff	Supporting Documents Related V	Test number 2
		2 Add Existing Organisa.	Test University
Organisation Name 1 ~	External Organisation Partnership Status ~ External Organisation R	Relationship Status ~ International Organisation Indicator ~	Testing
Test University	Partner Inactive	International	+ New Organisation Advanced lookup
1-1ef1			Add Cancel

3. Select the organisation, click Add :

ACU Ed	ucational Partnersh	ips Register			P Sea	irch						Sł	Loo	kup Records		×	;
← 🗉	🖆 🗟 Save	📳 Save & Close	+ New	🔁 Deactivate	🗓 Delete	🖔 Refresh	💫 Check Access	B Process	∨ 🗛 Assign	🔊 Flow 🗸	🖷 Word Templa	ates 🗸	Sele	ct record	-		
Articu Agreeme	lation - Unsaved										EPR-00043 Agreement No	Propose Agreemer		Test number 2 $ imes$			
Agreemer Active for	nt Workflow	<		Draft (13 D)					Under Review				Ad	d more records		م	-
		Agreement Schedu	lo Dotaile		nications	Extornal Cor	ACILISta	ff Supporting		Polated v			←aii		Organisations		
General	Articulation	Agreement schedu	lie Details			External Col	itacis ACO Sta	n supporting	y Documents	Related V				Manual Test Qld		\sim	
_											🖄 Add Existin	g Organisa.	5	Test University			
0	Organisation Nam	e ↑ ¥	E	xternal Organisation	Partnership S	atus 🗠	External Organisat	tion Relationship Sta	atus ∨ I	International Organ	isation Indicator 🜱		2	Testing			
	Test University			Partner			Inactive			International			+	New Organisation		Advanced lookup	р
															Add	Cancel]

4. Refresh the grid and the second organisation will be listed:

Agreement No	Proposed Under Review Michelle Walford Agreement Status Action Owner
Under Review	Finish
f Supporting Documents Related \vee	
🖄 Add Existing	Organisa じ Refresh 🖏 Quick Campaign ン :
on Relationship Status ~ International Organisation Indicator ~	Country ~ Partnership First Est ~
Domestic	
International	Afghanistan 25/10/2022
	f Supporting Documents Related \constrained Add Existing to Relationship Status \constrained Add Existing to Relationship Status \constrained Add Existing to Domestic

🔶 🗐 🖬 Save	🛱 Save & Close 🕂 New 🗋 🛙	leactivate 🗊 Delete 🔇) Refresh 🔍 Che	ck Access 🚦 Process	∨	n 🔊 Flow 🗸	🖷 Word Templates \vee 🛛 🖬] Run Report 🗸	🖻 Sha
Articulation - Saved Agreement							EPR-00043 Proposed Agreement No Agreement S	Under Review tatus Action	Wichelle Walford Owner
Agreement Workflow Active for 13 days	<	raft (13 D)			Under Review	,		Finish	
General Articulation	Agreement Schedule Details Ext	ernal Organisations Ex	ternal Contacts	ACU Staff Supporti	ng Documents	Related $ \smallsetminus $			
Agreement Type	* 🖾 Articulation		'rimary External)rganisation	* 🔁 Test University			A External Source		
International Agreement Indicator	* Domestic		rimary External Contact				🛆 External ID		
🗄 Consortium	Yes						Associated External 0	Organisations	
Physical Copy	_	Р	revious Version				Organisation	Name ↑ ~	International 🗡
Required Indicator	No		greement				<u>Test numbe</u>	e <u>r 2</u>	Domestic
External Organisation			Verarching	No No			Test Univer	<u>sity</u>	Internation

Note: If you remove an organisation the Consortium field will update to No.

Workflow Example

Once you have completed and saved all relevant information for your agreement, you can begin the process to have the agreement approved.

