Creating New Agreements

March 2024

Contents

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:
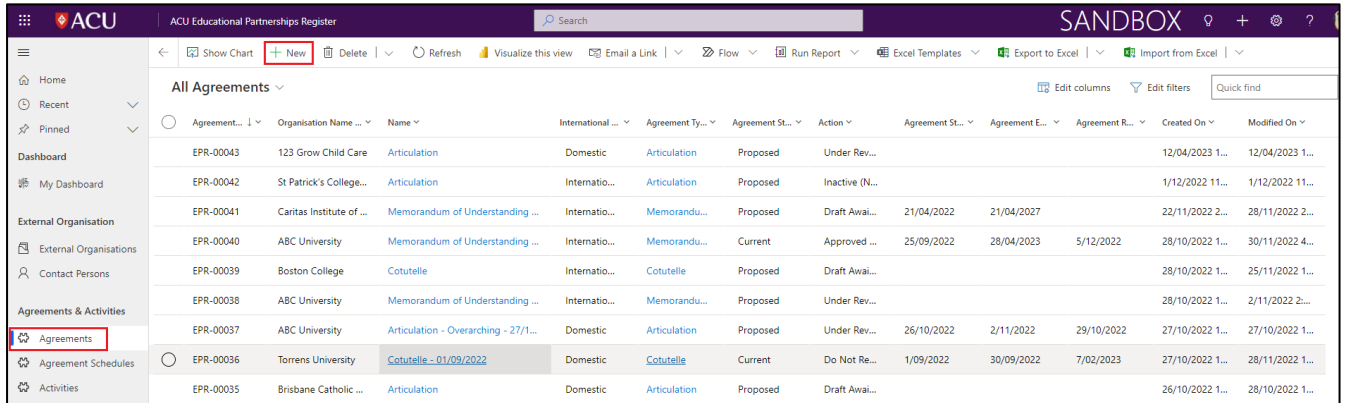
- General
- Articulation
- Agreement Schedule Details
- External Organisations

- External Contact
- ACU Staff
- Supporting Documents
- Related

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.
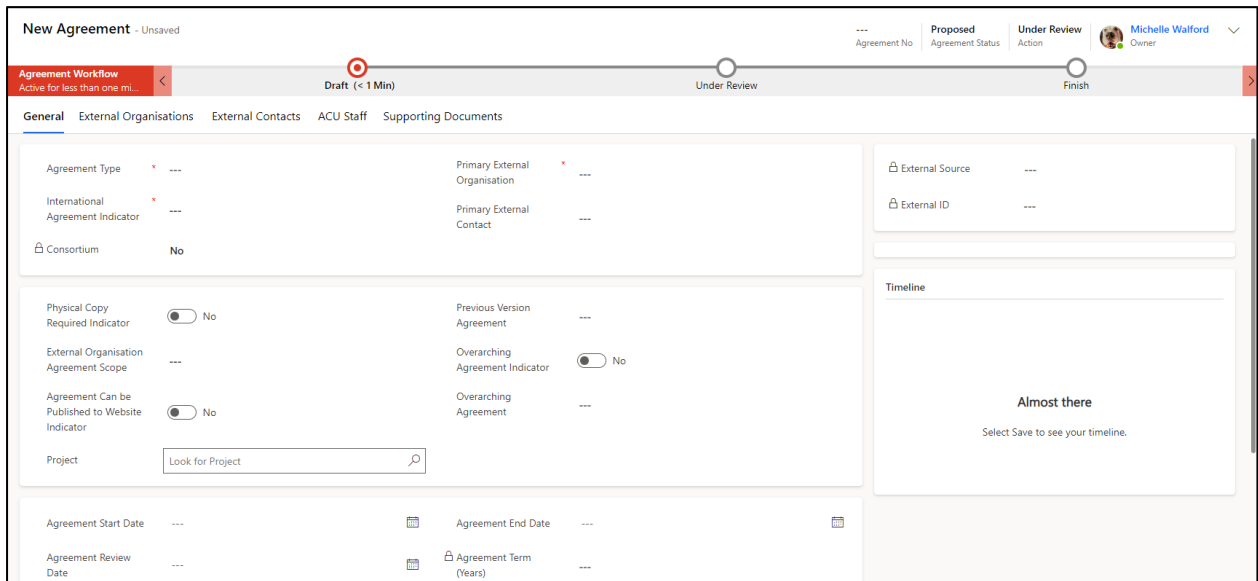
Creating a new Agreement

1. To create a new Agreement, using the left navigation bar, navigate to **Agreements**. On the top menu, click ![+ New]:

2. A **New Agreement** window opens:

3. Fill in the following required fields:

    o Agreement Type – There is a list of agreement types for you to search on, click ![search icon] to look up the applicable agreement type.

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

o Primary External Organisation – Click 🔍 to search for the Organisation:

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

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

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:
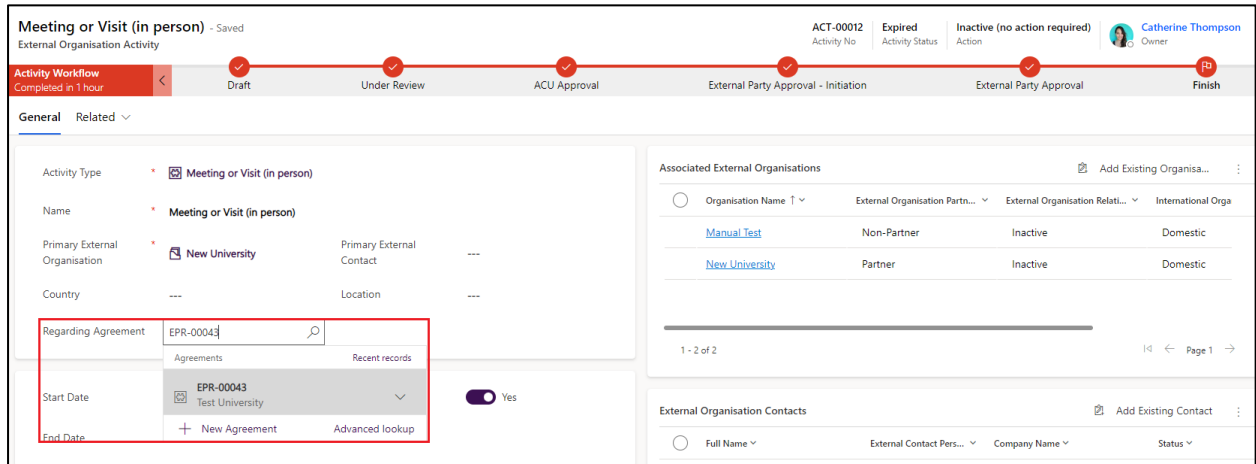
Continue completing the agreement details in the different navigation tabs.

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.

1.   To create a new **Articulation Agreement**, click ✚ New , in **Agreement Type**, search for **Articulation**. Fill in the required fields, click 🖫 Save :
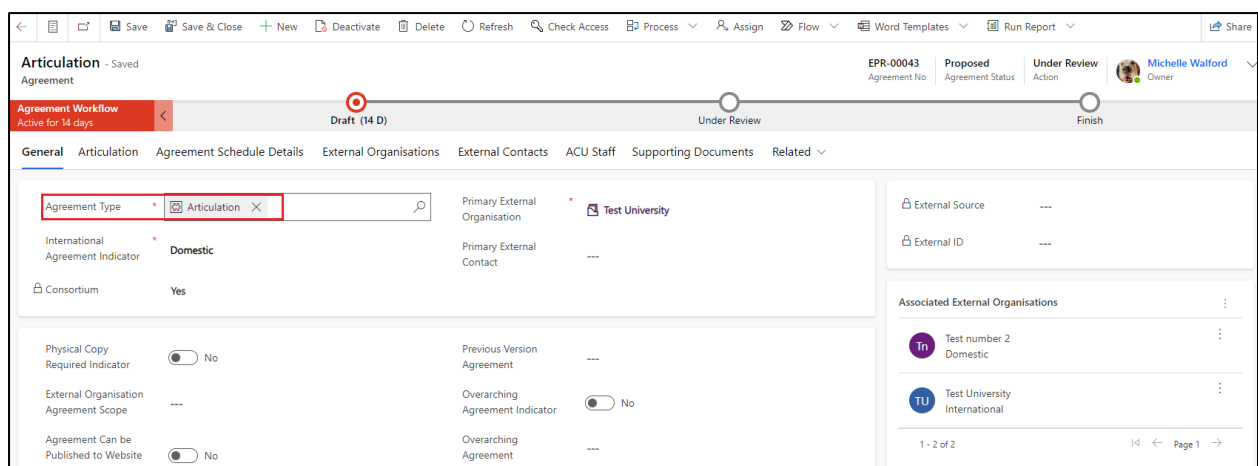
2. Once you have saved the record, the navigation tabs will update to the following:

