ACU
AUSTRALIAN CATHOLIC UNIVERSITY

Using the Timeline

Educational Partnerships Register (EPR)
Staff Training Guide

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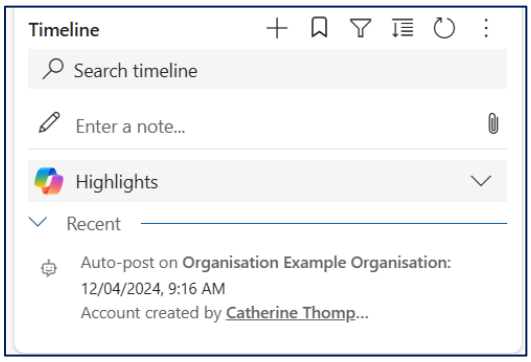
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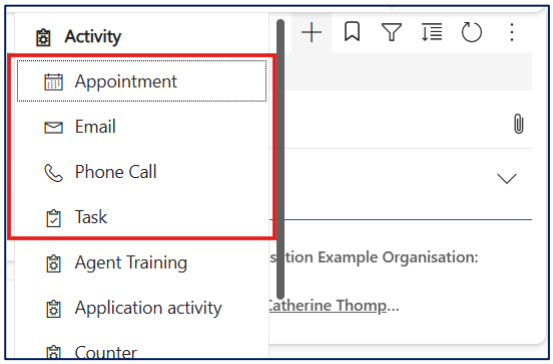
1. Using the Timeline

The Timeline allows users to record and view information and activities associated with an EPR record. It provides a history of relevant interactions, communications and actions.

The Timeline can be used to add Notes and create or manage activities, including:

- Appointments
- Emails
- Phone Calls
- Tasks



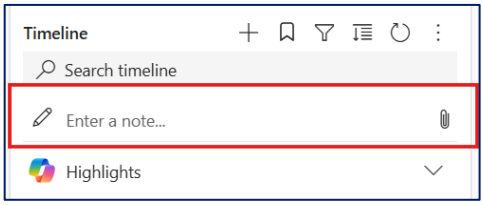


Information can be added to the Timeline of relevant EPR records, including Agreements, Organisations, Contacts and Activities.

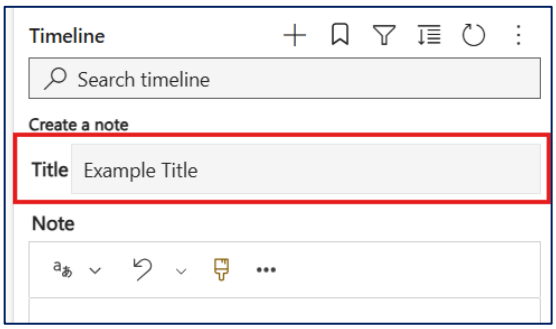
2. Adding a Note

Notes can be used to add general information or supporting documentation to an EPR record where another Timeline activity type is not required.

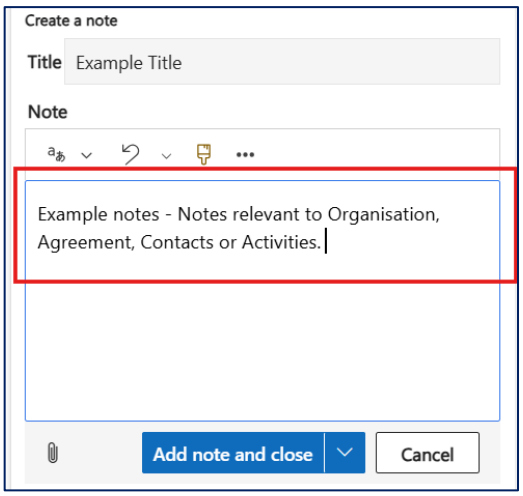
- From the Timeline, select the **Enter a note** field



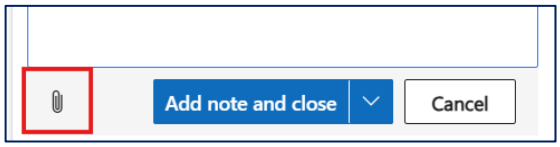
- Enter a Title that clearly describes the purpose of the Note



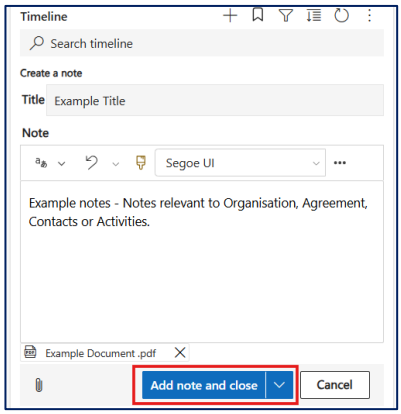
- Enter the relevant information in the Note field