In the Agreement workflow bar, click Draft, In the field Find or create an external contact, look up the relevant contact, select Next Stage :

Articulation - Saved Agreement	_				EPR-00048 Proposed Under Review Agreement No Agreement Status Action	Wichelle Walford Owner
Agreement Workflow Active for 43 hours	<	Draft (43 Hrs)		Under Review	Finish	
General Articulation	Agreement Schedule Details	Active for 43 hours	E ×	.CU Staff Supporting Documents Related \vee		
Agreement Type	* 🖾 Articulation	 Find or create organisation Find or create external contact 	Catherin ρ	Test University		
Agreement Indicator	International	✓ Set Agreement Type *	Contacts	Recent records	Li External ID	
☐ Consortium	Yes	Next Stage	Catherine Thomp catherine.thomps		Associated External Organisations	
Physical Copy Required Indicator	No No		Test Test catherine.thomps	on@acu.edu.au	Organisation Name 1 ~	International ~ Domestic

2. An **Agreement** requires 2 levels of approval. In the section **Under Review**, use the lookup to select the appropriate person in the **Nominate Approver** field. Click **Execute** :

ſ	Articulation - Saved Agreement						EPR-00048 Proposed Agreement No Agreement Status	Under Review Action Michelle Walford Owner
	Agreement Workflow Active for 43 hours	<	Draft			Under Review (< 1 Min)		Finish
	General Articulation	Agreement Schedule Details	External Organisations	External Contacts	ACU Staff Su	Active for less than one minute	EZ ×	
	Agreement Type	* 🖾 Articulation		Primary External Organisation	* 🔁 Test Univ	Send Approval Request NC ACO Ap	Δ.ε	
	International Agreement Indicator	* International		Primary External Contact	🕅 Catherin		tichelle Walford (L1) evel 1	
	☐ Consortium	Yes				< Next Stage	New ACU Approver Advanced look	
	Physical Copy	_		Previous Version			Organisation Name	t ↑ ✓ International

3. The Agreement WF Action – Create L1 Approval Request window opens, click Execute to send off a notification email to the approver:

Agreement WF Action - Create L1 Approval Request	\times
No input parameters This action has no input parameters. Click Execute to run this action.	
Execute	!

Note: You can save and close the request, once approved you can continue with the record.

Requests for approval

1. The relevant approver will receive a notification email with a link to the approval request in the **EPR**:

File Message Het																
Bilgnore Delete Archive Delete	Reply Reply Forward All Reply Reply Forward Report		Move to: 7 Team Email C: Reply & Delete Care	G So Manager ✓ Done ¥ Create New x Steps	 Rules - Move P Actions - Move	Policy - Unress	Categorize	Fellow Up -	Fanslate Editing	A) Immersive	Zoom Zoom	Dynamics 365 Add-in	Report Message - Protection			
		equested												ynamics 365	م	+
	r activity proposal that requires your a 6.dynamics.com/main.aspx?pagetype					z										

2. The approval request will show on the **Tier 1 Dashboard – My EPR Data**, under **My Approval Requests**:

=	\leftarrow IB Save As $+$ New \vee \checkmark Set As Default \circlearrowright R	Refresh All				
☆ Home	Tier 1 Dashboard - My EPR Data 🗸					
\odot Recent \checkmark					1	
🖈 Pinned 🗸 🗸	My Activities \checkmark	🖸 Task 🗄	My Approval Requests	+ New :	My Team's Approval Requests	+ New :
Dashboard	Quict	:k find		Quick find		Quick find
해 My Dashboard	✓ Date Created \lor Due Date \lor Create ↓ \lor	Owner V Activ	✓ Name ✓	Request Da \checkmark Due Date \checkmark Created By \cdot	✓ Name ∨	$\Bigl \ {\rm Request} \ {\rm Da} \ \smile \Bigr \ {\rm Due} \ {\rm Date} \ \smile \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ $
External Organisation			Agreement - Articulation	18/05/2023 19/05/2023 Michelle V		
External Organisations						
8 Contact Persons						
Agreements & Activities						
Agreements						
Agreement Schedules	No data available.				No	data available.
Activities						
Approvals						
ACU Approvers						
Approval Requests						
	ABC 0-0 of 0		ABC 1-1 of 1		ABC 0 - 0 of 0	

3. Click on the approval request to open it. In the **Approval Result** field select **Approved** or **Rejected**. Click Save & Close:

greement - Articula oproval Request eneral Related ~	ation - Saved			Active Active Status Status Reason
Name *	Agreement - Articulation	Approver	Michelle Walford (L1)	
🔒 Regarding Agreement	Articulation	Owner	* (Michelle Walford (Available)	
Regarding External Organisation Activity		Approval Result	Select	
🛆 Request Date	18/05/2023		Approved Rejected	
🔒 Due Date	19/05/2023			
A Resolved Date				
⊖ Created By	(Michelle Walford (Available)			
	No data available.	ta available.		data available.

