ACU
AUSTRALIAN CATHOLIC UNIVERSITY

Creating New External Organisation Activity

Educational Partnerships Register (EPR) Staff Training Guide

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1. New External Organisation Activity

An **External Organisation Activity** is used to record activities or engagements that take place between ACU and an external organisation.

Activities can include meetings, events, visits, workshops and other forms of engagement that contribute to or support ACU's relationship with the organisation. Where relevant, an activity can also be linked to an agreement recorded in the EPR. Activities may take place in person or virtually.

1.1. ACTIVITY TYPES

When creating a new External Organisation Activity, select the **Activity Type** that best describes the engagement.

Some of the Activity Types currently available in the EPR include:

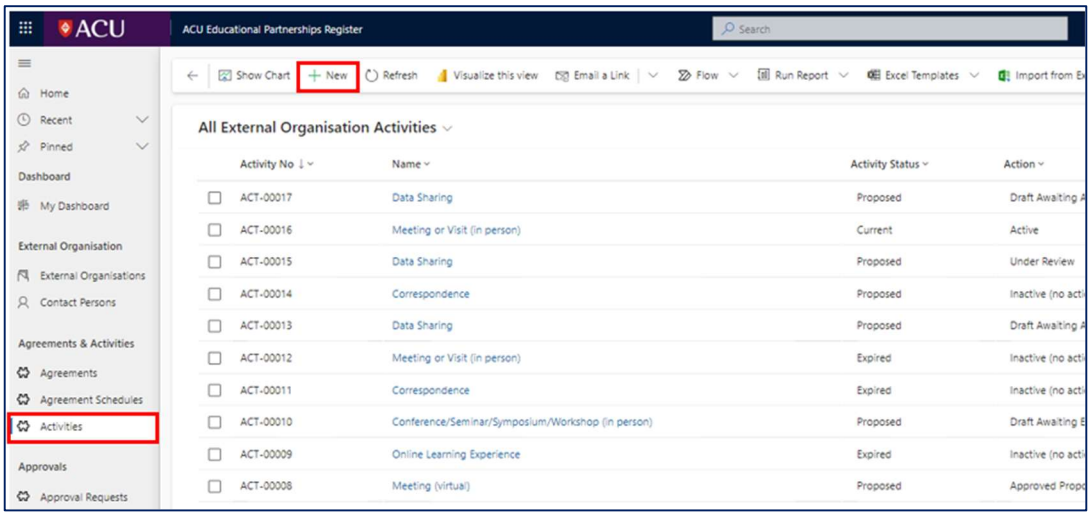
- Conference
- Correspondence
- Data Sharing
- Event
- Meeting
- Membership / Network / Alliance
- Off or On Shore Conference
- Online Learning Experience
- Research Engagements
- Seminars
- Study Tour
- Symposium
- Visit
- Workshops

***Note**: This is not a complete list of the Activity Types available in the EPR. If a suitable Activity Type is not available, contact EPR.CEI@acu.edu.au to request that the required Activity Type be created.*

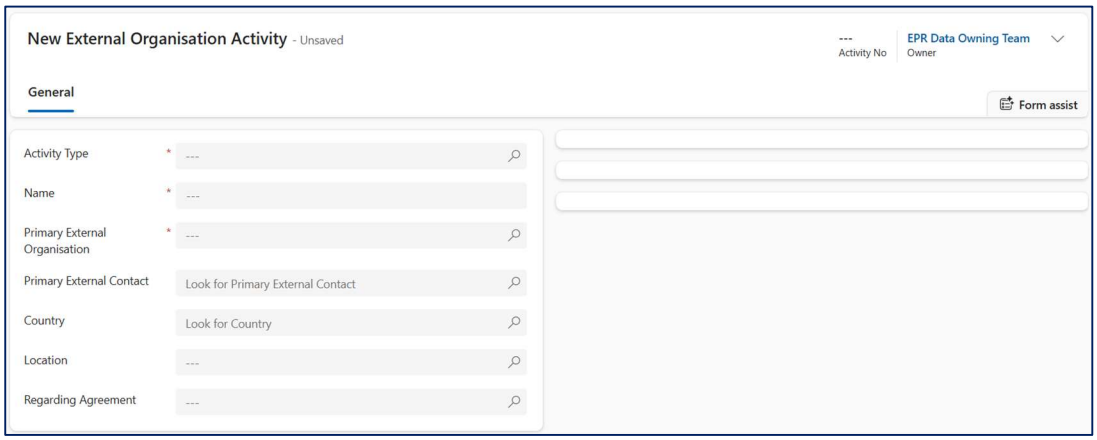
2. Creating a New External Organisation Activity

To create a new External Organisation Activity:

- Using the left-hand navigation menu, select **Activities**
- From the top menu bar, select **+New**



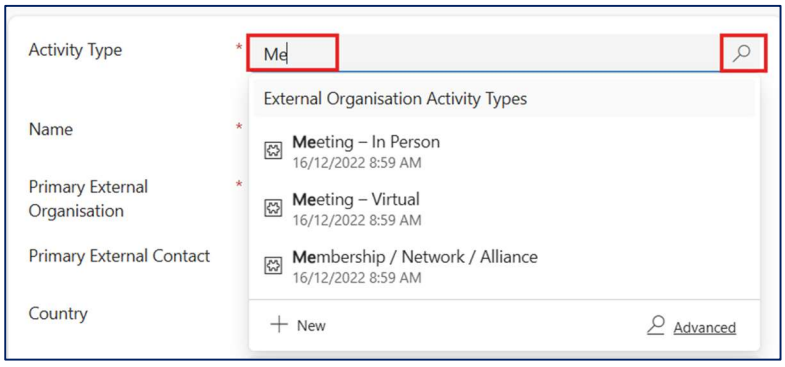
- The **New External Organisation Activity** form will open.



