

EDUCATIONAL PARTNERSHIPS REGISTER

Creating New External Organisation Activity

Contents

New External Organisation Activity	3
Creating a new external organisation activity	3
Workflow Example	7
Requests for approval	
Approved Requests	
Rejected Requests	

New External Organisation Activity

An External Organisation Activity allows users to record specific activities undertaken by partners during the course of their relationship, including delivering outcomes specified in an agreement. There are several types of External Organisation Activity types in EPR:

- Conference/Seminar/Symposium/Wor kshop (in person)
- Conference/Seminar/Symposium/Wor kshop (virtual)
- Correspondence
- Data Sharing

- Event (includes competition)
- Meeting (virtual)
- Meeting or Visit (in person)
- Membership/Network/Alliance
- Online Learning Experience

Creating a new external organisation activity

1. To create a new external Organisation activity, using the left navigation bar, navigate to

Activities. On the top menu, click + New :

III 🦉 ACU	ACU Educational Partnerships Regis	ter	,P Search										
≡ @ Home	← Show Chart + New	🕐 Refresh 📲 Visualize this view 🛛 🕱 Email a Link 🛛 🛩 🔊 Fio	w 🗸 🗐 Run Report 🗸 🕮 Excei Templates	 ✓ ■ Import from Excel ✓ 									
③ Recent ∨ Ø Pinned ∨	All External Organisat	All External Organisation Activities \vee											
x ² Pinned ∨ Dashboard	Activity No $\downarrow \sim$	Name ~	Activity Status ~	Action ~	Start Date ~	End Date ~							
My Dashboard	ACT-00017	Data Sharing	Proposed	Draft Awaiting ACU Ap									
xternal Organisation	ACT-00016	Meeting or Visit (in person)	Current	Active	1/11/2023	30/11/2023							
L External Organisation	ACT-00015	Data Sharing	Proposed	Under Review									
Contact Persons	ACT-00014	Correspondence	Proposed	Inactive (no action requ									
	ACT-00013	Data Sharing	Proposed	Draft Awaiting ACU Ap									
greements & Activities	ACT-00012	Meeting or Visit (in person)	Expired	Inactive (no action requ	13/04/2023	20/04/2023							
Agreement Schedules	ACT-00011	Correspondence	Expired	inactive (no action requ	13/04/2023	27/04/2023							
Activities	ACT-00010	Conference/Seminar/Symposium/Workshop (in person)	Proposed	Draft Awaiting External	6/04/2023								
oprovals	ACT-00009	Online Learning Experience	Expired	Inactive (no action requ	5/04/2023	27/04/2023							
Approval Requests	ACT-00008	Meeting (virtual)	Proposed	Approved Proposal									

2. A New External Organisation Activity window opens:

New External O	rganisation Activity				Activity No Activity Status Acti	
utivity Workflow Intive for less then one min		Draft (< I Min)		Under Review	F	
General						
Activity Type *			م			
Name *						
Primary External * Organisation		Primary External Contact				
Country		,o Location				
Regarding Agreement		P				
Start Date		E All Day Event	Nes Nes			
End Date		8				
Fineline						
		Almost there				
		Select Save to see your timeline.				

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

Activity Type *	Look for Activity Type	م
Name *	External Organisation Activity Types	
Primary External *	Conference/Seminar/Symposium/Workshop (in person) 5/10/2022 9:09 AM	
Drganisation Country	Conference/Seminar/Symposium/Workshop (virtual) 5/10/2022 9:09 AM	
	Correspondence 5/10/2022 9:09 AM	
Regarding Agreement	Data Sharing 5/10/2022 9:09 AM	
Start Date	Event (includes competition)	
Start Date		Advanced lookup

• **Name** – This will auto populate when you select an Activity Type. If appropriate, you can amend the name by clicking and typing in the field:

Activity Type *	හ <u>Meet</u>	ing (virtual) ×	Q	
Name *	Meeting	(virtual)		
Primary External * Organisation		Activity Type *	Meeting (virtual) ×	Q
Country		Name *	Example Meeting (virtual)	
Regarding Agreement		م ر		