Approved Requests

1. Once the request has been approved, the owner of the record will receive an email notification. Click on the link to open the agreement:

						Level 1 Approval	Activity decision - Message (+17ML))				8			- 10	0	×
File Message Het	P V Tell me what you want to do Reply Forward C MA - All Reply Forward More - Reply Reply Forward More -		Team Email Reply & Delete Case	C So Manager Done T Create New ox Steps		Move Move Move	Assign Mark Categorize Folio Policy - Unread Up	w Tre	Anniate Canuilate Cating	Read immersive Aloud Reader	Q Zoom Zoom	Dynamics 365 Add-in	Report Message Protectio				-
													Į.	Oynamics 365	Q,	+	8 ×
Hi Gary, This is to inform you that	the activity proposal has been review												^	Not tracked Set Regarding			
https://acueprdev1.crm6	dynamics.com/main.aspx?pagetype-	entityreco	d&etn+acu_externa	alorganisationactive	rysia-rac	ba06d-1dbd-44(0-ae75-11)	\$7166225F3							Professore .			_

Note: You can go directly to the EPR to access the agreement. Open the EPR, navigate to **Agreements and Activities**, click **Agreements** and search for your agreement:

=	~	🛱 Show Chart	+ New 🗎 Delete	✓ ♥ Refresh d Visualize this	view 🐯 Email a	Link 🗸 🛛 🖾 F	low 🗸 🗃 Run	Report 🗸 🖷	Excel Templates ~	Export to E	ccel 🗸 🛛 🖪 Im	port from Excel	~
Home	A	II Agreements	~							Ec	lit columns 🛛 🍸 E	Edit filters Quic	k find
③ Recent ∨ ☆ Pinned ∨	O	Agreement \downarrow \checkmark	Organisation Name Y	Name Y	International 👻	Agreement Ty ~	Agreement St ~	Action ~	Agreement St ~	Agreement E 👻	Agreement R 👻	Created On ~	Modified On ~
Dashboard		EPR-00048	Test University	Articulation	Internatio	Articulation	Proposed	Approved				16/05/2023 2	18/05/2023 9
勝 My Dashboard		EPR-00047	Test number 2	Student Placement	Domestic	Student Plac	Proposed	Draft Awai				8/05/2023 7:	8/05/2023 8:
External Organisation		EPR-00046	New Organisation	Articulation - 04/05/2023	Domestic	Articulation	Current	Active	4/05/2023	18/05/2023	11/05/2023	4/05/2023 10	4/05/2023 12
External Organisations		EPR-00045	Test University	Student Placement Agreement In	Domestic	Student Plac	Current	Active	4/05/2023	11/05/2023	5/05/2023	27/04/2023 1	5/05/2023 12
A Contact Persons		EPR-00044	Placements R' Us	Student Placement - 24/04/2023	Domestic	Student Plac	Current	Active	24/04/2023	27/04/2023	26/04/2023	27/04/2023 9	27/04/2023 1
Agreements & Activities		EPR-00043	Test University	Articulation	Domestic	Articulation	Proposed	Under Rev				12/04/2023 1	26/04/2023 1
Agreements		EPR-00042	St Patrick's College	Articulation	Internatio	Articulation	Proposed	Inactive (N				1/12/2022 11	1/12/2022 11
Agreement Schedules		EPR-00041	Caritas Institute of	Memorandum of Understanding	Internatio	Memorandu	Proposed	Draft Awai	21/04/2022	21/04/2027		22/11/2022 2	28/11/2022 2
Activities		EPR-00040	ABC University	Memorandum of Understanding	Internatio	Memorandu	Current	Approved	25/09/2022	28/04/2023	5/12/2022	28/10/2022 1	30/11/2022 4