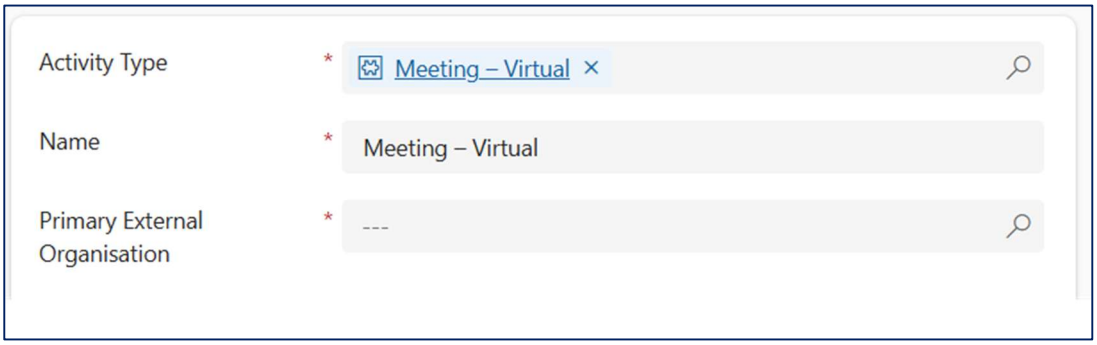
2.1. MANDATORY FIELDS

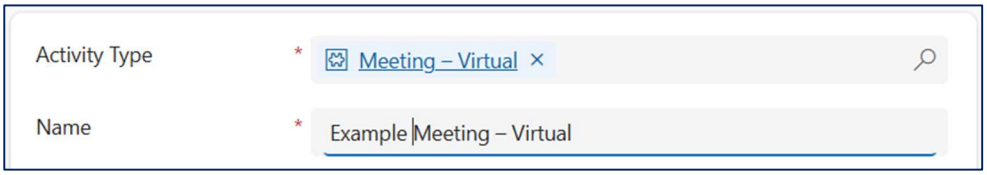
Complete the following mandatory fields:

- **Activity Type** – Select the Activity Type that best describes the engagement. Start typing in the field to search for an Activity Type or select the **lookup icon** to search and select from the available options.

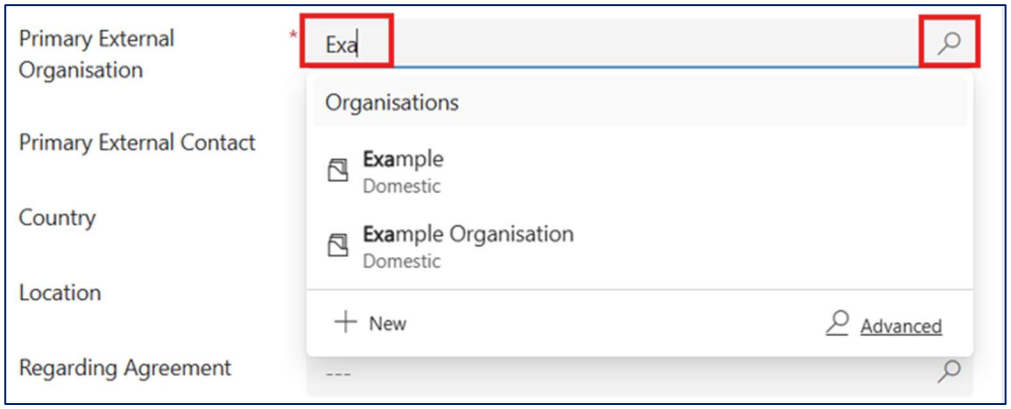


- **Name** – This Name field will automatically populate once an **Activity Type** has been selected. If required, the name can be amended by selecting the field and entering a more appropriate name for the activity.





- **Primary External Organisation** – Start typing in the field to search for and select the External Organisation associated with the activity, or select the **lookup icon** to search for and select from the available External Organisations.



2.2. ADDITIONAL ACTIVITY DETAILS

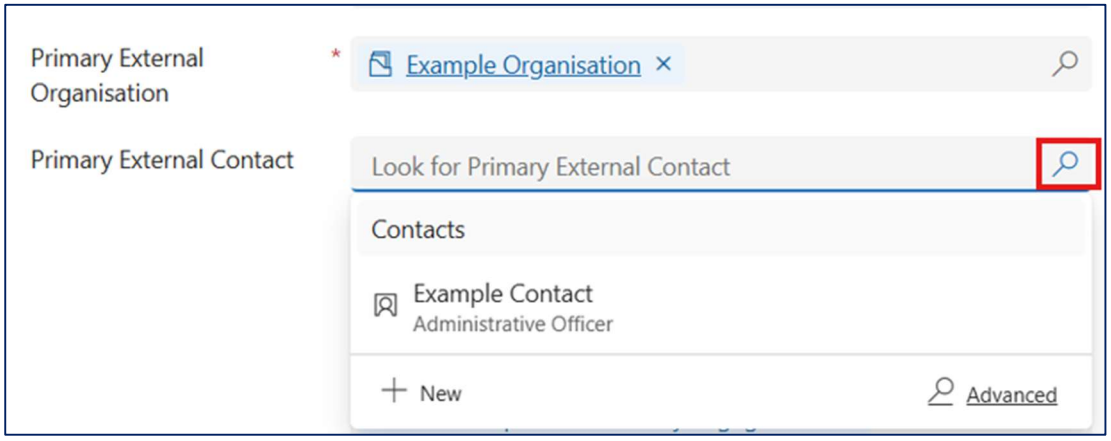
In addition to the mandatory fields, the form contains optional fields that can be completed where relevant to the activity. These fields are available when the activity is first created and can be completed before the activity record is saved.

