

Creating New Agreements

Educational Partnerships Register (EPR)
Staff Training Guide

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1. Creating a New Agreement

The Educational Partnership Register (EPR) enables users to record and manage formal agreements with partner institutions. The system supports a range of agreement types that facilitate partnership activity across the University.

When creating a new Agreement, select the appropriate Agreement Type. Common types include (but are not limited to):

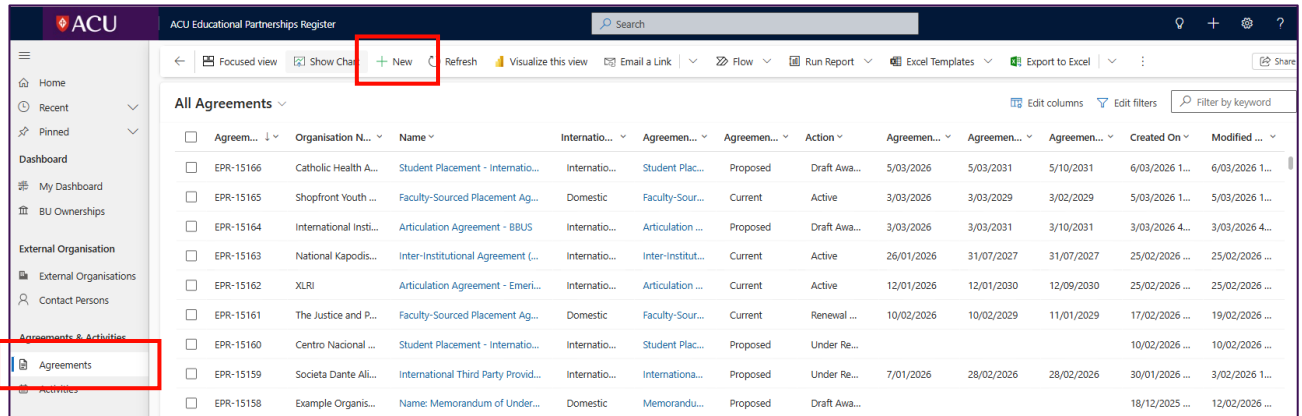
- Articulation Agreement
- Cotutelle
- Credit Agreement
- Memorandum of Understanding (MOU)
- Placement Agreement
- Research Collaboration
- Student Exchange

Each Agreement Type captures information specific to the nature of the partnership and supports the University's partnership management processes.

1.1. CREATE A NEW AGREEMENT RECORD

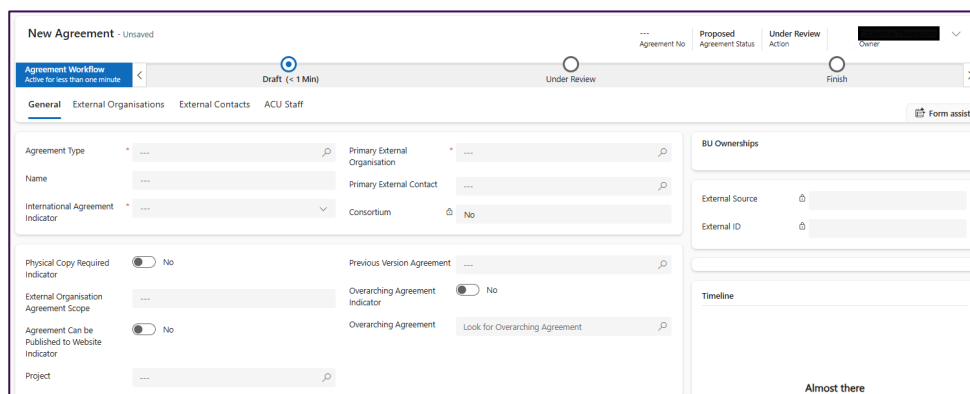
To create a New Agreement:

- From the left-hand navigation bar, select **Agreements**, then click **+ New** from the top menu bar.



Agreement No.	Organisation Name	Name	International	Agreement Type	Agreement Status	Action	Agreement Start Date	Agreement End Date	Agreement Review Date	Created On	Modified On
EPR-15166	Catholic Health A...	Student Placement - Internatio...	Internatio...	Student Plac...	Proposed	Draft Awa...	5/03/2026	5/03/2031	5/10/2031	6/03/2026 1...	6/03/2026 1...
EPR-15165	Shopfront Youth ...	Faculty-Sourced Placement Ag...	Domestic	Faculty-Sour...	Current	Active	3/03/2026	3/03/2029	3/02/2029	5/03/2026 1...	5/03/2026 1...
EPR-15164	International Insti...	Articulation Agreement - BBUS	Internatio...	Articulation ...	Proposed	Draft Awa...	3/03/2026	3/03/2031	3/10/2031	3/03/2026 4...	3/03/2026 4...
EPR-15163	National Kapodis...	Inter-Institutional Agreement (...)	Internatio...	Inter-Institut...	Current	Active	26/01/2026	31/07/2027	31/07/2027	25/02/2026 ...	25/02/2026 ...
EPR-15162	XLRI	Articulation Agreement - Emeri...	Internatio...	Articulation ...	Current	Active	12/01/2026	12/01/2030	12/09/2030	25/02/2026 ...	25/02/2026 ...
EPR-15161	The Justice and P...	Faculty-Sourced Placement Ag...	Domestic	Faculty-Sour...	Current	Renewal ...	10/02/2026	10/02/2029	11/01/2029	17/02/2026 ...	19/02/2026 ...
EPR-15160	Centro Nacional ...	Student Placement - Internatio...	Internatio...	Student Plac...	Proposed	Under Re...				10/02/2026 ...	10/02/2026 ...
EPR-15159	Societa Dante Ali...	International Third Party Provid...	Internatio...	Internationa...	Proposed	Under Re...	7/01/2026	28/02/2026	28/02/2026	30/01/2026 ...	3/02/2026 1...
EPR-15158	Example Organis...	Name: Memorandum of Under...	Domestic	Memorandu...	Proposed	Draft Awa...				18/12/2025 ...	12/02/2026 ...

- The **New Agreement** window opens.



New Agreement - Unsaved

Agreement Workflow: Active for less than one minute

Draft (+ 1 Min) | Under Review | Finish

Agreement No. | Proposed Agreement Status | Under Review Action | Name

General | External Organisations | External Contacts | ACU Staff

Form assist

Agreement Type: ... | Primary External Organisation: ...

Name: ... | Primary External Contact: ...

International Agreement Indicator: ... | Consortium: No

Physical Copy Required Indicator: No | Previous Version Agreement: ...

External Organisation Agreement Scope: ... | Overarching Agreement Indicator: No

Agreement Can be Published to Website Indicator: No | Overarching Agreement: Look for Overarching Agreement

Project: ...

BU Ownerships

External Source: ...

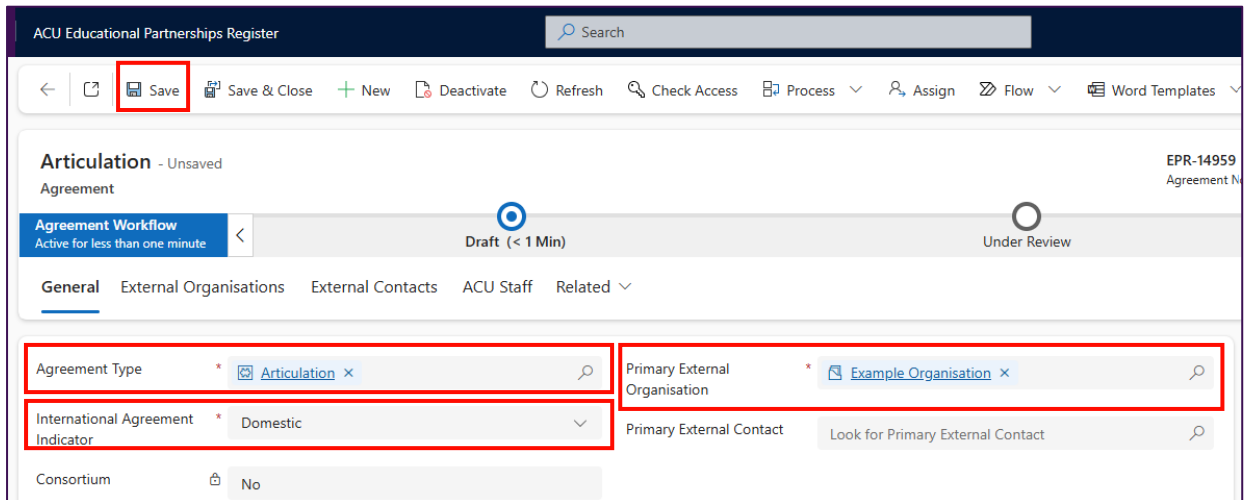
External ID: ...

Timeline

Almost there

Complete the following required fields:

- **Agreement Type** – start typing or use the lookup icon to select from the list.
- **International Agreement Indicator** – select **International** or **Domestic** from the drop-down list.
- **Primary External Organisation** – start typing or use the lookup icon to search for the organisation.
- Click **Save**.