2. The **Agreement** workflow, under the **Under Review** dropdown, the **Approval Result** field has updated to **Approved**, click Next Stage :

reement Workflow K twe for 43 hours K ieneral Articulation Agreen	Draft Ement Schedule Details	ixternal Organisations	External (Under Review (9 Min) Active for 9 minutes	ez x		Approval		Finish
ieneral Articulation Agreen	ment Schedule Details E	xternal Organisations	External (Active for 9 minutes	E2 ×				
						Related \vee			
Agreement Type 🔹 🏠 A	Articulation		Primary E: Organisat	_	Michelle Walfor		A External Source		
International * Intern Agreement Indicator	rnational		Primary E: Contact		pproved		A External ID		
🗄 Consortium Yes				< Next Stage	>		Associated External O	rganisations	

Follow the above steps for the second level approval in the ACU Approval dropdown.
 Once the request has been approved, click Next Stage >. The External Party Approval – Initiation dropdown will show, select Yes in the Sent to External Party for Approval? field:

Articulation - Saved Agreement					EPR-00 Agreeme		Draft Awaiting External Action	Party Approval	Wichelle Walford Owner
Agreement Workflow Active for 43 hours	< Draft	Under Review	ACU Appro	val	External Party Approval - I	nitiation (< 1 Min)	External Party	Approval	OGC Review
General Articulation	Agreement Schedule Details	External Organisations	External Contacts	ACU Staff St	Active for less than one minu	te El X			
Agreement Type	* 🛱 Articulation		Primary External Organisation	* 🔁 Test Uni	Sent To External Party for Approval? Next Sta	No Yes	External Source		
International Agreement Indicator	International		Primary External Contact	🛛 Catherin	A HEAT STO	<u>-</u>	🛆 External ID		
🛆 Consortium	Yes						Associated External Organis	ations	

Note: If you select **No**, the agreement will no longer progress and the below window will open, click **OK**:



4. The External Party Approval option asks if there are any changes required, click No:

Articulation - Saved Agreement		EPR-00 Agreem		Draft Awaiting Exter	nal Party Approval	
Agreement Workflow Active for 1 hour	<	External Party Approval (< 1 Min)	OGC Review	v Sig	ning Off - Initiation	O Signing Off
General Articulation	Agreeme	Active for less than one minute	E∄ × External Cor	ntacts ACU Staff	Supporting Documents	Related \vee
Agreement Type	* 🖾 Art	Changes Required? No No Kext Stat Yes	∨ ■ New Orga	nisation	A External Source	
International Agreement Indicator	* Domes	Contact	R Test Test		🛆 External ID	

Note: If you select **Yes**, you won't be able to proceed, and the following window will open, click OK:



5. In the OGC Review dropdown select Yes in the field OGC Approval is required?:

Articulation - Unsaved Agreement	d			EPR-00046 Proposed Agreement No Agreement Status	Under Review OGC Action	
Agreement Workflow Active for 2 hours	< External Party Approval		OGC Review	OGC Approval (< 1 Min)	O Signing Off - Initiation	Signing Off
General Articulation	Agreement Schedule Details	Exte	Completed		aff Supporting Documents	Related \vee
Agreement Type	* 🖾 Articulation	Pri Or	OGC Approval Required?	No IV	A External Source	
International Agreement Indicator	* Domestic	Pri Co		Set Active Yes	A External ID	

Note: If you select **No**, you won't be able to proceed, and the following window will open, click OK:



6. Complete the relevant fields in the **OGC Approval** dropdown, click Next Stage >:

Articulation - Saved Agreement					EPR-00043 Proposed Agreement No Agreement Sta	Under Review OGC	Owner
greement Workflow ctive for 35 days	< Draft	Under Review	ACU Approval	External Party Approval - Initiation	External Party Approval	OGC Review	OGC Approval (< 1 Mir
General Articulation	Agreement Schedule Details	External Organisations	External Contacts	ACU Staff Supporting Documents Rela	ated \vee	Active for less than one	minute 🖸 🖯
Agreement Type International Agreement Indicator	Articulation Domestic		Primary External Organisation Primary External Contact	. Test University	A External Source	 ✓ Submitted to OGC? ✓ Date Submitted to OGC ✓ Provide OGC Reference Number 	Yes 18/05/2023 🗰 123456
🔒 Consortium	Yes				Associated Exter	OGC made	No
Physical Copy Required Indicator	No No		Previous Version Agreement		Organis Test nu	N Ne	xt Stage >

Note: OGC approval is managed outside of the EPR. Any correspondence with the OGC will need to be recorded on the **Agreement timeline**. To do this, you can either track OGC email correcpondence via outlook (see tracking emails using outlook manual), or making a manual note on the timeline grid.