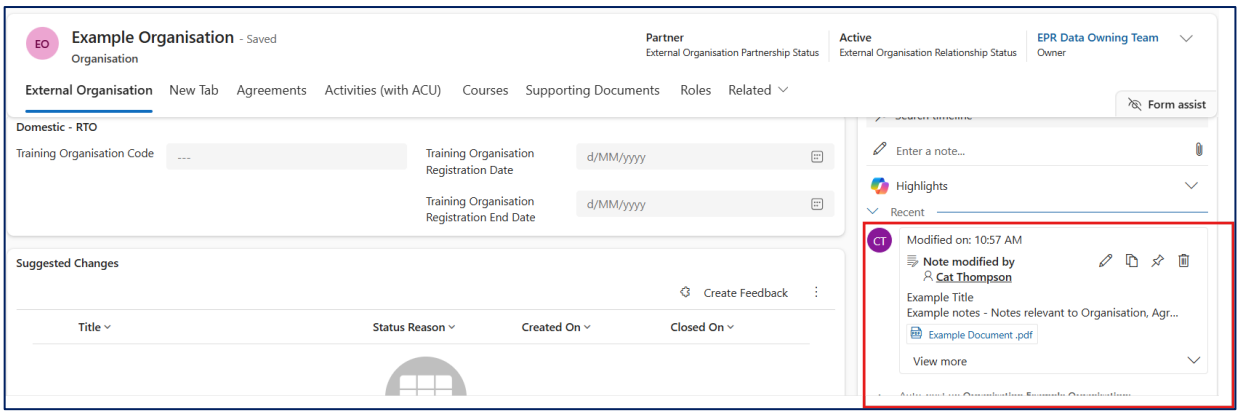
- To attach supporting documentation, select the **attachment icon** and upload the relevant file



- Once all relevant information has been entered, select **Add note and close**

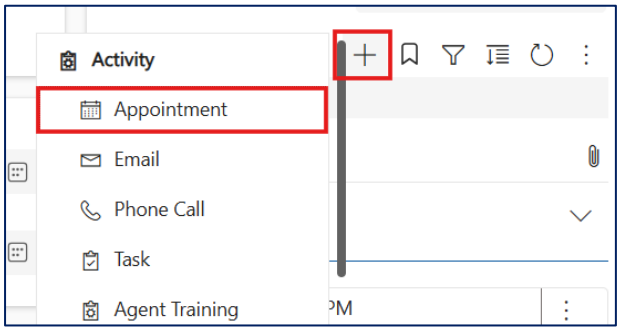


- The Note, including any attachments, will appear in the **Timeline** of the associated EPR record