- General
- Articulation
- Agreement Schedule Details
- External Organisations

- External Contacts
- ACU Staff
- Supporting Documents
- Related
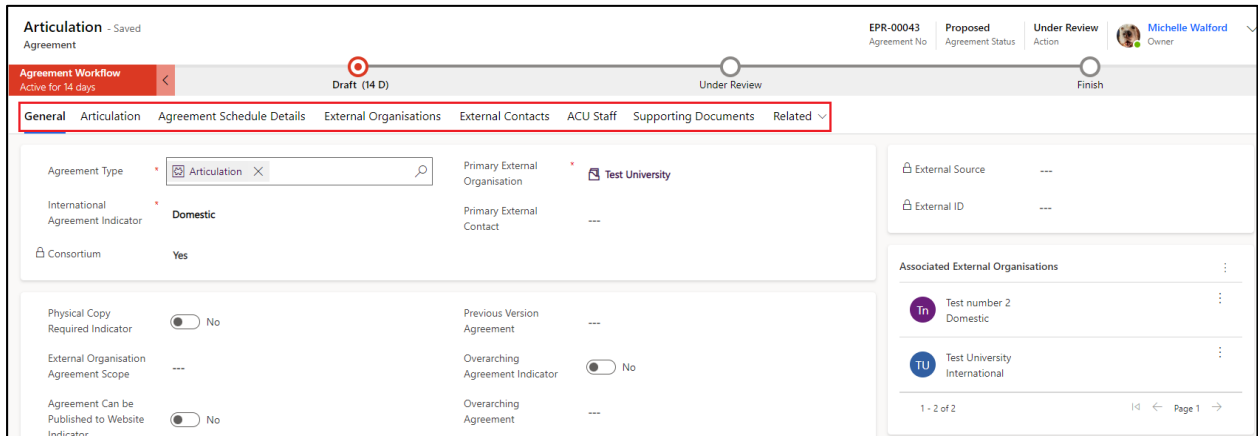
3. Click on the **Articulation** tab to fill in the appropriate information:

4. Click [New Articulation Agre...] to add a new course. The **New Articulation Agreement Course** window opens:
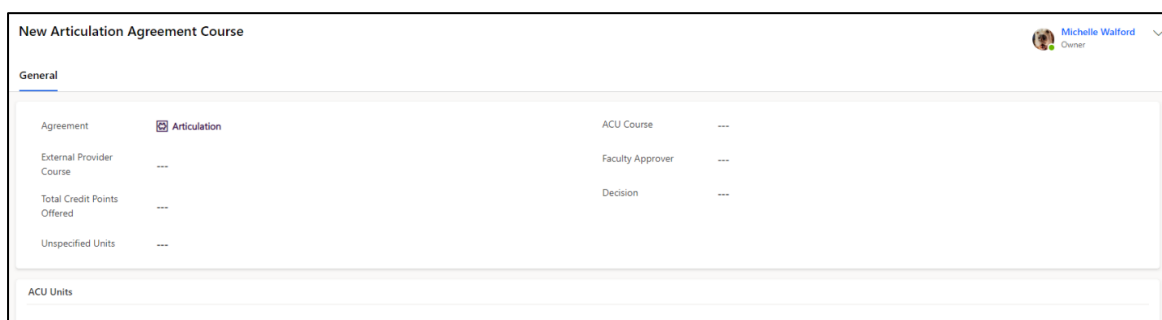
5. Fill in the **External Provider Course** field and the **ACU Course** field:

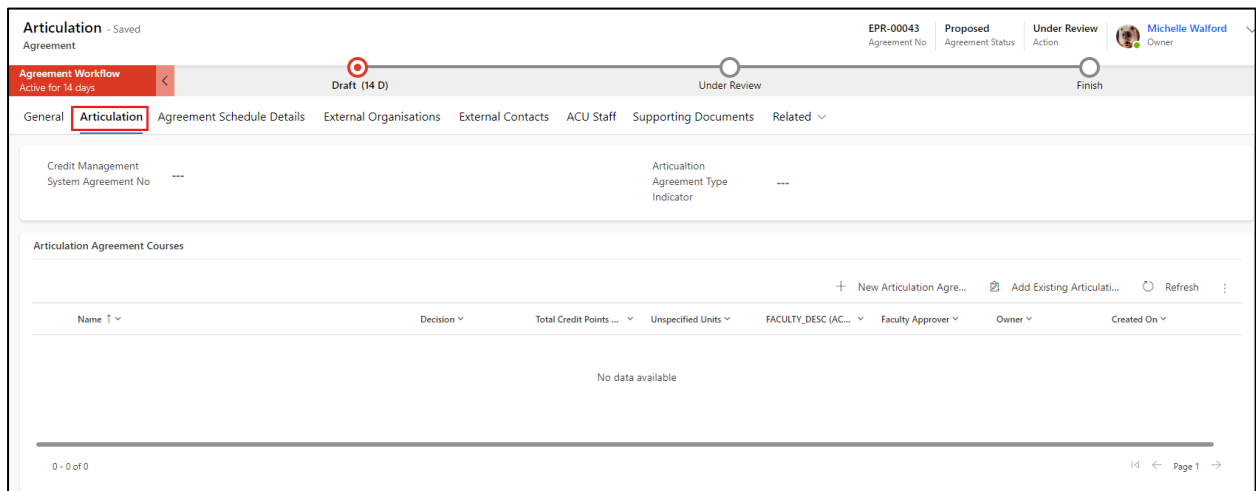6. Fill in the other appropriate fields, click 🖫 Save . The **ACU Units** section becomes available to update with the ACU unit information. Click 🖉 Add Existing ACU Unit :

7. The **Lookup Records** window opens, search for the correct ACU unit, click Add :
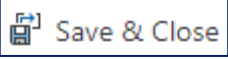
8. The course unit is visible in the **ACU Units** grid:

9. Once you have completed the relevant information click [Save & Close], this will bring you back to the main Articulation screen:
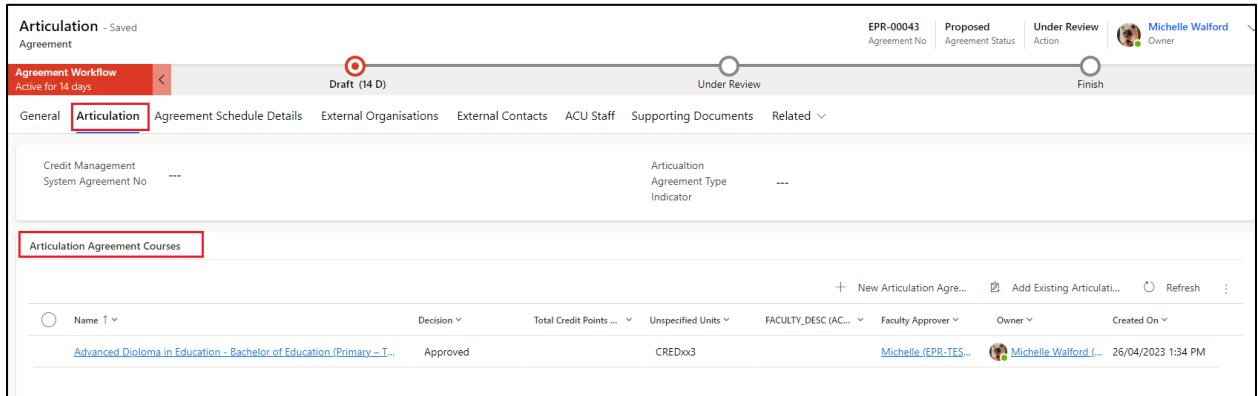
Consortium Agreements

