

Creating New External Organisation Activity

Educational Partnership Register (EPR)
Staff Training Guide

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1. New External Organisation Activity

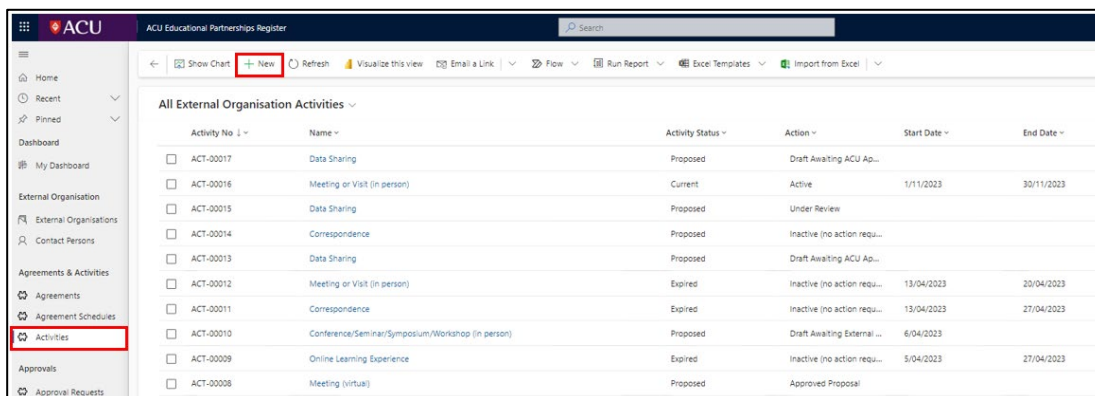
An **External Organisation Activity** allows users to record specific activities undertaken with external organisations during the course of their relationship with ACU. These activities may include meetings, events, visits, or other engagements that contribute to or support the outcomes outlined in an agreement.

External Organisation Activities may occur in **person or virtually**, depending on the nature of the engagement. The following are the main activity types available in the EPR:

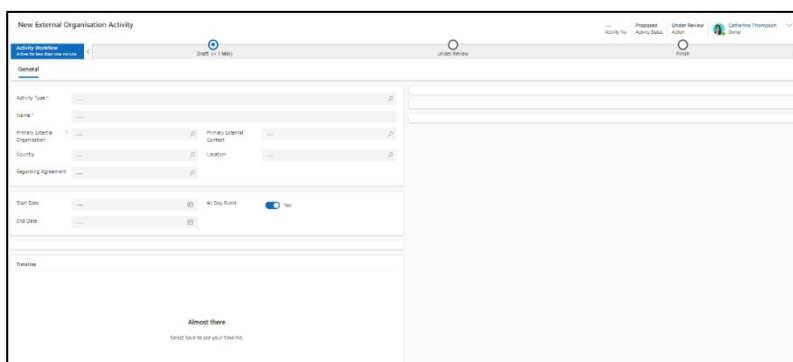
- Conference
- Correspondence
- Data Sharing
- Event
- Meeting or Visit
- Membership / Network / Alliance
- Off or On Shore Conference
- Online Learning Experience
- Research Engagements
- Seminars
- Study Tour
- Symposium
- Virtual Engagements
- Workshops

2. Creating a New External Organisation Activity

- To create a new **External Organisation Activity**, navigate to **Activities** using the left-hand navigation bar.
- In the top menu bar, click **New External Organisation Activity**.

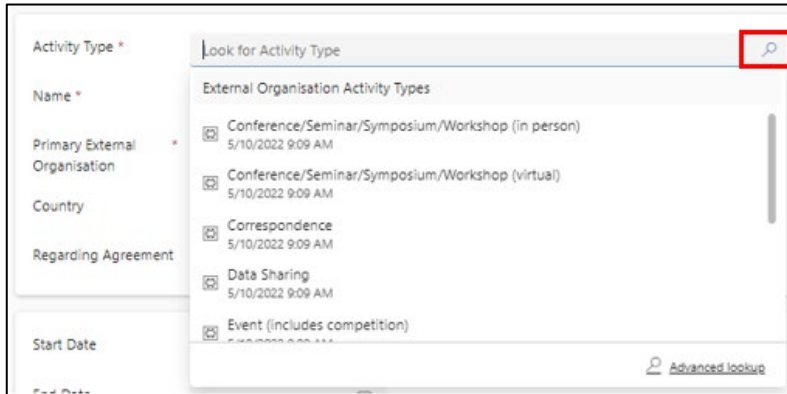


- The New **External Organisation Activity** window will open.

