

# **Creating New External Organisations and Contact Persons**

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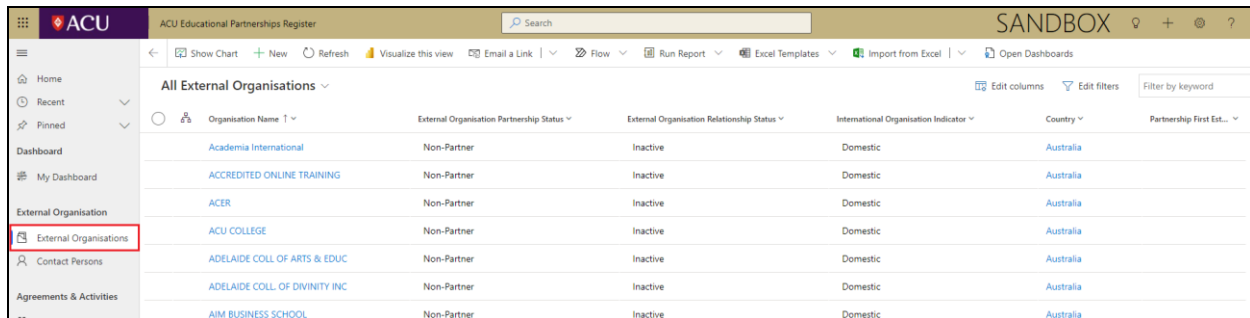
## New External Organisations and Contact Persons

External Organisations are an entity other than the University with which a relationship has been established and/or with which an agreement has been proposed or created. External Organisations include but are not limited to granting bodies, other academic or research institutions, health practitioners and educational providers.

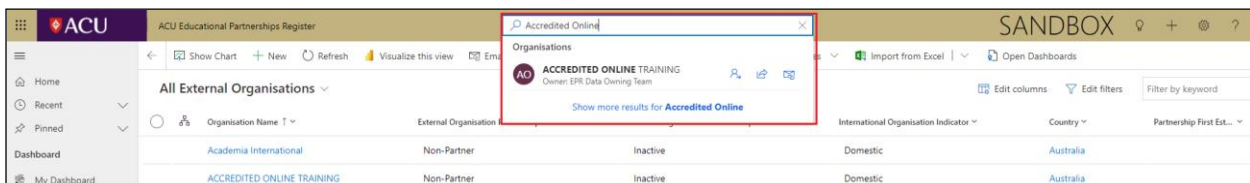
Contact Persons are personnel in an external organisation who can be contacted regarding a partnership relationship or agreement.

## Creating an External Organisation record

- Using the left navigation bar, click on **External Organisations**:

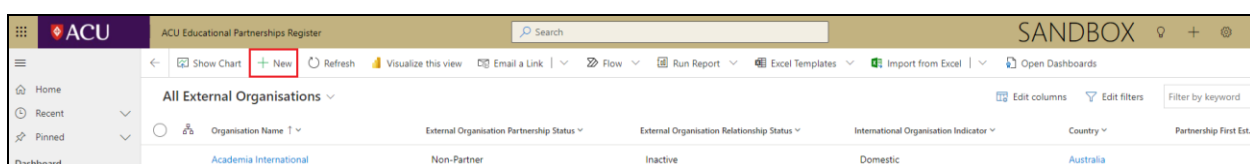


- Ensure you do a global search for the External Organisation or Contact Persons **BEFORE** you add a new External Organisation or Contact Persons:



- When using the global search bar use an asterisk as a wild card if you don't know the full name of an External Organisation, for example Accredited\*, this will select all External Organisations with Accredited as the first word in the External Organisation title.

- On the top menu, click **+ New** :



A new External Organisation record opens:

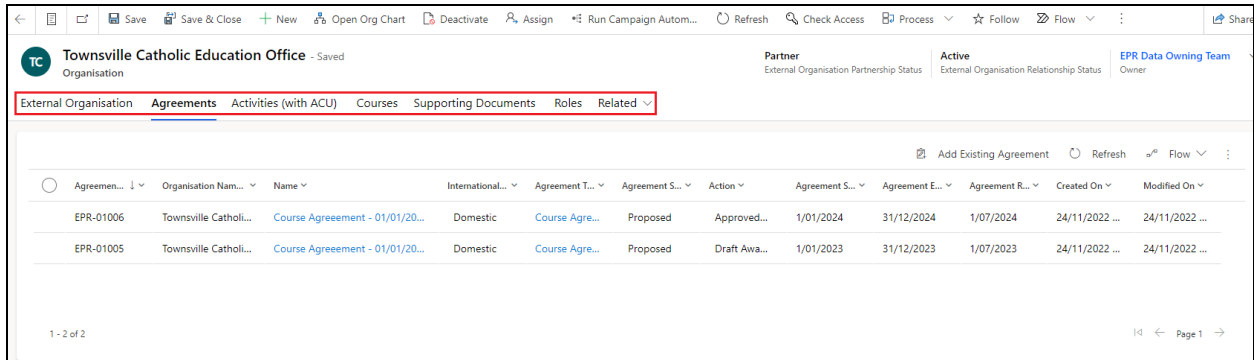
3. Under the **External Organisation** tab fill in the required fields **Name** and **Organisation Indicator**. Once the required fields are filled in, click **Save** . Fill in any other additional information on this tab, for example Address details:

**Note:** fields indicated with a red asterisk \* are a required field.

4. There are several navigation tabs on the **External Organisation** record:

- External Organisation
- Agreements
- Activities (with ACU)
- Courses
- Supporting Documents
- Roles
- Related v

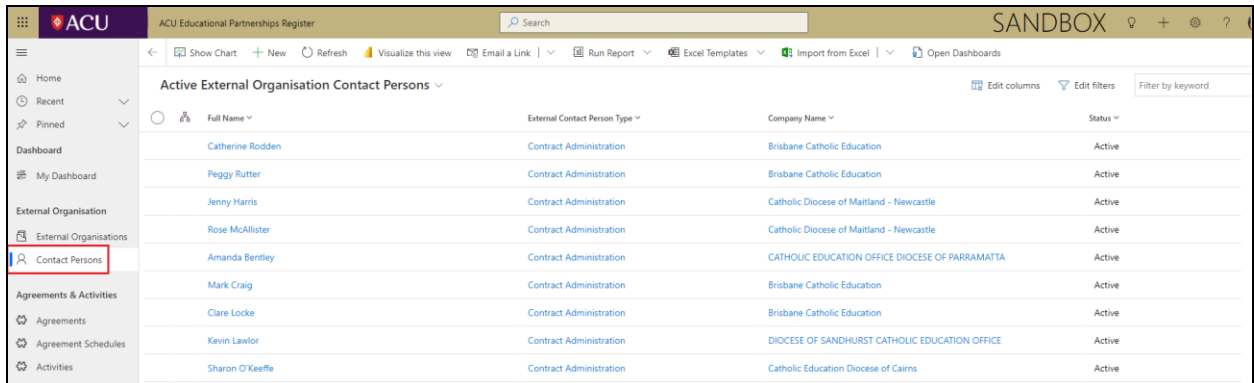
5. Click on the appropriate tab to fill in the relevant information:



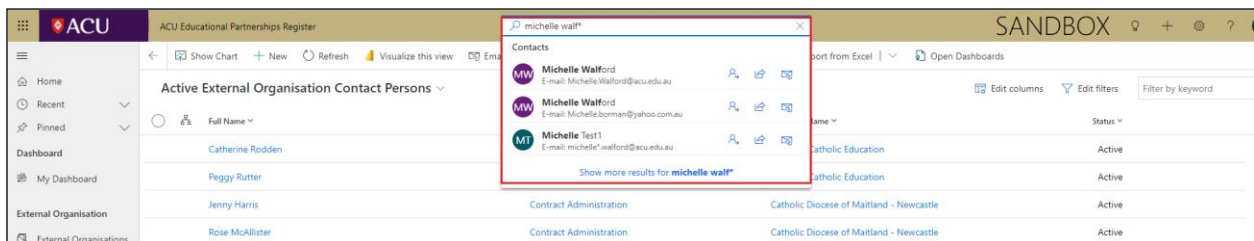
## Creating a Contact Persons record

**Duplicates:** It is important **not** to create duplicate contact records. To avoid creating a duplicate contact record make sure you search using student id, full name, mobile or email. By checking all these options in a search will ensure you do not create duplicates.