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:
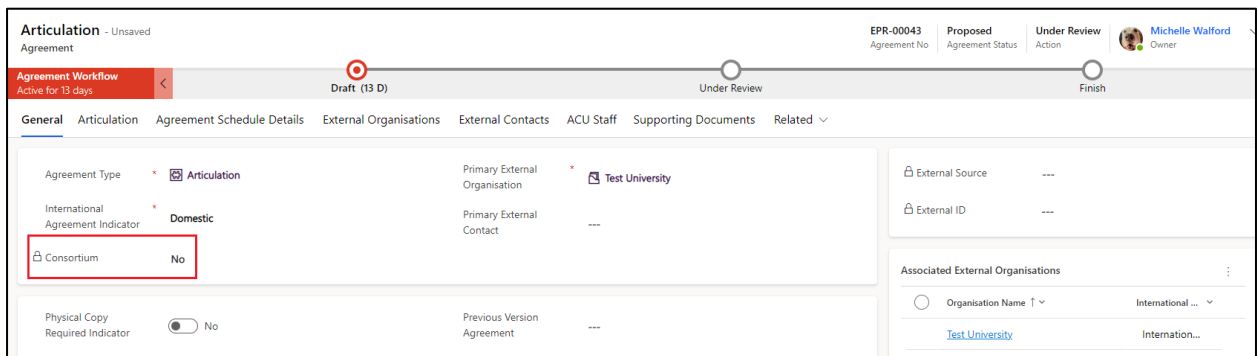
1. To add another organisation to an **Agreement**, navigate to the relevant **Agreement** and click **External Organisations**:
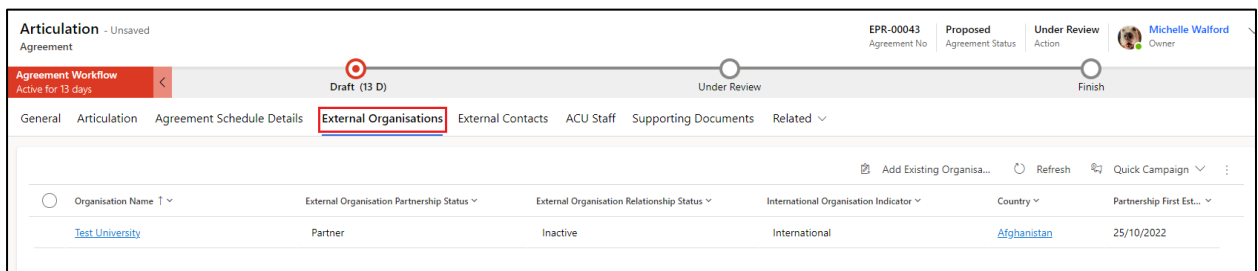
2. Click to add an additional organisation:
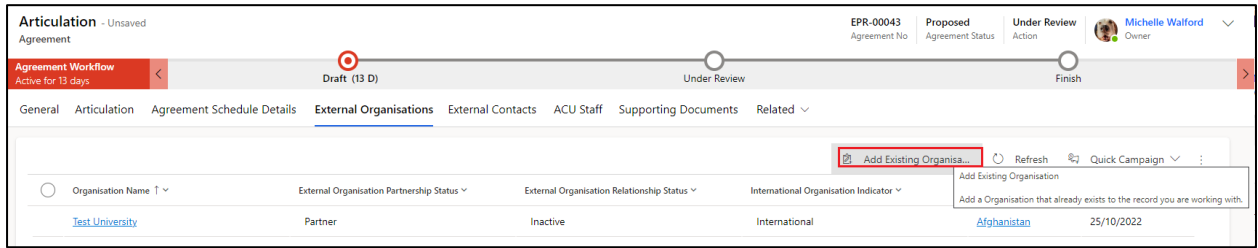
The **Lookup Records** window opens, search on the organisation:
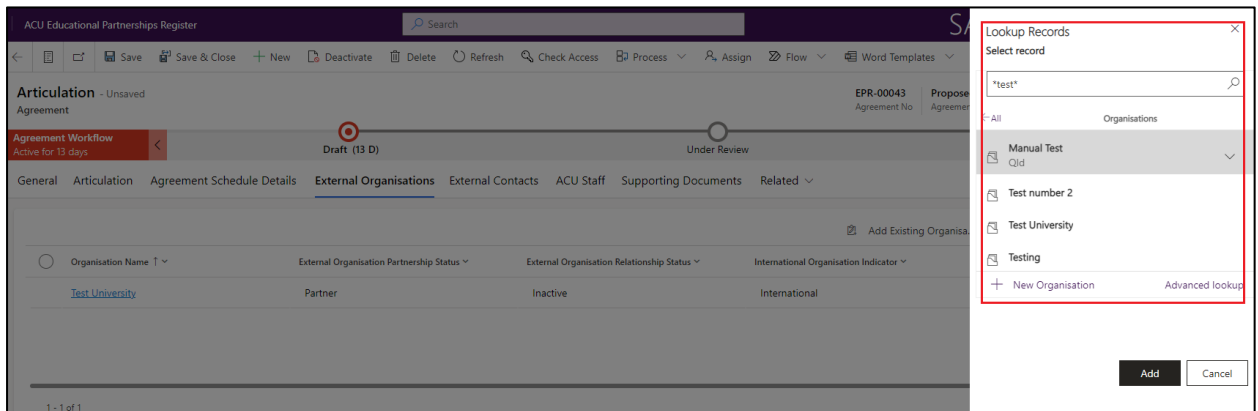
3. Select the organisation, click :
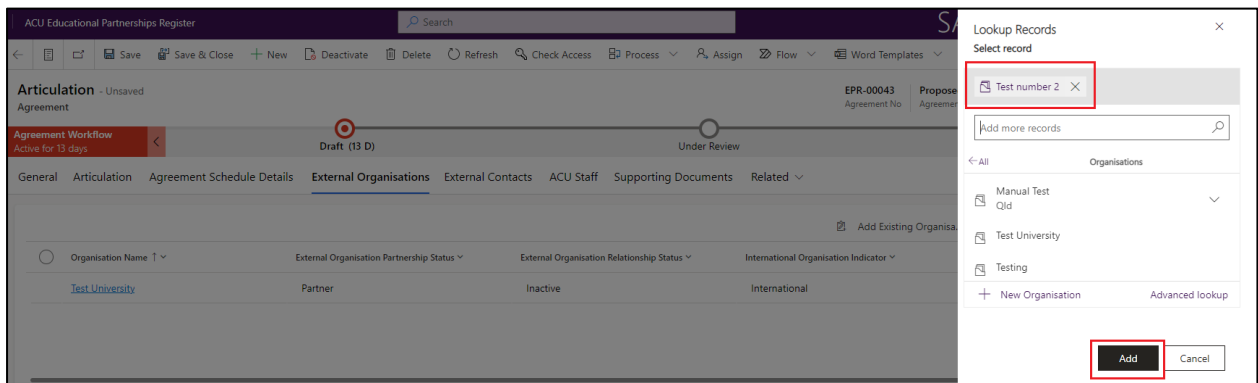
4. Refresh the grid and the second organisation will be listed:
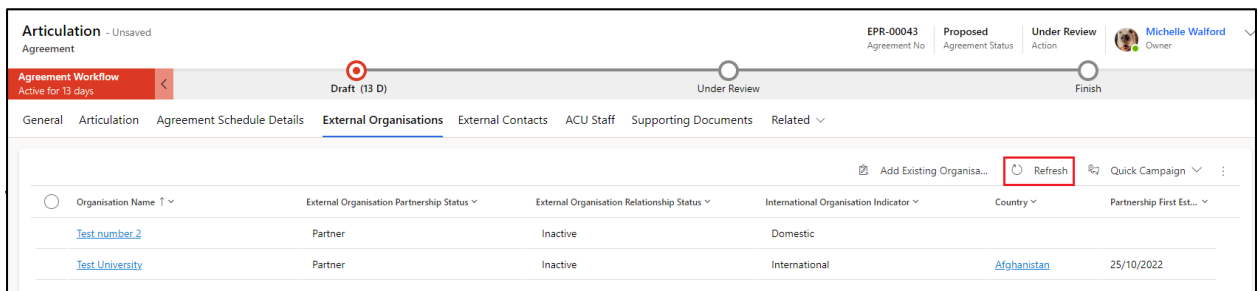
Note: If you remove an organisation the **Consortium** field will update to **No.**
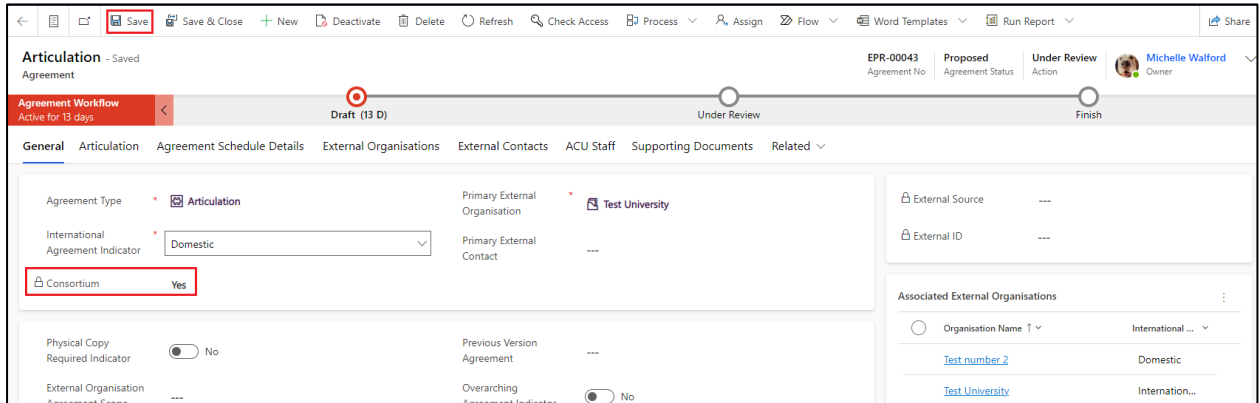
Workflow Example