Optional fields include:

- Primary External Contact
- Country
- Location
- Regarding Agreement
- Activity Date and Time

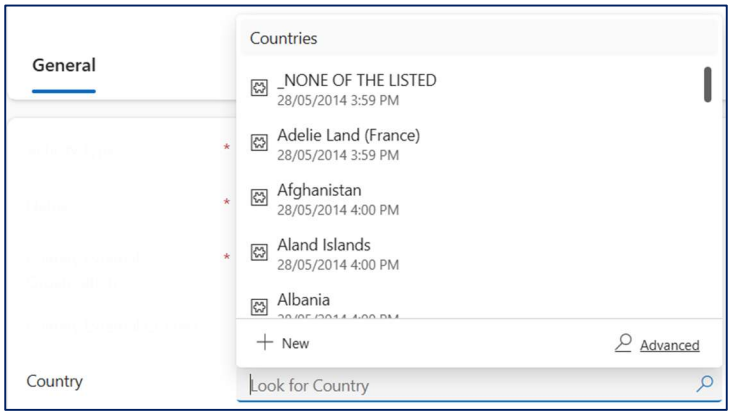
Complete any of the fields that are relevant to the activity.

- **Primary External Contact** – Start typing in the field to search for and select the relevant External Organisation Contact, or select the **lookup icon** to search for and select from the available contacts.

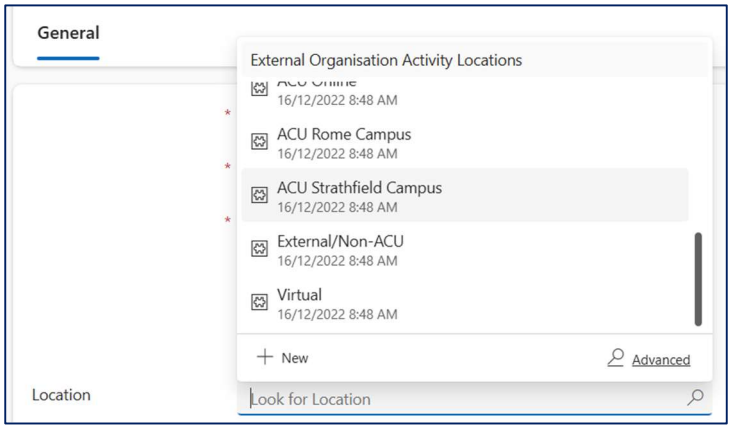


Note: *Once the* ***Primary External Organisation*** *has been selected, the available contacts will be filtered to those associated with that organisation.*

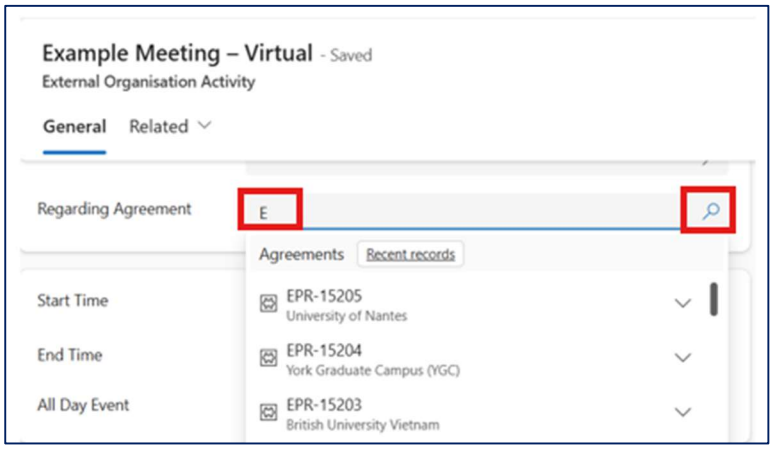
- **Country** – Select the country associated with the activity from the available list.



- **Location** – Select the location that best describes where the activity will take place. This can be:
  - an ACU campus,
  - an External/Non-ACU location
  - virtually



- **Regarding Agreement** – If the activity is associated with an agreement recorded in the EPR, the agreement can be linked using this field. Start typing the EPR Agreement Number to search for and select the relevant agreement, or select the **lookup icon** to search for and select from the available agreements.



Once selected, the agreement will be linked to the activity.