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

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

- 🗧 🖾 Save 🖓 Save & Close + New 🕞 Deactivate 🖒 Refresh 🖏 Check Access 🚯 Process 🗸 A, Assign 😰 Flow 🗸 🖷 Word Templates 🗸 🗐 Run Report 🗸 [₽\$ Sha ACT-00018 Propos Example Meeting (virtual) - Saved Under Review Cat Owr Exter al Organisation A Under P-Draft (< 1 Min) O flow General Related V Associated External Organisations Activity Type * III Meeting (virtual) × Organisation Name 1 ~ External Organisation R.,. v In Example Meeting (virtual) Name 1 Test University Partner Inactive mary Exter Test University × ,0 Organisation Contac Country Location Q Regarding Agreement ... ,o
- 4. Once you have filled in the required fields, click \square Save :

- 5. Once you have saved your **External Organisation Activity** you will see the following additional grids appear:
 - ACU Staff
 - Associated External Organisations
 - External Organisation Contacts
 - Supporting Documents

Example Meetin External Organisation A			0			ACT-00018 Proposed Under Review Catherine Thompson Activity No Activity Status Action Owner
Activity Workflow Active for less than one minu	_{rte} <		Draft (< 1 Min)			Under Review Finish
General Related ~	,					
Activity Type *	Meeting (virtual) ×				Q	Associated External Organisations
Name *	Example Meeting (virtu	ual)				Organisation Name ↑ × External Organisation P.,, × External Organisation R.,, × In
Primary External * Organisation	⊠ <u>Test University</u> ×	Q	Primary External Contact		Q	Test University Partner Inactive
Country		Q	Location		Q	
Regarding Agreement		Q				Rows: 1
Start Date			All Day Event	Yes		
End Date		::-				External Organisation Contacts 🛛 Add Existing Contact : Full Name † × External Contac × Company Name × Status ×
Supporting Documents						
Document	t Title ↑ ~		Document Type ~	Created On ~		We didn't find anything to show here
	We didn'	t find a	nything to show here			Rows: 0
Rows: 0		_			•	ACU Staff 🖉 Add Existing Contact :

- 6. For activities that include multiple organisations, there can only be one **Primary External Organisation**, however additional organisations can be added.
 - Under Associated External Organisations, click Add Existing Organisation

ciated External Organisations	🖄 Add Existing Organisa	
Organisation Name $\uparrow \checkmark$	External Organisation P ~	External Organisation R Y International Or
	No data available	
	NO data available	
0 - 0 of 0		$ \triangleleft \ \leftarrow \ Page \ 1 \ ightarrow$

• Lookup Organisation and click **Add**. Any new organisations will need to be added prior to being added to the Associated External Organisation.

Lookup Records Select record	×
Look for records	Q
Recent records	All records
Boston College	
123 Grow Child Care	
ALFRED HEALTH (HOSPITAL)	
ABC University	
+ New Record	
Add	Cancel

• The external organisation will now be added to the activity under the **Additional External Organisations** grid.

ty Workflow for 4 hours	<	Draft (4 Hrs)		Under Review		Finish	
eral Related 🗸							
Activity Type	Conference/Seminar/Sympo	osium/Workshop (in person)		Associated External Organisations		创 Add Exis	sting Organisa
Name	* Conference/Seminar/Symposiu	Conference/Seminar/Symposium/Workshop (in person)			External Organisation P \checkmark	External Organisation R V	International C
Primary External Organisation	ABC University	Primary External Contact		123 Grow Child Care	Partner	Active	Domestic
Country		Location					
Regarding Agreement							

7. Once all relevant data has been entered for the remaining grids, click \square Save .

Workflow Example

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

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

Example Meetin External Organisation A					0		ACT-00018 Proposed Activity No Activity Statu		atherine Thompson wner	~
Activity Workflow Active for 55 minutes	<	Draft (55 Min)			Under Review			Finish		>
General Related	~	Active for 55 minutes								
Activity Type *	(3) Meeting.(virtua)) ×	Find or create * ✓ organisation Find or create external	(3 Test Unive × P	Q	Associated External Organisa	tions		Add Existing Organisa	O Refresh	:
Name *	Example Meeting (virtual)		Look for Primary A Contacts Becent records Search		Organisation N	ame ↑ ~ External Organisation P	 External Organisation R 	International Organisati v	Country ~ Par	r
Primary External Organisation	(3) Test University ×		Amber O'Neill Amber.Cottage@campbeltown.nsw.gov.au	~	Test University	Partner	Inactive	International	Afghanist 25/	-
Country			Andrew (EPR-TEST) O'Connor Andrew O'Connor@acuedu.au	م ~						