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** :
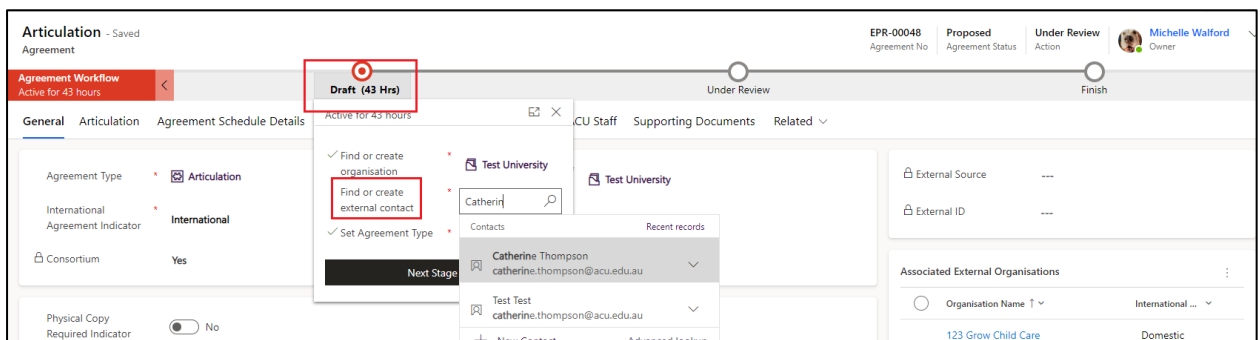
2. An **Agreement** requires 2 levels of approval. In the section **Under Review,** use the lookup to select the appropriate person in the **Nominate Approver** field. Click **Execute** :
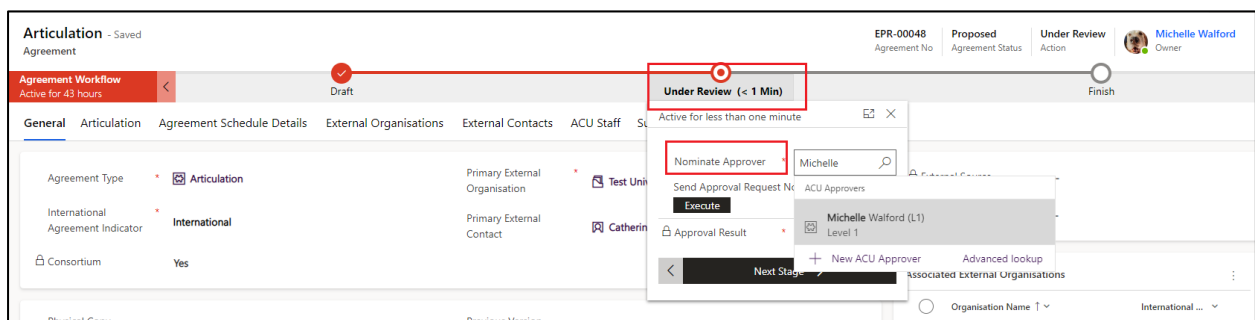
3. The **Agreement WF Action – Create L1 Approval Request** window opens, click
    Execute to send off a notification email to the approver:
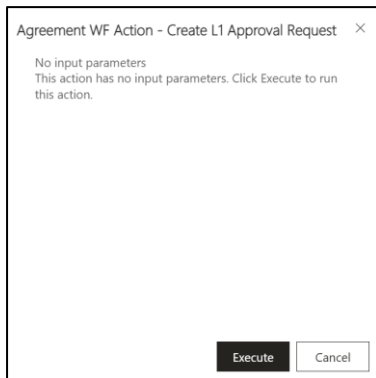
Note: You can save and close the request, once approved you can continue with the record.
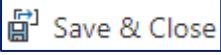
Requests for approval

1. The relevant approver will receive a notification email with a link to the approval request
    in the **EPR**:
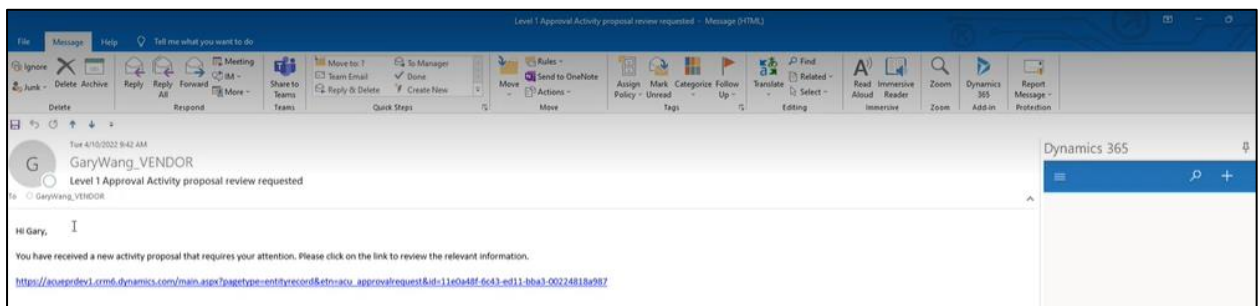
2. The approval request will show on the **Tier 1 Dashboard – My EPR Data**, under **My
    Approval Requests**:
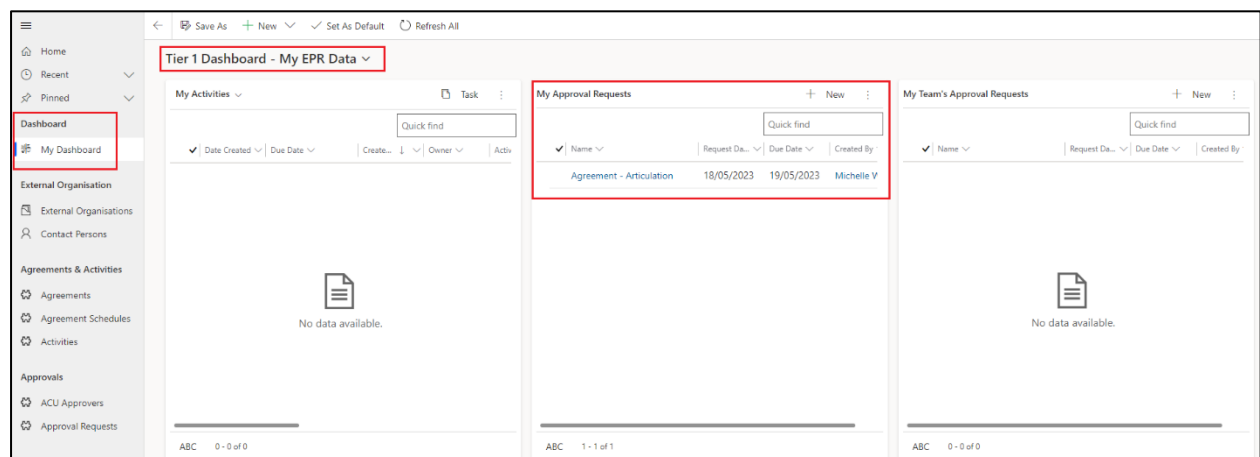
3. Click on the approval request to open it. In the **Approval Result** field select **Approved** or **Rejected**. Click ⊞ Save & Close :
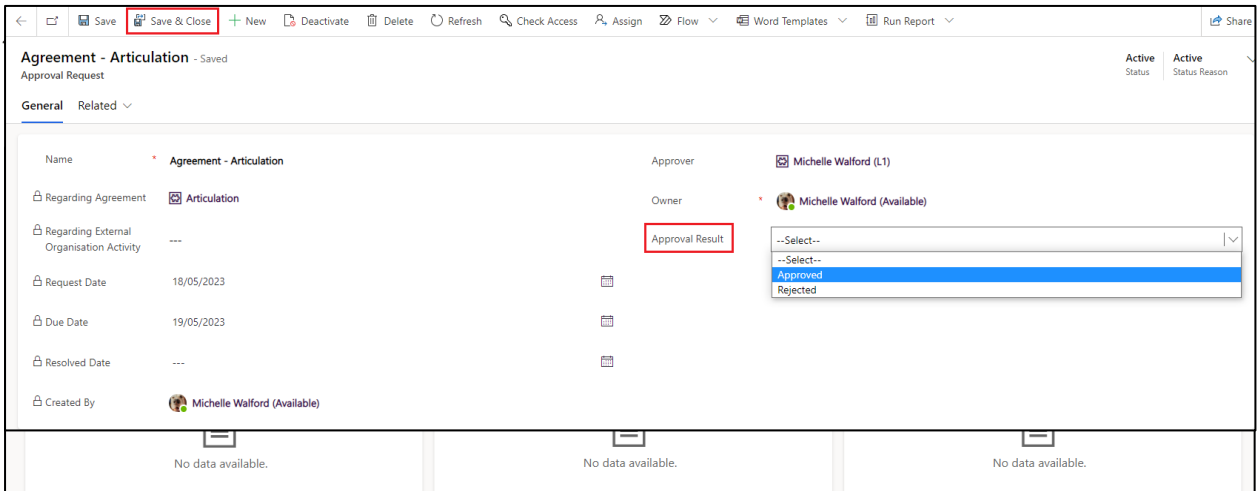
Approved Requests