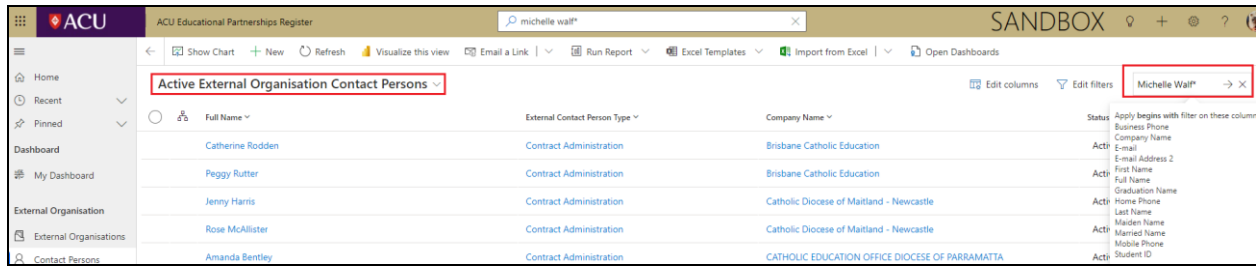
1. Using the left navigation bar, click on **Contact Persons**:



2. Ensure you do a global search for the **Contact Person BEFORE** you add a new **Contact Person**. The global search will look through the whole of the database:

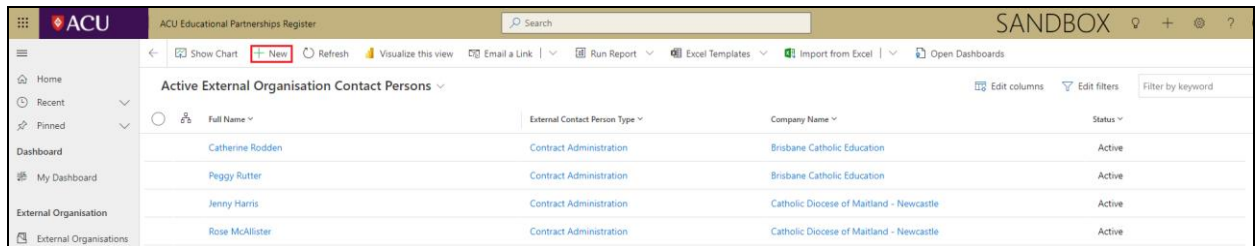


- You can also use the quick find in the view **Active External Organisation Contact Persons**, the quick search will look for any contacts in this view:

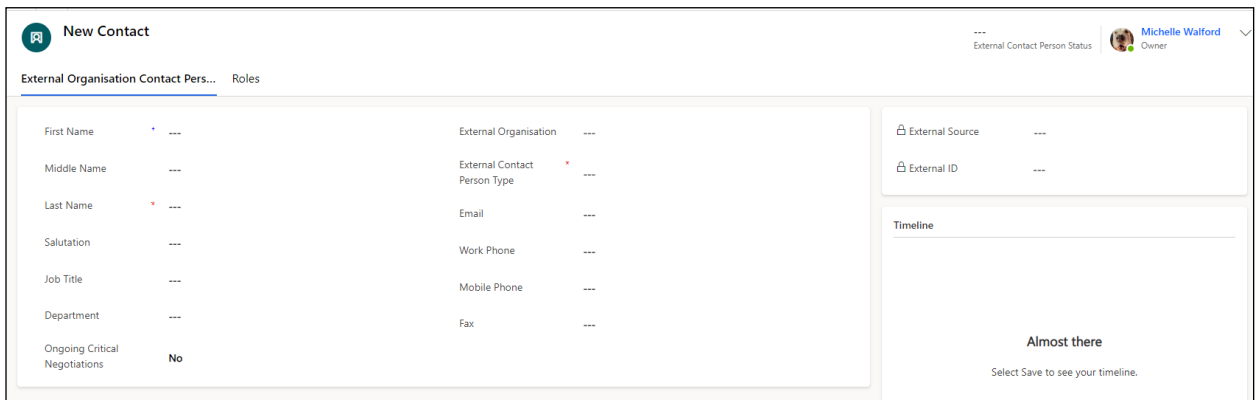


- Use an asterisk as a wildcard if you are unsure of spelling. You can search in the global and quick search using full name, email address and mobile number.