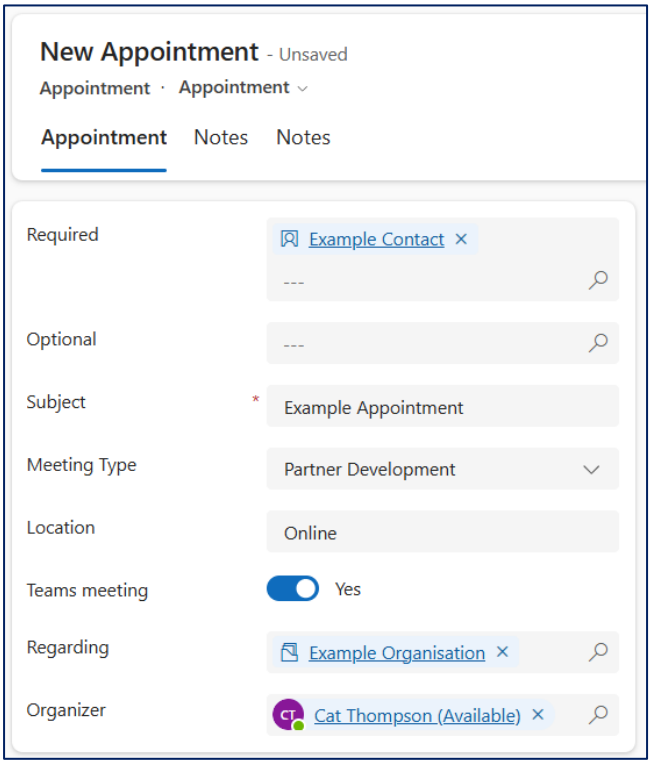


3. Creating an Appointment

- From the Timeline, select the **+ button** and select **Appointment**



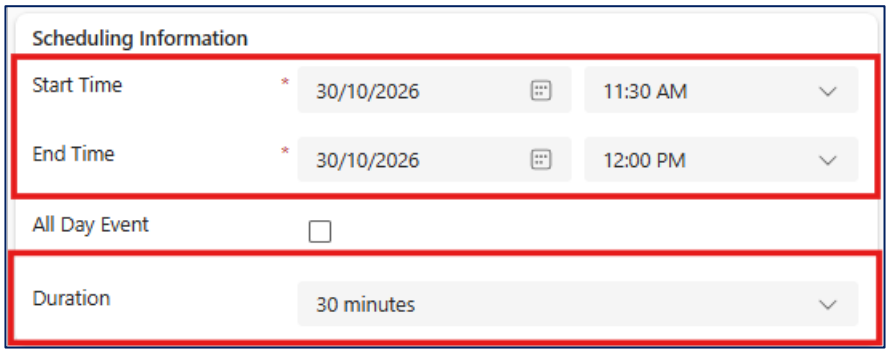
- A new Appointment record will open. Complete the following fields, where applicable:
  - **Required** – add attendees who are required to attend
  - **Optional** – add any optional attendees, where applicable
  - **Subject** – enter a brief description
  - **Meeting Type** – select the relevant meeting type, where applicable.
  - **Location** – enter the location, where applicable.
  - **Teams meeting** – toggle to **Yes** if the appointment will be held via Microsoft Teams



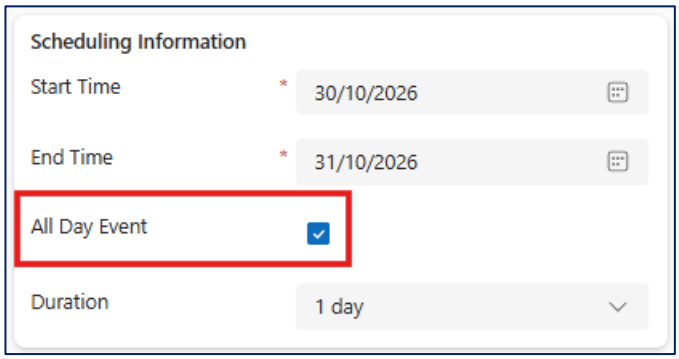
  - The **Regarding** field will automatically display the EPR record from which the Appointment was created.



- In the **Scheduling Information** section, enter the **Start Time** and **End Time**. The **Duration** will reflect the scheduled length.



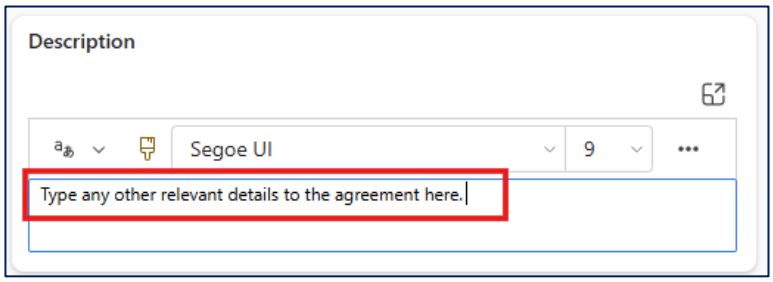
- If the appointment runs for the entire day, select **All Day Event**



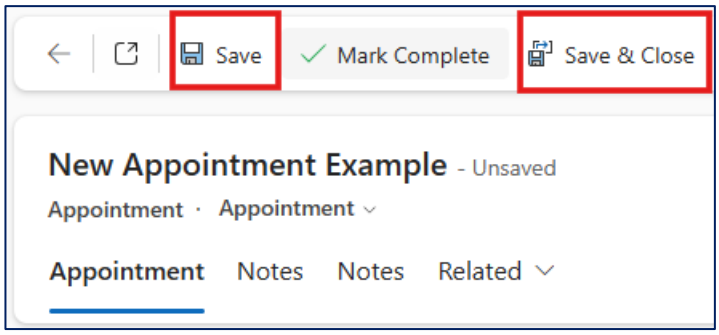
- Add any relevant supporting documents under Attachments.



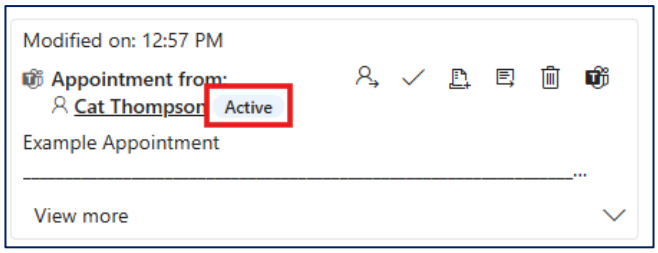
- Enter any additional information relating to the appointment in the Description field.

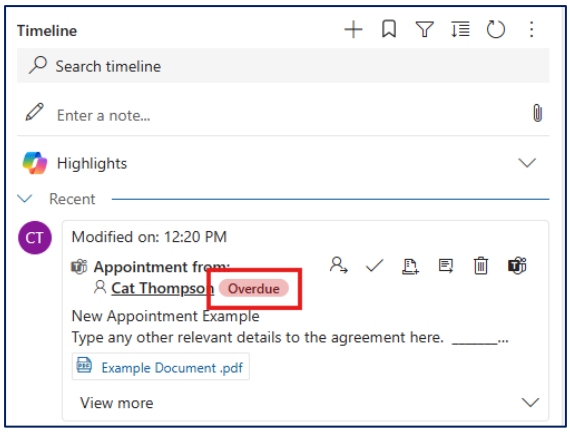


- Select **Save** to save the Appointment and continue working in the record, or **Save & Close** to save and return to the main EPR record.