• Click **Enter a note**:

International * Agreement Indicator	Domestic		Primary External Contact		Q	External ID 🗇	
Consortium	No		contact			Associated External Organisations	
Physical Copy Required Indicator	No No		Previous Version Agreement		٩	Academia International Domestic	
External Organisation Agreement Scope			Overarching Agreement Indicator	No No		1 - 1 of 1	${\rm Id}~ \leftarrow~ {\rm Page} {\rm I}~ \rightarrow$
Agreement Can be Published to Website Indicator	No No		Overarching Agreement		م	Timeline	+ ⊽ ī≣ :
Project		م				Search timeline	
		~				Enter a note	0
Agreement Start Date		[11]	Agreement End Date				
1			A				

• Provide subect text, body text (if applicable) and attach document. Click add note

Timeline	+	7	Ţ≣	:	
$\mathcal P$ Search timeline					
Create a note					
OGC Correspondence					
Enter text					
≪ Font • Size • B I U ∠	- <u>A</u> -				
🖾 OGC Email.png 🛛 🗙					
0 Add	note		Cancel		

• OGC correspondence will then appear on agreement timeline



7. Complete the relevant fields in the **Signing Off – Initiation** dropdown, click Next Stage >:

Articulation - Unsaved Agreement		EPR-00043 Proposed Agreement No Agreement Status	Awaiting Signature - either ACU or external Action Michelle Walford Owner
Agreement Workflow Active for 35 days	Signing Off - Initiation (< 1 Min)	Signing Off	Finish
General Articulation Agreement Schedule Detai	Active for less than one minute	ACU Staff Supporting Documents Related \vee	
Agreement Type * 🔀 Articulation	✓ Submitted to Delegates? ✓ Date Submitted to 18/05/2023	Test University	A External Source
International * Domestic	Delegates	🕅 Test Test	A External ID
🛆 Consortium Yes	A Next Stage 7		Associated External Organisations

8. In the **Signing Off** dropdown select **Yes** for the fields **Have ACU Signed?** and **Have External Party Signed?**, click Next Stage

Articulation - Unsaved Agreement	d					eement Status Action	Signature - either ACU or ex	ternal Michelle Walford Owner
Agreement Workflow Active for 35 days	<	Signing Off - Initiation			Signing Off (< 1 Min)			Finish
General Articulation	Agreement Schedule Details	External Organisations	External Contacts	ACU Staff Supporting	Active for less than one min	nute 🖾 🗙	_	
Agreement Type	* 🛱 Articulation		Primary External Organisation	* 🖸 Test University	✓ Have ACU Signed? ✓ Have External Party Signed?	Yes Ves	I Source	
International Agreement Indicator	* Domestic		Primary External Contact	🕅 Test Test	-	itage >	i ID	
🔒 Consortium	Yes					Associate	ed External Organisations	

Note: If you select **No**, you will not be able to proceed and will receive the below pop-ups, click **OK**:

Cannot proceed to the next stage until ACU have signed the agreement.	Cannot proceed to the next stage until External Party has signed the agreement.
ОК	ОК

9. Once you select Yes, click Next Stage >. You will be notified that the fields Agreement Start Date, Agreement End Date and Agreement Review Date become required, fill the fields in and click Next Stage >:

🗄 🗖 🖬 Save	🛱 Save & Close 🕂 New 🗋 Deactivate 💼	Delete 🕐 Refresh 🔍 Che	eck Access 🛛 🕄 Process	∨ A, Assign 🖾 Flow ∨ ⊄	Word Templates 🗸 🛛 🖬 Run Rep	ort 🗸 💆 Sha
You have 3 notifications. Select	to view.					
ticulation - Unsaved				•	EPR-00043 Current Agreement No Agreement State	as Active Michelle Walford
ement Workflow re for 35 days	< Signing Off - Initiation			Active for less than one minute	ez ×	Finish
neral Articulation a Indicator Project	Agreement Schedule Details External Organisat	ions External Contacts	ACU Staff Supportin	Ves Have ACU Signed? Yes Have External Party Signed? Yes	2	$Id \ \leftarrow \ Page I \ \rightarrow \\$
	6	1		< Next Stage >	th timeline	+ 7 15 5
Agreement Start * Date	Agreement Start Date: Required fields must be filled in.	Agreement End Date		ate: Required fields must be filled in.	Enter a note	
		Agreement Term (Years)				
Agreement Review * Date	Agreement Review Date: Required fields must be filled in.				G	Set started
					Capture and mana	ge all records in your timeline.