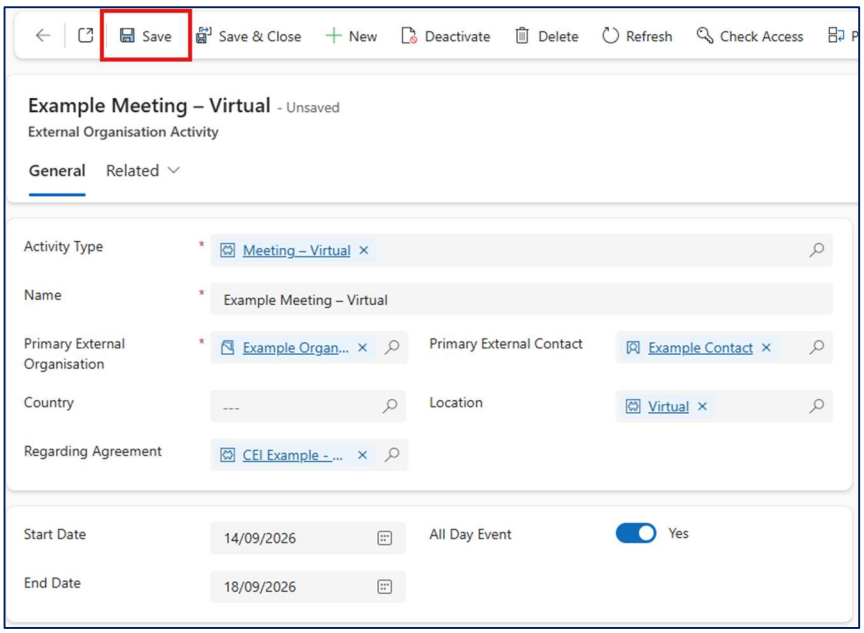
- **Activity Date and Time** – Enter the date and time of the activity.



For an activity that runs for an entire day or across multiple days, set **All Day Event** to **Yes** and enter the appropriate start and end dates.



Once the mandatory fields and any relevant optional fields have been completed, select **Save**.



3. Completing the Activity Record

Once the External Organisation Activity has been saved, the activity record is created in the EPR and additional grids become available for recording further information.

3.1. ADDITIONAL ACTIVITY INFORMATION

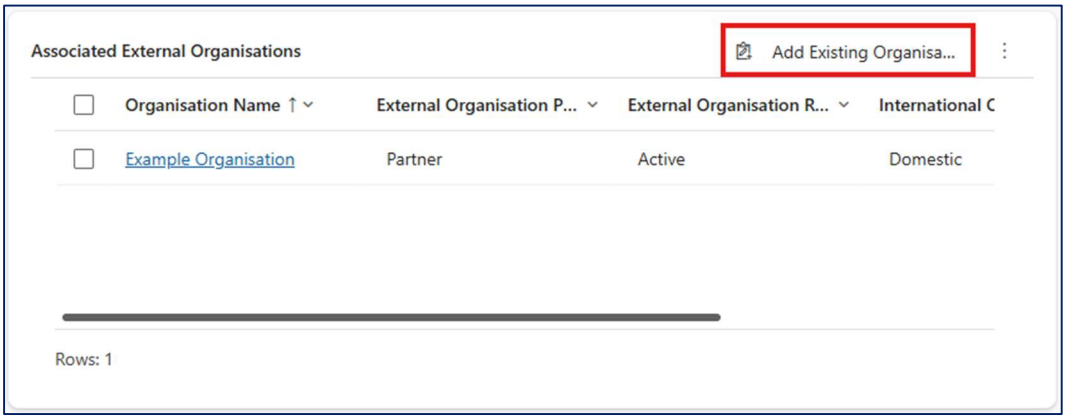
The following grids become available after the activity record has been saved:

- Associated External Organisations
- External Organisation Contacts
- ACU Staff
- Supporting Documents
- Timeline

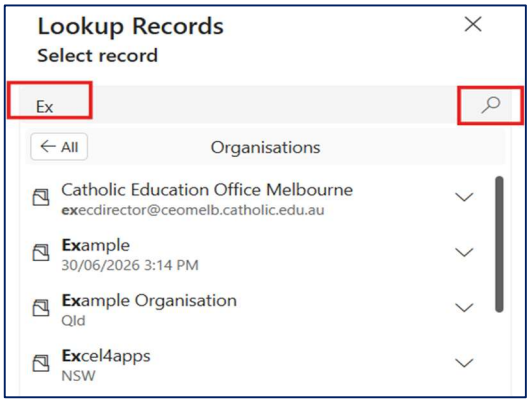
Complete any of the grids that are relevant to the activity.

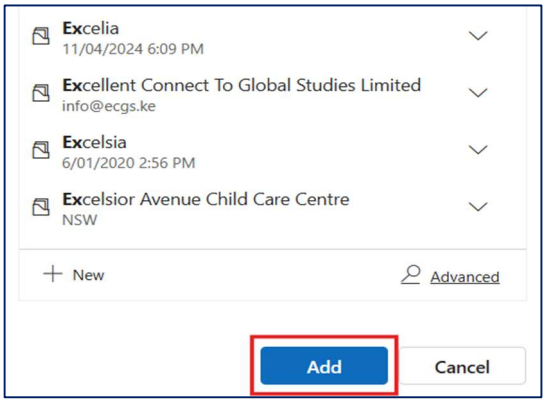
Associated External Organisations – If an activity involves more than one external organisation, additional organisations can be added to the activity. The **Primary External Organisation** selected when creating the activity remains the primary organisation.

- In the **Associated External Organisations** grid, select **Add Existing Organisation**

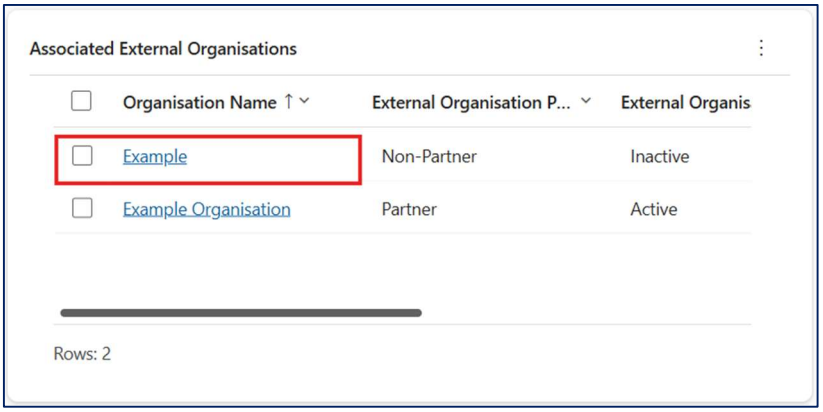


- Start typing in the field to search for and select the additional External Organisation, or select the **lookup icon** to search from the available External Organisations. Select all relevant External Organisations, then select **Add**.