ACU Educational Partnerships Register

Search

Save Save & Close New Deactivate Refresh Check Access Process Assign Flow Word Templates

Articulation - Unsaved Agreement

EPR-14959 Agreement No

Agreement Workflow Active for less than one minute Draft (< 1 Min) Under Review

General External Organisations External Contacts ACU Staff Related

Agreement Type * Articulation x

Primary External Organisation * Example Organisation x

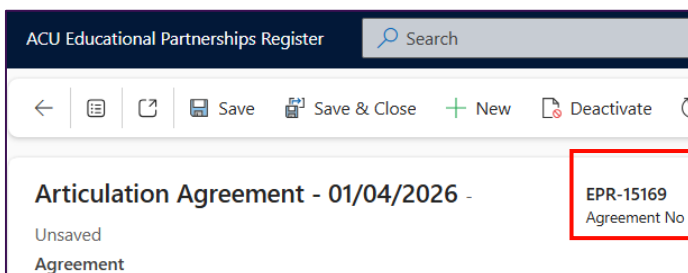
International Agreement Indicator * Domestic

Primary External Contact Look for Primary External Contact

Consortium No

Once the Agreement is saved, additional tabs and grids automatically become available so you can enter further information relevant to the Agreement Type.

Note: Each Agreement is automatically assigned a **unique Agreement Identification number**.



ACU Educational Partnerships Register

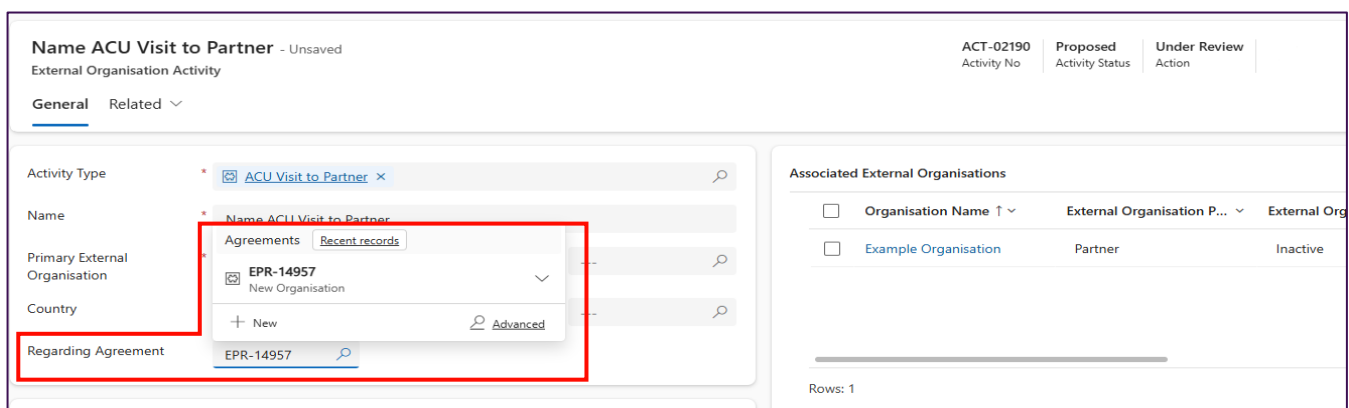
Search

Save Save & Close New Deactivate

Articulation Agreement - 01/04/2026 - Unsaved Agreement

EPR-15169 Agreement No

Use this number to locate the Agreement later or when linking related External Organisation Activity records within EPR.



Name ACU Visit to Partner - Unsaved External Organisation Activity

ACT-02190 Activity No Proposed Activity Status Under Review Action

General Related

Activity Type * ACU Visit to Partner x

Name * Name ACU Visit to Partner

Primary External Organisation * EPR-14957 New Organisation

Country + New Advanced

Regarding Agreement EPR-14957

Associated External Organisations

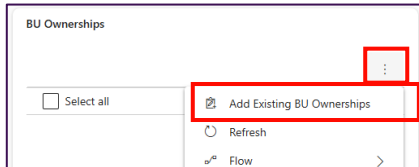
Organisation Name	External Organisation P...	External Org
Example Organisation	Partner	Inactive

Rows: 1

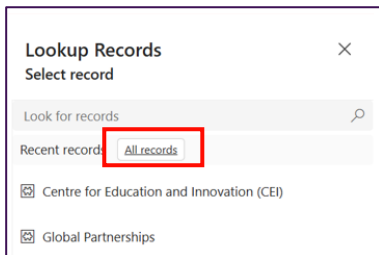
1.2. ADDING A BUSINESS UNIT

To ensure accurate reporting and clear ownership, each Agreement must be linked to the appropriate Business Unit.

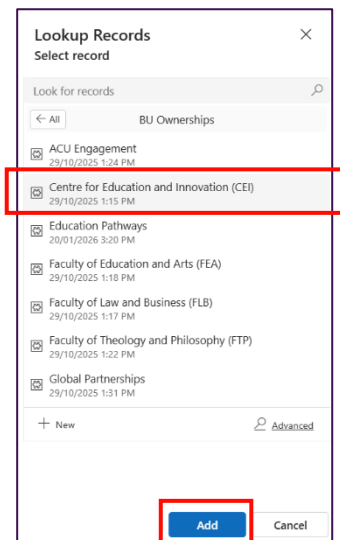
- In the **BU Ownerships** field, click the three dots (...).
- Select Add Existing BU Ownerships



- A list of recent Business Units is displayed. Select **All Records** to view additional Business Units if required.

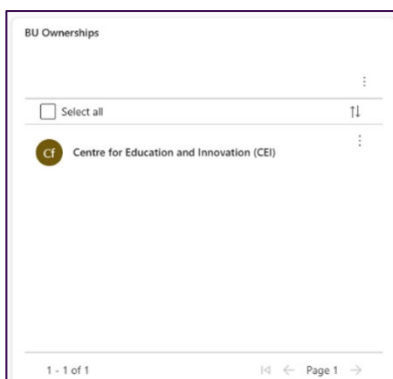


- Search for or select the relevant Business Unit, then click **Add**

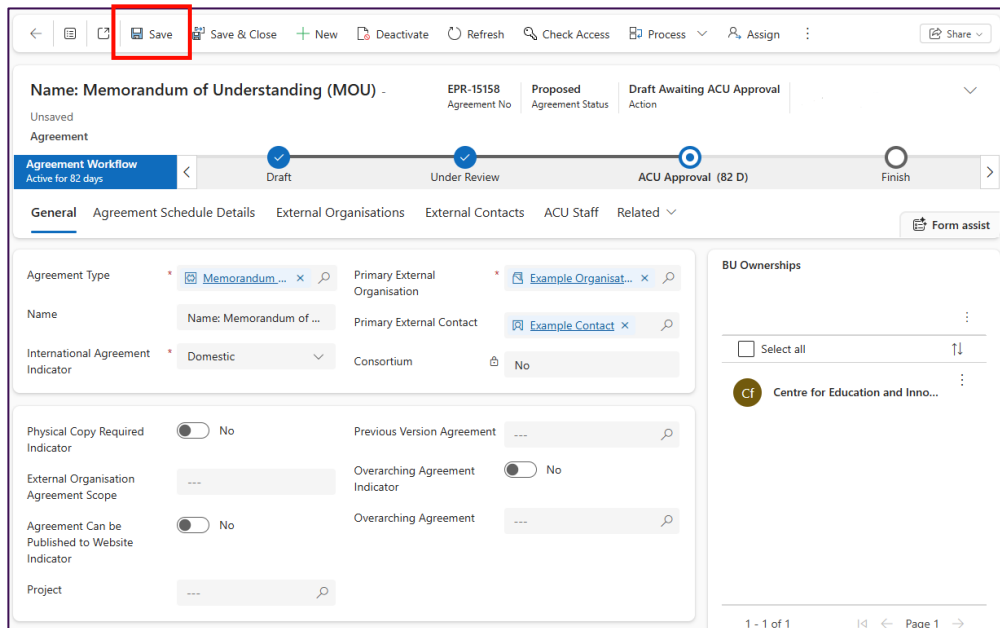


Note: If the Business Unit is not listed, please contact CEI via the **General Enquiry** form in Service Central.

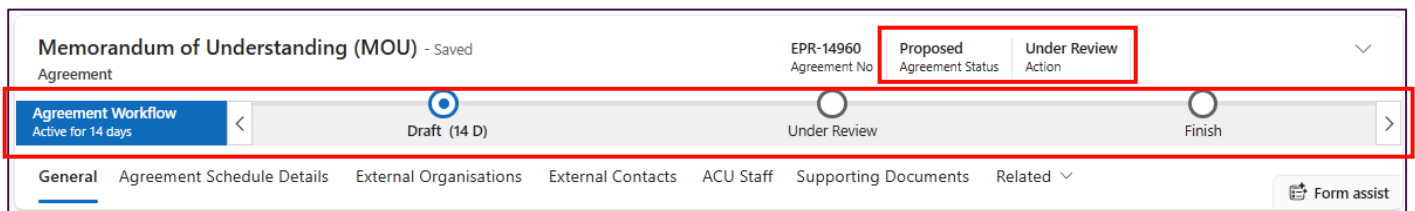
- Once added, the Business Unit will appear in the **BU Ownerships** field.



- Enter any remaining required fields and click **Save**.



Important: The Agreement Workflow must be completed for every Agreement to ensure accurate **Agreement Status** and **Action** are applied. Workflow instructions are provided later in this guide.