2. An External Organisation Activity 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 :

Example Meetin External Organisation /							-	ACT-00018 Activity No		Action	atherine Thompso wher	• ~
Activity Workflow Active for 58 minutes	<	D	braft			Under Review (< 1 N	tin)			O Finish		
General Related						Active for less than one	e minute ES ×					
						Nominate Approver *	Look for Level On 🔎					
Activity Type *	89 <u>Meeting/virtual)</u> ×				٩,		ACU Approvers Recent records		6	2 Add Existing Organisa.	- O Refresh	n I
Name *	Example Meeting (virtual)					Execute Approval Result * @	B Adele Richards (L1)	xternal Organ	isation R ~ Int	ternational Organisati ~	Country ~	Par
Primary External * Organisation	(3 Test University ×	۵,	Primary External Contact	의 Amber O'Nelli ×	م	Approval Result - ID	BE Andrew OConnor Level 1	Inactive	le	nternational	Afghanist	25/
Country		ο,	Location		,p		88 Catherine Thompson (L1) Level 1					
Regarding Agreement		Q.					RI Fanika Janev Trajkovska					
						Rows 1	Gary Test L1					
Start Date		F	All Day Event	Yes				tranced lookup				

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



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	Tell me what you want to do					Level 1 Approval Activity									
	Reply Reply Forward More - Reply Reply Forward More - All	Share to Teams Teams	Move to: 7 Team Email Reply & Delete Que	Create New		Move - Move - Move Move	Assign Mark Cab Policy - Unread	Find Familate Conting	A ⁽⁾ Read Immersive Aloud Reader Immersive	Q Zoom Zoom	Dynamics 365 Add-in	Repo Messar Protect	on ge -		
G GaryWa													Dynamics 365		ņ
	proval Activity proposal review r	equested										~		S	+
Hi Gary, I															
You have received a new	activity proposal that requires your a	ttention. Pi	ease click on the lin	k to review the rele	evant int	ormation.									
https://acumprdev1.crmd	dynamics.com/main.aspx?pagetype	entityreco	rd&etn+acu approv	rairequest&id=11e	04487-64	43-ed11-bba3-00224818a98	t								

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

III VACU	ACU Educational Partnerships Register		, P Search		SANDBO	X New look 🔼 🖓 + 🕲 ?
■	← B Save As + New ∨ √ Set J Tier 1 Dashboard - My EPR Data √	-				سدة 🖄
Dashboard	My Activities ~	13 Task 59 Email	My Approval Requests	+ New O Refresh :	My Team's Approval Requests	+ New O Refresh :
My Danboard External Organisation Contact Persons Acronents & Activities Aprevents & Activities Approvals Approvals Approvals	20/06/20 28/06/2023 2:30	D Guia free Orat. 1* Onne * Activity* Sa Q SUC_Pose Email Lin Q Corper Q SUC_Pose Email Lin Q Corper Q Staterin Appon Me Q Corper Q Staterin Bac Dr Q Corper Q Staterin Bac Dr	Atame 1 - Report D., - Activity - Example Meeting (r/., 9/11/2023	Druce tree Orace tree Due Date Created by 10/11/2023 Catherine T	Name 1 - Requ	P quanter

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

Activity - Examp Approval Request	le Meeting (virtual) - Saved			Active Active Status Status Reason
General Related ~				
Name *	Activity - Example Meeting (virtual)	Approver	Catherine Thompson (L1) ×	م
Regarding ô Agreement		Owner *	R Catherine Thompson (Available) ×	م
Regarding External 🗇 Organisation Activity	Example Meeting (virtual)	Approval Result	Select ✓Select	~
Request Date 🗄	9/11/2023		Approved Rejected	
Due Date	10/11/2023			
Resolved Date 🗄				
Created By 🗇	Catherine Thompson (Available)			

4. The **Tier 1 Dashboard – My EPR Data** will update to show the removal of the approval request in the **My Approval Request** grid:

fy Activities $ \smallsetminus $	🖪 Task	My Approval Requests	+ New :	My Team's Approval Requests	+ New
	Quick find		Quick find		Quick find
✔ Date Created ∨ Due Date ∨ Cre	reate ↓ ∨ Owner ∨ Activ	✓ Name ∨	Request Da V Due Date V Created By	✓ Name ∨	Request Da V Due Date V Created B

Any relevant information regarding the approval or rejection should be noted on the activity timeline.

See *Creating New External Organisations and Contact Persons* instruction manual for instructions on how to record an email on the **Agreement timeline**.