10. Click Finish P in the Finish dropdown:

					Agreement No Agreement Status Action W Owner
greement Workflow ctive for 35 days	<	Signing Off - Initiation		Signing Off	Finish (< 1 Min)
General Articulation	Agreement Schedule Details	External Organisations	External Contacts AC	:U Staff Supporting Documents Related $arphi$	Active for less than one minute $~~~ {\rm E}^{2} ~\times$
Agreement Can be Published to Website Indicator	No No		Overarcning Agreement		✓ Confirm the Action * Active
Project					K Finish P
Agreement Start Date	* 18/05/2023		Agreement End Date *	4/01/2024	Timeline + √ I≣ P Search timeline
Agreement Review	* 18/05/2023		Agreement Term (Years)	0.6	Enter a note

11. The **Agreement** will update and save:

- 🗄 🖬 Save	e 🛱 Save & Close 🛛 + New	🔓 Deactivate 🛙 🗐 Delete	🖒 Refresh 🛛 🔍 Ch	neck Access	₿₽ Process ∨ P. Assign	n 🔊 Flow 🗸	🖷 Word Templates \vee 🔳 Run Repor	t ~	🖻 Share
Articulation - 18/0	5/2023 - Saved	_					EPR-00043 Current Agreement No Agreement Status	Active Action Owner	e Walford 🛛 🔨
Agreement Workflow Completed in 35 days	<	Signing Off - Initiation			Signing	Off		Finish	
General Articulation	Agreement Schedule Details	External Organisations	External Contacts	ACU Staff	Supporting Documents	Related \sim	Completed	63 ×	
Agreement Can be Published to Website Indicator	No No		Overarcning Agreement				✓ Confirm the Action * Active Status	Id \leftarrow Pa	ge 1 →
Project							Finished 🗸	+ 7	
Agreement Start Date	* 18/05/2023		Agreement End Date	* 4/01/20	24		Search timeline		
Agreement Review Date	* 18/05/2023	T	Agreement Term (Years)	0.6			Enter a note		Û

Rejected Requests

1. Once the request has been rejected, the owner of the record will receive an email notification. Click on the link to open the agreement:

3 🖫 り ひ ↑ ↓ マ Level 2 Approval Activity decision - Message (HTML ile Message Help O Tell me what you want to do											
le Message Help Q Tell me what you want to do											
S Delete Archive → Forward → Forwar	er V Move	Tags Editing	Immersive *	Translate		Reply with Scheduling Poll	Dynamics 365	Report Message ~	Viva Insight	s	
Delete Respond Teams Apps Quick St	eps 🖓			Language	Zoom	Find Time	Add-in	Protection	Add-in	1	`
Level 2 Approval Activity decision						Dynan	nics 365			-0	a X
s SVC_PowerApps To Catherine Thompson	© \(\circ)	Reply 🖔 Re	ply All →		100 ···	=			Q	+	:
S SVC_PowerApps To Catherine Thompson		Reply 🖔 Re	oly All →				tracked		Q	+	:
S SVC_PowerApps To Catherine Thompson			oly All →			Not	tracked Regarding		م		1
SVC_PowerApps	o review the outcome	<u>.</u>		Thu 15/02/	2024 3:32 PM	Not			<i>م</i>		1

Note: You can go directly to the EPR to access the agreement. Open the EPR, navigate to **Agreements and Activities**, click **Agreements** and search for your agreement:

2. The **Agreement** workflow, under the **Under Review** dropdown, the **Approval Result** field has updated to **Rejected**, click Next Stage :

