

Creating New Agreements

Contents

New Agreements	3
Agreement Types	3
Navigation Tabs	3
Creating a new Agreement.....	4
Agreement Examples.....	6
Articulation Agreements.....	6
Consortium Agreements	9
Workflow Example	11
Approval Requests.....	12
Approved Requests.....	13
Rejected Requests.....	18

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:

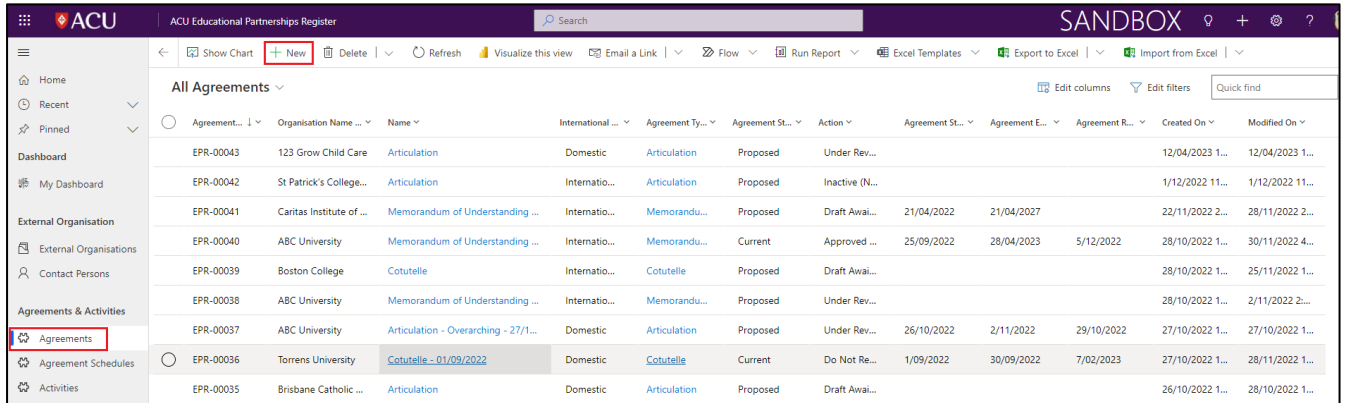
- General
- Articulation
- Agreement Schedule Details
- External Organisations
- External Contact
- ACU Staff
- Supporting Documents
- Related

The screenshot shows the EPR interface for creating a new agreement. The 'Articulation' agreement type is selected in the 'Agreement Type' dropdown menu. The navigation tabs are: General, Articulation, Agreement Schedule Details, External Organisations, External Contacts, ACU Staff, Supporting Documents, and Related. The 'Articulation' tab is active. The 'Agreement Type' dropdown is highlighted with a red box. The interface also shows the agreement status as 'Draft (14 D)' and 'Under Review'. The user is Michelle Walford, Owner. The agreement number is EPR-00043. The agreement status is 'Proposed'. The agreement is currently 'Under Review'. The agreement is for 'Test University'. The agreement is 'Domestic'. The agreement is a 'Consortium'. The agreement is 'Physical Copy Required'. The agreement is 'External Organisation'. The agreement is 'Agreement Can be Published to Website'. The agreement is 'Previous Version Agreement'. The agreement is 'Overarching Agreement Indicator'. The agreement is 'Overarching Agreement'. The agreement is 'Associated External Organisations'. The agreement is 'Test number 2 Domestic'. The agreement is 'Test University International'. The agreement is '1-2 of 2'. The agreement is '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.

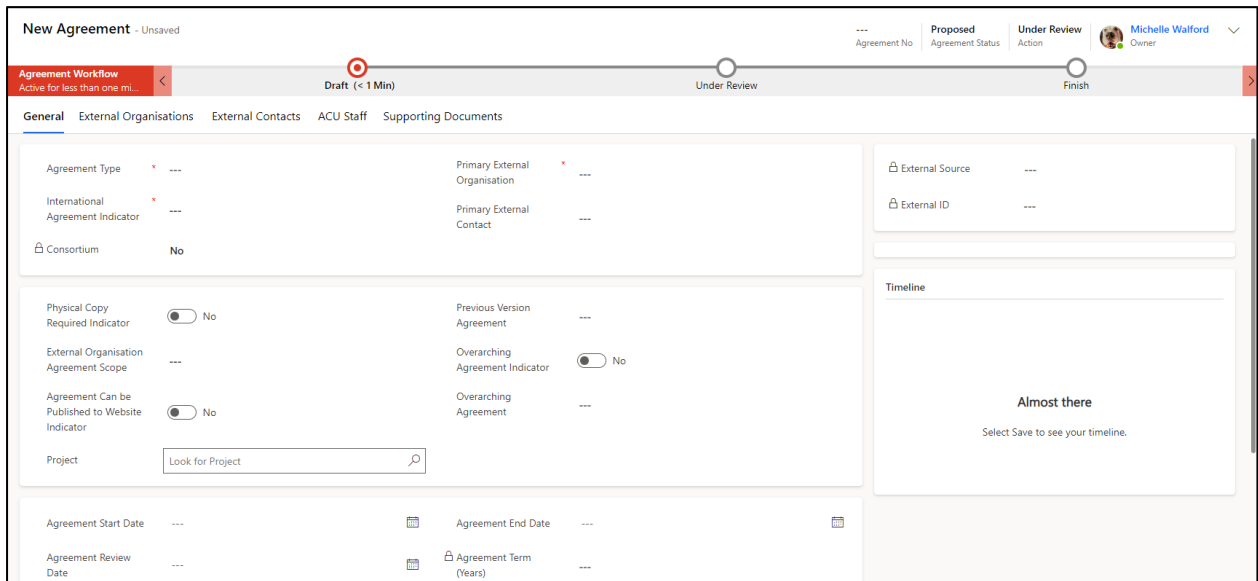
Creating a new Agreement

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



Agreement No.	Organisation Name	Name	International	Agreement Type	Agreement Status	Action	Agreement Start	Agreement End	Agreement Review	Created On	Modified On
EPR-00043	123 Grow Child Care	Articulation	Domestic	Articulation	Proposed	Under Rev...				12/04/2023 1...	12/04/2023 1...
EPR-00042	St Patrick's College...	Articulation	Internatio...	Articulation	Proposed	Inactive (N...				1/12/2022 11...	1/12/2022 11...
EPR-00041	Caritas Institute of ...	Memorandum of Understanding ...	Internatio...	Memorandu...	Proposed	Draft Awa...	21/04/2022	21/04/2027		22/11/2022 2...	28/11/2022 2...
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...
EPR-00039	Boston College	Cotutelle	Internatio...	Cotutelle	Proposed	Draft Awa...				28/10/2022 1...	25/11/2022 1...
EPR-00038	ABC University	Memorandum of Understanding ...	Internatio...	Memorandu...	Proposed	Under Rev...				28/10/2022 1...	2/11/2022 2...
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...
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...
EPR-00035	Brisbane Catholic ...	Articulation	Domestic	Articulation	Proposed	Draft Awa...				26/10/2022 1...	28/10/2022 1...

- A **New Agreement** window opens:



New Agreement - Unsaved

Agreement No. Proposed Agreement Status Under Review Action Michelle Walford Owner

Agreement Workflow: Active for less than one mt... Draft (< 1 Min) Under Review Finish

General External Organisations External Contacts ACU Staff Supporting Documents

Agreement Type * --- Primary External Organisation * --- External Source ---

International Agreement Indicator * --- Primary External Contact * --- External ID ---

Consortium No

Physical Copy Required Indicator No

External Organisation Agreement Scope --- Previous Version Agreement ---

Agreement Can be Published to Website Indicator No

Overarching Agreement Indicator No

Overarching Agreement ---

Project Look for Project

Timeline

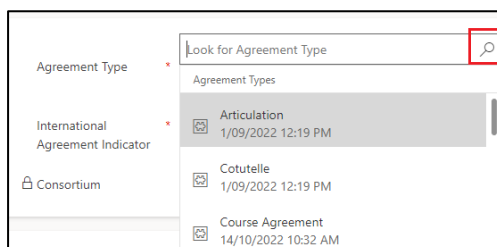
Almost there
Select Save to see your timeline.

Agreement Start Date --- Agreement End Date ---

Agreement Review Date --- Agreement Term (Years) ---

- Fill in the following required fields:

- Agreement Type – There is a list of agreement types for you to search on, click  to look up the applicable agreement type.



Agreement Type * --- Look for Agreement Type

Agreement Types

- Articulation 1/09/2022 12:19 PM
- Cotutelle 1/09/2022 12:19 PM
- Course Agreement 14/10/2022 10:32 AM

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

A screenshot of a form field labeled 'International Agreement Indicator'. The dropdown menu is open, showing three options: 'Domestic', 'International', and 'Domestic'. The second 'Domestic' option is highlighted in blue. To the left of the dropdown, the text 'Agreement Type * Articulation' and 'Consortium' are visible.

- Primary External Organisation – Click  to search for the Organisation:

A screenshot of the 'Primary External Organisation' search interface. A search bar at the top contains the text 'test' and has a magnifying glass icon to its right. Below the search bar, a list of results is shown under the heading 'Organisations'. The results include 'Test number 2 Domestic' and 'Test University International'. At the bottom of the list, there is a '+ New Organisation' button and an 'Advanced lookup' link.