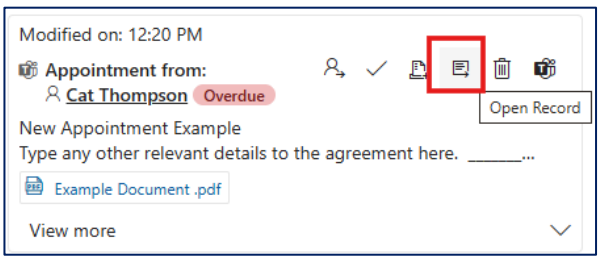


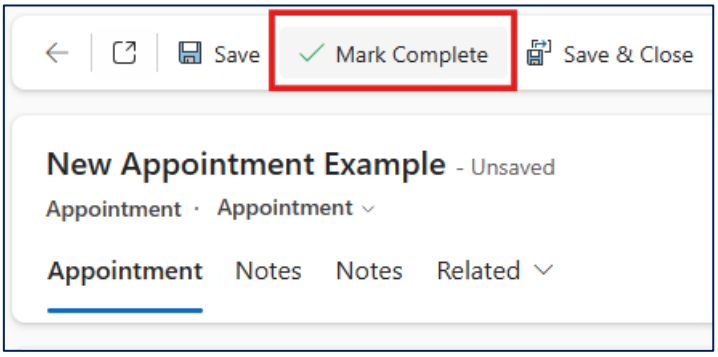
- The Appointment and its status will appear on the Timeline.



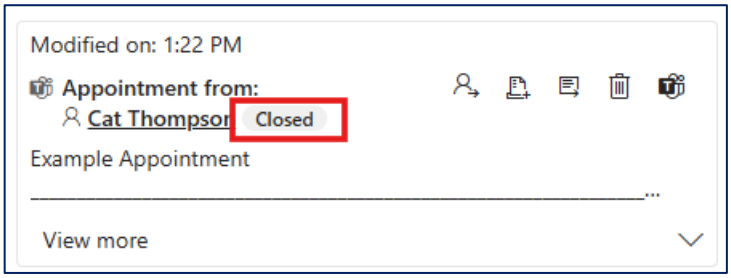


- Once the Appointment has taken place, open the Appointment record and mark it as complete.





- The status will update to Closed on the Timeline

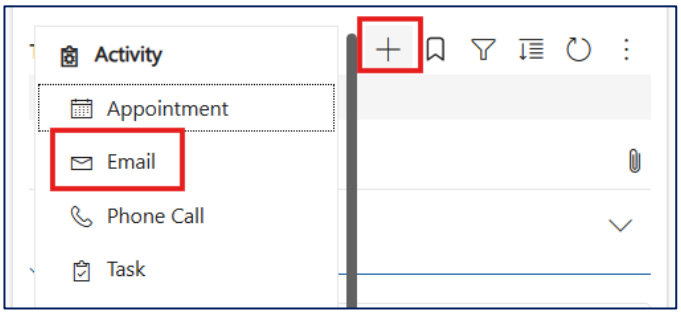


4. Creating an Email

Emails can be created and sent directly from the Timeline of an EPR record. This provides an option for recording email correspondence with contacts as part of the record's activity history.

Please note: *Emails can only be sent to contacts who already exist in the EPR. If the intended recipient is not listed, a contact record must be created before an email can be sent from the Timeline.*

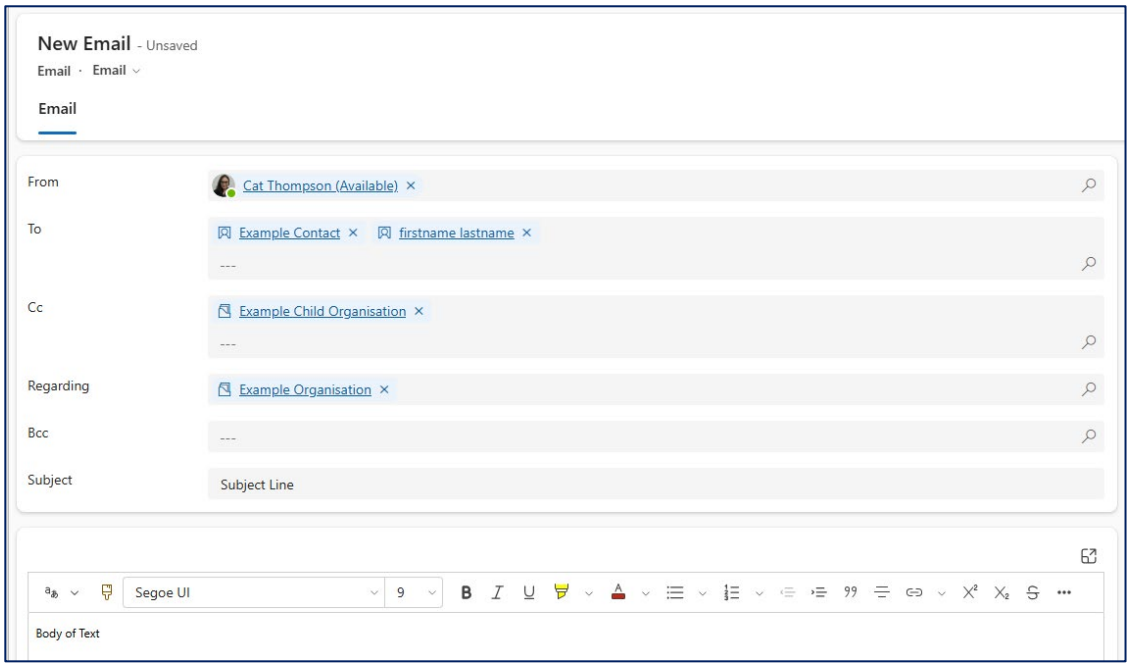
- From the Timeline, select the **+ button** and select **Email**