2. Agreement Type Examples

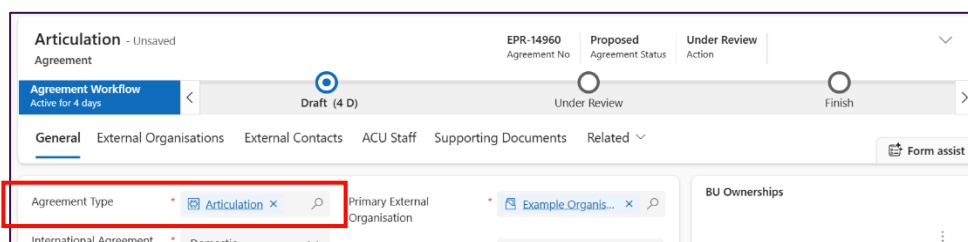
While the Agreement creation process is consistent across the EPR, the available fields and navigation tabs vary depending on the **Agreement Type** selected. The examples below demonstrate how additional information can be recorded.

2.1. ARTICULATION AGREEMENTS

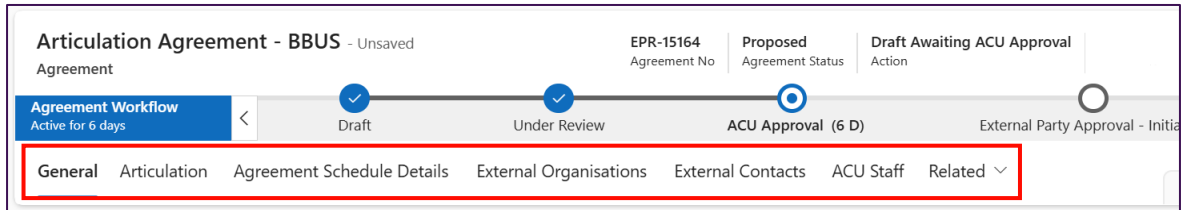
Articulation Agreements record mapped coursework or credit points allocated between an external organisation and ACU units.

Create an Articulation Agreement:

- Create a new Agreement and select **Articulation** in the **Agreement Type** field.

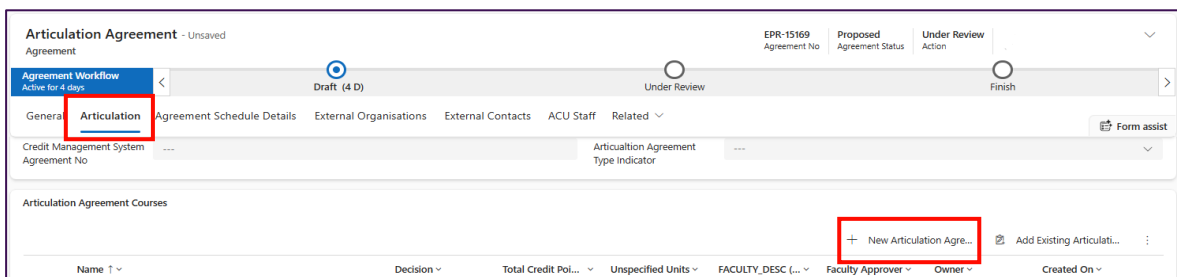


- Complete the required fields marked with a red asterisk, then click **Save**.
- Once saved, the following navigation tabs become available:
 - General
 - Articulation
 - Agreement Schedule Details
 - External Organisations
 - External Contacts
 - ACU Staff
 - Related (Supporting documents tab)

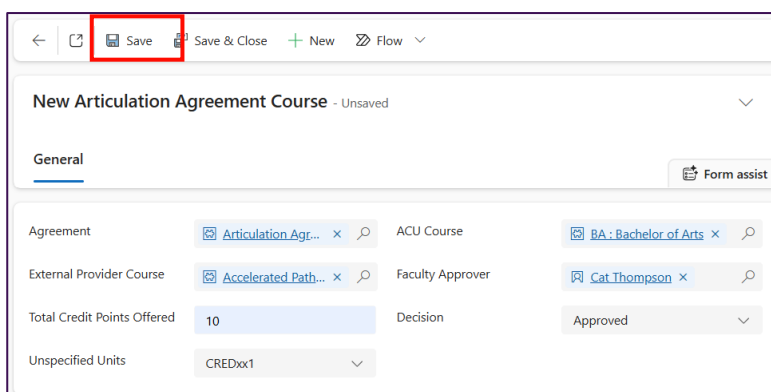


Add Articulation Details

- Select the **Articulation** tab and click **+New Articulation Agreement**



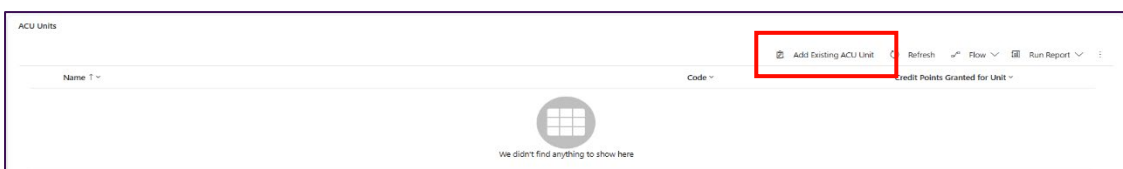
- The **Articulation Agreement Course** form opens.
- Enter the relevant information and click **Save**.



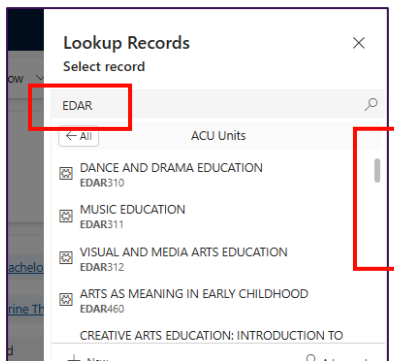
The **Add ACU Units** grid is populated automatically.

Add ACU Units:

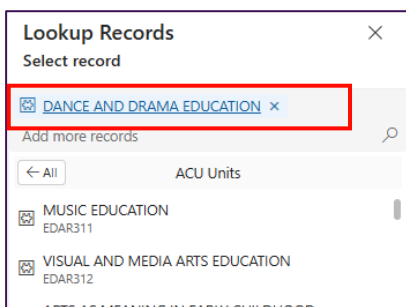
- Click **Add Existing ACU Unit**



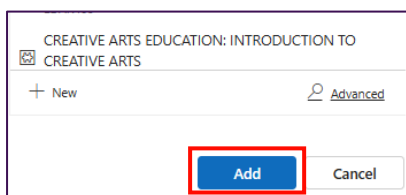
- Search for units by entering the ACU Unit code or browsing the list



- Click the unit's name to select it. The selected unit appears at the top of the search bar.



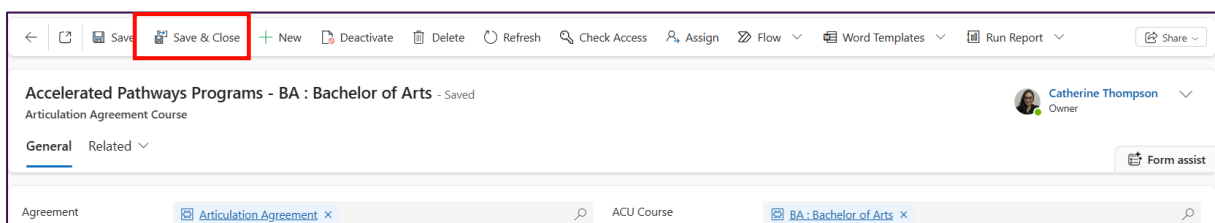
- To display additional results, click the search icon 
- You can select multiple units if required. After selecting the unit/s, click **Add**.



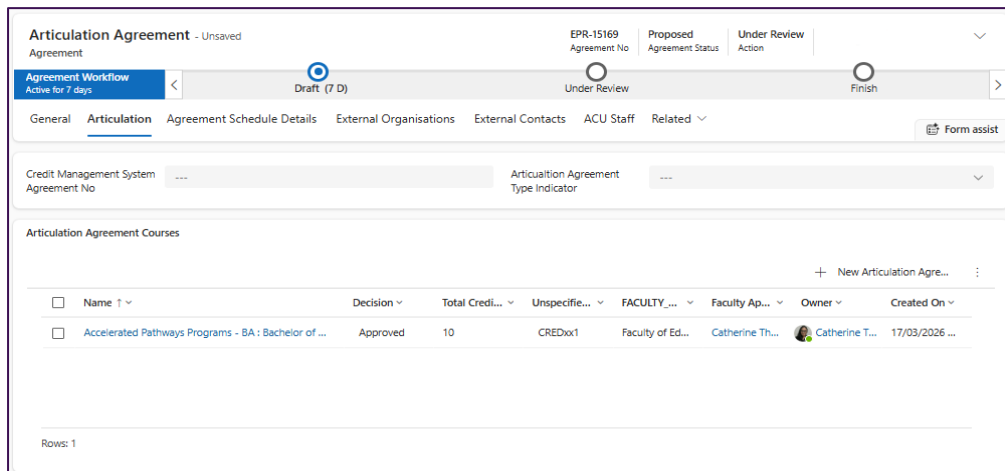
- The selected unit(s) appear in the **ACU Units** grid.

ACU Units		
Add Existing ACU Unit Refresh Flow		
Name ↑	Code	Credit Points Granted for Unit
☐ DANCE AND DRAMA EDUCATION	EDAR310	10

- Once the articulation information is entered and the units added, click **Save and Close**.



- Return to the main Agreement record to complete any additional tabs or attach supporting documentation.