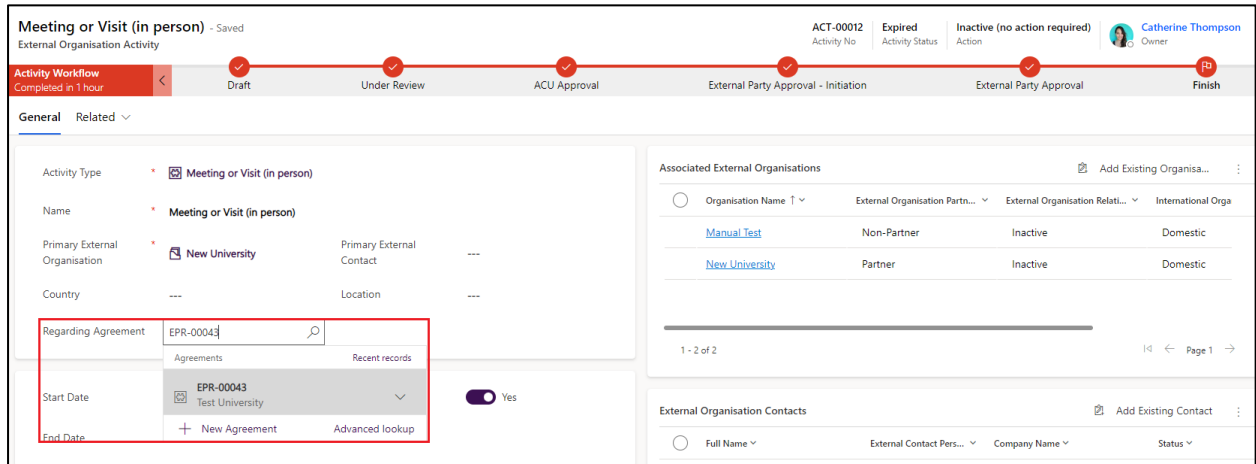
4. Once you have filled in the required fields, click  Save :

A screenshot of the 'Articulation - Saved Agreement' form. The 'Save' button in the top left corner is highlighted with a red box. The form shows the following details: Agreement Type: Articulation; International Agreement Indicator: Domestic; Consortium: Yes; Primary External Organisation: Test University; Physical Copy Required Indicator: No; External Organisation Agreement Scope: ---; Agreement Can be Published to Website Indicator: No; Project: ---. The status bar at the top indicates 'Draft (23 Min)' and 'Under Review'.

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

A screenshot of the 'Articulation - Saved Agreement' form, similar to the previous one, but with the unique identifying number 'EPR-00043' highlighted in a red box in the top right corner. The status bar at the top now shows 'Proposed Agreement Status' and 'Under Review'.

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:



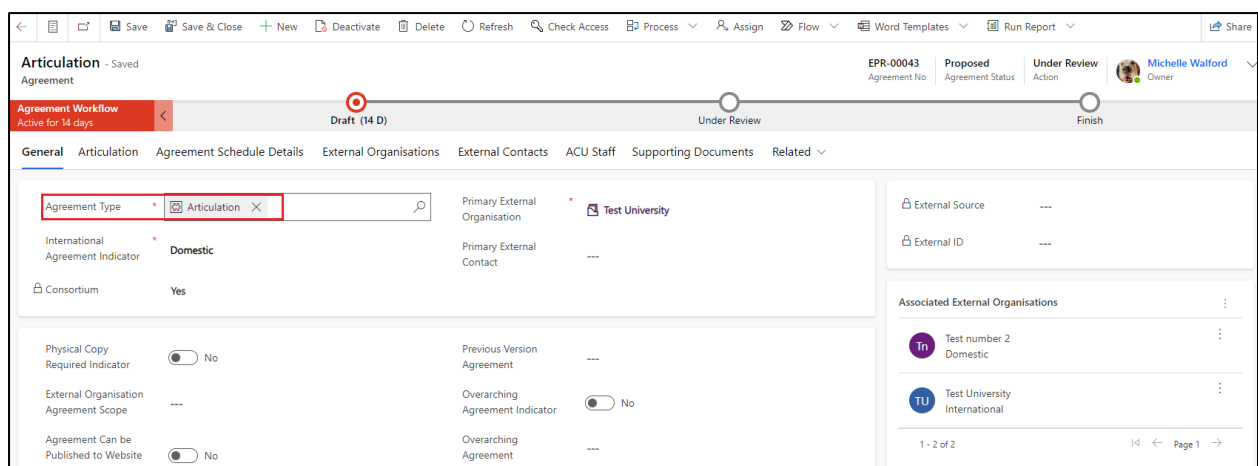
Continue completing the agreement details in the different navigation tabs.

Agreement Examples

Articulation Agreements

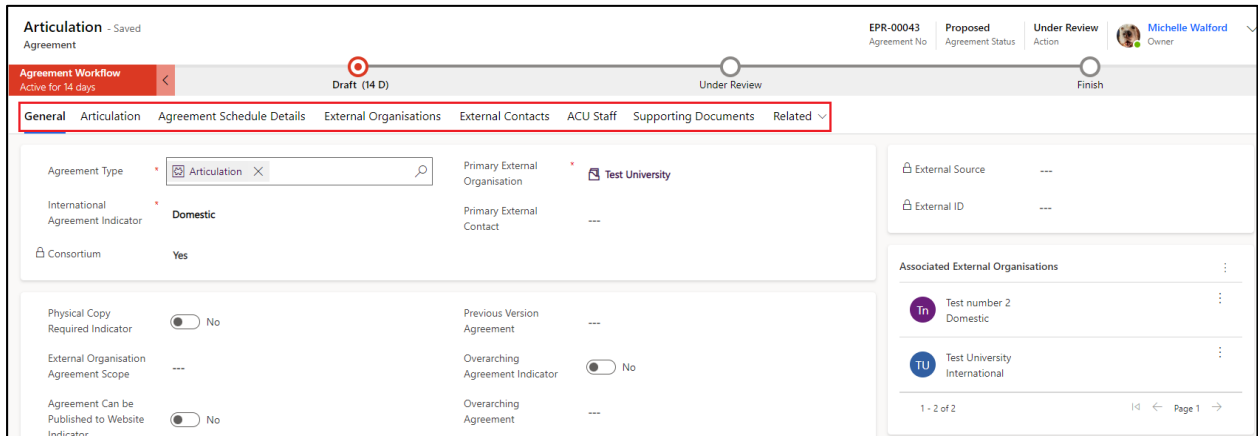
Articulation is the process by which the external organisation matches its course credit points or requirements to coursework completed at ACU.

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

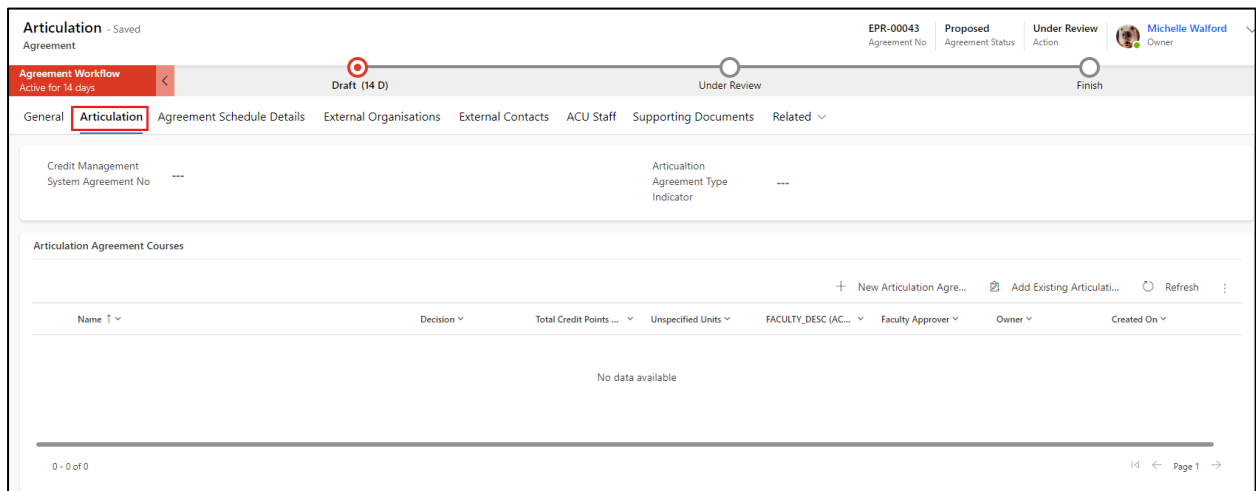


2. Once you have saved the record, the navigation tabs will update to the following:

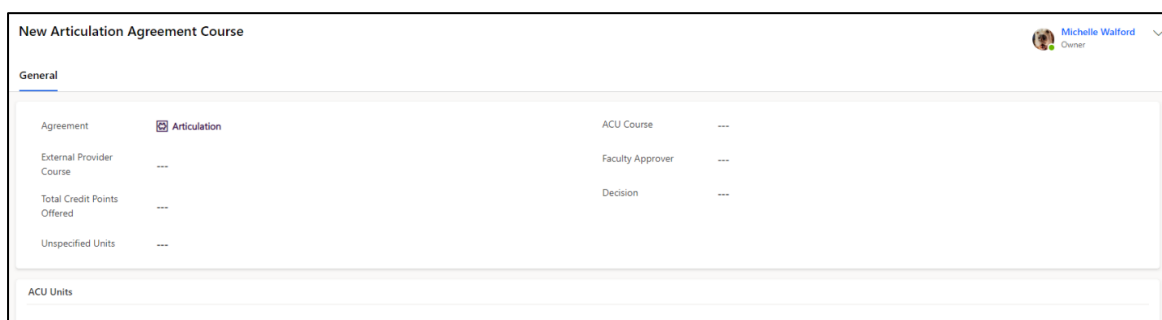
- General
- Articulation
- Agreement Schedule Details
- External Organisations
- External Contacts
- ACU Staff
- Supporting Documents
- Related