Conference/Seminar/Symposium/Workshop (in person) - Sa External Organisation Activity	ved		ACT-00020 Proposed U Activity No Activity Status A	tion Catherine Thompson
ctivity Workflow Ctive for 25 hours CDraft (25 Hrs)		Under Review		Finish
General Related ~				
Supporting Documents	+ New Supporting Docu		No data available	
Document Title ↑ ~ Document Type ~	Created On ~			
No data available		0 - 0 of 0		Id \leftarrow Page 1 \rightarrow
		ACU Staff		Add Existing Contact :
0 • 0 • 0 • 0	${\rm Id}\ \leftarrow\ {\rm Page}{\rm I}\ \rightarrow$	Full Name ↑ ∽ Ad	dress × Address × Address ×	Address V Address V Org U
Timeline	+ 7 11 :		No data available	
✓ Search timeline				
Enter a note	0			
V Recent		0 - 0 of 0		I4 ← Page 1 →
Modified on: 1:30 PM				
IIII Note modified by A Catherine Thompson Rejected Notes Venue not available for recommended dates				
View more	\sim			

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:

The Message Hetp Thill me what you work to do Is junce Image: Second se	Share to Teams	V Done	Move Move Move Move Move	Ausign Mark Categorite Follow Policy - Unread - Up - Tags 5	D Find Daniel D Related - Translate D Select - Edting	A La Read Immensive Aloud Reader Immensive	Q Zoom Zoom	Dynamics 365 Add-in	Report Message Protection			
G GaryWang_VENDOR Level 1 Approval Activity decision									5	lynamics 365	م	 ф ж
Hi Gary,									~	Not tracked Set Regarding		
This is to inform you that the activity proposal has been revie https://acueptdev1.crm6.dynamics.com/main.aspx?pagetype			Oba06d-1dbd-4fc0-ae75-11	a7106225f3								

Note: You can go directly to the EPR to access the activity. Open the EPR, navigate to **Activities**, and search for your external Organisation activity:

III 🔮 ACU	ACU Educ	ational Partnerships Re	gister 🔎 Search				SAND
≡ ŵ Home	← [5] Show Chart $+$ N	ew 🖒 Refresh 👍 Visualize this view 🛛 🖾 Email a Link 🗌 🗸	🔊 Flow 🖂 🔟 Run R	teport \vee 🛛 🕮 Excel Te	mplates 🖂 🚺 In	nport from Excel
③ Recent ∨ S ² Pinned ∨	All E	xternal Organis	ation Activities ~				170 E
Dashboard	-	Activity No \downarrow ~	Name ~	Activity Status ~	Action ~	Start Date ~	End Date ~
泰 My Dashboard		ACT-00018	Example Meeting (virtual)	Proposed	Approved Prop		
		ACT-00017	Data Sharing	Proposed	Draft Awaiting		
External Organisation		ACT-00016	Meeting or Visit (in person)	Current	Active	1/11/2023	30/11/2023
Contact Persons		ACT-00015	Data Sharing	Proposed	Under Review		
		ACT-00014	Correspondence	Proposed	Inactive (no acti		
Agreements & Activities		ACT-00013	Data Sharing	Proposed	Draft Awaiting		
Agreement Schedules		ACT-00012	Meeting or Visit (in person)	Expired	Inactive (no acti	13/04/2023	20/04/2023
Activities		ACT-00011	Correspondence	Expired	Inactive (no acti	13/04/2023	27/04/2023
Approvals		ACT-00010	Conference/Seminar/Symposium/Workshop (in person)	Proposed	Draft Awaiting	6/04/2023	
Approval Requests		ACT-00009	Online Learning Experience	Expired	Inactive (no acti	5/04/2023	27/04/2023

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

External Organisatio	on Activity					-	Activity N	lo Activity Status Action	oved Proposal Owner	
Activity Workflow Active for 1 hour	<	Draft			Under Review (28 Min)		ACU A	pproval	Finish	
General Related	1 ~				Active for 28 minutes	Ež ×				
Activity Type *	Meeting (virtual) ×				Nominate * ✓ Approver Send Approval Request Now?	© <u>Catherine</u> × ♪	ganisations		🖄 Add Existing	Organisa
Name *	Example Meeting (virtual)				Execute]	tion Name 1 🗸	External Organisation P ~	External Organisation R ~	International
Primary External	* 🔁 <u>Test University</u> ×	Q	Primary External	Amber O	Approval Result * 🗇	Approved	ersity	Partner	Inactive	Internationa

Follow the above steps for the second level approval in the **ACU Approval** dropdown. Once the request has been approved, click Next Stage >.