Articulation Agreement - Unsavd Agreement

EPR-15169 Agreement No Proposed Agreement Status Under Review Action

Agreement Workflow Active for 7 days Draft (7 D) Under Review Finish

General Articulation Agreement Schedule Details External Organisations External Contacts ACU Staff Related

Credit Management System Agreement No Articulation Agreement Type Indicator

Articulation Agreement Courses

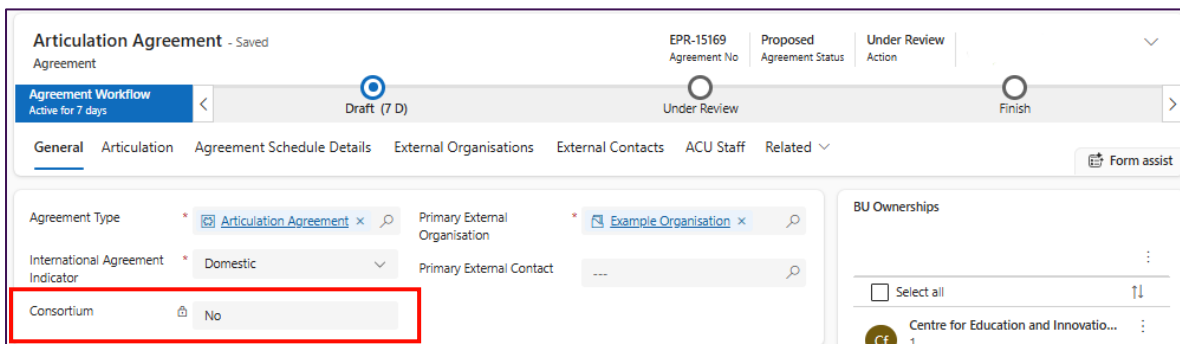
Name	Decision	Total Credit	Unspecific	FACULTY	Faculty Ap	Owner	Created On
Accelerated Pathways Programs - BA : Bachelor of ...	Approved	10	CREDox1	Faculty of Ed...	Catherine Th...	Catherine T...	17/03/2026 ...

Rows: 1

2.2. CONSORTIUM AGREEMENTS

A **Consortium Agreement** involves two or more External Organisations.

The **Consortium** field is read-only. It automatically updates when multiple External Organisations are linked with an Agreement.



Articulation Agreement - Saved Agreement

EPR-15169 Agreement No Proposed Agreement Status Under Review Action

Agreement Workflow Active for 7 days Draft (7 D) Under Review Finish

General Articulation Agreement Schedule Details External Organisations External Contacts ACU Staff Related

Agreement Type * Articulation Agreement Primary External Organisation * Example Organisation

International Agreement Indicator * Domestic Primary External Contact

Consortium No

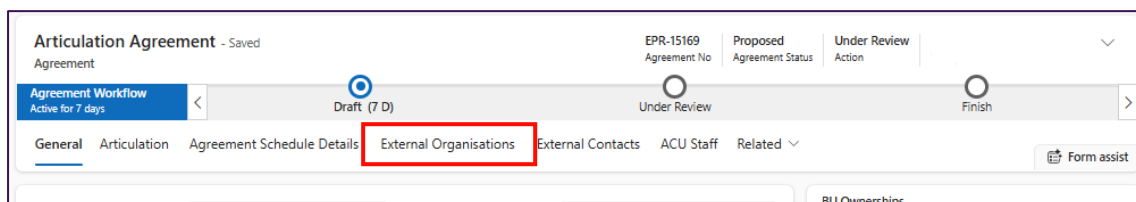
BU Ownerships

Select all

Centre for Education and Innovatio... 1

Add an Additional External Organisation:

- In the Agreement select the **External Organisations** tab.



Articulation Agreement - Saved Agreement

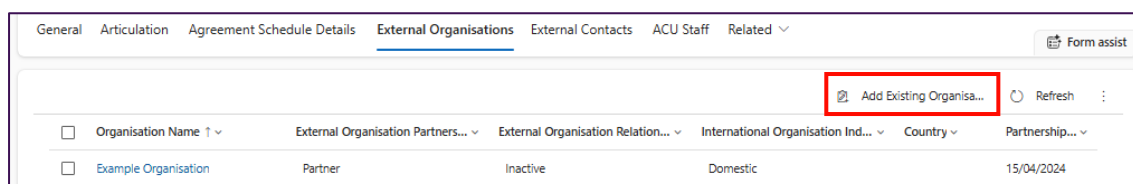
EPR-15169 Agreement No Proposed Agreement Status Under Review Action

Agreement Workflow Active for 7 days Draft (7 D) Under Review Finish

General Articulation Agreement Schedule Details External Organisations External Contacts ACU Staff Related

BU Ownerships

Click **Add Existing External Organisation**.

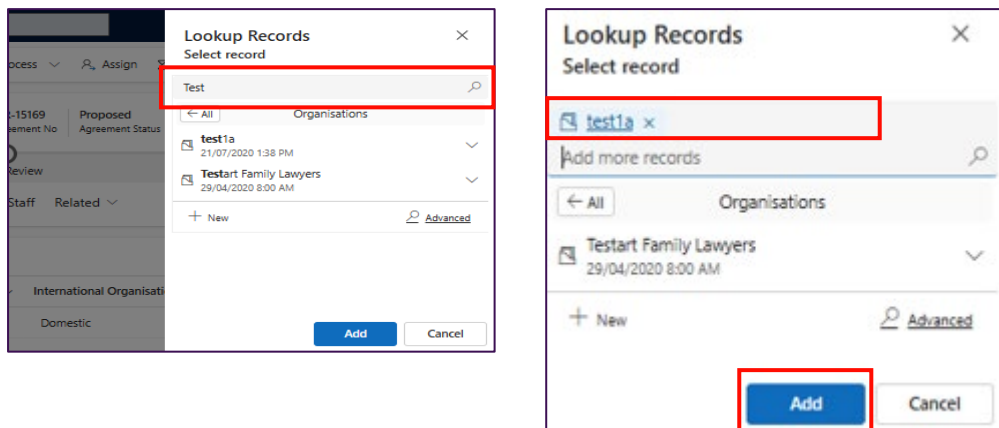


General Articulation Agreement Schedule Details External Organisations External Contacts ACU Staff Related

Add Existing Organisation Refresh

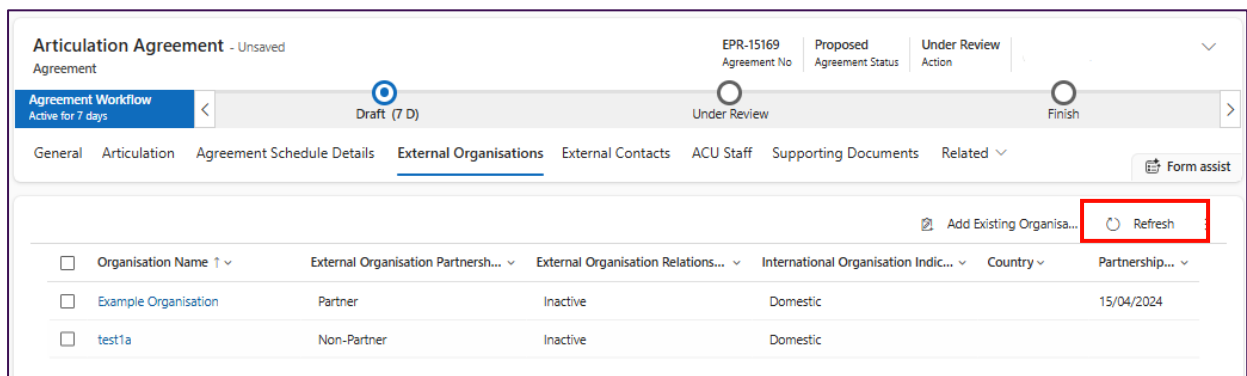
Organisation Name	External Organisation Partners	External Organisation Relation	International Organisation Ind	Country	Partnership
Example Organisation	Partner	Inactive	Domestic		15/04/2024

- Search for and select the additional organisation, then click **Add**.



The first screenshot shows a 'Lookup Records' dialog box with a search input field containing 'Test'. The second screenshot shows the same dialog box with search results for 'test1a' and a red box around the 'Add' button.

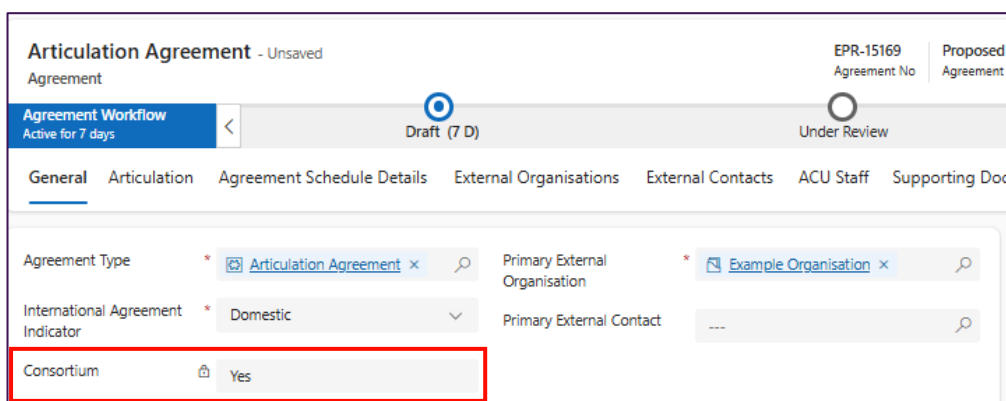
- The organisation is added in the **External Organisations** tab. Click **Refresh** if the organisation does not appear immediately.



The screenshot shows the 'Articulation Agreement' form, 'External Organisations' tab. A red box highlights the 'Refresh' button.