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



4. Click [New Articulation Agre...](#) to add a new course. The **New Articulation Agreement Course** window opens:



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

New Articulation Agreement Course - Unsaved

Michelle Walford
Owner

General

Agreement Articulation

External Provider Course **Advanced Diploma in Education**

ACU Course **Bachelor of Education (Primary – The Arts Specialisation) (Test)**

Total Credit Points Offered ---

Unspecified Units ---

Faculty Approver ---

Decision ---

ACU 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 in Education - Bachelor of Education (Primary – The Arts Specialisation) (Test) - Saved

Michelle Walford
Owner

General Related

Agreement Articulation

External Provider Course **Advanced Diploma in Education**

ACU Course **Bachelor of Education (Primary – The Arts Specialisation) (Test)**

Total Credit Points Offered ---

Unspecified Units **CREDEX3**

Faculty Approver

Decision **Approved**

ACU Units

Add Existing ACU Unit Refresh Flow

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

Search

Advanced Diploma in Education - Bachelor of Education (Primary – The Arts Specialisation) (Test) - Saved

Michelle Walford
Owner

General Related

Agreement Articulation

External Provider Course **Advanced Diploma in Education**

ACU Course **Bachelor of Education (Primary – The Arts Specialisation) (Test)**

Faculty Approver

Decision **Approved**

Lookup Records
Select record

education

← All ACU Units

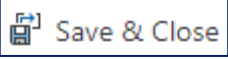
- EDUCATION & SOCIETY EDFD103
- EDUCATION & SOCIETY GDFD103

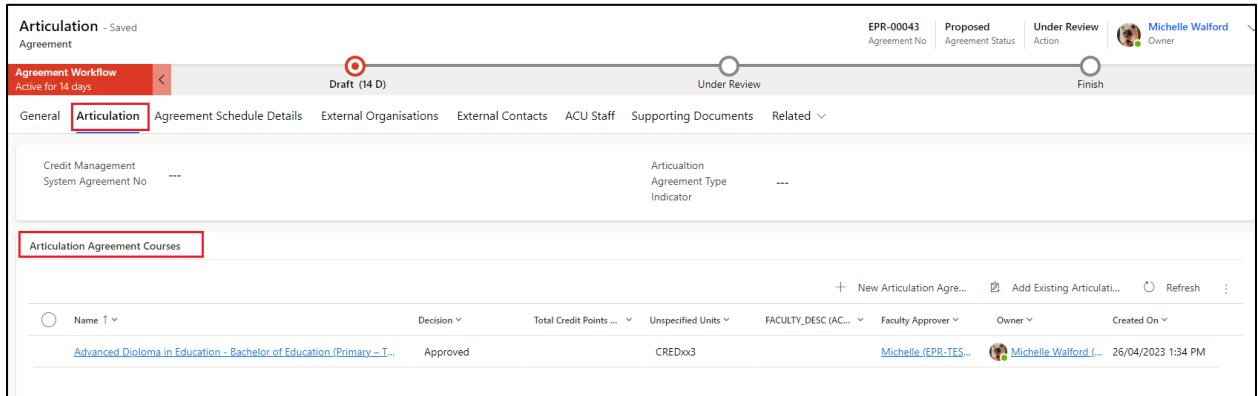
8. The course unit is visible in the **ACU Units** grid:

ACU Units

Add Existing ACU Unit Refresh Flow

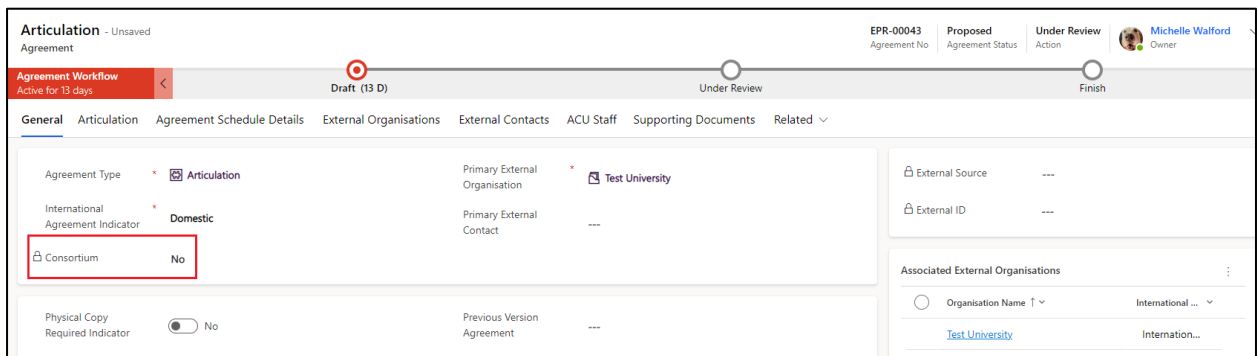
Name	Code	Credit Points Granted for Unit
EDUCATION & SOCIETY	EDFD103	10

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

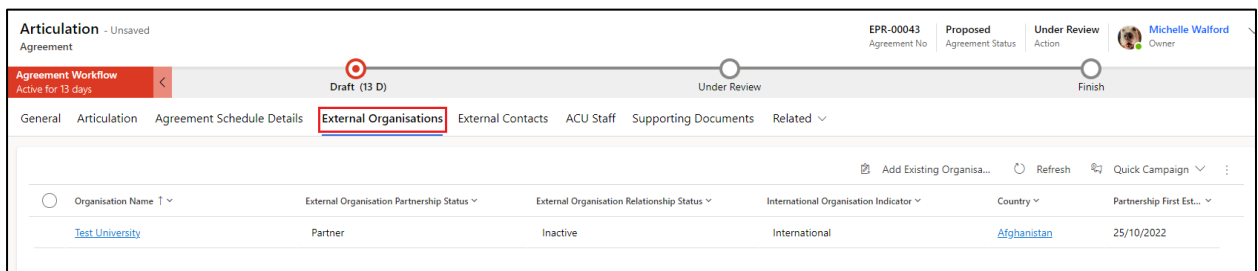



Consortium Agreements

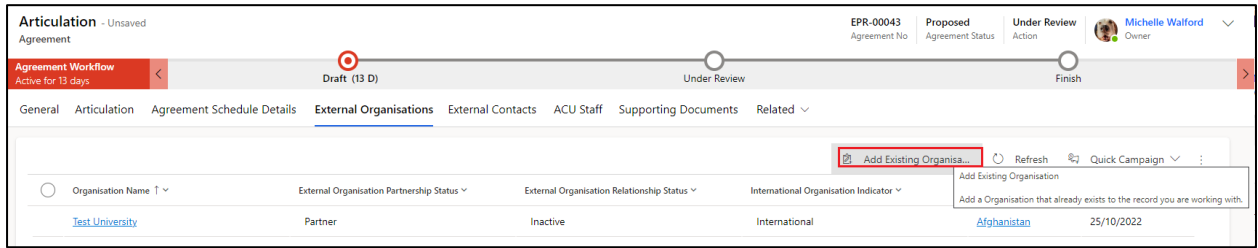
A **Consortium Agreement** indicates an agreement with two or more **External Organisations**. **Consortium** is a read only field activated when more than one **External Organisation** is added to an Agreement. Users are unable to update this manually:



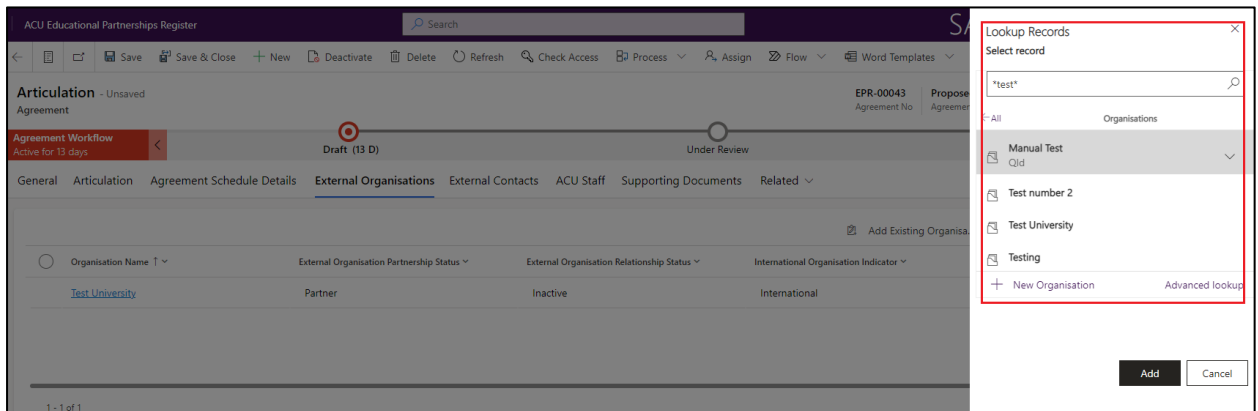
1. To add another organisation to an **Agreement**, navigate to the relevant **Agreement** and click **External Organisations**:



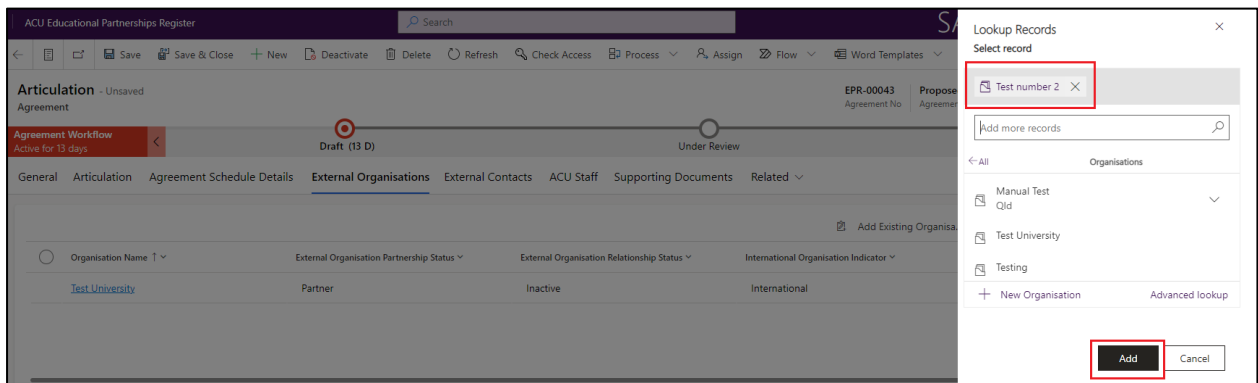
2. Click  **Add Existing Organisa...** to add an additional organisation:



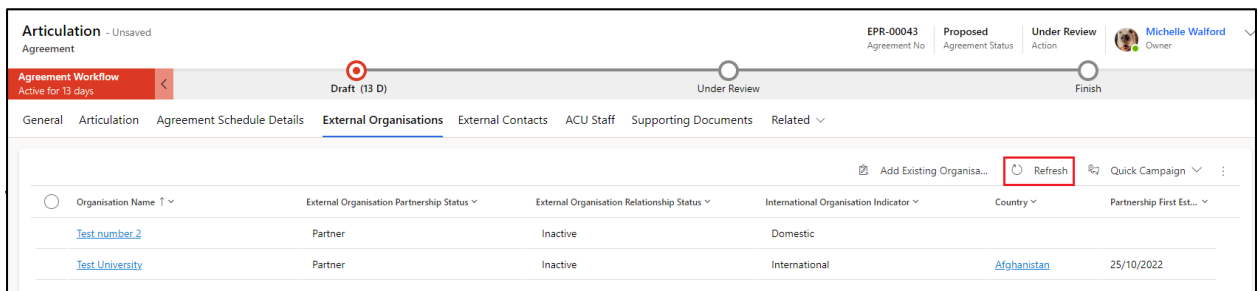
The **Lookup Records** window opens, search on the organisation:



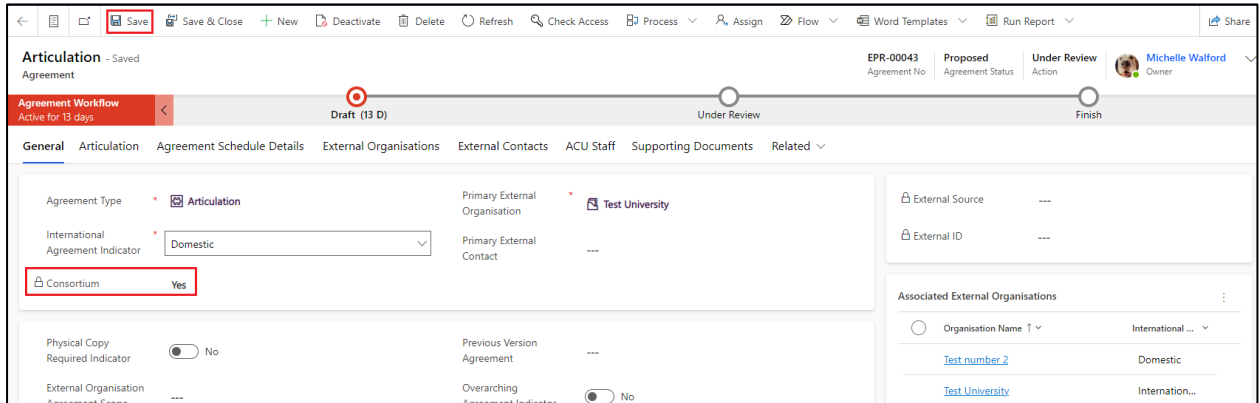
3. Select the organisation, click **Add**:



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



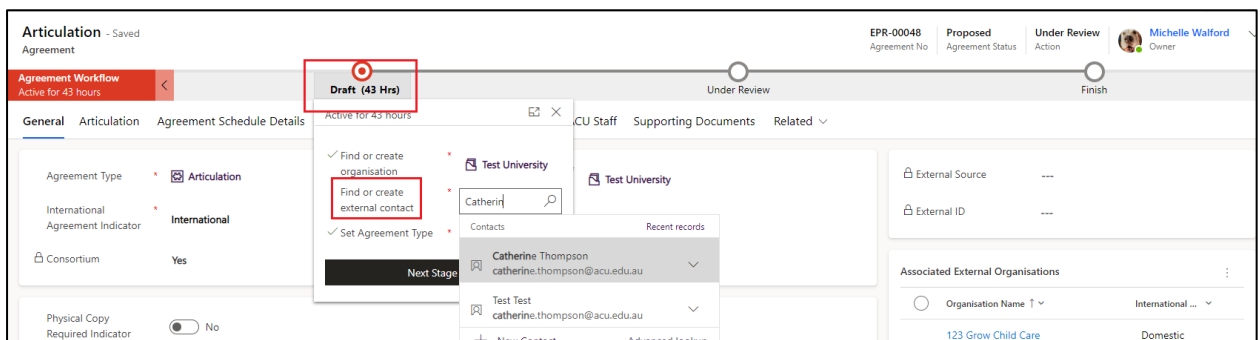
Note: If you remove an organisation the **Consortium** field will update to **No**.



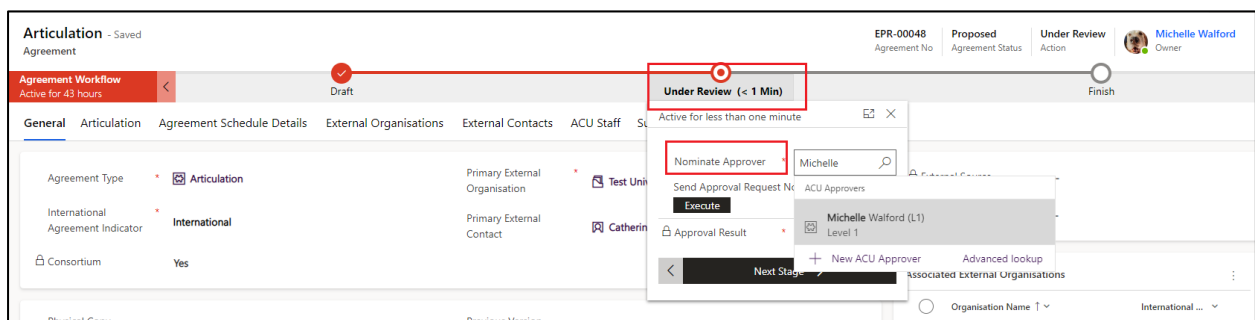
Workflow Example

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

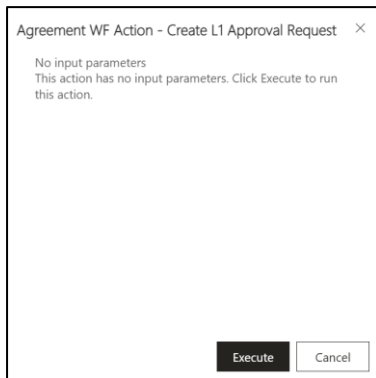
1. In the **Agreement** workflow bar, click **Draft**. In the field **Find or create an external contact**, look up the relevant contact, select **Next Stage** >:



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**:



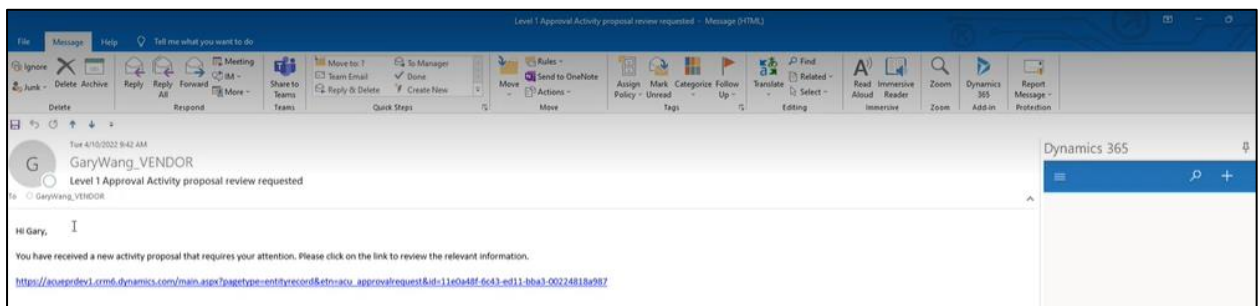
- The **Agreement WF Action – Create L1 Approval Request** window opens, click **Execute** to send off a notification email to the approver:



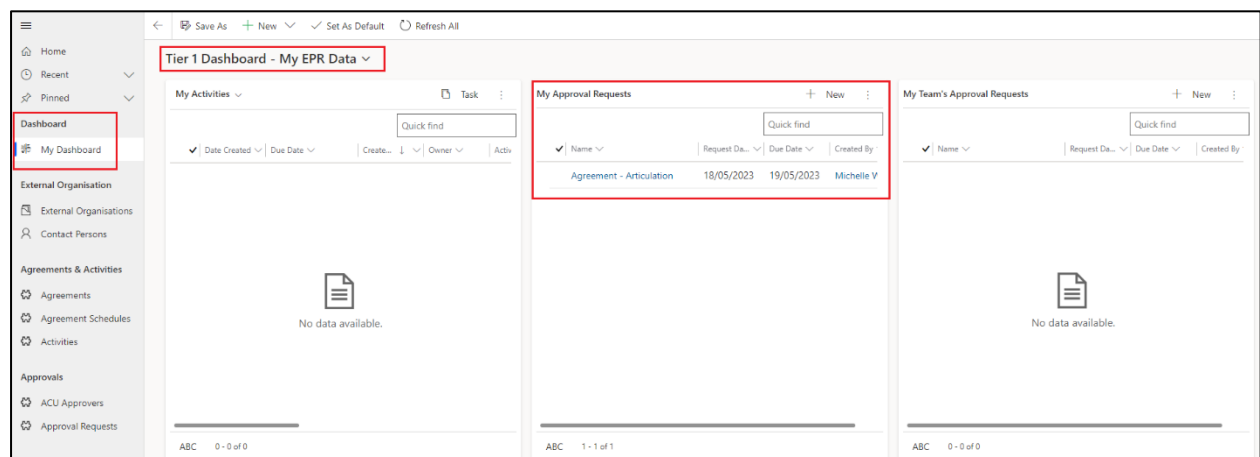
Note: You can save and close the request, once approved you can continue with the record.

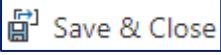
Requests for approval

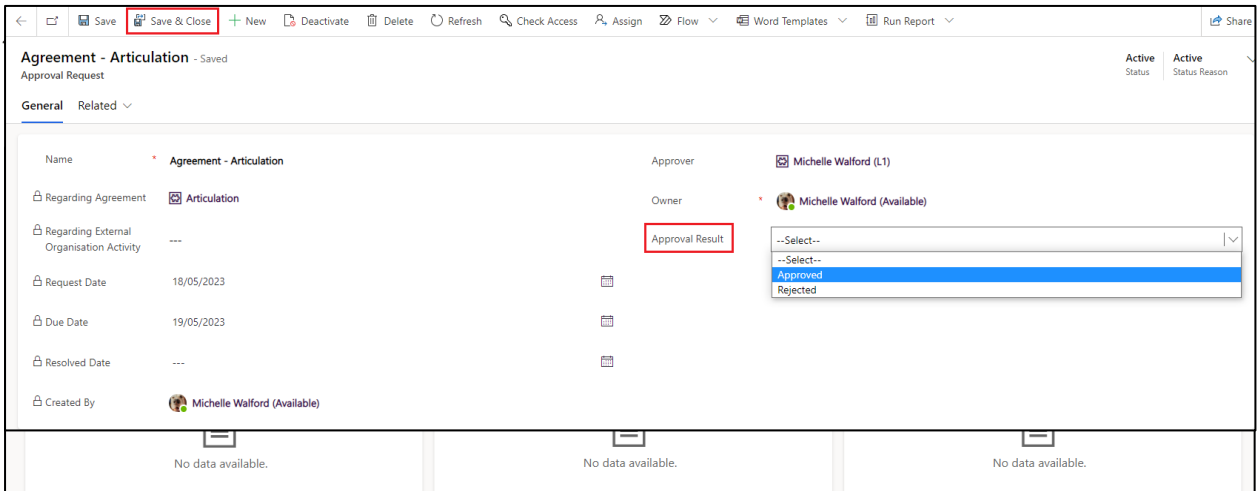
- The relevant approver will receive a notification email with a link to the approval request in the **EPR**:



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

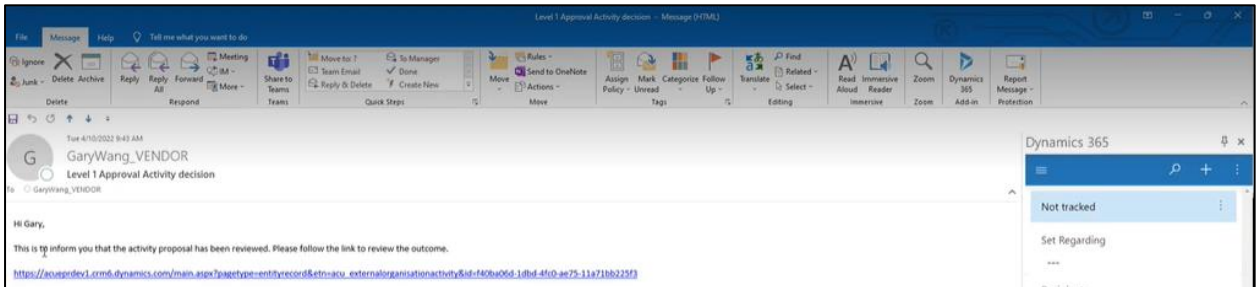


- Click on the approval request to open it. In the **Approval Result** field select **Approved** or **Rejected**. Click :

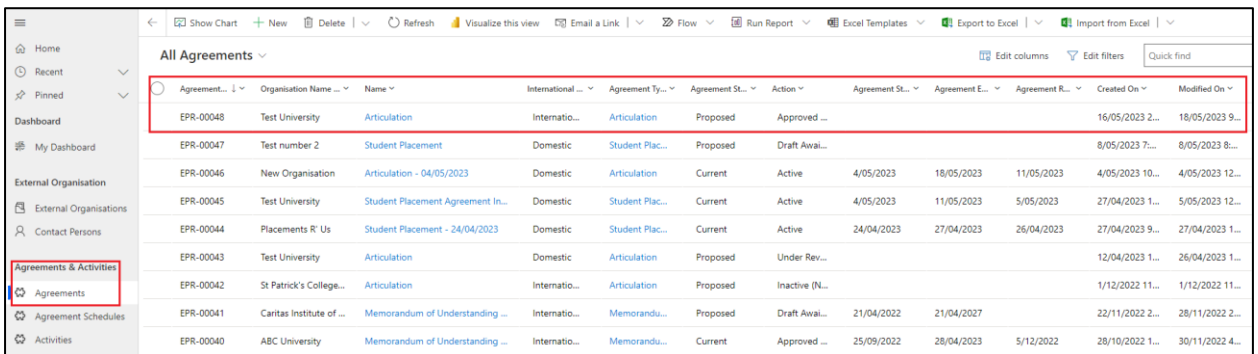


Approved Requests

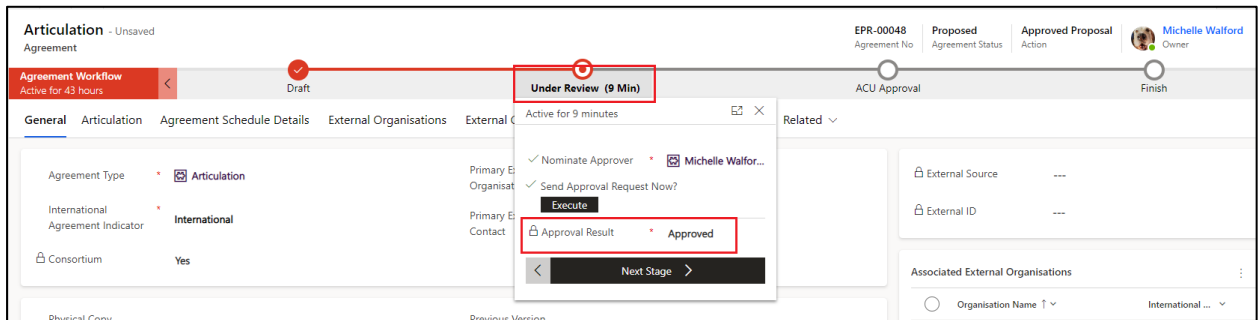
- Once the request has been approved, the owner of the record will receive an email notification. Click on the link to open the agreement:



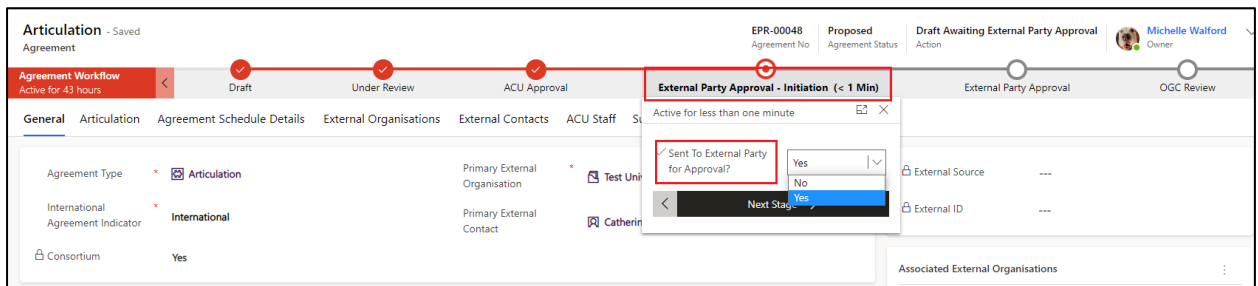
Note: You can go directly to the EPR to access the agreement. Open the EPR, navigate to **Agreements and Activities**, click **Agreements** and search for your agreement:



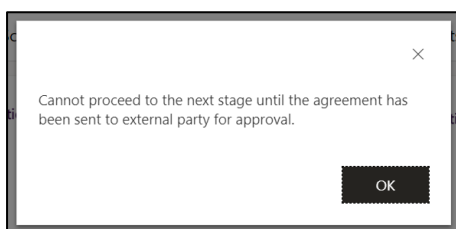
- The **Agreement** workflow, under the **Under Review** dropdown, the **Approval Result** field has updated to **Approved**, click **Next Stage** >:



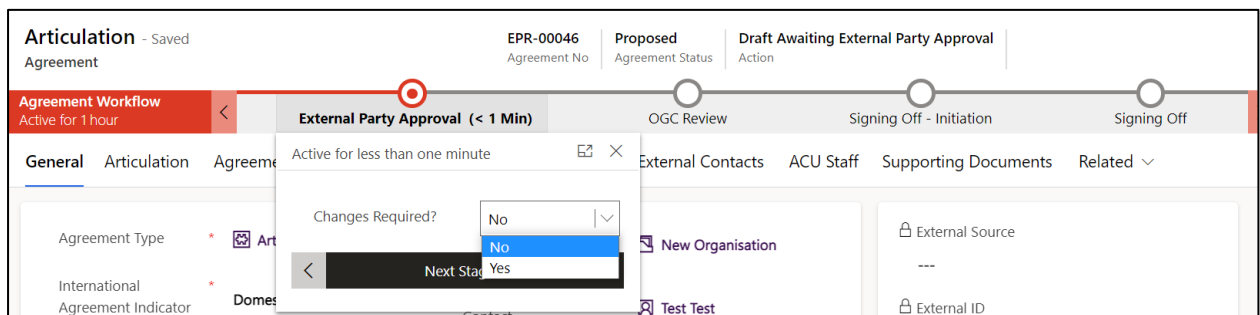
- Follow the above steps for the second level approval in the **ACU Approval** dropdown. Once the request has been approved, click **Next Stage** >. The **External Party Approval – Initiation** dropdown will show, select **Yes** in the **Sent to External Party for Approval?** field:



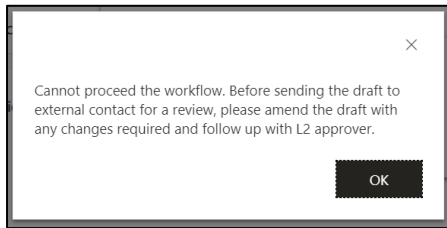
Note: If you select **No**, the agreement will no longer progress and the below window will open, click **OK**:



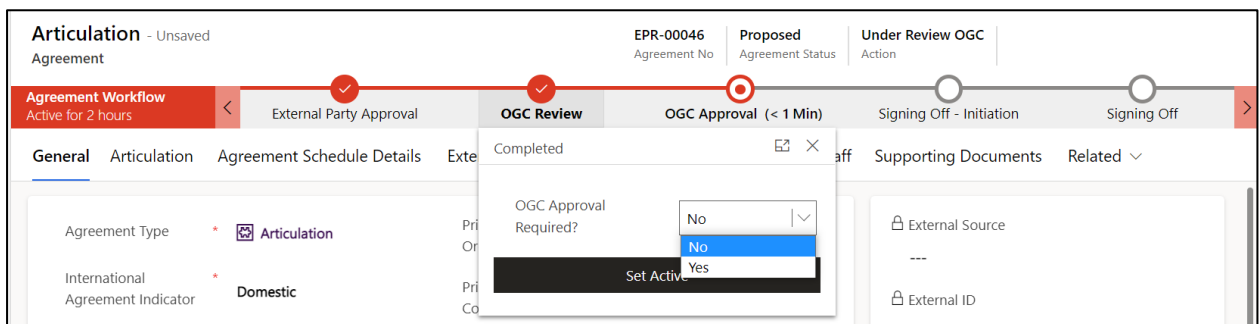
- The **External Party Approval** option asks if there are any changes required, click **No**:



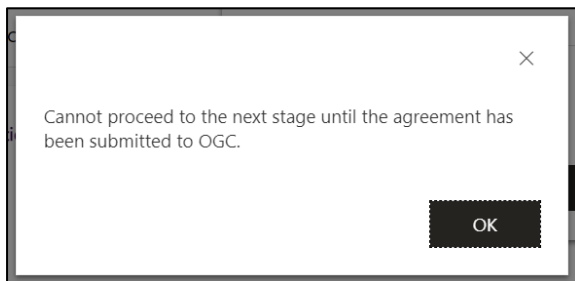
Note: If you select **Yes**, you won't be able to proceed, and the following window will open, click **OK** :



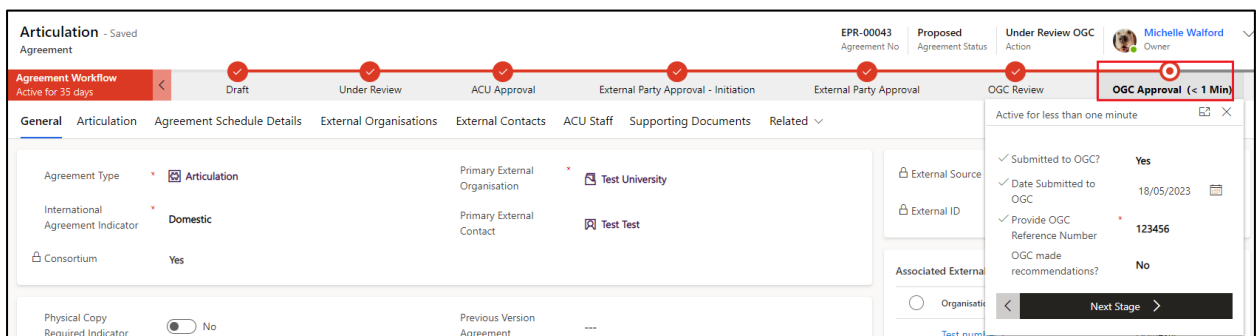
5. In the **OGC Review** dropdown select **Yes** in the field **OGC Approval is required?**:



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

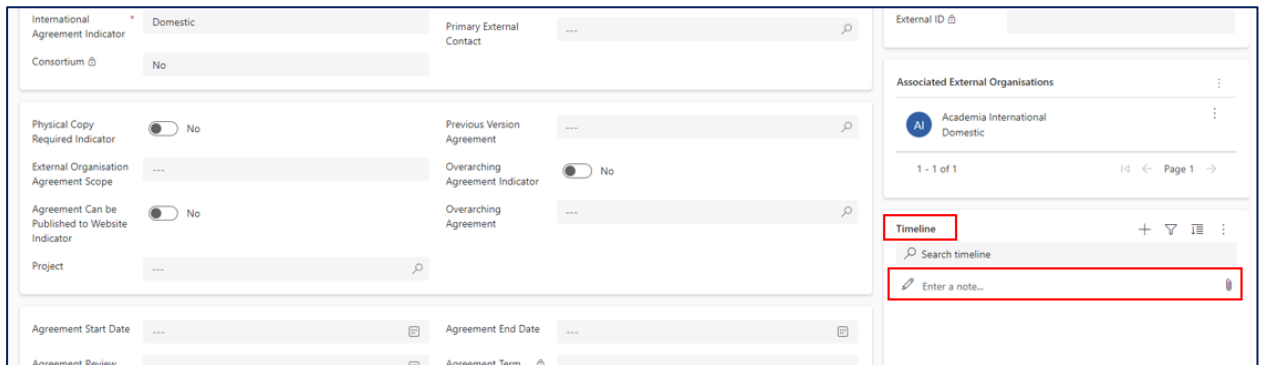


6. Complete the relevant fields in the **OGC Approval** dropdown, click **Next Stage** > :

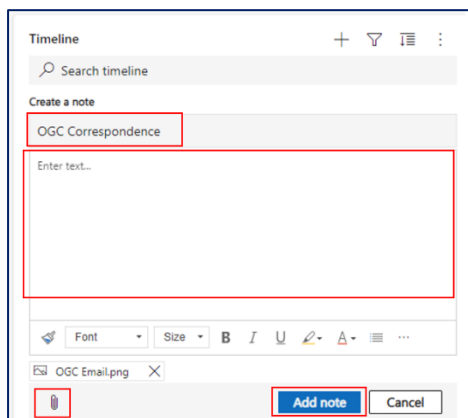


Note: OGC approval is managed outside of the EPR. Any correspondence with the OGC will need to be recorded on the **Agreement timeline**. To do this, you can either track OGC email correspondence via outlook (see tracking emails using outlook manual), or making a manual note on the timeline grid.