3. The External Party Approval – Initiation dropdown will show, select Yes in the Sent to External Party for Approval? field:

Activity Workflow Active for Noor Organisation Organisation Organisation Organisation Organisation Organisation Add Existing Organisa	External Organisa	eting (virtual) - Saved tion Activity				Proposed Draft / Activity Status Action	Awaiting External Party Ap	proval Owner
General Related No Activity Type * Image: Section External Organication Section External Organication Operandation Filter No V No V No		< Draft	Under Review	ACU Approval		External Party Approva	al - Initiation (< 1 Min)	O
Activity Type * Meeting (virtual) × Activity Type * Meeting (virtual) × Activity Type * Meeting (virtual) × Mo Meeting (virtual) × Meeting (vir	General Relat	ed \sim			A	Active for less than one n	ninute 🖸 🗙	-
Activity type * 🙁 Meeting.(virtual) × \mathcal{O} Activity type * \mathcal{O}					2		No 🗸	
Name 1 Organisation Vec bal Organisation R Y Internation								
Name * Example Meeting (virtual)	Activity Type *	Meeting.(virtual) ×		Assor	iated External Organi:	for Approval?	✓ No	Add Existing Organisa

Note: If you select **No**, the activity 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:

Example Meet External Organisation		- Saved					Draft Awaiting External Party Approval	Catherin Owner	e Thompson	\sim
Activity Workflow Active for 1 hour	<	Draft	Under Review	ACU Approval		External Party Approval - Initiation	External Party Approval (< 1 Min)		O Finish	>
General Related	I ~						Active for less than one minute	E ×		
Activity Type *	Meeting (<u>virtual)</u> ×			Q	Associated External Organisations	Changes Required? ✓ Yes	~	Organisa	
Name *	Example Mee	ting (virtual)				Organisation Name ↑ ~ Ext	e		Internation	ıal

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



When you click **No**, if you have not entered in Start and End dates for the Activity, you will receive an error message prompting you to enter start and end dates.

ACU Educational Partnerships Register	P Search			SANDBOX New look	©	? 🌘
8 You have 2 notifications. Select to view.						<
E B Save Save Close Save Save Save Close Save Save	+ New 🚺 Deactivate 🖒 Refresh	Q, Check Access ₿₽ Process ~	ጻ Assign 🔊 Flow 🗸 🖷 Word Tem	plates \vee 🗐 Run Report 🗸		숭 Share ↔
Example Meeting (virtual) - Unsaved External Organisation Activity				ACT-00018 Current Active Activity No Activity Status Action	Quer Catherine Thompso	n 🗸
Activity Workflow Active for 1 hour Craft	Under Review	ACU Approval	External Party Approval - Initiation	External Party Approval (2 Min)	O Finish	>

Enter Start and End Date for the Activity.

Start Date *	9/1	1/202	3				::*	All Day Event Yes	
End Date *	N	ovem	ber	2023		\uparrow	\downarrow		
	Su	Мо	Tu	We	Th	Fr	Sa		
	29	30	31	1	2	3	4		
	5	6	7	8	9	10	11		
Supporting Documents	12	13	14	15	16	17	18	+ New Supporting Docu	
							25		

If the activity is not an all day event, use the toggle and enter the appropriate times.

8:00 AM ~ End Time * 9/11/2023 9:00 AM ~	Start Time *	9/11/2023	:::	All Day Event	No No
5,11/2025		8:00 AM	~		
9:00 AM 🗸 🗸	End Time *	9/11/2023	:::		
		9:00 AM	~		

5. In the **External Organisation** workflow click **Finish** in the **Finish** dropdown:

Litterina organisation,	Activity		_	_		_	Activity No	Activity Status Action	Wier Owner
Activity Workflow Active for 1 hour	< Draft		Under Review	ACU Approval		External Party Approval - Initiation	Extern	al Party Approval	Finish (< 1 Min)
General Related \	/							Active for less than one	minute 🖾 🔀
	comple weeting (virtual)							Confirm the ★ ✓	Active 🗸
Primary External *	<u>Test University</u> ×	Q	Primary External	Amber O'Neill ×	Q	Test University	Partner	Action Status	Active
Organisation			Contact						< P Finish
Country		Q	Location		Q				N P ^{or Pinish}