- A new Email record will open, with the **From** field automatically populated with the current user's details.



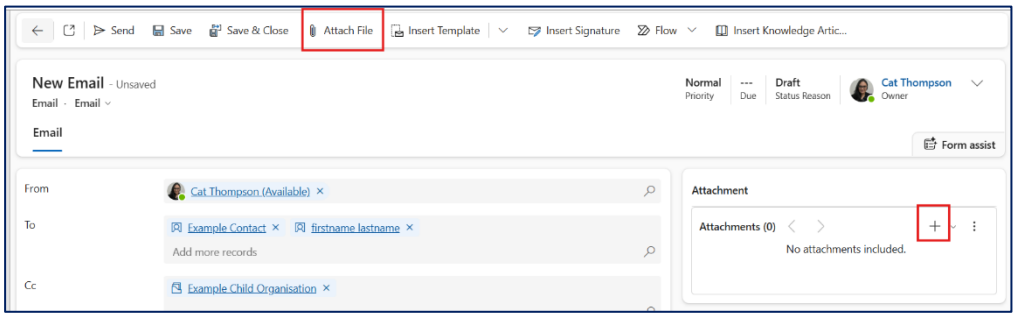
- Enter the recipient in the **To** field and add **Cc** or **Bcc** recipients where required.
- Enter a **Subject** and compose the email in the message field.



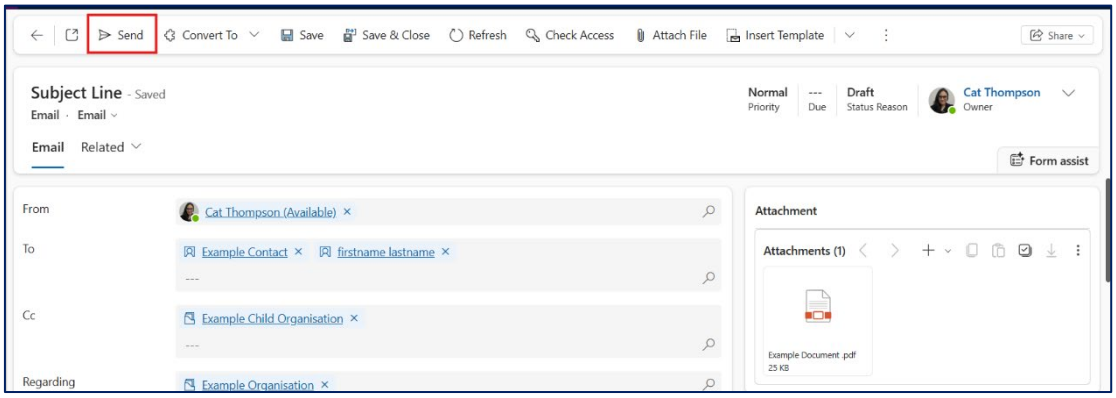
- The Regarding field will automatically display the EPR record from which the Email was created.



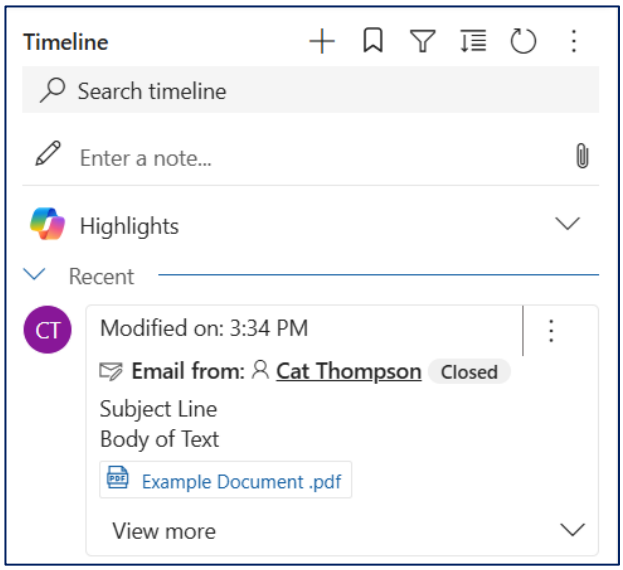
- To include supporting documents, select **Attach File** or use the **Attachments** section



- Once the email is complete, select Send.