Organisation Name	External Organisation Partners...	External Organisation Relations...	International Organisation Indic...	Country	Partnership...
Example Organisation	Partner	Inactive	Domestic		15/04/2024
test1a	Non-Partner	Inactive	Domestic		

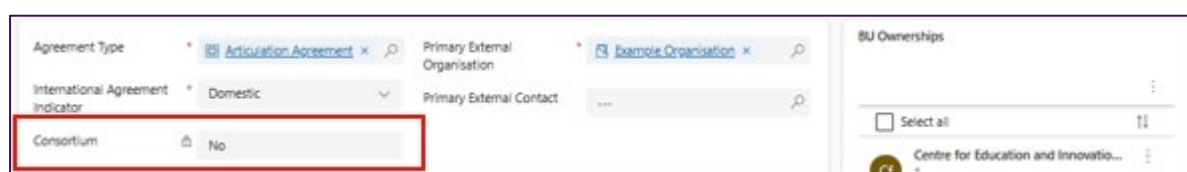
- Once a second organisation is added, the **Consortium** field updates to **Yes**.



The screenshot shows the 'Articulation Agreement' form, 'External Organisations' tab. A red box highlights the 'Consortium' field, which is set to 'Yes'.

Agreement Type	Primary External Organisation	Consortium
Articulation Agreement	Example Organisation	Yes

- If the organisation is removed, the field reverts to **No**.

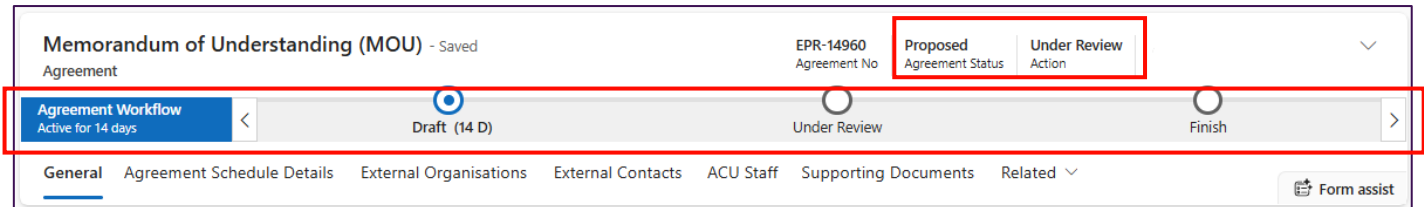


The screenshot shows the 'Articulation Agreement' form, 'External Organisations' tab. A red box highlights the 'Consortium' field, which is set to 'No'.

Agreement Type	Primary External Organisation	Consortium
Articulation Agreement	Example Organisation	No

3. Agreement Workflow

The Agreement Workflow must be completed for every Agreement to ensure the correct **Agreement Status** and **Action** are applied. As each stage is completed, the workflow automatically updates the status and action.



Memorandum of Understanding (MOU) - Saved
 Agreement

EPR-14960 Agreement No

Proposed Agreement Status Under Review Action

Agreement Workflow Active for 14 days

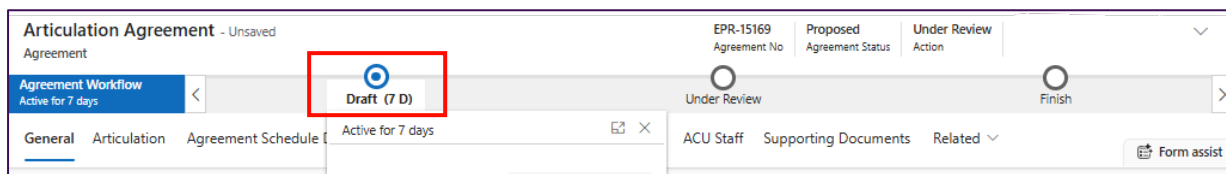
Draft (14 D) Under Review Finish

General Agreement Schedule Details External Organisations External Contacts ACU Staff Supporting Documents Related

Form assist

To Begin:

- In the **Agreement Workflow** bar, select **Draft**.



Articulation Agreement - Unsavd
 Agreement

EPR-15169 Agreement No

Proposed Agreement Status Under Review Action

Agreement Workflow Active for 7 days

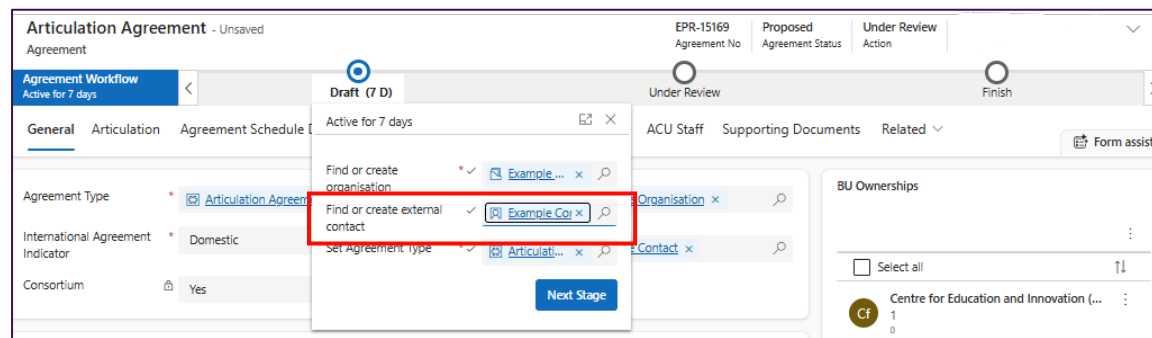
Draft (7 D) Under Review Finish

General Articulation Agreement Schedule Details Active for 7 days

ACU Staff Supporting Documents Related

Form assist

- If no external contact is listed, search for or create one in the **Find or create an external contact** field.



Articulation Agreement - Unsavd
 Agreement

EPR-15169 Agreement No

Proposed Agreement Status Under Review Action

Agreement Workflow Active for 7 days

Draft (7 D) Under Review Finish

General Articulation Agreement Schedule Details Active for 7 days

ACU Staff Supporting Documents Related

Form assist

Find or create organisation

Find or create external contact

Set Agreement type

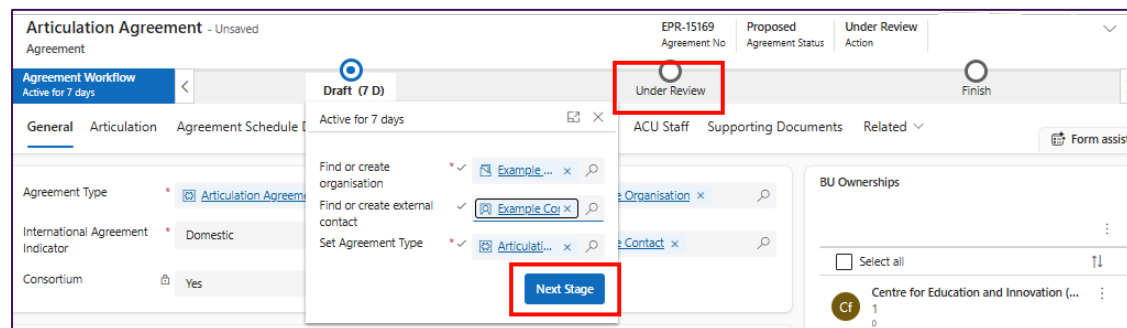
Next Stage

BU Ownerships

Select all

Centre for Education and Innovation (...)

- Click **Next Stage** to proceed. The workflow automatically advances to **Under Review**.



Articulation Agreement - Unsavd
 Agreement

EPR-15169 Agreement No

Proposed Agreement Status Under Review Action

Agreement Workflow Active for 7 days

Draft (7 D) Under Review Finish

General Articulation Agreement Schedule Details Active for 7 days

ACU Staff Supporting Documents Related

Form assist

Find or create organisation

Find or create external contact

Set Agreement type

Next Stage

BU Ownerships

Select all

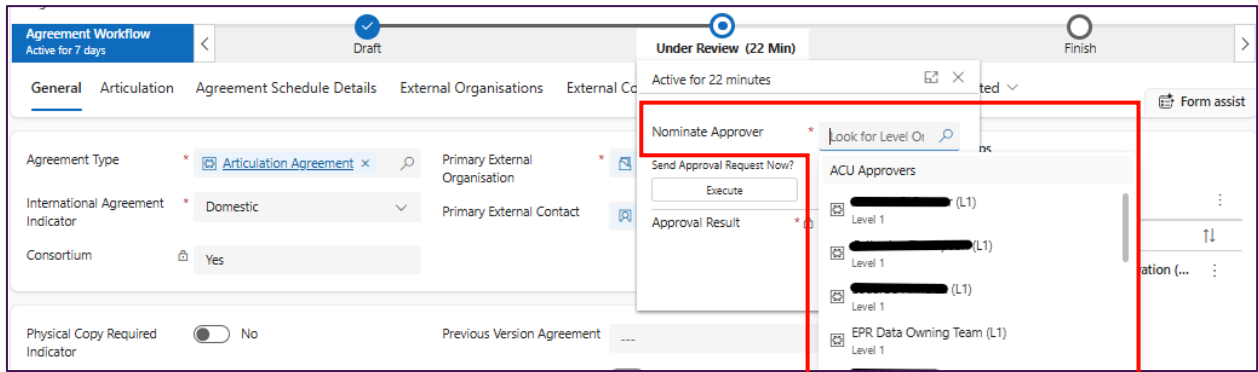
Centre for Education and Innovation (...)

The next two workflow stages require the appropriate approvals before you can continue progressing.