6. The External Organisation Activity will update and save:

	Activity	-	•				Activity No	Activity Status Action	Moner 0		
Activity Workflow Completed in 1 hour	<	Draft	Under Review	ACU Ar	pproval	External Party Approval - Initiation		External Party Approval		Finish	
General Related								Completed		\mathbb{E} ×	
	cxample weeting (v	/iituai)						Confirm the * ✓	Active		-
rimary External *	Test University	x ,Q	Primary External	Amber O'Neill ×	Q	Test University	Partner	Action Status	Active		iona
Organisation			Contact						Fi Fi	inished	
Country		Q	Location		Q					in an ea	

Rejected Requests

If an Activity is rejected, under the Under Review dropdown, the Approval Result field will be updated to Rejected, click Next Stage :

ernal Organisation Ac	tivity				-	A	ctivity No Activity Status Acti	on	Owner
ivity Workflow ve for 13 months	<	Draft			Under Review (1 Min)	No	tify External Contacts	F	Cinish
eneral Related \sim					Active for 1 minute	<			
Activity Type	* 🖾 Conference	Conference/Seminar/Symposium/Workshop (in person)		Nominate Approver Mominate Approver Mominate Approval Request Now?	Organisations		🖄 Add Existin	ng Organisa	
Name	* Conference/Ser	ninar/Symposium/W	/orkshop (in person)		Execute	on Name ↑ ∽	External Organisation P ~	External Organisation R ~	International Or
Primary External Organisation	* Torrens Uni	versity	Primary External Contact	🛛 Fa		iversity	Partner	Active	Domestic

2. Under Notify External Contacts, click Execute :

Conference/Seminar/ External Organisation Activity	/Symposium/Workshop (in person) - Saved		ction Isis Kowaliauskas v	
Activity Workflow Active for 13 months	< Draft	Under Review	Notify External Contacts (< 1 Min)	Finish
General Related \vee			Active for less than one minute	s ×
	Conference/Seminar/Symposium/Workshop (in person) Conference/Seminar/Symposium/Workshop (in person)	Associated Exte		Add Existing Organisa i ternal Organisation R International Or tive Domestic

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 wish to manually send an email via Outlook with further details.

3. Click Next Stage >:

Conference/Seminar/Symposi External Organisation Activity	um/Workshop (in person) - Saved		ACT-00005 Proposed Activity No Activity Status		(no action required) Isis Kowaliauskas V Owner		
Activity Workflow Active for 13 months	Draft	Under Review		Notify External Contacts (< 1 Min)		Finish		
General Related \vee				Active for less than one minute	\mathbb{E} \times			
				✓ Send Automatic Notification				
Activity Type * 🖾 Confere	Activity Type * 🔀 Conference/Seminar/Symposium/Workshop (in person)		Associated External	Execute		🖄 Add Existing Organisa		
Name * Conference/Seminar/Symposium/Workshop (in person)		person)	 Organisati 	< Next Stage >		ternal Organisation R Y International Or		
			Torrens Un			ctive Domestic		

4. Click Finish P in the Finish dropdown.

Conference/Seminar/Sympo External Organisation Activity	sium/Workshop (in person)	ACT-00005 Prop Activity No Activit	osed Inactive (no action required) Isis Kowaliauskas ty Status Action Owner	\sim	
Activity Workflow Active for 13 months	Draft	Under Review	Notify External Contacts	Finish (< 1 Min)	
General Related \vee				Active for less than one minute $ \bowtie \times$	
Activity Type * 🔀 Confe	· ivity Type * 🖾 Conference/Seminar/Symposium/Workshop (in person)		Associated External Organisations	✓ Confirm the Action * Inactive (no ✓ isa :	
Name * Conferen	ce/Seminar/Symposium/Workshop (in per	son)	Organisation Name 1 v External Organ	C Finish P ational Or	

Note: The Finished bar will turn green indicating this has been saved.

Conference/Seminar/ External Organisation Activity	/Symposium/Workshop (in person) - Save	d		pposed Inactive (no action required) ivity Status Action	(See Stress Constraints Constr	liauskas 🗸 🏹
Activity Workflow Completed in 13 months	< Draft	Under Review	Notify External Contacts	5	Finish	
General Related \vee				Completed		
Activity Type *	Conference/Seminar/Symposium/Workshop (in perso	on)	Associated External Organisations	✓ Confirm the Action * Status Inactive (no	nisa.	. :
Name *	Conference/Seminar/Symposium/Workshop (in person)		Organisation Name ↑ ✓ External Org Torrors University Batters	a Finished 🗸	natio	nal Or