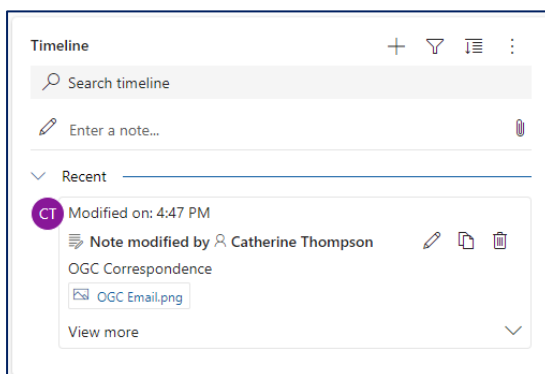
- Click **Enter a note:**



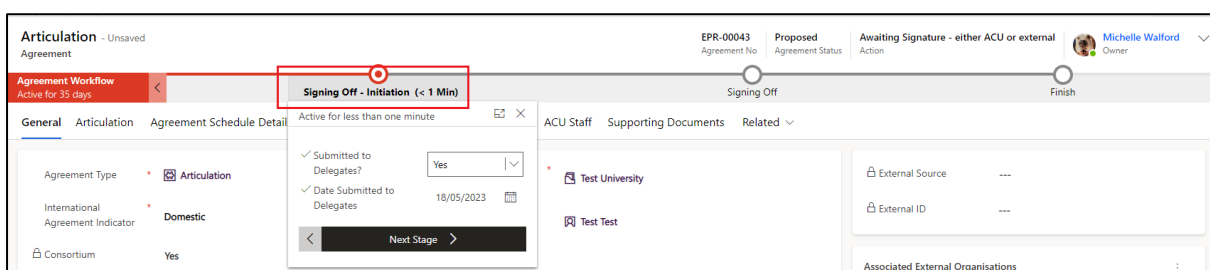
- Provide subject text, body text (if applicable) and attach document. Click add note



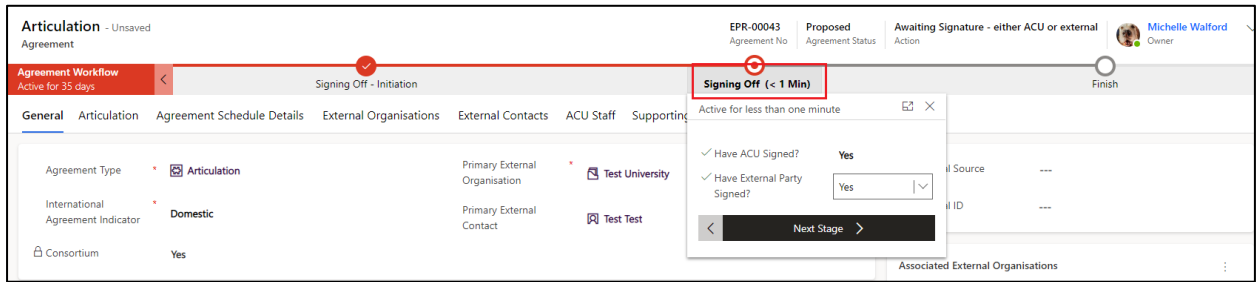
- OGC correspondence will then appear on agreement timeline



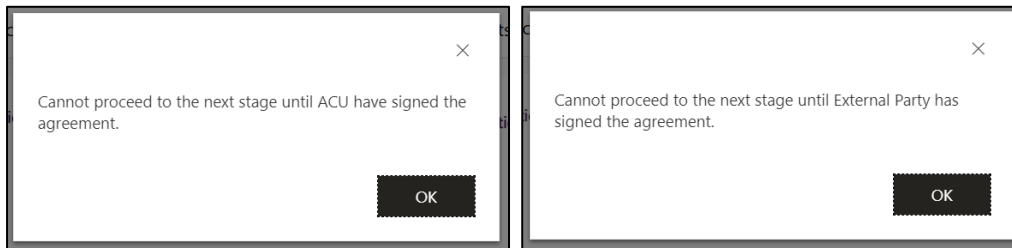
7. Complete the relevant fields in the **Signing Off – Initiation** dropdown, click **Next Stage** >:



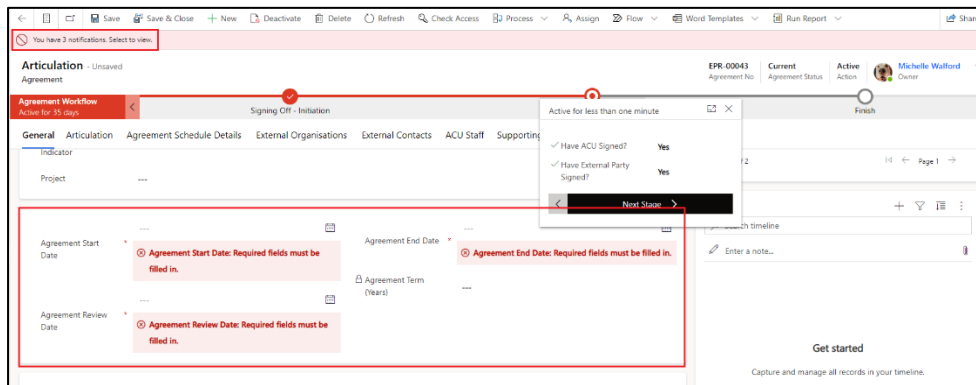
8. In the **Signing Off** dropdown select **Yes** for the fields **Have ACU Signed?** and **Have External Party Signed?**, click **Next Stage** >:



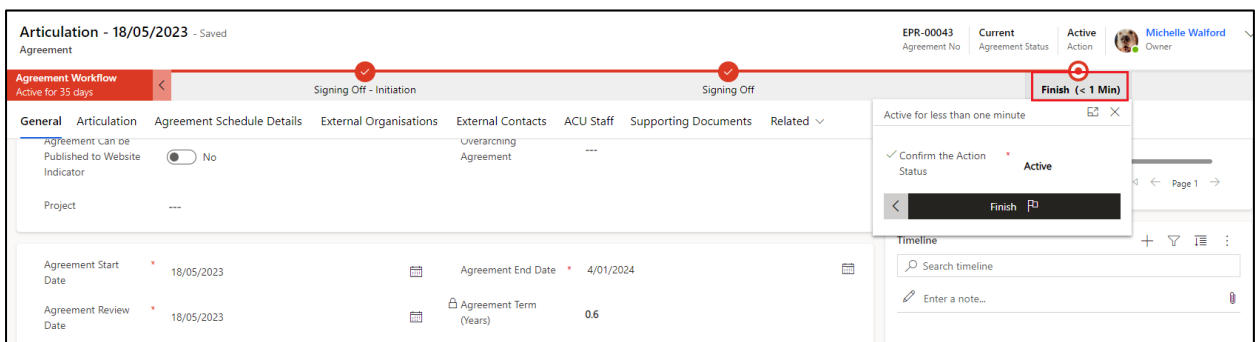
Note: If you select **No**, you will not be able to proceed and will receive the below pop-ups, click **OK** :



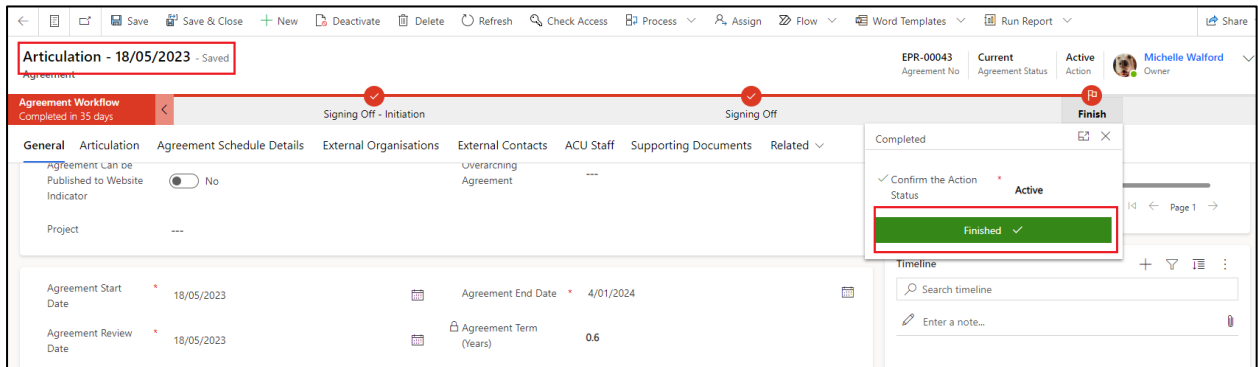
9. Once you select **Yes**, click **Next Stage** >. You will be notified that the fields **Agreement Start Date**, **Agreement End Date** and **Agreement Review Date** become required, fill the fields in and click **Next Stage** >:



10. Click **Finish** in the **Finish** dropdown:

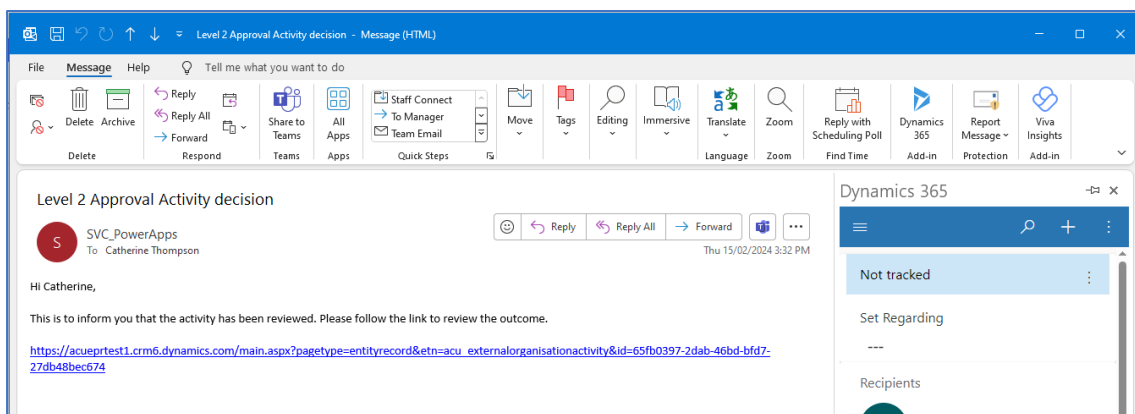


11. The **Agreement** will update and save:



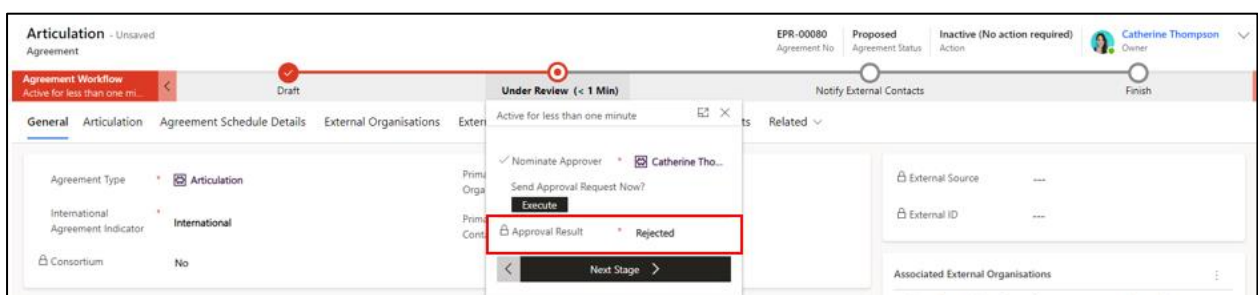
Rejected Requests

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

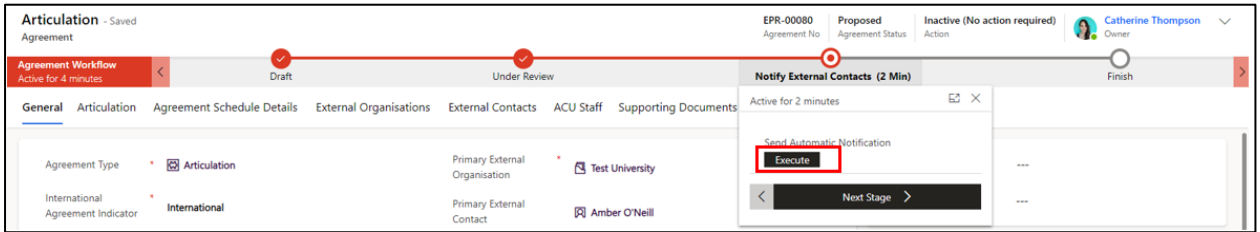


Note: You can go directly to the EPR to access the agreement. Open the EPR, navigate to **Agreements and Activities**, click **Agreements** and search for your agreement:

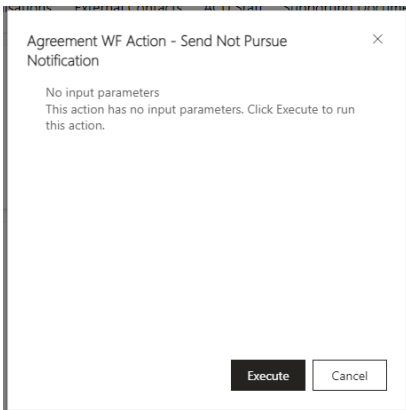
- The **Agreement** workflow, under the **Under Review** dropdown, the **Approval Result** field has updated to **Rejected**, click **Next Stage** >:



3. Under **Notify External Contacts**, click **Execute** :

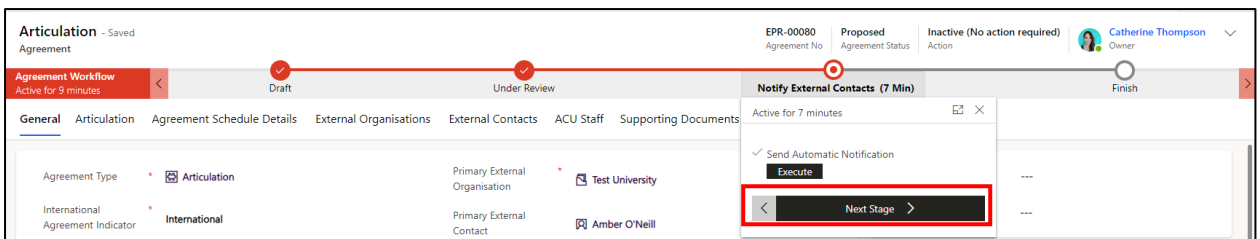


- The **Agreement WF Action – Send Not Pursue** window opens, click **Execute** to send off a notification email to the external contact that the agreement will not be pursued:

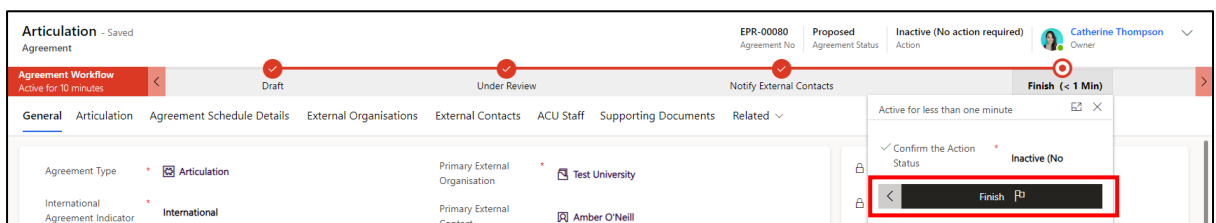


Note: Users may need to manually send an email via Outlook.

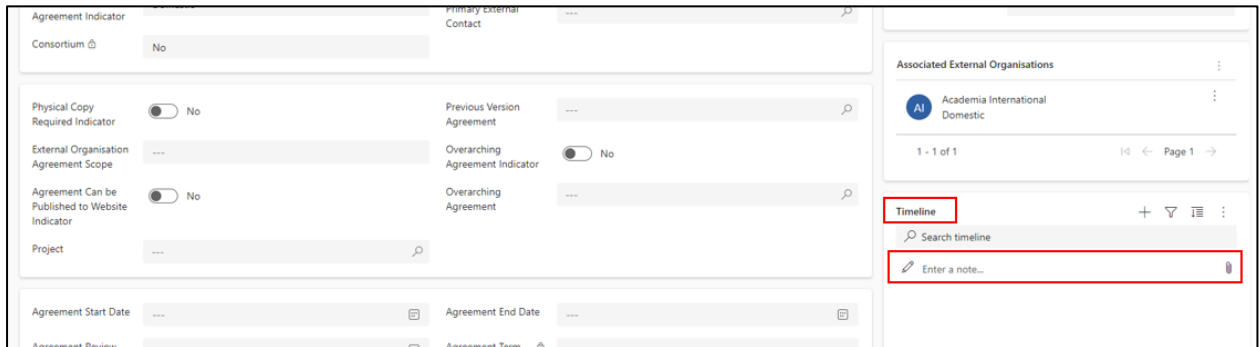
4. Click **Next Stage** > :



5. Click **Finish** in the **Finish** dropdown.



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:**



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