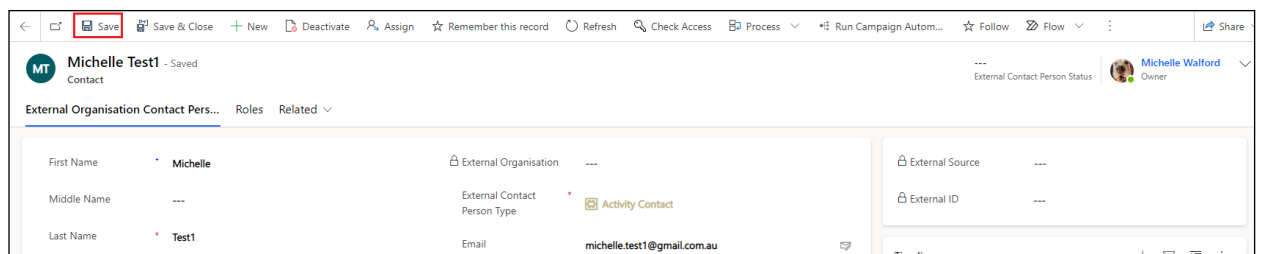
3. On the top menu, click **+ New** :



A **New Contact** record opens:

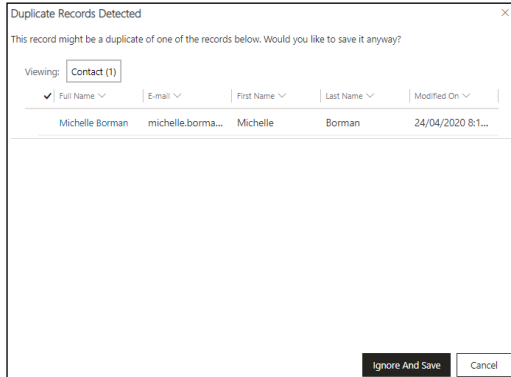


4. Enter the appropriate information under the **External Organisation Contact Person** tab, ensuring you add a unique email address, click **Save** to activate the record:

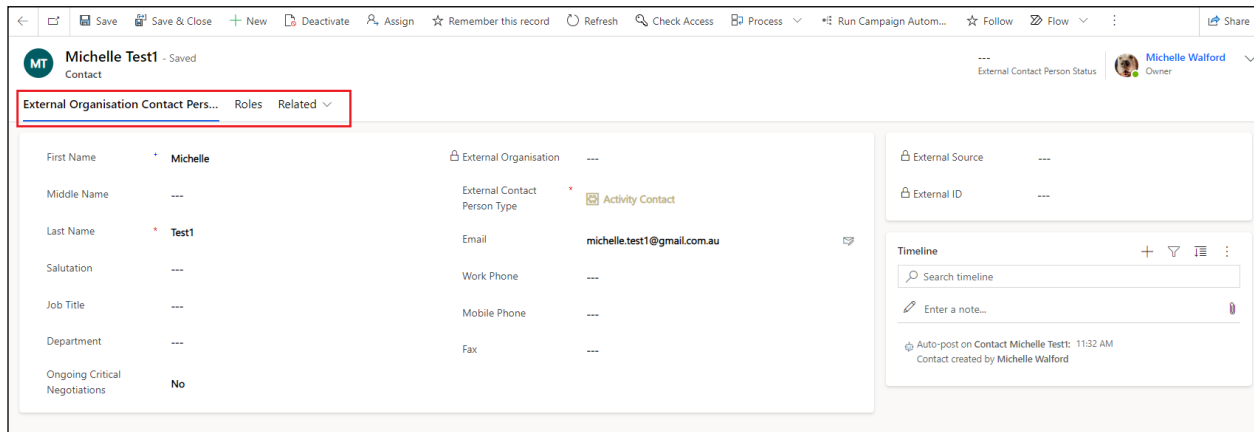


**Note:** fields indicated with a red asterisk \* are required fields.

- If you add a **Contact** who does not have a unique personal email address, then the EPR will run a duplicate detection, if this occurs you will need to update the existing **Contact** record:



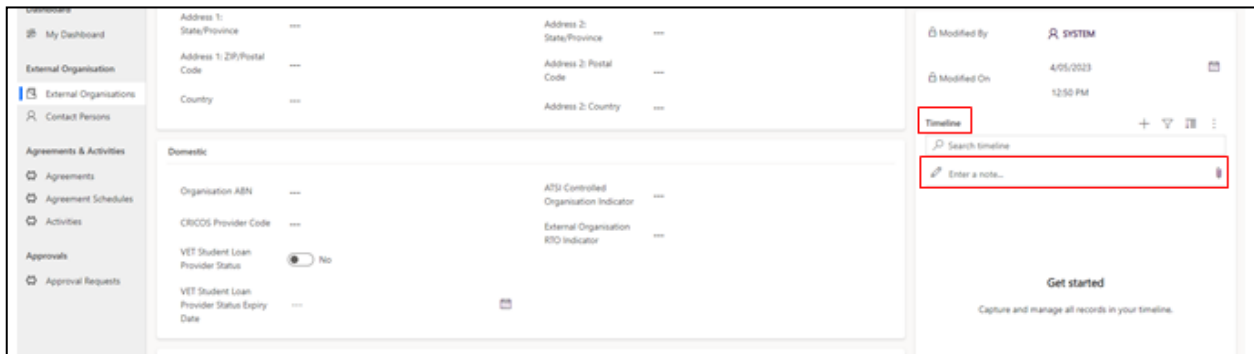
- There are several navigation tabs on the **Contact Persons** record, click on the appropriate tab to fill in the relevant information:



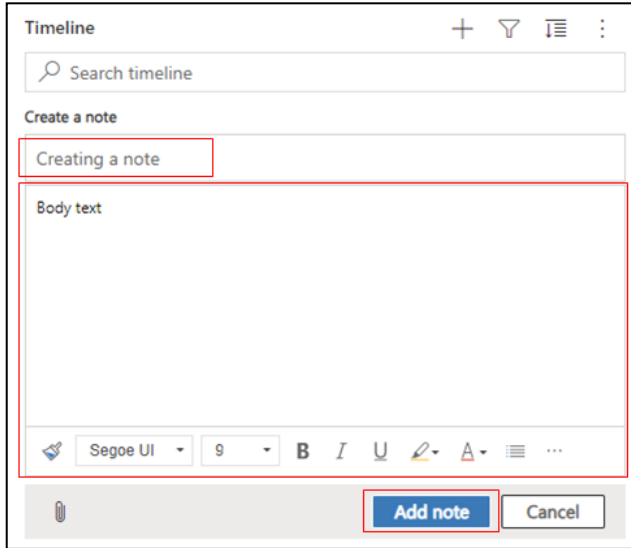
## Adding Notes to External Organisations and Contact Persons

To record relevant information about an external organisation or contact person that is not already documented in the EPR, you have the option to create a note.

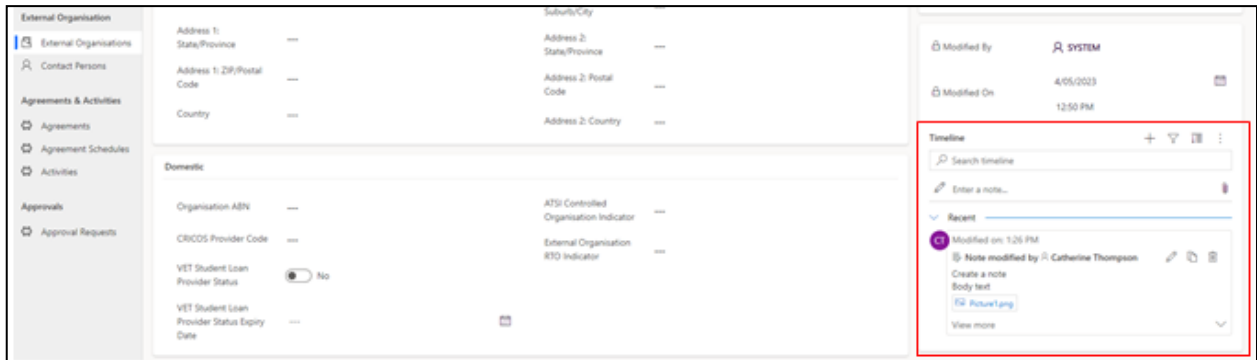
- To create a note, on the **Timeline** grid, click **Enter a note**