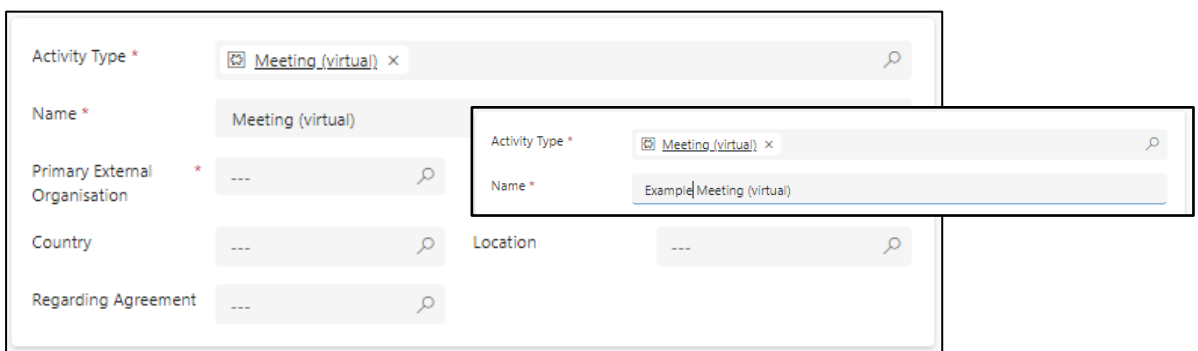


- Complete the following required fields:

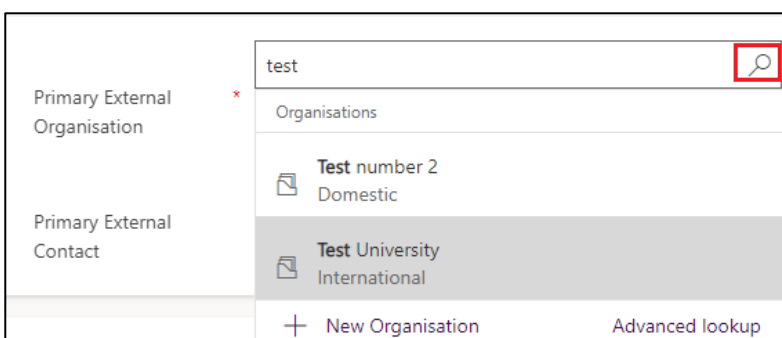
- Activity Type** – Select the appropriate activity type. Use the **lookup icon** to search and select from the available list.



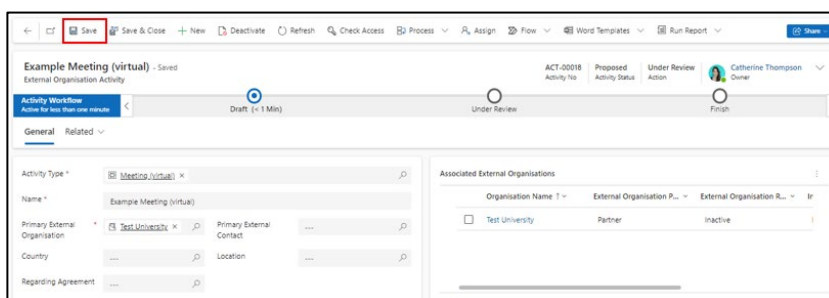
- Name** – This field will automatically populate once an **Activity Type** is selected. If required, you can amend the name by clicking in the field and entering the preferred text.



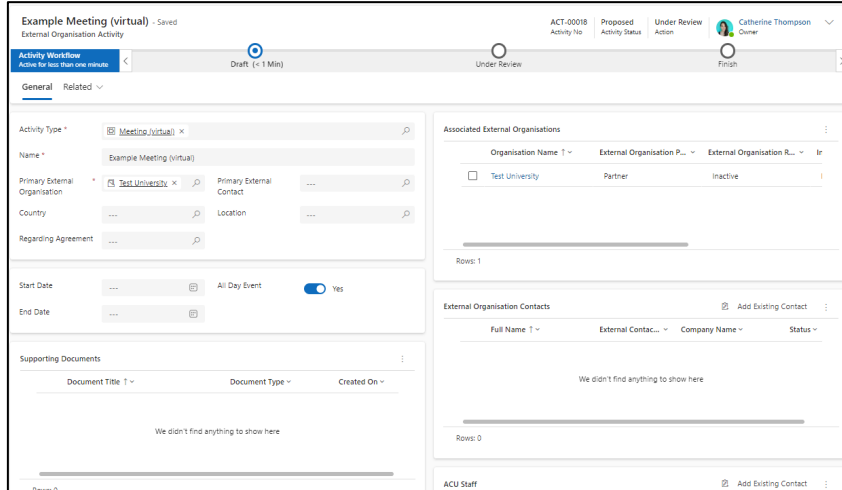
- Primary External Organisation** – Use the **lookup icon** to search for and select the relevant organisation.