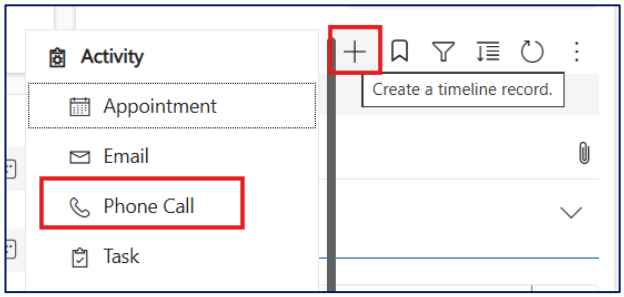
- The sent email will appear in the Timeline of the associated EPR record.



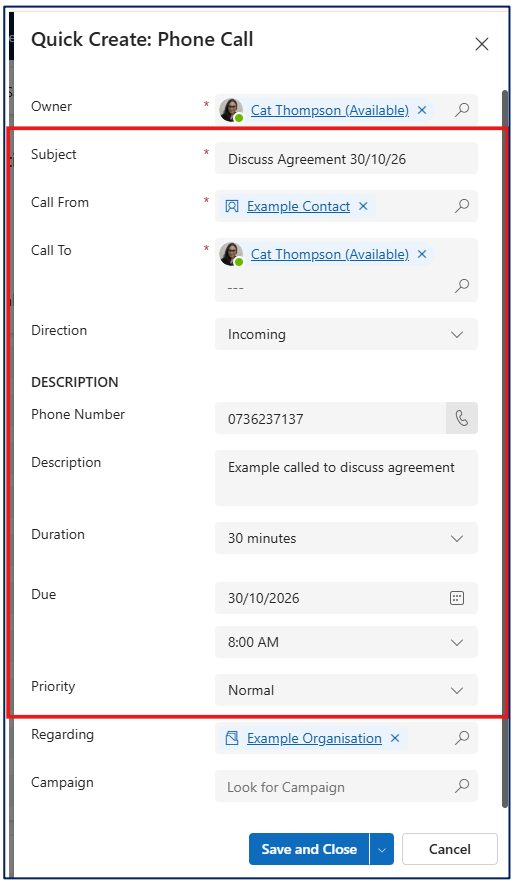
5. Recording a Phone Call

Phone Calls can be used to record planned or completed incoming and outgoing telephone conversations relating to an EPR record.

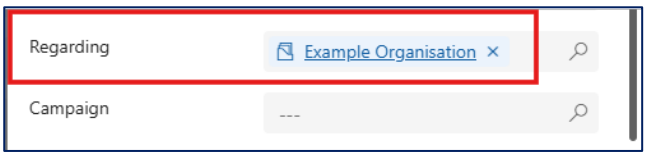
- From the Timeline, select the **+ button** and select **Phone Call**.



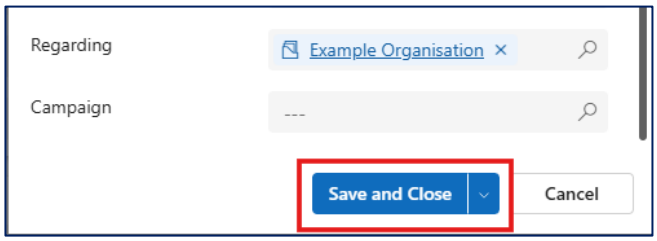
- The Quick Create: Phone Call form will open.
- Enter a **Subject** describing the purpose of the call.
- Complete the **Call From** and **Call To** fields.
- In the **Direction** field, select **Incoming** or **Outgoing** to indicate whether the call was received or made.
- Enter the relevant **Phone Number**, if known.
- Add relevant information about the call or its outcome in the Description field.
- Complete any other relevant information, including Duration, Due and Priority, where applicable.



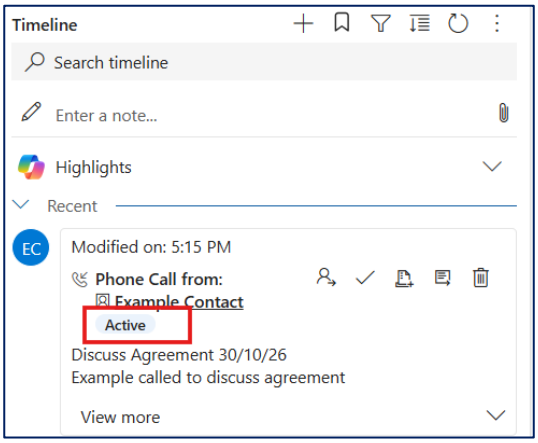
- The Regarding field will automatically display the EPR record from which the Phone Call was created.