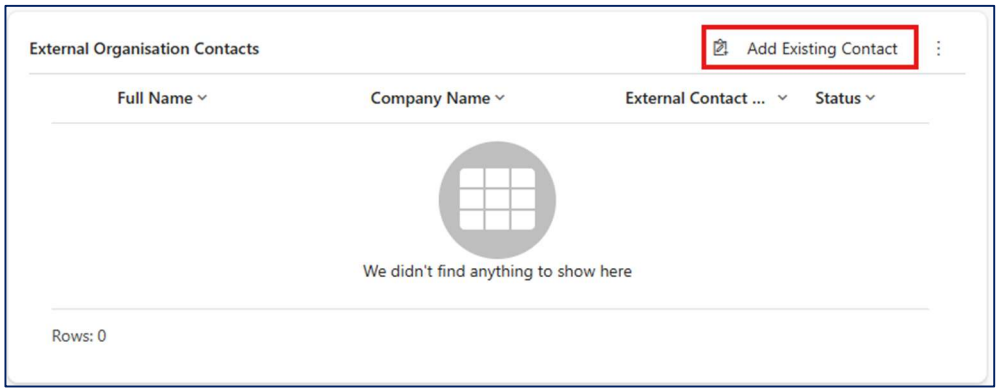
- The selected External Organisations will appear in the **Associated External Organisations** grid.



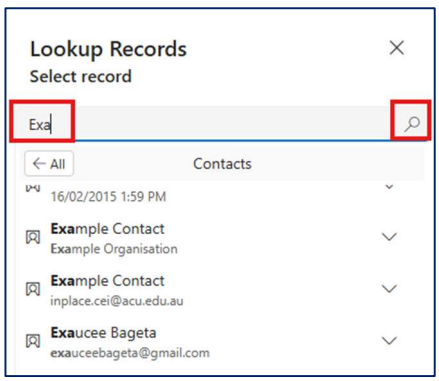
Note: *The External Organisation must already exist in the EPR before it can be added to the activity. If the required External Organisation is not available, it must first be created as a New External Organisation record.*

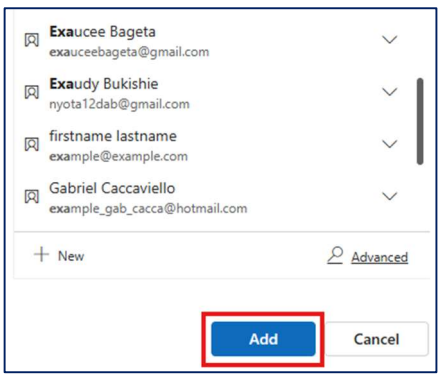
External Organisations Contacts – If an activity involves additional External Organisation Contacts, they can be added to the activity.

- In the **External Organisation Contacts** grid, select **Add Existing Contact**.



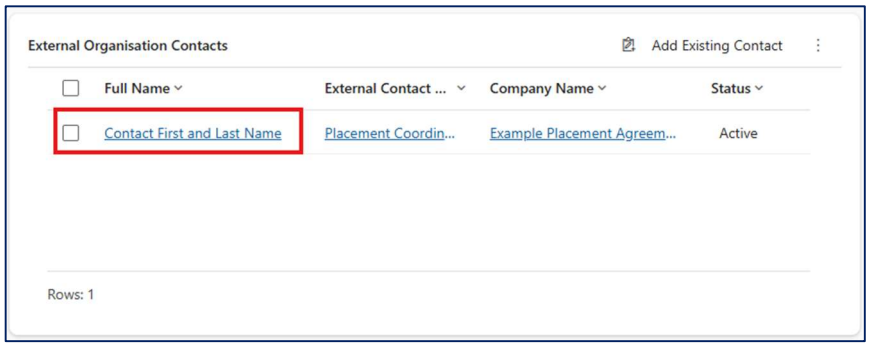
- Start typing in the field to search for and select the relevant External Organisation Contact, or select the **lookup icon** to search from the available contacts. Select all relevant contacts, then select **Add**.





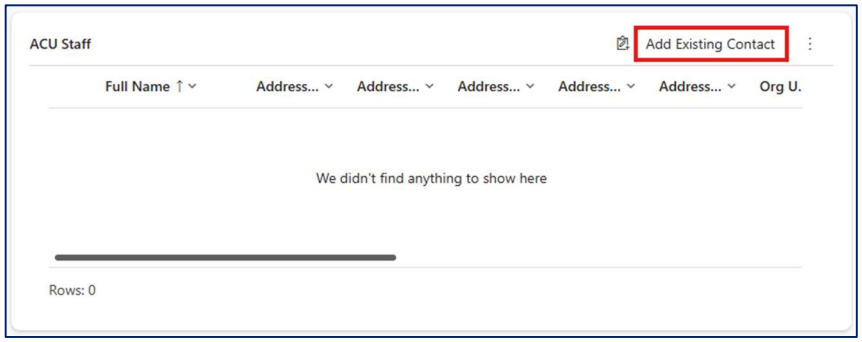
Note: *The External Organisation Contact must already exist in the EPR before it can be added to the activity. If the required External Organisation Contact is not available, it must first be created as a New External Organisation Contact record.*

- The selected contacts will appear in the **External Organisation Contacts** grid.