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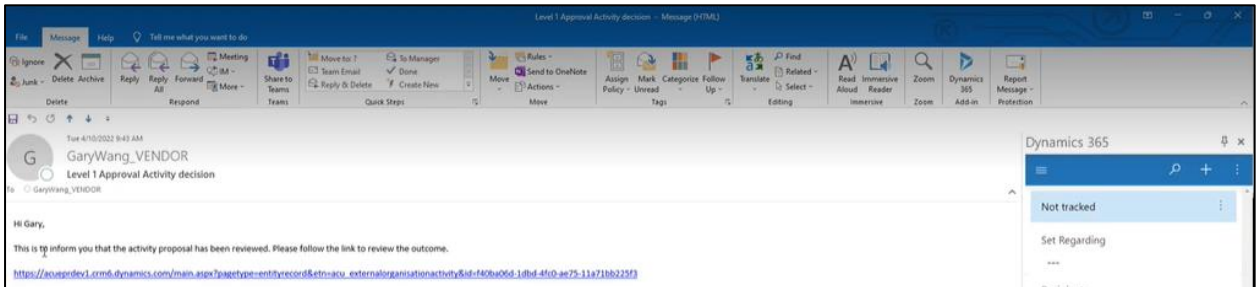
Note: You can go directly to the EPR to access the agreement. Open the EPR, navigate to **Agreements and Activities**, click **Agreements** and search for your agreement:

2. The **Agreement** workflow, under the **Under Review** dropdown, the **Approval Result** field has updated to **Approved**, click ![Next Stage]:

3. 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:
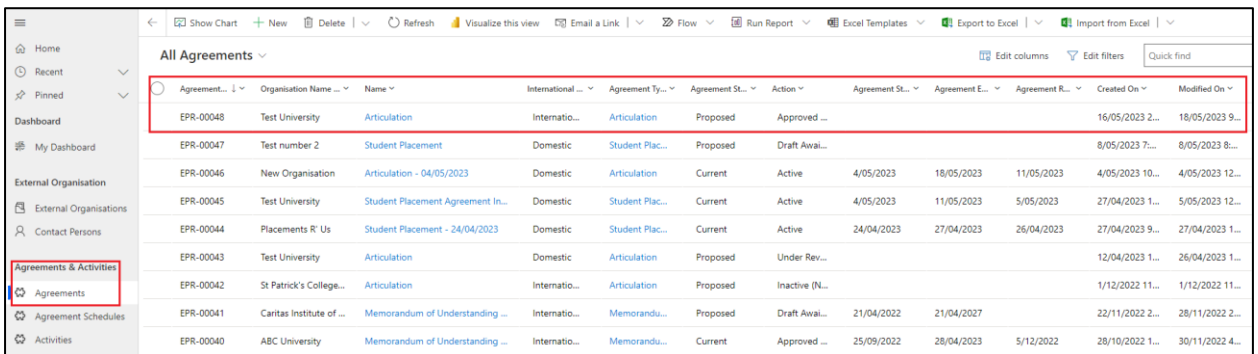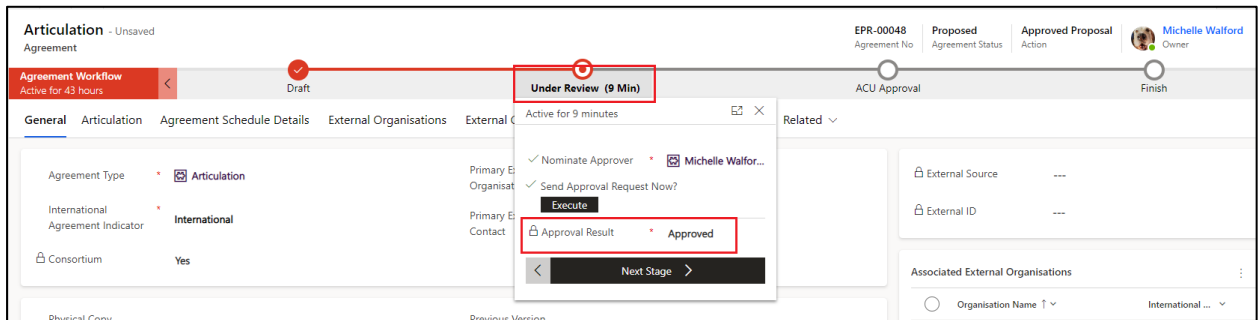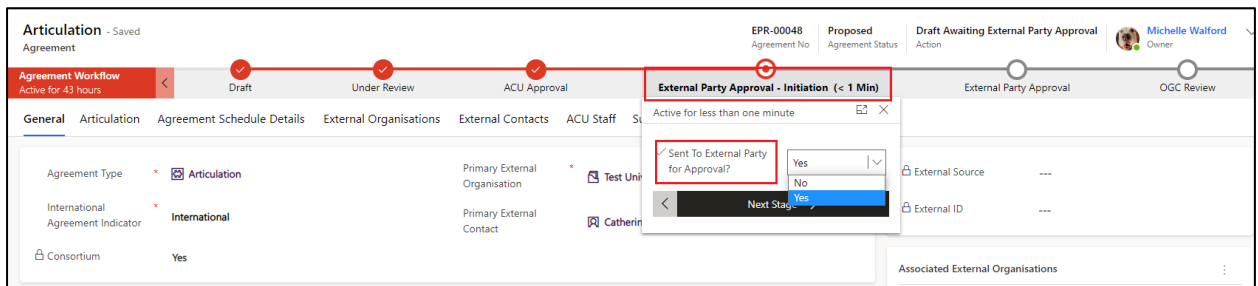