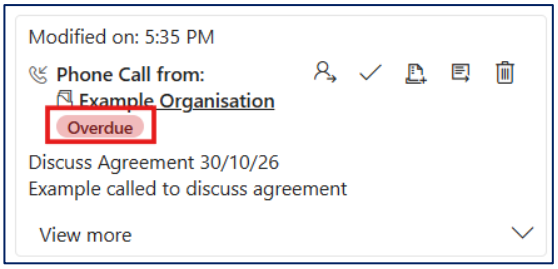


- Once completed, select Save and Close.

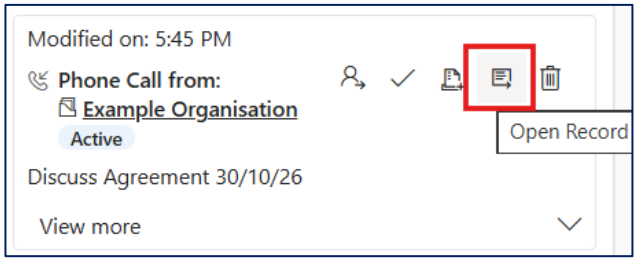


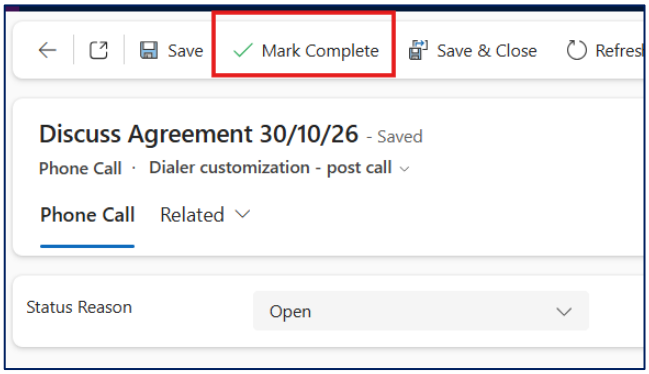
- The Phone Call and its status will appear in the Timeline of the associated EPR record.



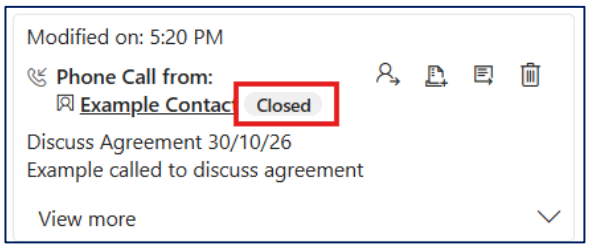


- If you are recording a Phone Call that has already taken place, or the call has since been completed, open the Phone Call record and mark it as complete.





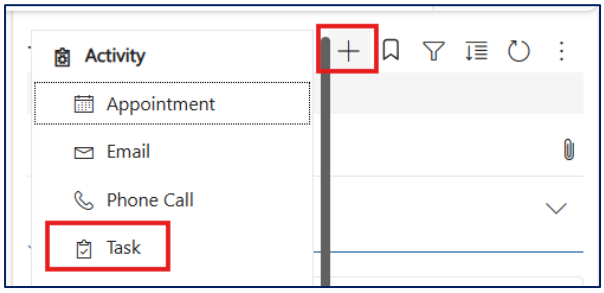
- The status will update to Closed on the Timeline.



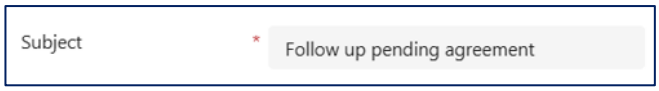
6. Creating a Task

Tasks can be used to record an action or follow-up that needs to be completed in relation to an EPR record.

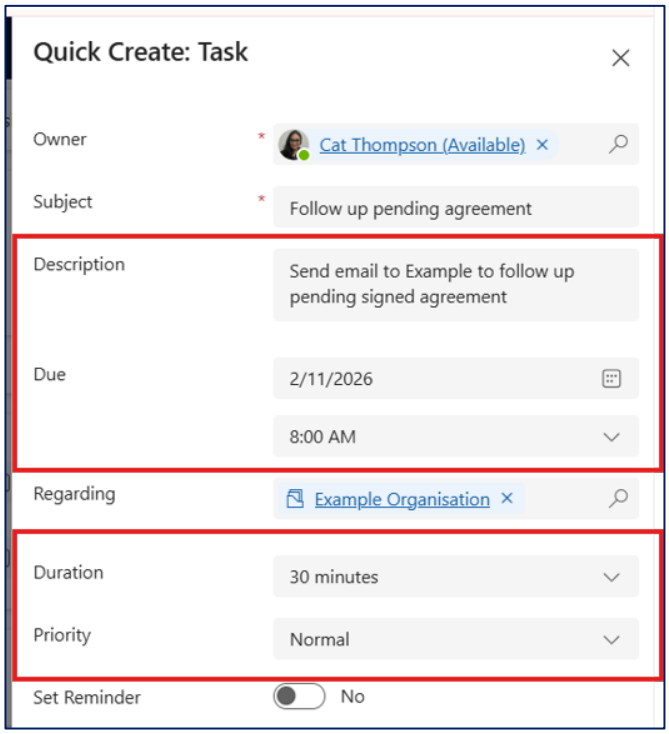
- From the Timeline, select the **+ button** and select **Task**.