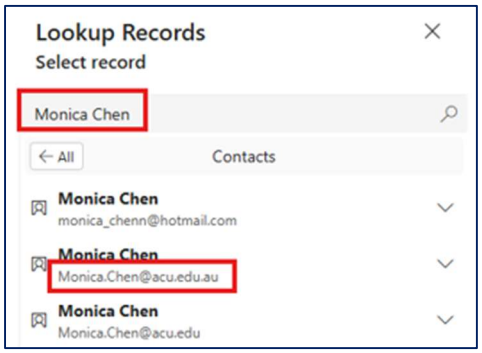


ACU Staff – ACU staff members involved in or attending the activity can be recorded in the **ACU Staff** grid.

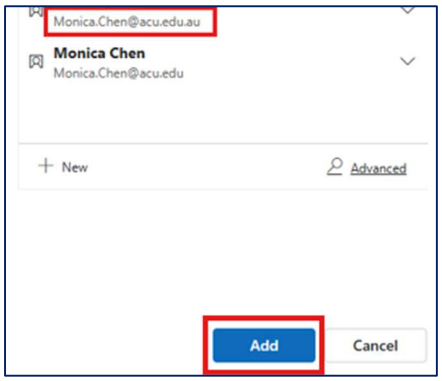
- In the **ACU Staff** grid, select **Add Existing Contact**.



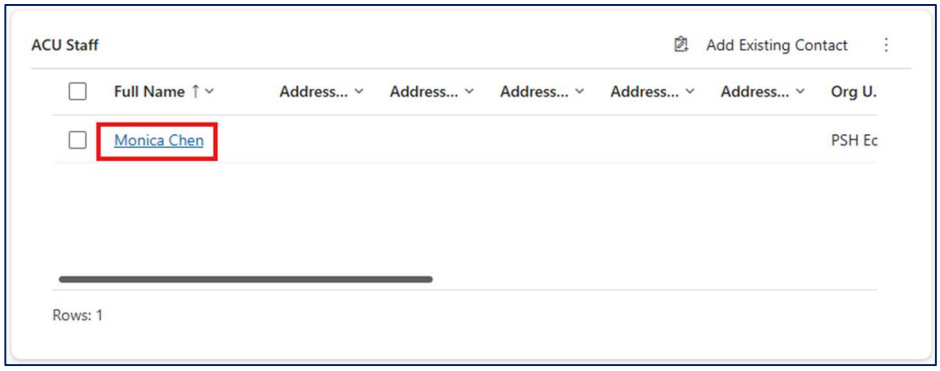
- Start typing in the field to search for the appropriate ACU staff member and select the correct record from the available list.



- Repeat this process for all relevant staff members, then select **Add**.

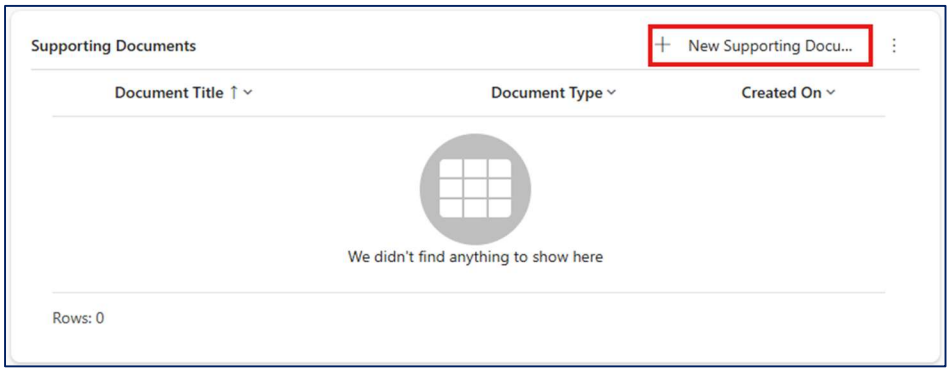


- The selected staff members will appear in the **ACU Staff** grid.