- Once the required fields have been completed, click **Save**.



- After saving the External Organisation Activity, the following additional grids will become available:
 - ACU Staff
 - Associated External Organisations
 - External Organisation Contacts
 - Supporting Documents



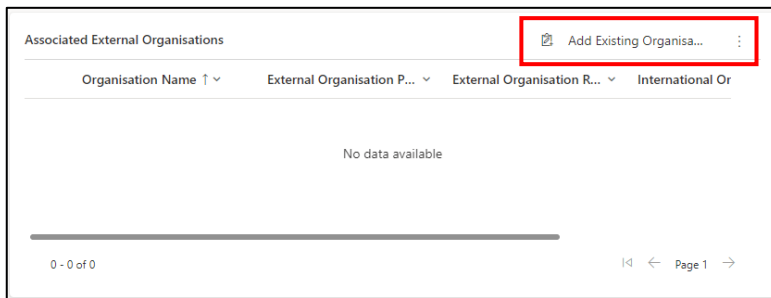
The screenshot shows a form titled 'Example Meeting (virtual)' with a status of 'Under Review'. The form is divided into several sections:

- General:** Includes fields for Activity Type (Meeting (virtual)), Name (Example Meeting (virtual)), Primary External Organisation (Test University), Country, Location, Regarding Agreement, Start Date, End Date, and All Day Event (Yes).
- Associated External Organisations:** A table with columns for Organisation Name, External Organisation P..., and External Organisation R... It shows one row for 'Test University' with a status of 'Inactive'.
- External Organisation Contacts:** A table with columns for Full Name, External Contact..., Company Name, and Status. It shows 'No data available'.
- Supporting Documents:** A table with columns for Document Title, Document Type, and Created On. It shows 'No data available'.

- Complete any additional relevant fields as required.

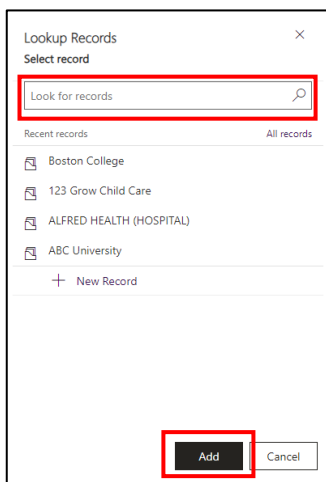
If the activity involves multiple organisations, only one organisation can be recorded as the **Primary External Organisation**. However, additional organisations can also be added.

- Under **Associated External Organisations**, click **Add Existing Organisation**.



The screenshot shows the 'Associated External Organisations' section. A red box highlights the 'Add Existing Organisation...' button in the top right corner. Below the button is a table with columns for Organisation Name, External Organisation P..., External Organisation R..., and International Or. The table is currently empty, showing 'No data available'.

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



The screenshot shows a 'Lookup Records' dialog box. It has a search bar at the top with the placeholder text 'Look for records'. Below the search bar is a list of recent records:

- Boston College
- 123 Grow Child Care
- ALFRED HEALTH (HOSPITAL)
- ABC University

 At the bottom of the dialog box, there is a red box highlighting the 'Add' button.

- If the organisation does not already exist in the system, it **must be created** before it can be added to the activity.
- The organisation will then appear in the **Associated External Organisations** grid.

Conference/Seminar/Symposium/Workshop (in person) - Saved

ACT-00020 Activity No. Proposed Activity Status Under Review Action Catherine Thompson Owner

Activity Workflow Active for 4 hours < Draft (4 Hrs) Under Review Finish

General Related

Activity Type * Conference/Seminar/Symposium/Workshop (in person)

Name * Conference/Seminar/Symposium/Workshop (in person)

Primary External Organisation * ABC University Primary External Contact ---

Country --- Location ---

Regarding Agreement ---

Start Date --- All Day Event Yes

Associated External Organisations Add Existing Organisa...

Organisation Name ↑	External Organisation P...	External Organisation R...	International Or
123 Grow Child Care	Partner	Active	Domestic

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External Organisation Contacts Add Existing Contact

- Once all relevant information has been entered in the remaining grids, click **Save and Close**.