Note: If you select **No**, the agreement will no longer progress and the below window will open, click ![OK]:
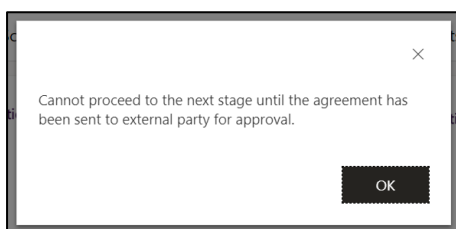
4. The **External Party Approval** option asks if there are any changes required, click **No**:
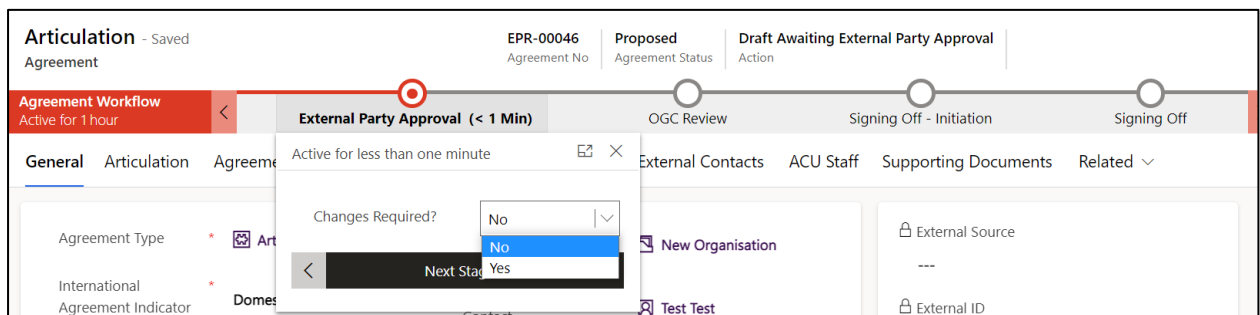
Note: If you select **Yes**, you won't be able to proceed, and the following window will open, click OK :

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

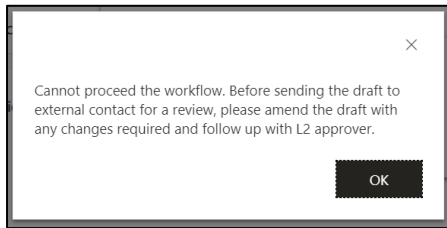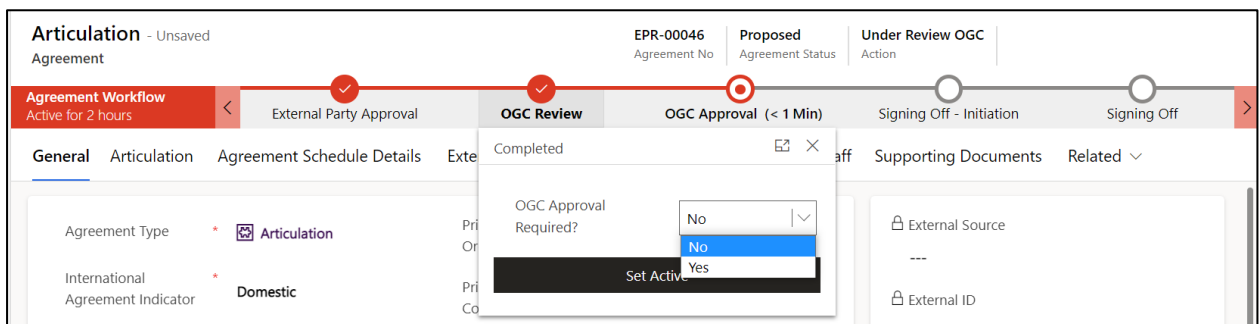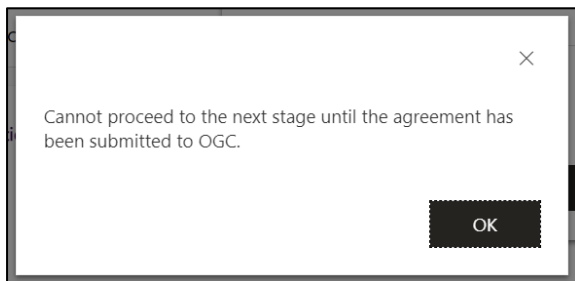**Note**: If you select **No**, you won't be able to proceed, and the following window will open, click OK :

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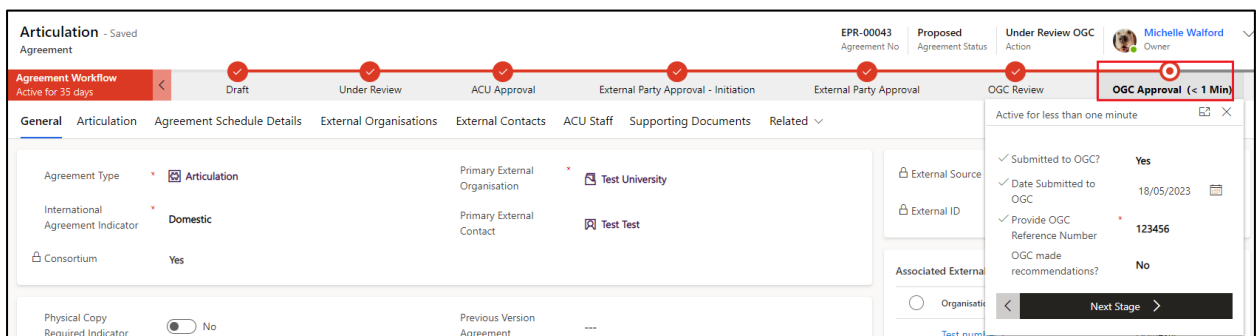
Note: OGC approval is managed outside of the EPR. Any correspondence with the OGC will need to be recorded on the **Agreement timeline**. To do this, you can either track OGC email correcpondence via outlook (see tracking emails using outlook manual), or making a manual note on the timeline grid.

- Click **Enter a note**:
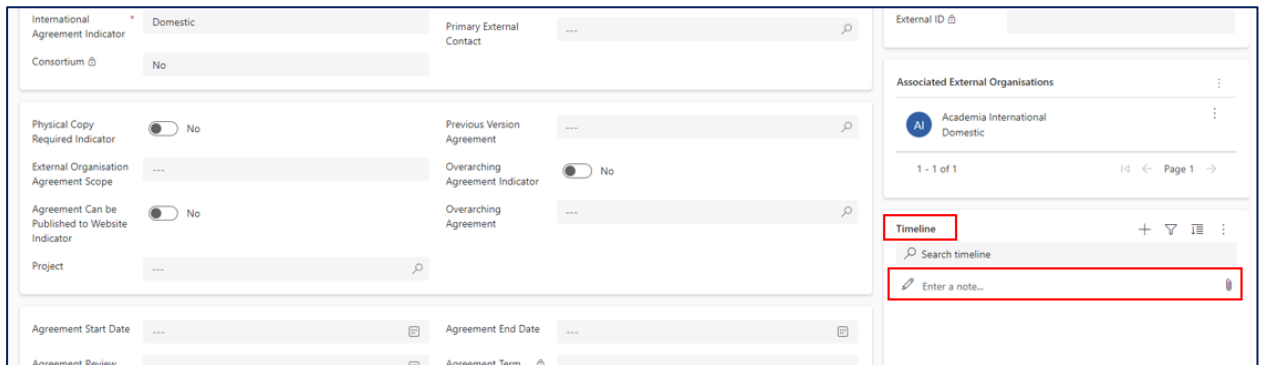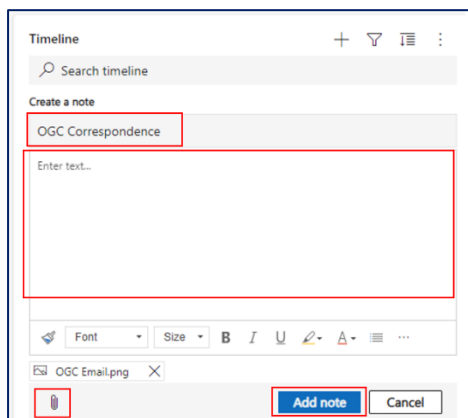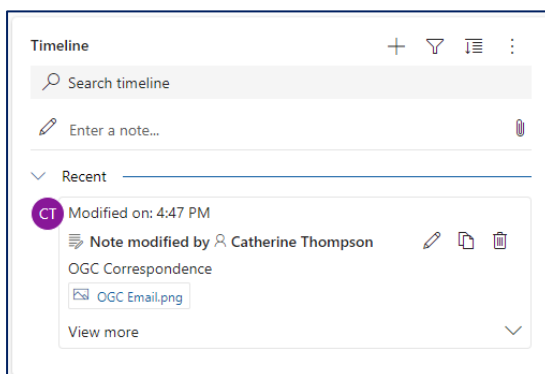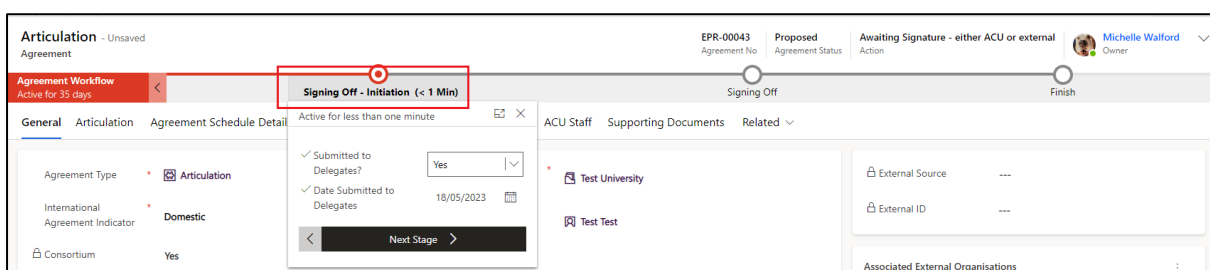