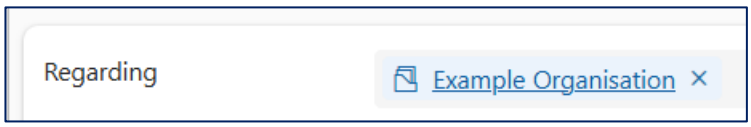
- The **Quick Create: Task** form will open.
- Enter a **Subject** describing the task to be completed.



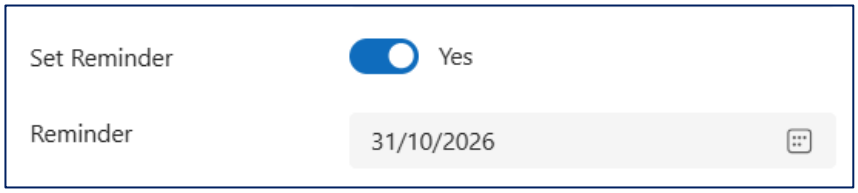
- Enter any additional information or instructions in the **Description** field.
- Enter a **Due** date and time, where applicable.
- Complete the **Duration** and **Priority** fields as required.



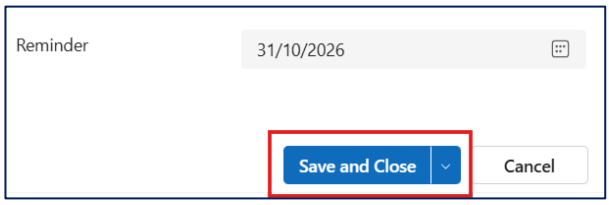
- The **Regarding** field will automatically display the EPR record from which the Task was created.



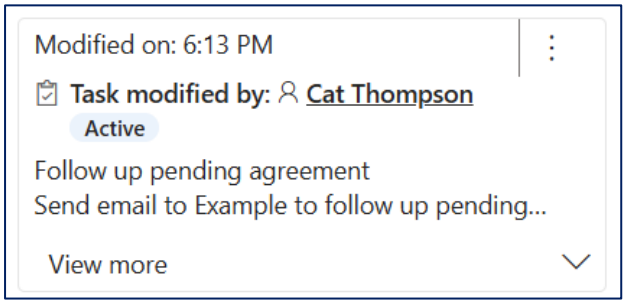
- To set a reminder, toggle **Set Reminder** to **Yes** and enter the **Reminder** date.

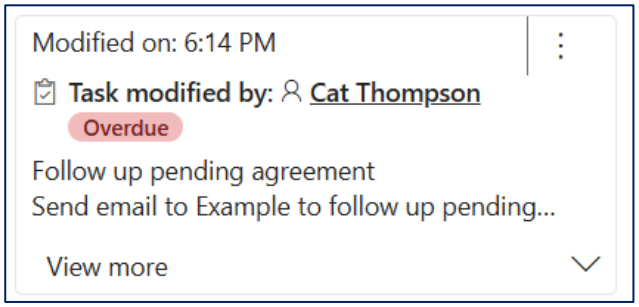


- Once all relevant information has been entered, select Save and Close.

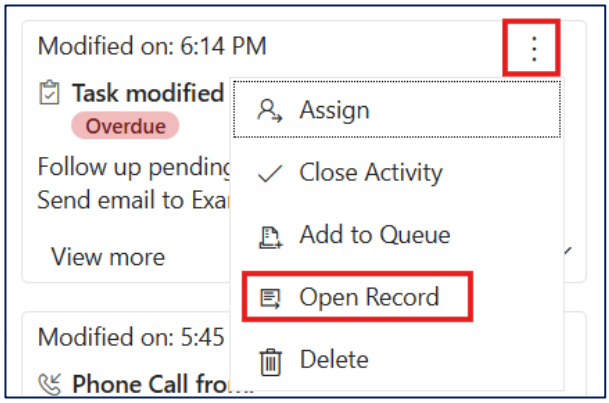


- The Task and its status will appear in the Timeline of the associated EPR record.





- Once the Task has been completed, open the Task record and mark it as complete.





- The status will update to Closed on the Timeline.