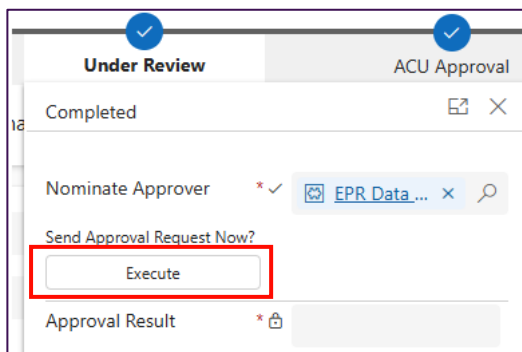
3.1. SENDING AN AGREEMENT FOR APPROVAL

The approval process is the same for both Level 1 and Level 2 approvals.

- In the **Nominate Approver** field, use the lookup to select the appropriate approver.

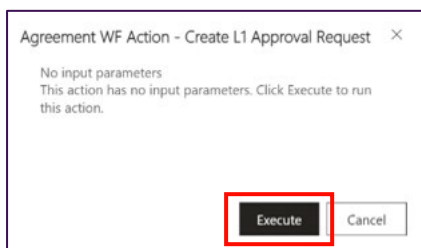


- Once selected, click **Execute**.

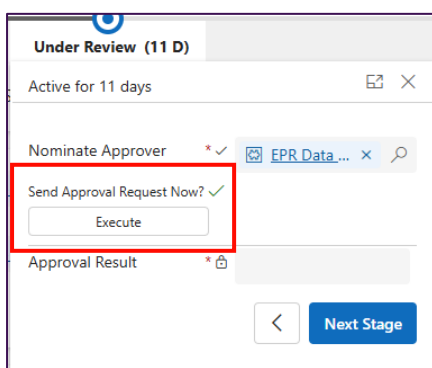


The **Agreement WF Action – Create Approval Request** window opens.

- Click **Execute** again to send the approval request.



- Once sent, a tick appears next to **Send Approval Request Now**. The Agreement can be **Saved and Closed** while approval is in progress.



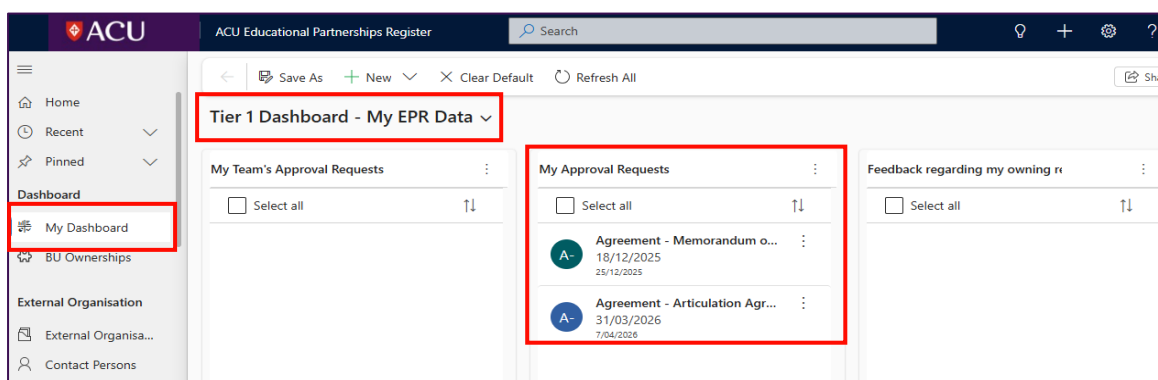
4. Approval Requests

Approval requests must be completed before the Agreement Workflow can continue. Two levels of approval are required, with approvers determined by the relevant Business Unit.

- Approvers receive a scheduled email notification containing a link to the approval request (sent daily at approximately 9:30 am).
- If required, approval requests can be accessed via **Approval Requests** in the left-hand navigation pane



- Alternatively, approval requests can also be accessed from **My Approval Requests** on the **Tier 1 Dashboard**.



Note: Approval Requests are visible only to users with the appropriate permissions.

To action an approval request:

- The **My Open Approval Requests** window opens.
- Select the relevant **Agreement** name to open the approval request.

My Open Approval Requests				
☐	Name	Request Date	Due Date	Created By
☐	Agreement - Memorandum of U...	18/12/2025	25/12/2025	Cat Thomps...
☐	Agreement - Articulation Agree...	31/03/2026	7/04/2026	Cat Thomps...

- To view Agreement details, click the link in the **Regarding Agreement** field.

Agreement - Articulation Agreement - Unsaved

Active Status
 Active Status Reason

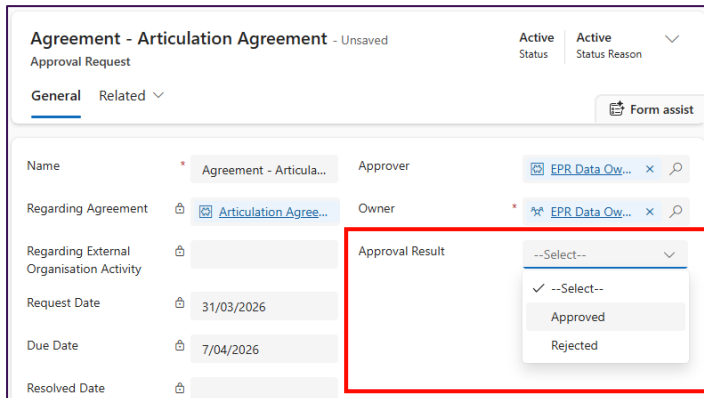
Approval Request

General
 Related

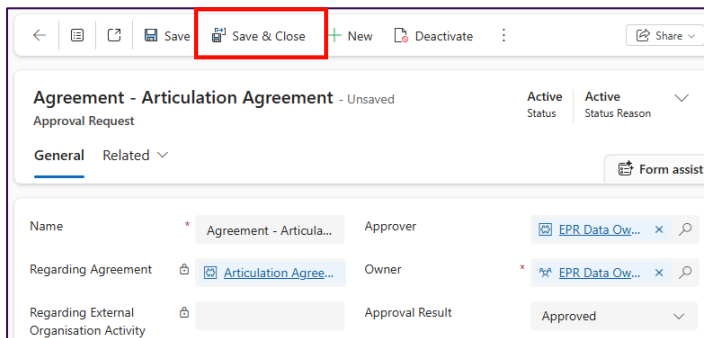
Name
 *
 Agreement - Articulation Agree...
 Approver
 EPR Data Owning Team (L1)

Regarding Agreement
 Articulation Agreement
 Owner
 *
 EPR Data Owning Team

- In the **Approval Result** field, select **Approve** or **Reject**.



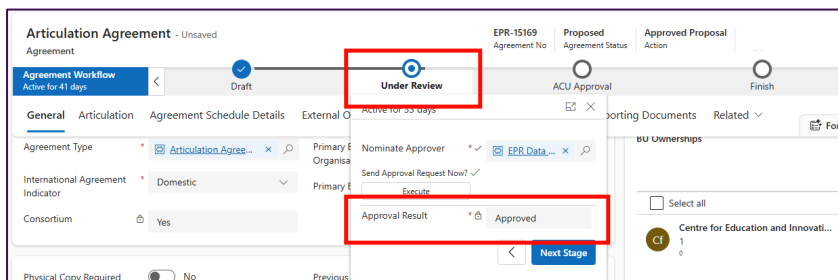
- Click **Save and Close**.



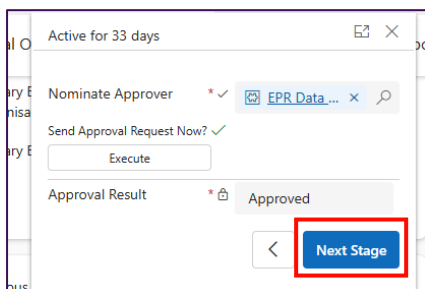
5. Approved Requests

Once approval is granted:

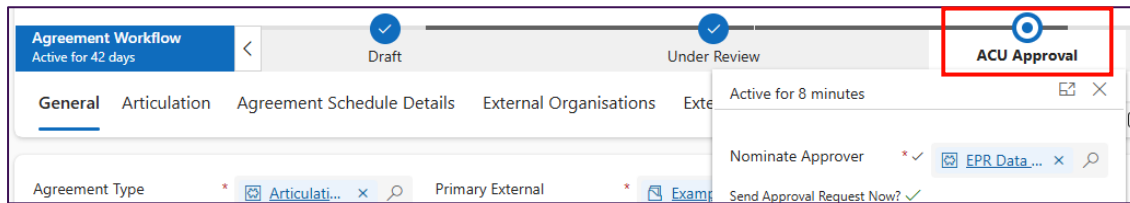
- Return to the Agreement Workflow.
- The **Under Review** approval result updates to **Approved**.



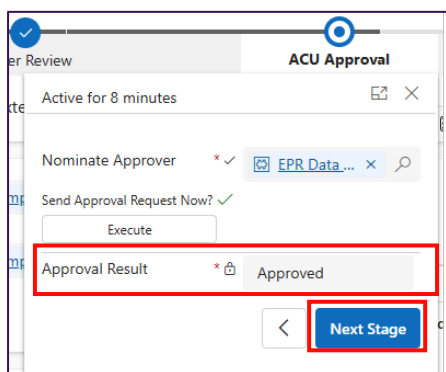
- Click **Next Stage**.