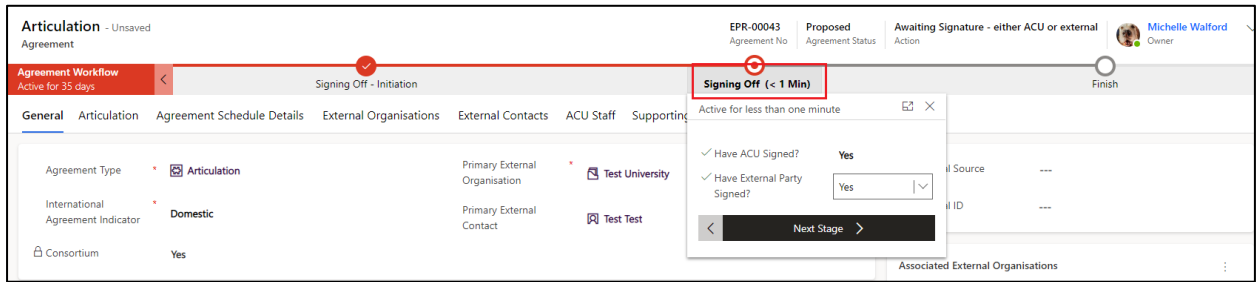- Provide subect text, body text (if applicable) and attach document. Click add note

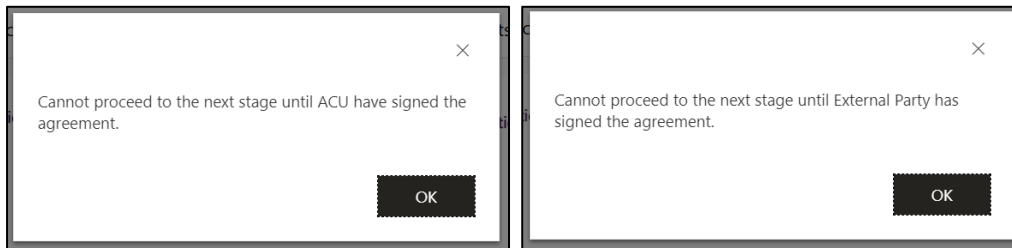- OGC correspondence will then appear on agreement timeline

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

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

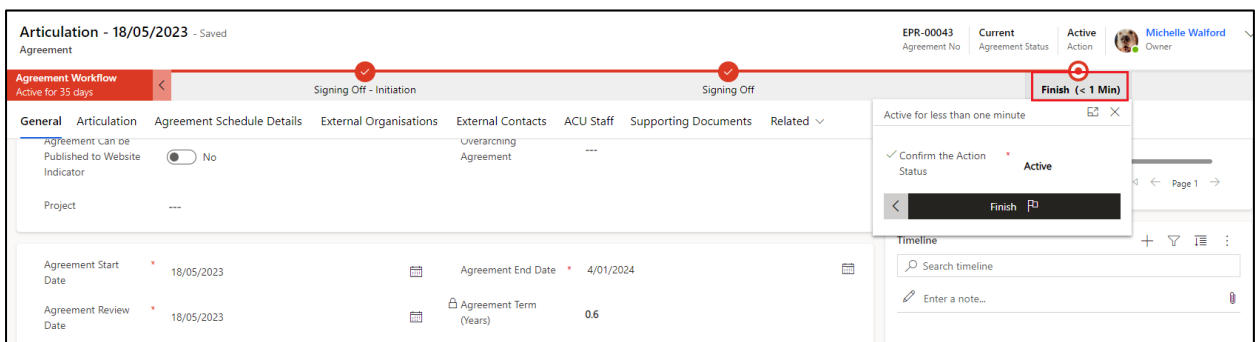**Note**: If you select **No**, you will not be able to proceed and will receive the below pop-ups, click [OK]:
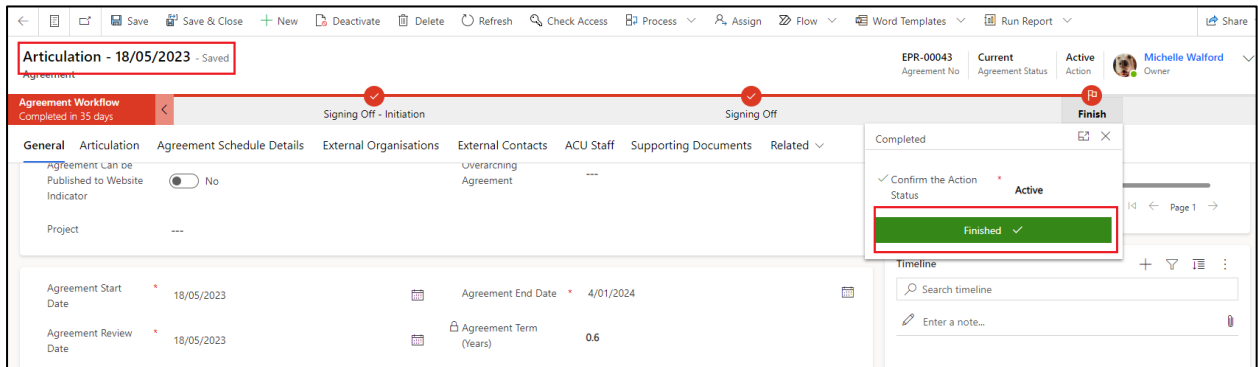