Articulation - Unsaved Agreement			EPR-00080 Proposed Inactive (No action required) Agreement No Agreement Status Action	Catherine Thompson Owner
Agreement Workflow Active for less than one mi	< Draft	Under Review (< 1 Min)	Notify External Contacts	Finish
General Articulation	Agreement Schedule Details External Organisations	s Extern Active for less than one minute E3 × ts	Related \sim	
Agreement Type	* 🗃 Articulation	V Nominate Approver * 🔀 Catherine Tho Primi Orga Send Approval Request Now?	🛆 External Source 📖	
International Agreement Indicator	International	Prime Cont. Approval Result " Rejected	🛆 External ID	
A Consortium	No	K Next Stage	Associated External Organisations	

3. Under Notify External Contacts, click Execute :

Articulation - Saved Agreement						EPR-00080 Agreement No	Proposed Agreement Status		tion required)	Catherine Thompson Owner	\sim
Agreement Workflow Active for 4 minutes	< Draft		Under Revie	ew.		Notify External	Oontacts (2 Min)			Finish	>
General Articulation	Agreement Schedule Details	External Organisations	External Contacts	ACU Staff	Supporting Documents	Active for 2 minu	tes	e ×			
Agreement Type	* 🖾 Articulation		Primary External Organisation	* 🔁 Test	t University	Send Automat Execute	tic Notification				
International Agreement Indicator	* International		Primary External Contact	Ami	ber O'Neill	<	Next Stage 📏				

• The **Agreement WF Action – Send Not Pursue** window opens, click **Execute** to send off a notification email to the external contact that the agreement will not be pursued:



Note: Users may need to manually send an email via Outlook.

4	Click	Next Stage	>	•
T	Onon			٠

Articulation - Saved Agreement					EPR-00080 Proposed Agreement No Agreement Status	Inactive (No action required Action	d) Catherine Thompson Owner	~
Agreement Workflow Active for 9 minutes	< Draft		Under Revie	ew	Notify External Contacts (7 Min)		Finish	>
General Articulation	Agreement Schedule Details	External Organisations	External Contacts	ACU Staff Supporting Documents	Active for 7 minutes	ez ×		
Agreement Type	* 🛱 Articulation		Primary External Organisation	* 🔁 Test University	✓ Send Automatic Notification Execute			
International Agreement Indicator	* International		Primary External Contact	🕅 Amber O'Neill	✓ Next Stage >			

5. Click Finish \square in the Finish dropdown.

Articulation - Saved Agreement							Proposed Agreement Sta	Inactive (No action require	ed) Catherine Owner	Thompson 🗸
Agreement Workflow Active for 10 minutes	< Draft		Under Revie	w		Notify External Cor	ntacts		Finish (< 1 Min)	>
General Articulation	Agreement Schedule Details	External Organisations	External Contacts	ACU Staff	Supporting Documents	Related $ \smallsetminus $		Active for less than one minute	. E ×	
Agreement Type	* 🖾 Articulation		Primary External Organisation	* Test	University		A	✓ Confirm the Action ★ Status	Inactive (No	
International Agreement Indicator	* International		Primary External Contact	Amb	er O'Neill		A	< Finish	β	

Note: A reason for the rejection, or correspondence regarding the rejection will need to be added to the **Agreement timeline** as a note. To enter the note manually, in the **Timeline** grid, click **Enter a note:**

Agreement Indicator		Primary External Contact		Q		
Consortium 🖄	No				Associated External Organisations	
Physical Copy Required Indicator	No No	Previous Version Agreement		P	Al Academia International Domestic	:
External Organisation Agreement Scope		Overarching Agreement Indicator	No No		1 - 1 of 1	\leftarrow Page 1 \rightarrow
Agreement Can be Published to Website Indicator	No No	Overarching Agreement		Q	Timeline	+ \2 12 :
Project		Q			, ○ Search timeline	
					Enter a note	0
Agreement Start Date	(Agreement End Date		::"		
Agreement Review		Agreement Term				

Provide subect text, body text (if applicable) and attach any relevant documentation. Click add note. Rejection note will then appear on agreement timeline.

Timeline + ∀ ī≣ :	Timeline	+ 7	7 ፲≣	:
Create a note Rejection Reason Does not meet requirements	Enter a note Recent			Û
	Modified on: 2:52 PM ■ Note modified by A Catherine Thomps Rejection Reason Does not meet requirements ■ Rejected Email.png	son 🖌	° 🗅	Î
Bill Rejected Email.png X Image: Add note Cancel	View more			\sim