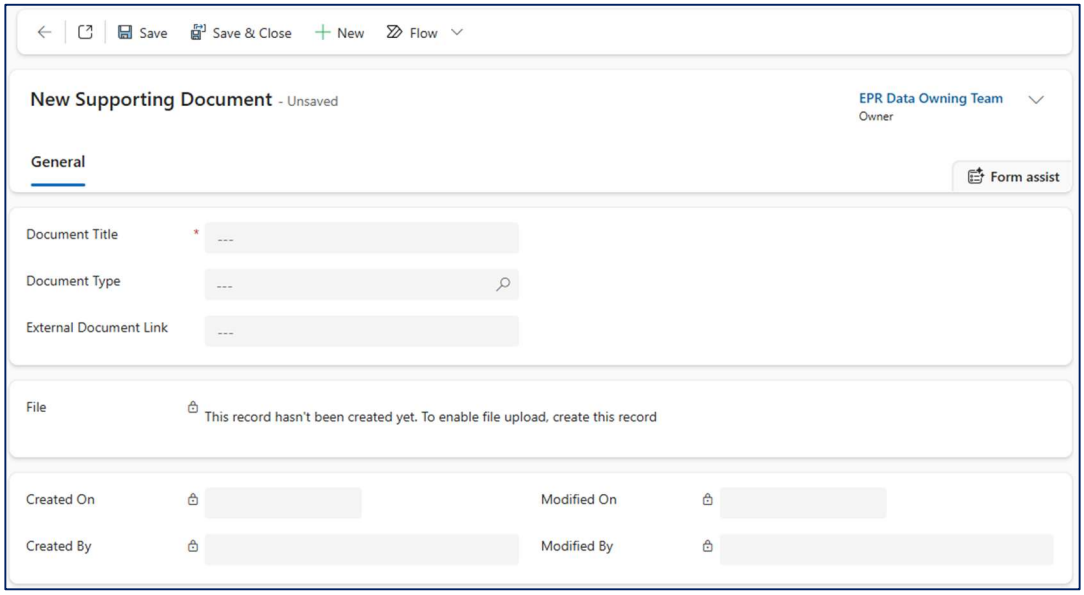


Supporting Documents – Relevant documents can be attached to the activity using the **Supporting Documents** grid.

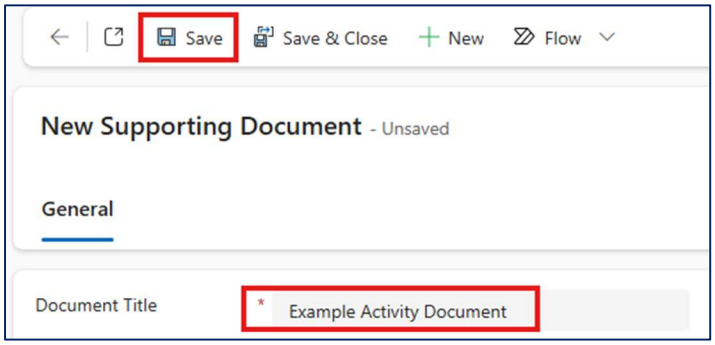
- In the **Supporting Documents** grid, select **+ New Supporting Document**.



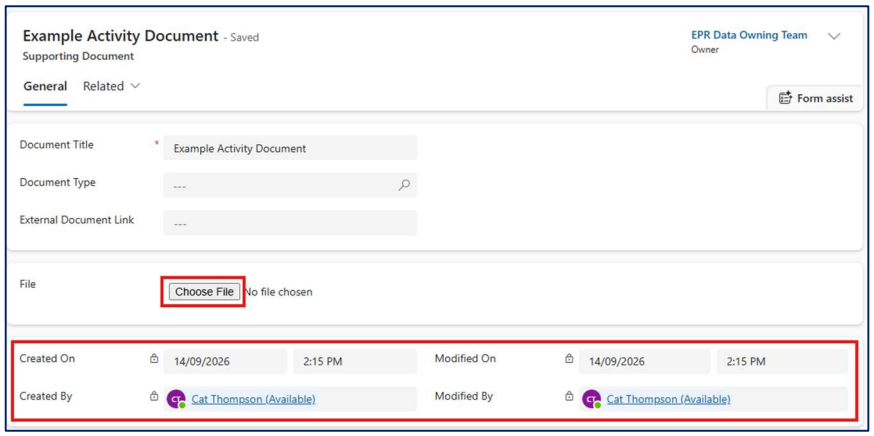
- The new **Supporting Document** screen will open.



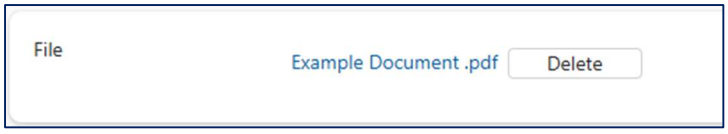
- Complete the mandatory **Document Title** field and select **Save**.



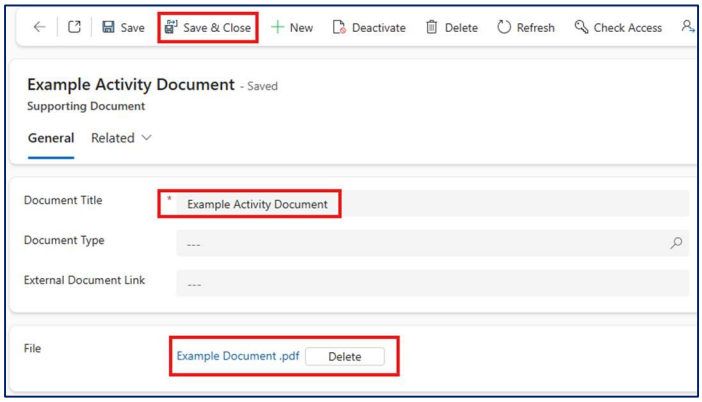
- Once the Supporting Document record has been saved, information about the record will automatically populate. You will then be able to select the appropriate file from its stored location.



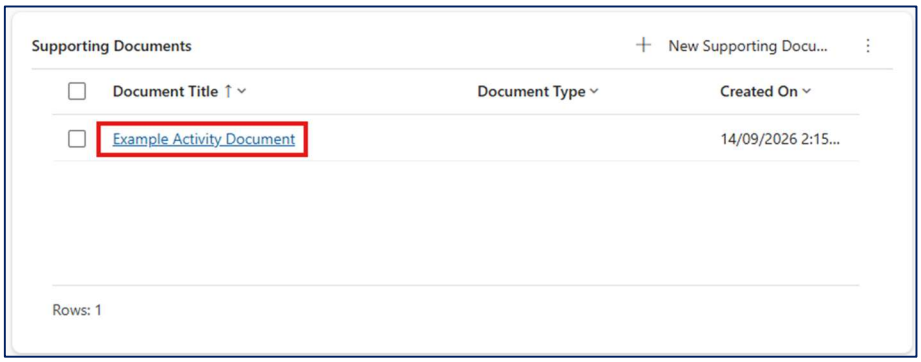
- Select the required file from its stored location. The file will then be attached to the Supporting Document record.