- **ACU Approval** is the second level of approval required



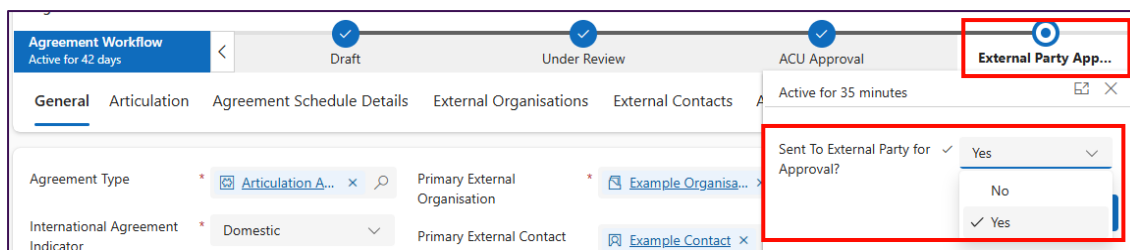
- Complete the approval process again with the Level 2 approver designated by the Business Unit.
- Once approved, the approval result updates to **Approved**.



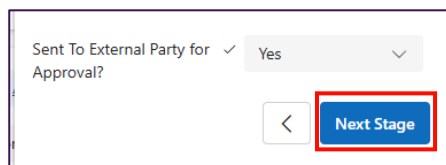
- Click **Next Stage**.

6. External Party, OGC and Signing-Off Steps

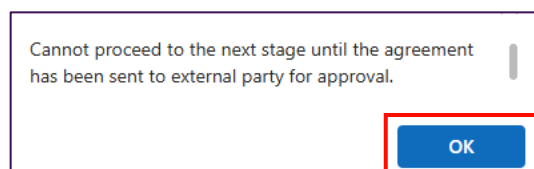
- In **External Party Approval – Initiation**, select **Yes** in the **Sent to External Party for Approval** field.



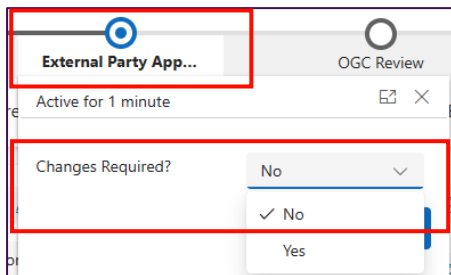
- Click **Next Stage**.



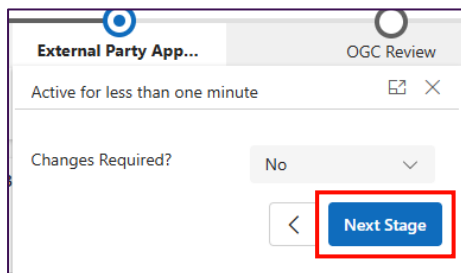
Note: Selecting **No** prevents progression. A pop-up message displays; click **OK** to close it.



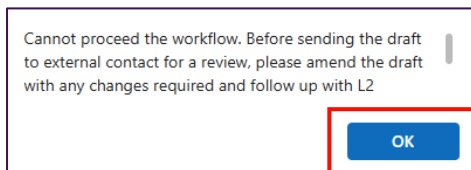
- At the **External Party Approval** stage, in the **Changes Required** field, select **No** to confirm the external party has no changes to the Agreement.



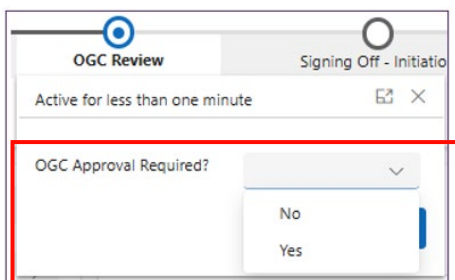
- Click **Next Stage**.



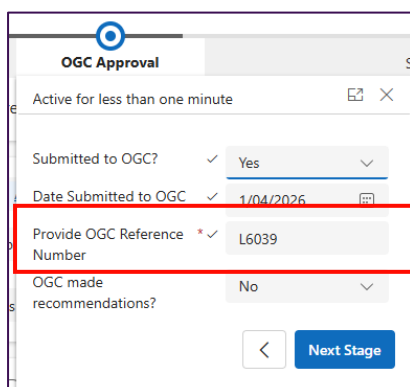
Note: Selecting **Yes** prevents progression and triggers a pop-up message.



- At the **OGC Review** stage, select **Yes** or **No** to indicate whether OGC approval is required.

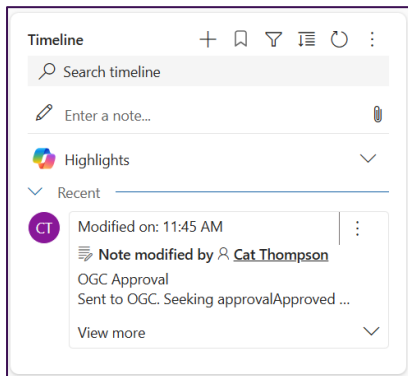


- If **Yes** is selected, click **Next Stage**
- Enter all required details. The OGC Reference Number is mandatory.

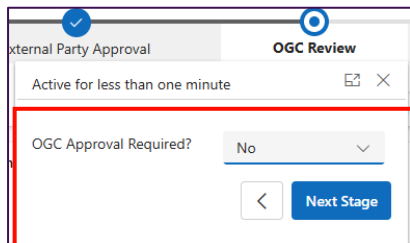


- Click **Next Stage** once complete.

Note: OGC approval is managed outside the EPR. All correspondence must be recorded on the **Agreement Timeline** by attaching emails or entering notes.

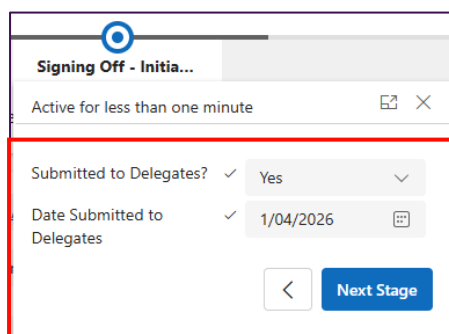


- If **No** is selected, click **Next Stage** to proceed directly.

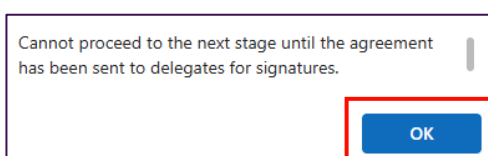


Signing Off – Initiation confirms that the Agreement has been approved by all relevant parties and submitted to the required delegates for approval.

- Select **Yes** to confirm the Agreement has been approved by all relevant parties and submitted to the required delegates.
- Enter the **Date Submitted to Delegates** (this date may be backdated if required).
- Click **Next Stage**.

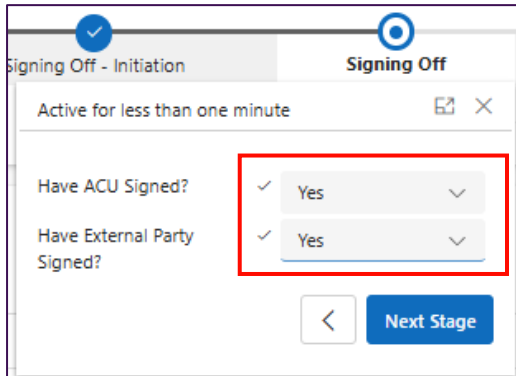


Note: Selecting **No** prevents progression. A pop-up message displays; click **OK** to close it.



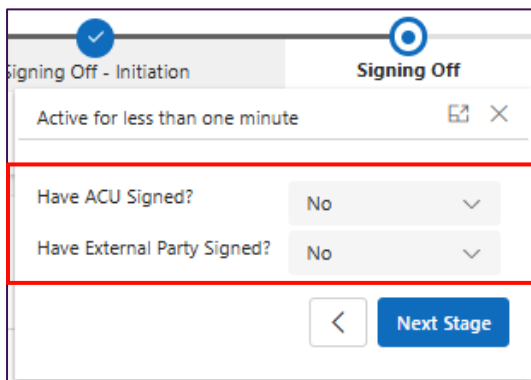
At the **Final Signing Off** stage, confirm that both ACU and the external party have signed the Agreement.

- Select **Yes** to progress the workflow.



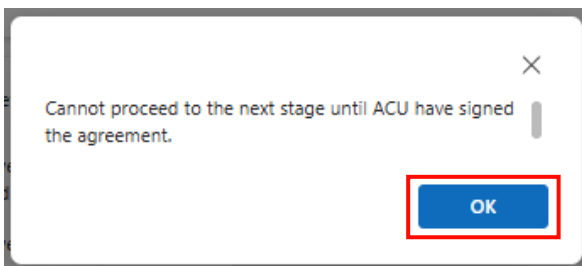
The screenshot shows the 'Signing Off' stage of a workflow. At the top, there are two tabs: 'Signing Off - Initiation' (with a checkmark icon) and 'Signing Off' (with a target icon). Below the tabs, it says 'Active for less than one minute'. The main form has two questions: 'Have ACU Signed?' and 'Have External Party Signed?'. Both have dropdown menus set to 'Yes'. A red box highlights these two dropdowns. At the bottom, there is a back arrow and a 'Next Stage' button.

- If **No** is selected in any field, the workflow cannot progress.