9. Once you select **Yes**, click [Next Stage ›]. You will be notified that the fields **Agreement Start Date**, **Agreement End Date** and **Agreement Review Date** become required, fill the fields in and click [Next Stage ›]:
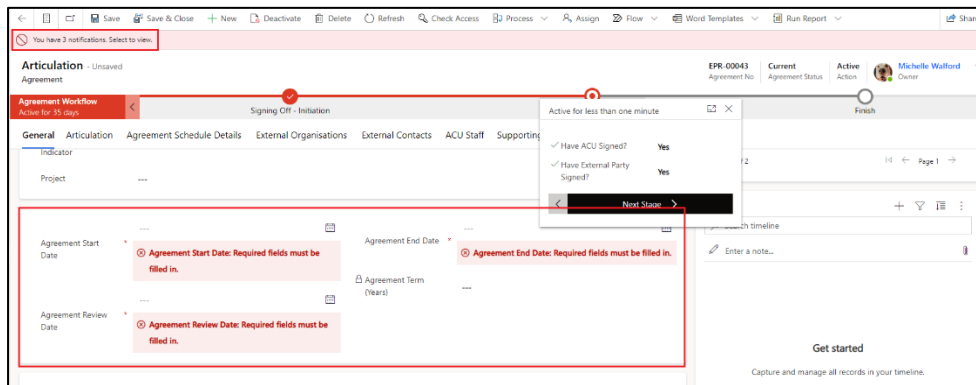
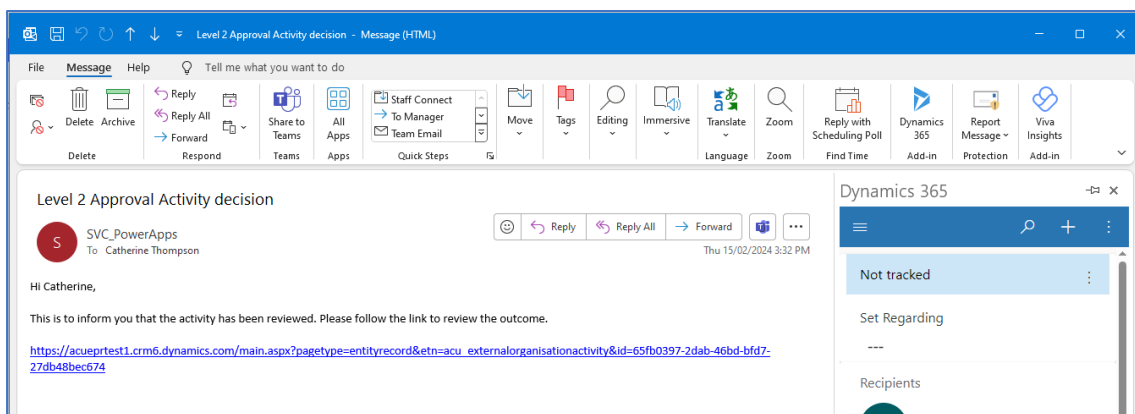10. Click [Finish ⚑] in the **Finish** dropdown:

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

Rejected Requests

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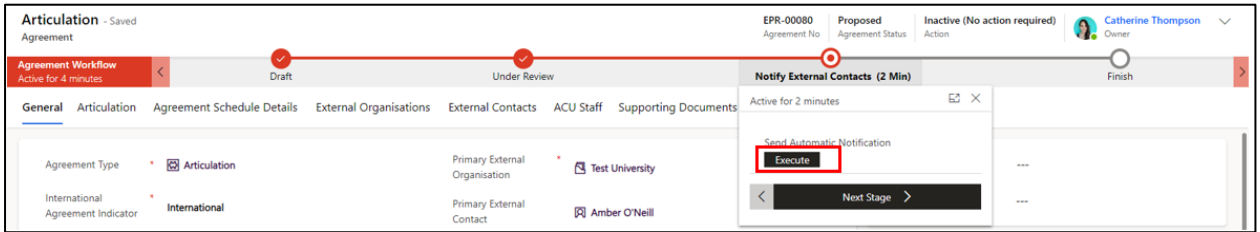

Note: You can go directly to the EPR to access the agreement. Open the EPR, navigate to **Agreements and Activities**, click **Agreements** and search for your agreement:
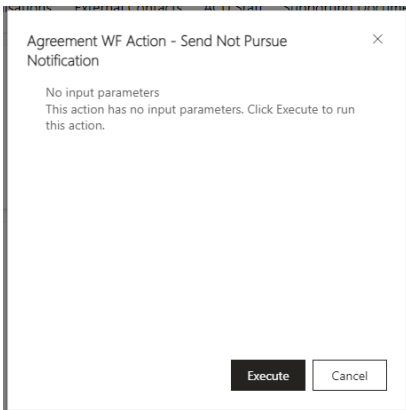
2. The **Agreement** workflow, under the **Under Review** dropdown, the **Approval Result** field has updated to **Rejected**, click Next Stage >:
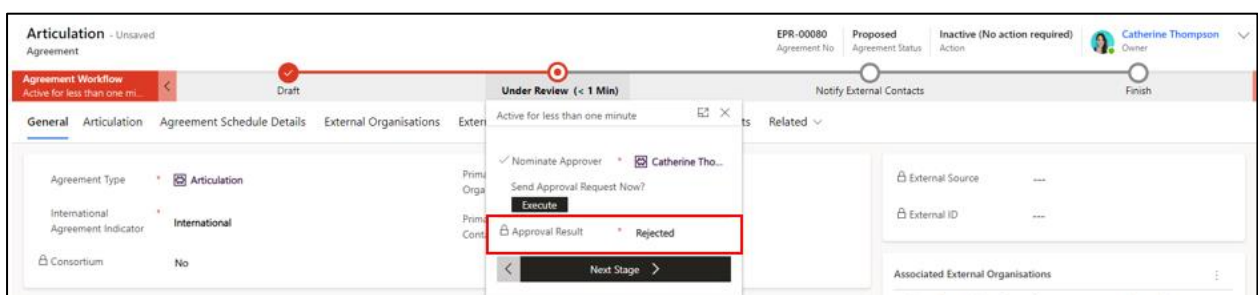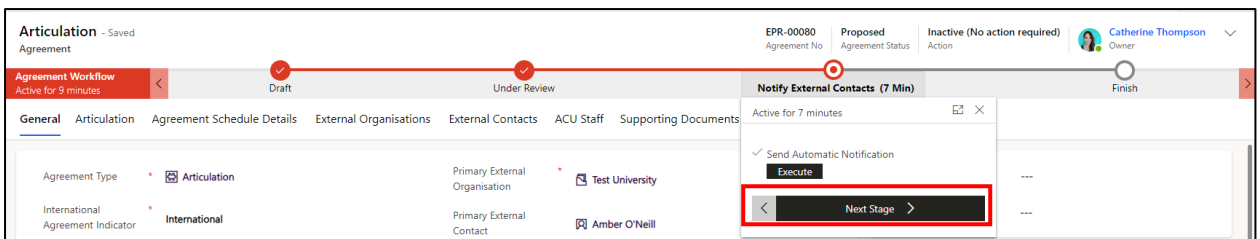
3. Under **Notify External Contacts**, click Execute :

- 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:
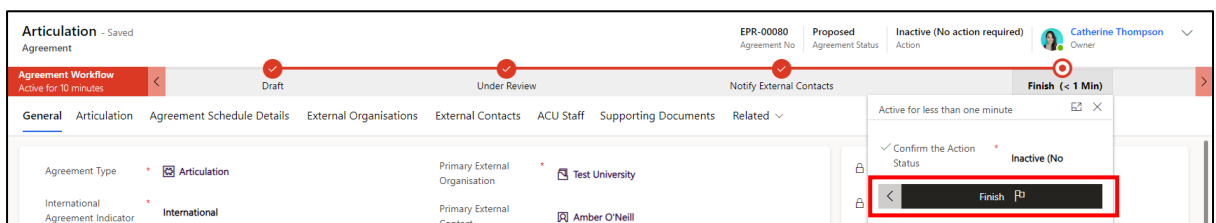

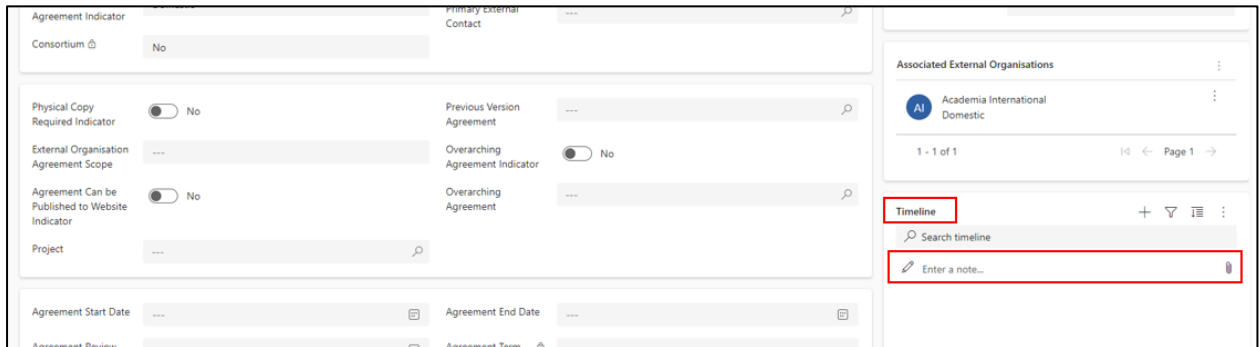**Note:** Users may need to manually send an email via Outlook.

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