- With all required information completed, select **Save and Close**.



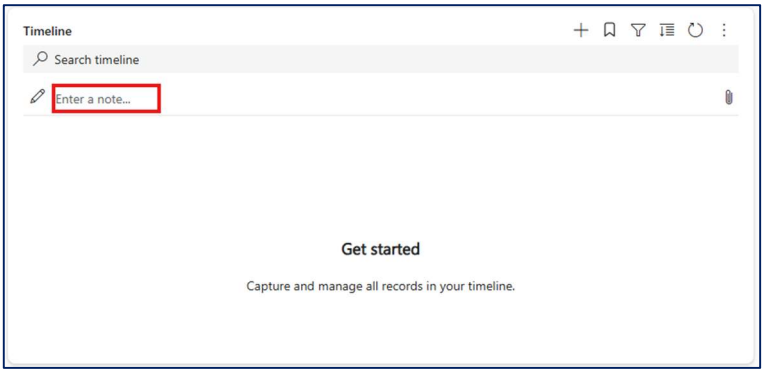
You will automatically be returned to the activity record, where the Supporting Document will appear in the **Supporting Documents** grid.



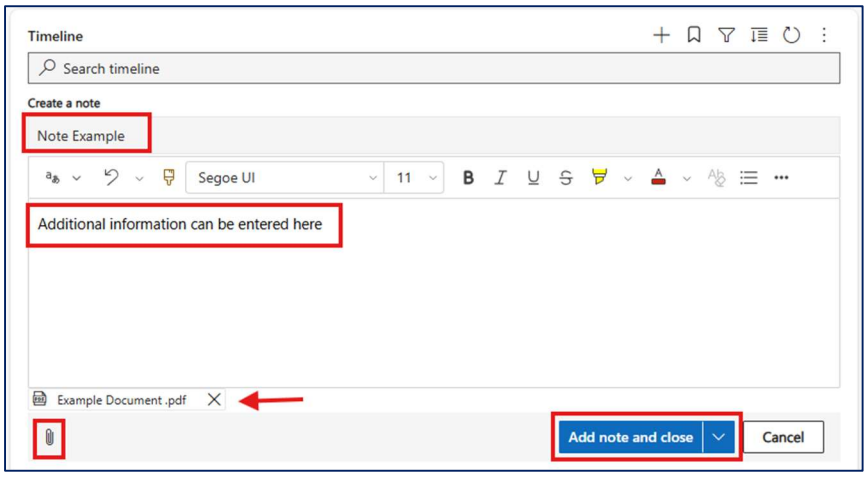
Note: *Only file can be attached to each Supporting Document record. To attach additional files to the activity, create a new Supporting Document record for each file.*

Timeline – The Timeline can be used to add relevant notes or information about the activity that has not been captured in the available fields.

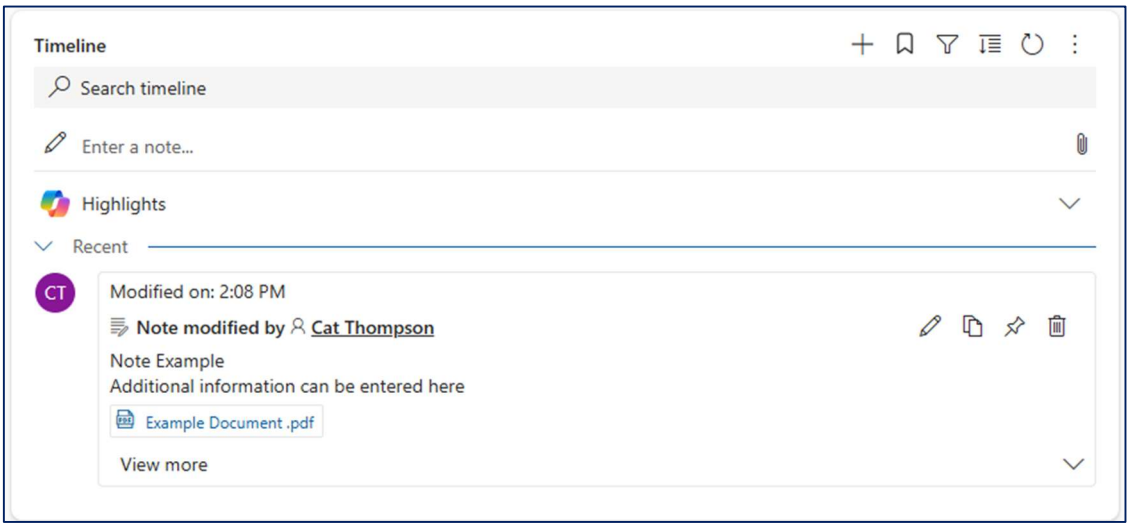
- In the **Timeline**, select **Enter a note…**



- The note fields will become available. Enter a title and any relevant information. Documents can also be attached to the note if required. Once all relevant information has been entered or attached, select **Add note and close**.



- The note and any attachments will appear in the **Timeline**.



Note: *Additional details can also be recorded in the* ***Timeline*** *for the activity. For further information on using the Timeline, refer to the* ***Timeline Staff Training Guide****.*

Once all relevant information has been added to the activity, select **Save** to continue working in the record or **Save and Close** to save the changes and close the activity record.