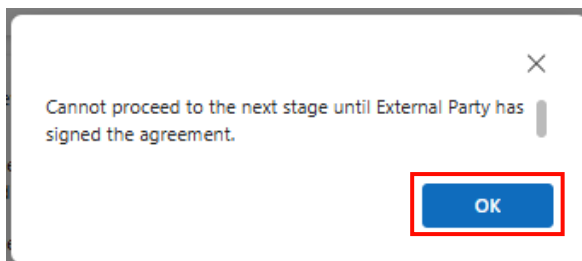


This screenshot shows the same 'Signing Off' stage form, but the dropdown menus for 'Have ACU Signed?' and 'Have External Party Signed?' are now set to 'No'. A red box highlights these two dropdowns. The 'Next Stage' button is still visible at the bottom.

- Pop-up messages display advising you of this; click **OK** to close the pop-ups.

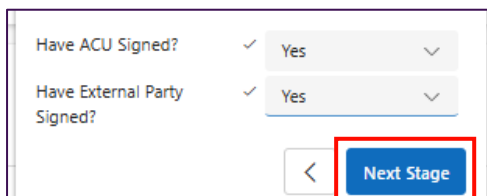


The screenshot shows a pop-up message box with a close button (X) in the top right corner. The text inside says: 'Cannot proceed to the next stage until ACU have signed the agreement.' At the bottom right, there is a blue 'OK' button highlighted with a red box.



This screenshot shows another pop-up message box, similar to the one above. The text inside says: 'Cannot proceed to the next stage until External Party has signed the agreement.' At the bottom right, there is a blue 'OK' button highlighted with a red box.

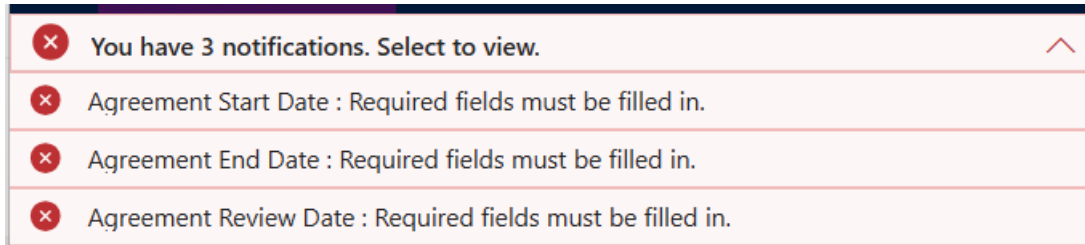
- After selecting yes, click **Next Stage**.



This screenshot shows the 'Signing Off' stage form with 'Yes' selected for both questions. A red box highlights the 'Next Stage' button at the bottom right.

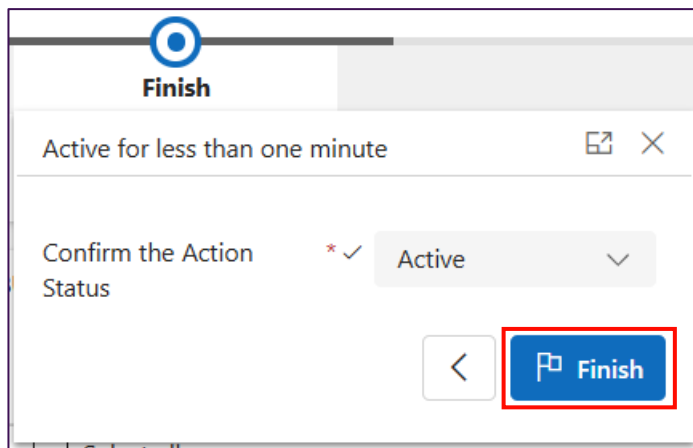
Note: If the workflow does not automatically progress, the Agreement **Start Date**, **Expiry Date**, and **Renewal Date** may be required before finalisation.

Check for notifications at the top of the screen and enter any missing dates. Once all required dates are entered, you can continue.



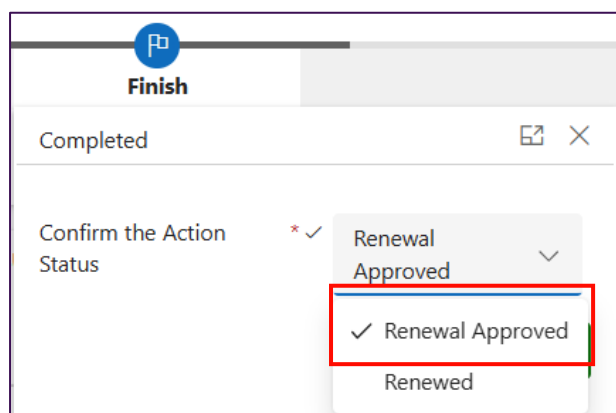
To complete the workflow:

- In the **Confirm the Action Status** field, select **Active**, then click **Finish**.
The Agreement is now recorded as completed and is **Current and Active**.



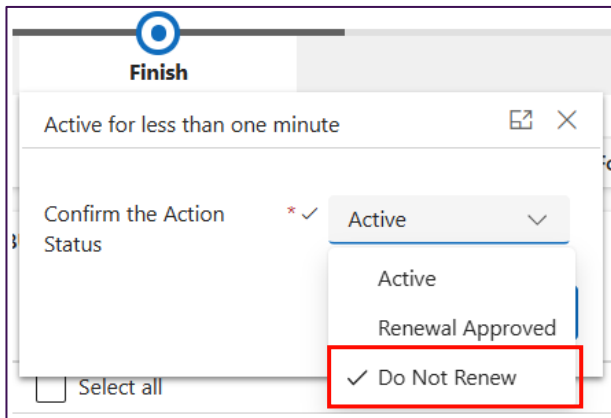
Alternative action statuses are also available, depending on the Agreement:

- Select **Renewal Approved** if the Agreement has been renewed.



Articulation Agreement - 01/04/2026 -		EPR-15169	Current	Renewal Approved
Unsaved		Agreement No	Agreement Status	Action
Agreement				

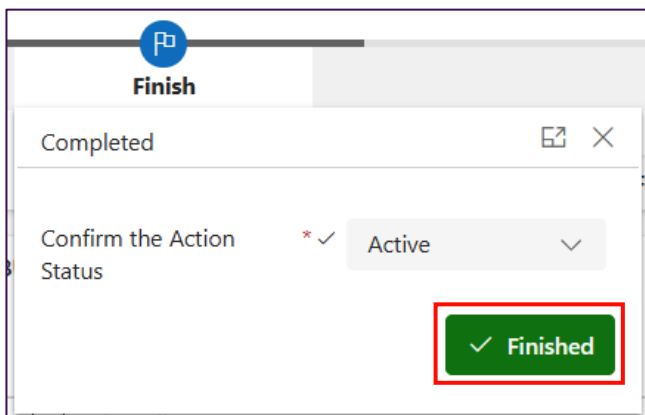
- Select **Do Not Renew** if the Agreement will not be renewed. This status can be updated at any time during the agreement lifecycle.



The screenshot shows a 'Finish' dialog box with a progress bar at the top. Below the progress bar, there is a section titled 'Active for less than one minute'. Under this, there is a 'Confirm the Action Status' label followed by a dropdown menu. The dropdown menu is open, showing three options: 'Active', 'Renewal Approved', and 'Do Not Renew'. The 'Do Not Renew' option is highlighted with a red box. There is also a 'Select all' checkbox at the bottom left of the dialog.

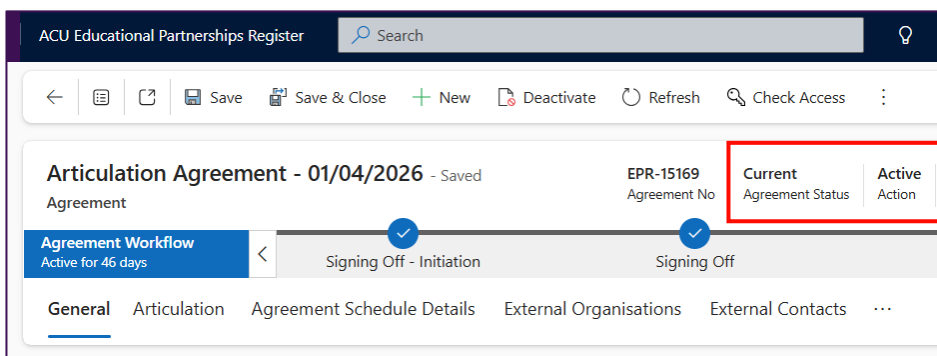
The selected status determines how the Agreement is recorded in the EPR. This should align with your Business Unit's requirements.

Once you've selected the correct status and clicked **Finish**, the workflow will update to **Finished** and display in green.



The screenshot shows the same 'Finish' dialog box, but now the 'Confirm the Action Status' dropdown menu is closed, and the selected status is 'Active'. A green button with a checkmark and the text 'Finished' is highlighted with a red box, indicating the final step to complete the process.

This confirms the process is complete, and the selected status is now recorded on the agreement.



The screenshot shows the ACU Educational Partnerships Register interface. At the top, there is a search bar and a navigation bar with various icons. Below this, there is a section for 'Articulation Agreement - 01/04/2026 - Saved'. To the right of this section, there is a table with two columns: 'Current Agreement Status' and 'Active Action'. The 'Current Agreement Status' column contains the value 'Active', which is highlighted with a red box. Below the table, there is a section for 'Agreement Workflow' showing a progress bar with two steps: 'Signing Off - Initiation' and 'Signing Off'. The 'Signing Off - Initiation' step is currently active, indicated by a blue checkmark. At the bottom, there is a navigation bar with tabs for 'General', 'Articulation', 'Agreement Schedule Details', 'External Organisations', and 'External Contacts'.