2. Provide a subject, enter text in the body (if applicable), and attach any relevant documentation. Click **Add note**

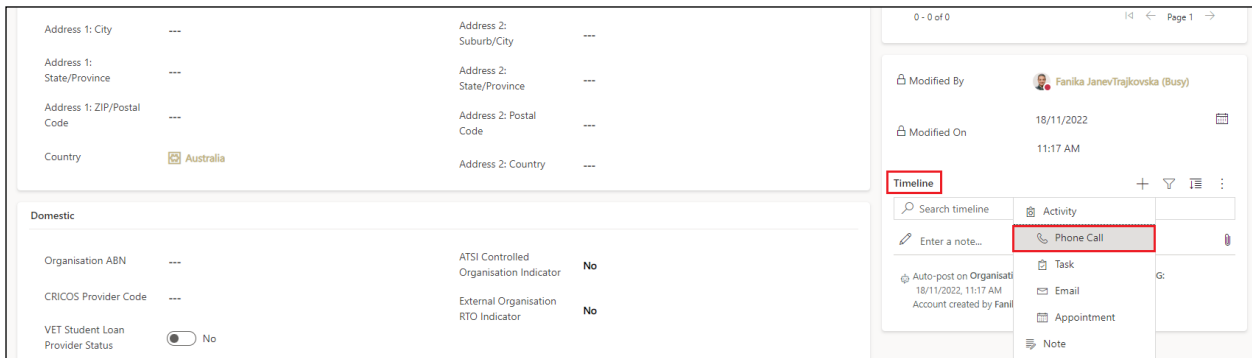


3. Recorded note will appear on the timeline.



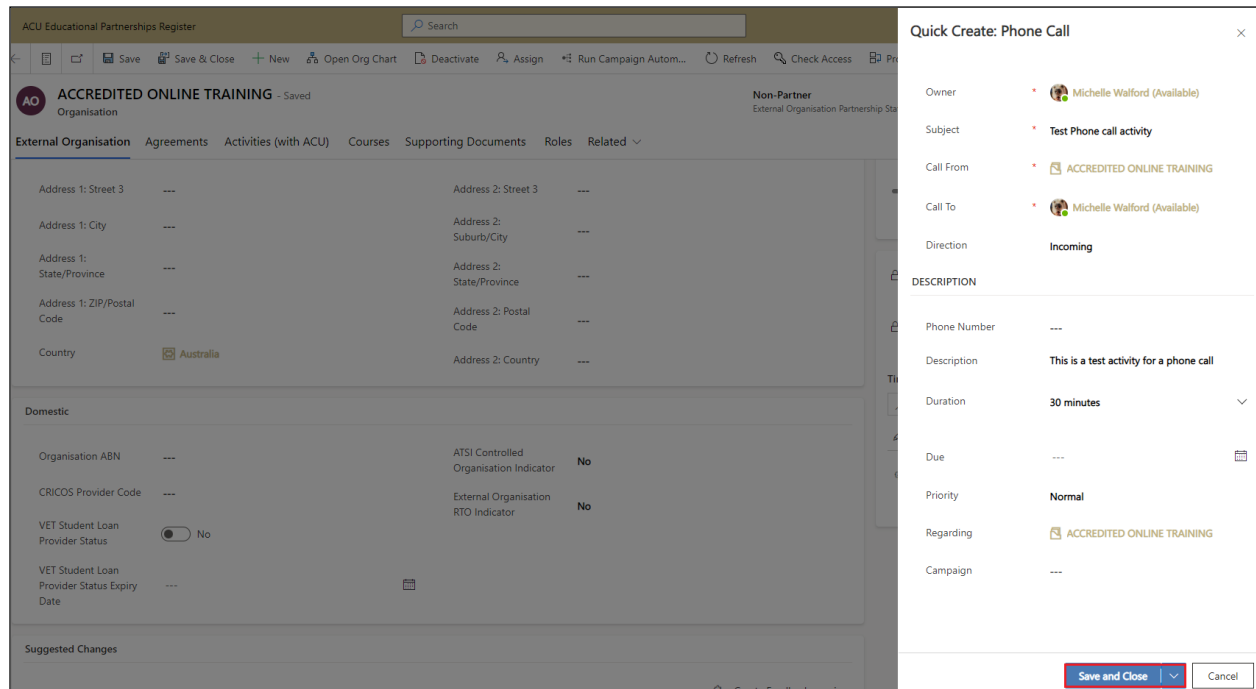
## Adding Activities to External Organisations and Contact Persons

1. Open your **External Organisation** record. Scroll to **Timeline** grid, click **+**, select the activity you want to add, in this instance, **Phone call**:

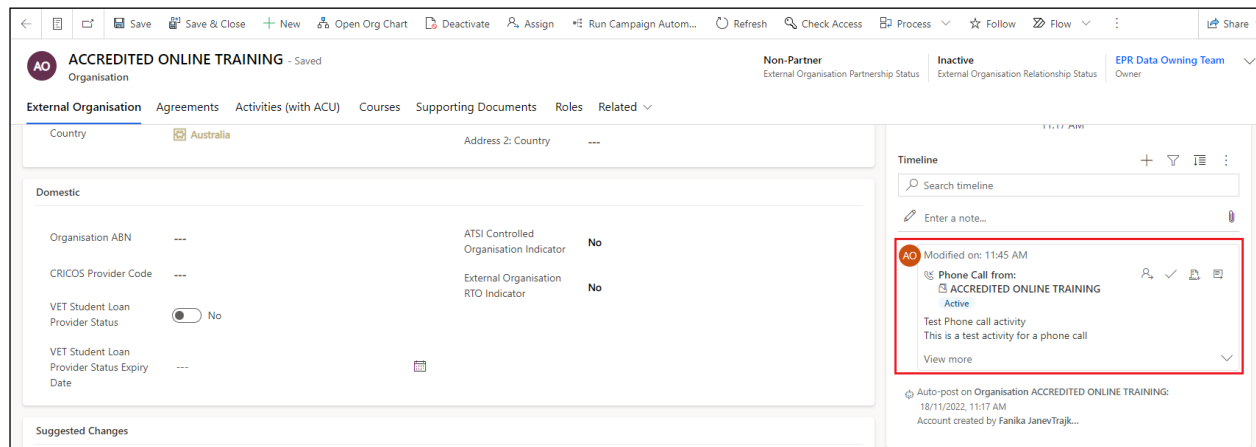




2. The **Quick Create: Phone Call** window opens, fill in the appropriate information, click




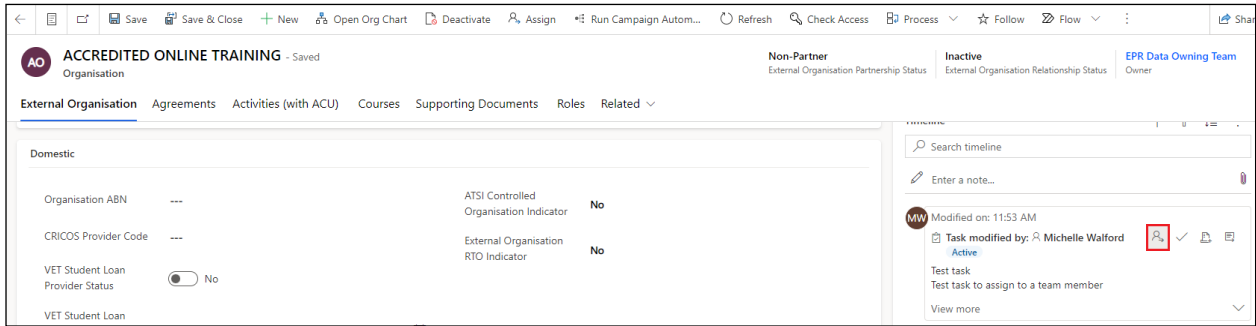
3. Your **Phone Call** will be saved on the **Timeline** grid:



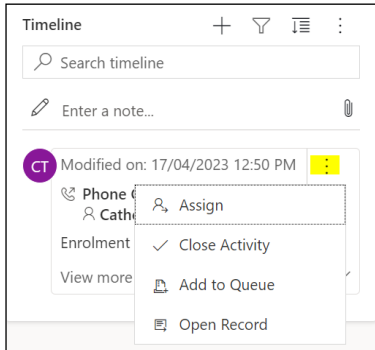
**Note:** Follow the above steps to create **Activities** on a **Contact Persons** record.

## Assigning Tasks to another User or Team

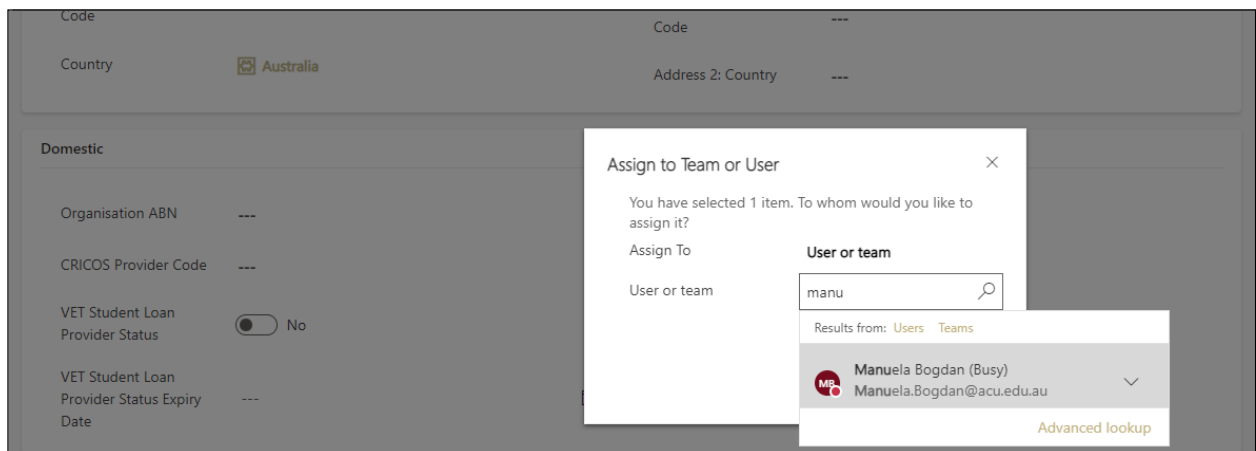
- To assign a **Task** to another user or team, navigate to your saved **Contact Persons or External Organisation** record. Hover over the **Task or Activity** you wish to assign, click :



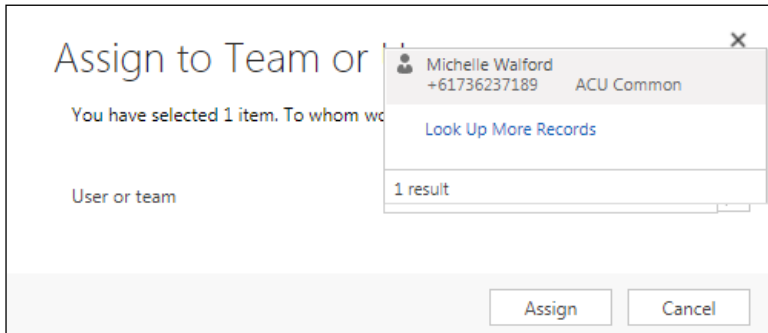
**Note:** If you are on a laptop, click the ellipsis 



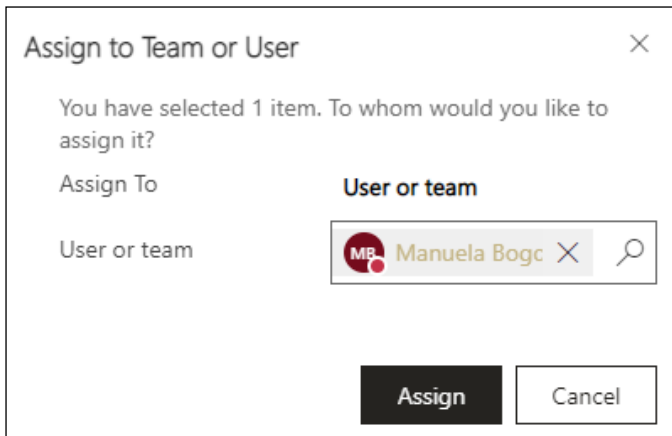
- The **Assign to Team or User** window opens, in the **Assign to** field, select **User or Team** and in the **User or team** field search on the user you wish to assign the task to:



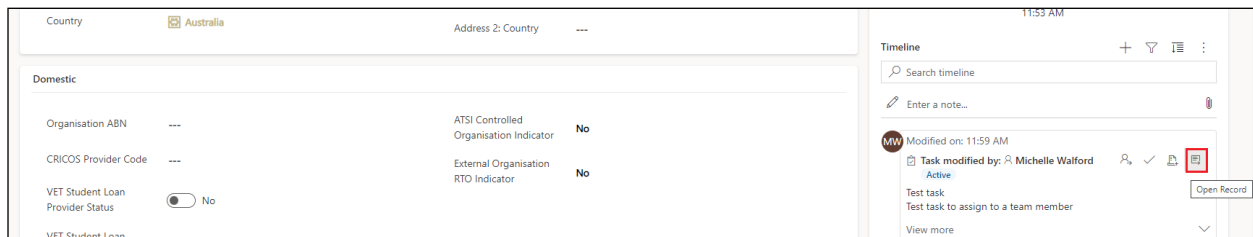
3. Click , select **Look up more Records.** to look up the team or user:



4. Once you have selected the user or team, click **Assign** :



5. Open the record to view the change, click  :



6. The **Owner** field has updated with the new user:

