Creating New External Organisation Activity
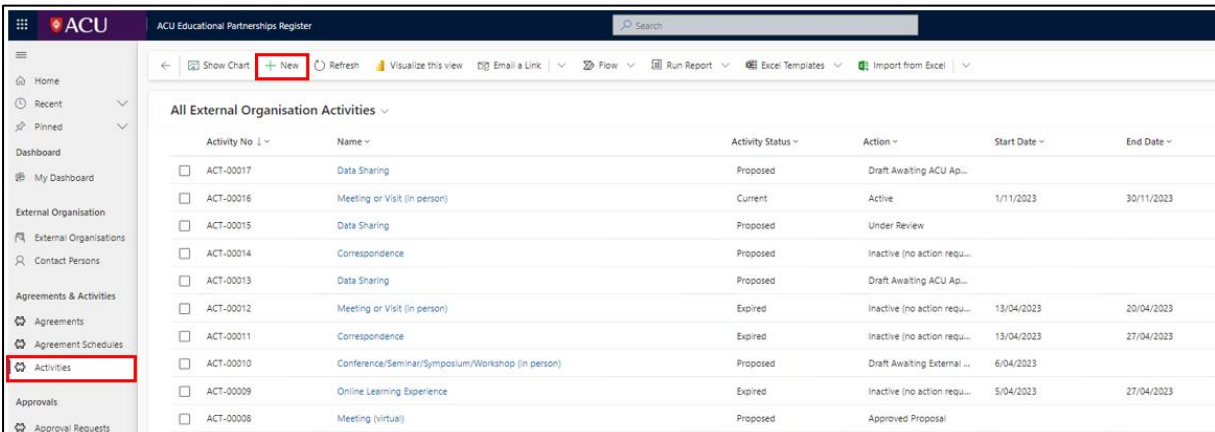
Contents

New External Organisation Activity

An External Organisation Activity allows users to record specific activities undertaken by partners during the course of their relationship, including delivering outcomes specified in an agreement. There are several types of External Organisation Activity types in EPR:

- Conference/Seminar/Symposium/Workshop (in person)
- Conference/Seminar/Symposium/Workshop (virtual)
- Correspondence
- Data Sharing

- Event (includes competition)
- Meeting (virtual)
- Meeting or Visit (in person)
- Membership/Network/Alliance
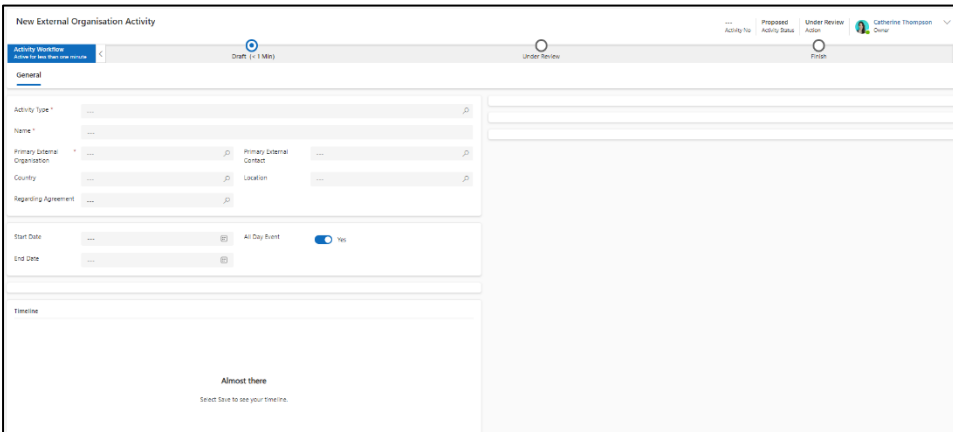- Online Learning Experience

Creating a new external organisation activity

1. To create a new external Organisation activity, using the left navigation bar, navigate to **Activities**. On the top menu, click ➕ New :

2. A **New External Organisation Activity** window opens:

3. Fill in the following required fields:

- **Activity Type** – There is a list of activity types for you to search on, click 🔍 to look up the applicable activity type.
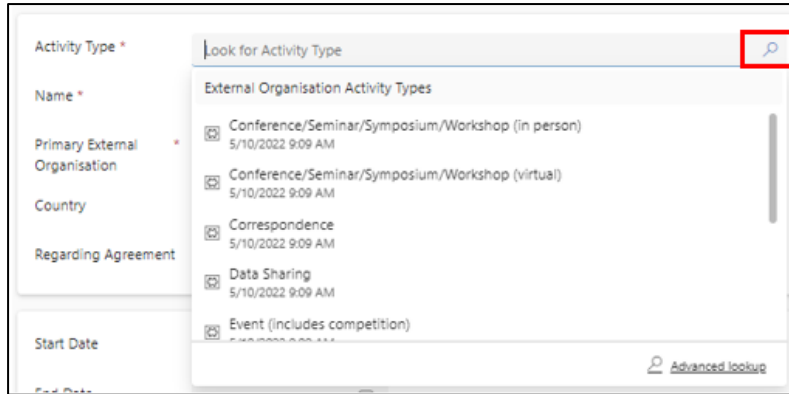
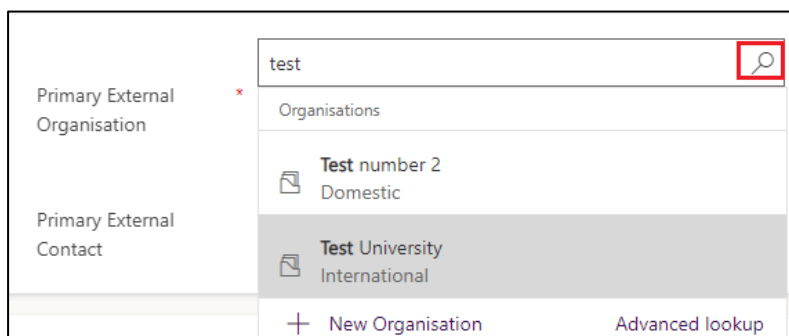- **Name** – This will auto populate when you select an Activity Type. If appropriate, you can amend the name by clicking and typing in the field:
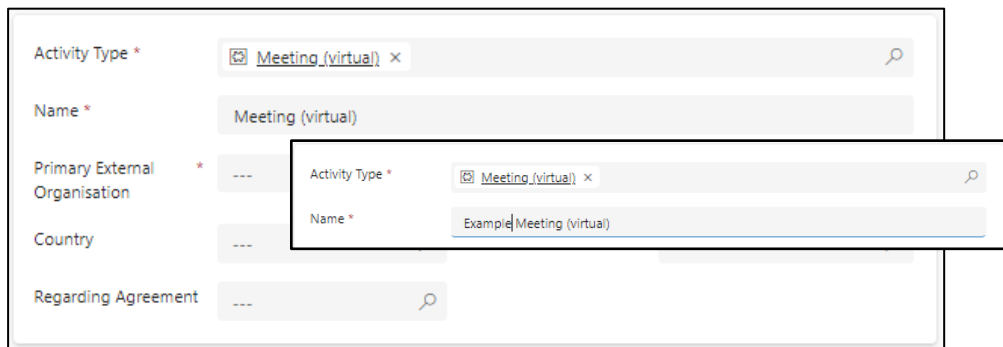
- **Primary External Organisation** – Click 🔍 to search for the Organisation:

4. Once you have filled in the required fields, click 💾 Save :
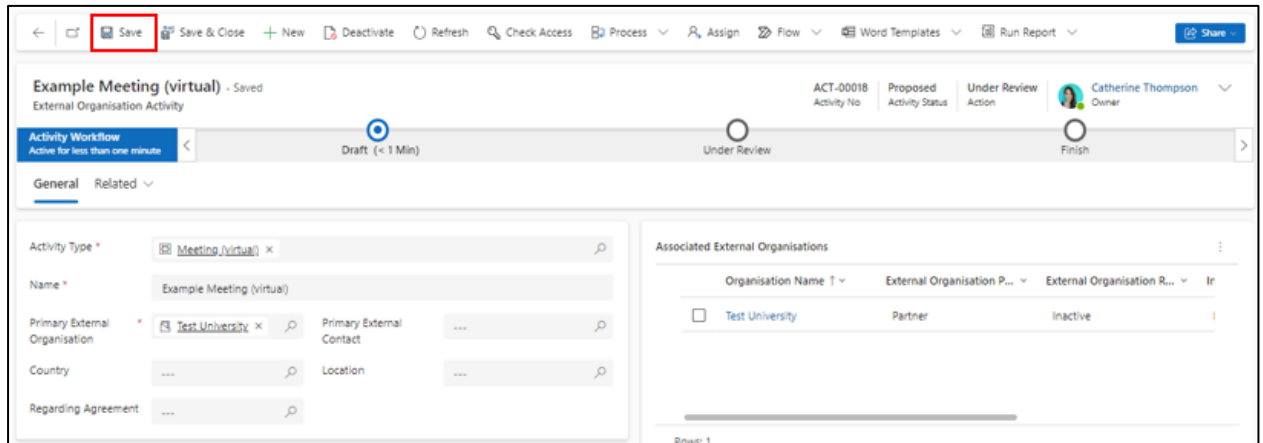
5. Once you have saved your **External Organisation Activity** you will see the following additional grids appear:

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

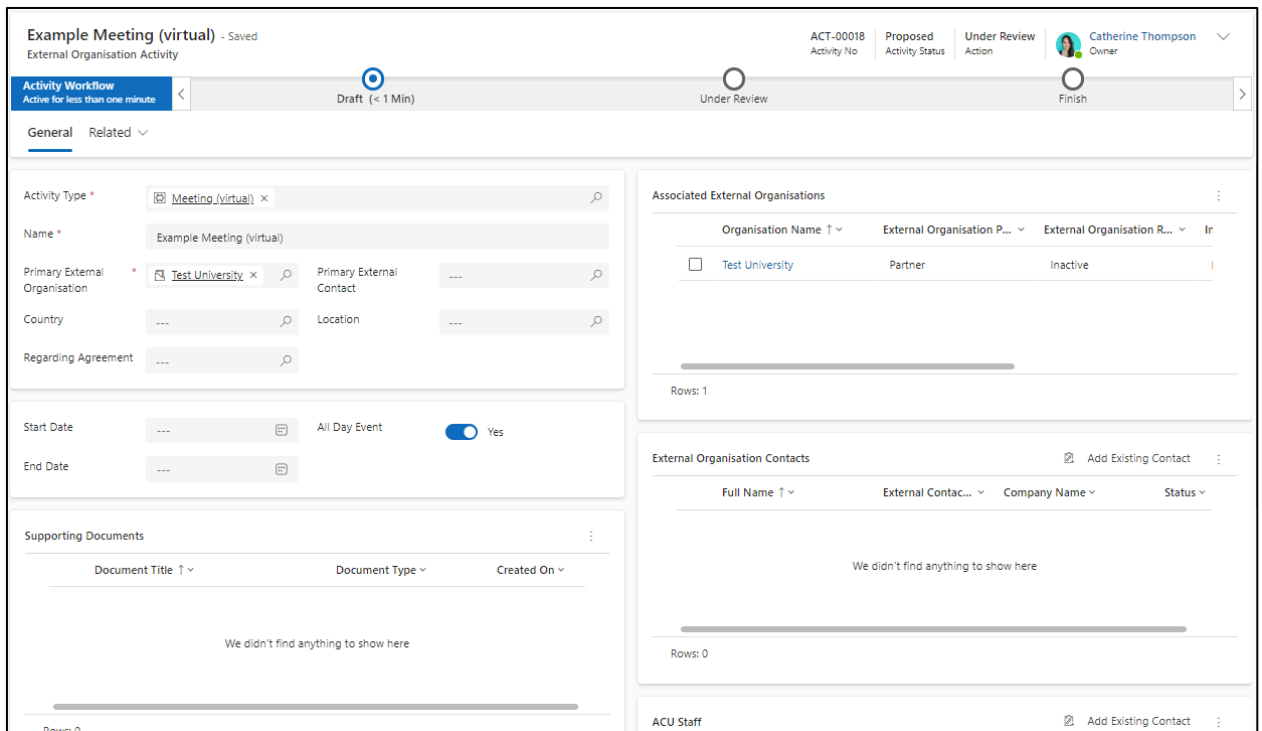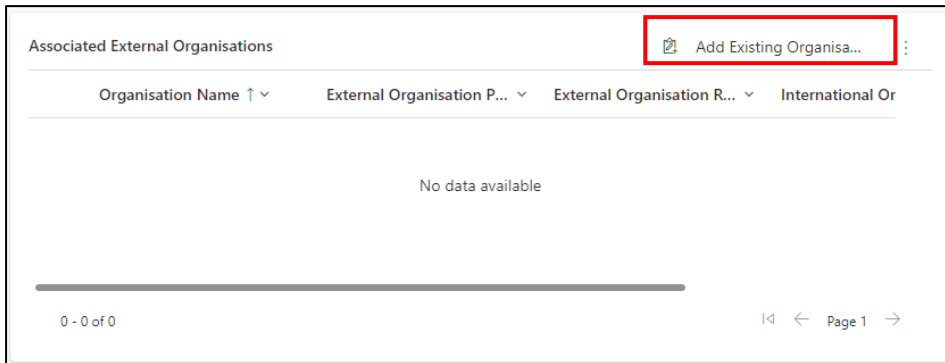6. For activities that include multiple organisations, there can only be one **Primary External Organisation**, however additional organisations can be added.
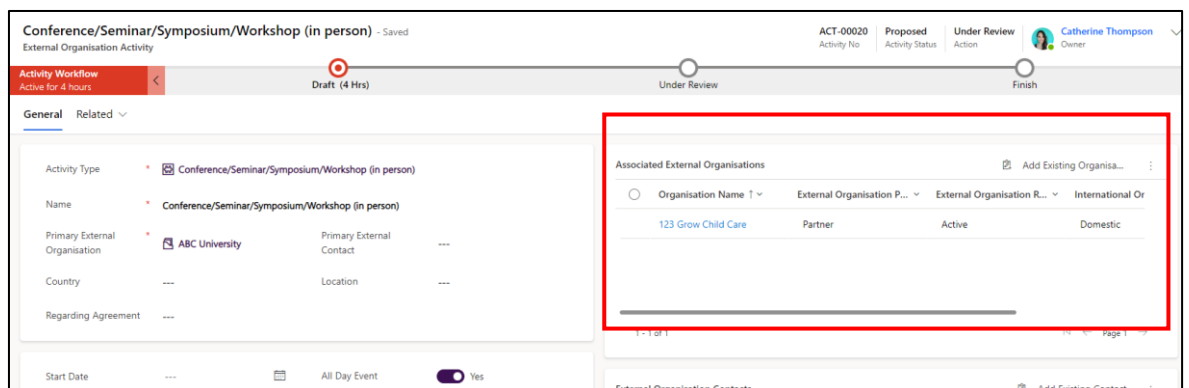
- Under **Associated External Organisations**, click **Add Existing Organisation**

- Lookup Organisation and click **Add**. Any new organisations will need to be added prior to being added to the Associated External Organisation.
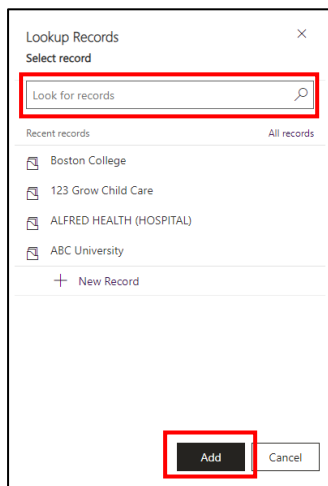
- The external organisation will now be added to the activity under the **Additional External Organisations** grid.


7. Once all relevant data has been entered for the remaining grids, click 🖫 Save .

Workflow Example

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

1. In the **Activity Workflow** bar, click **Draft**, In the field **Find or create an external contact**, look up the relevant contact, select **Next Stage** :
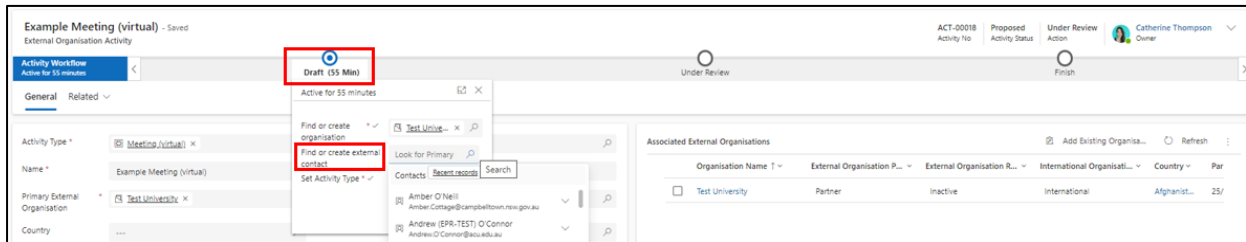
2. An **External Organisation Activity** requires 2 levels of approval. In the section **Under Review**, use the lookup to select the appropriate person in the **Nominate Approver** field. Click **Execute** :
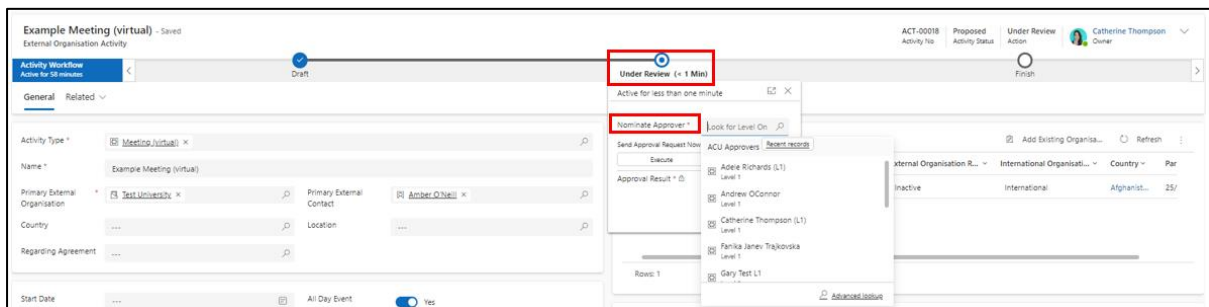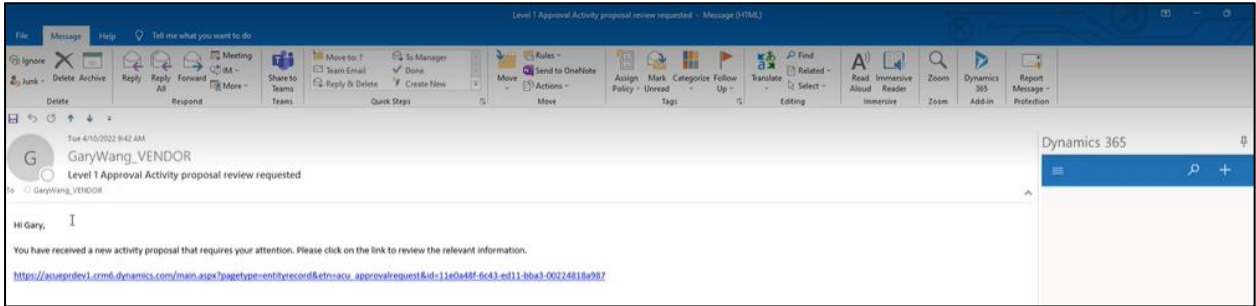

3. The **ExtOrgAct WF Action – Create L1 Approval Request** window opens, click **Execute** to send off a notification email to the approver:
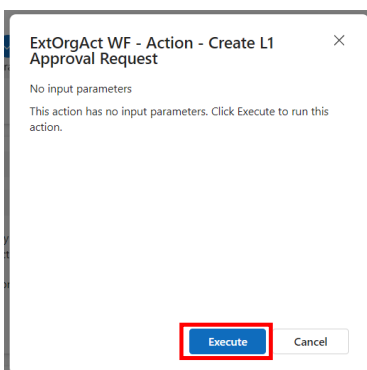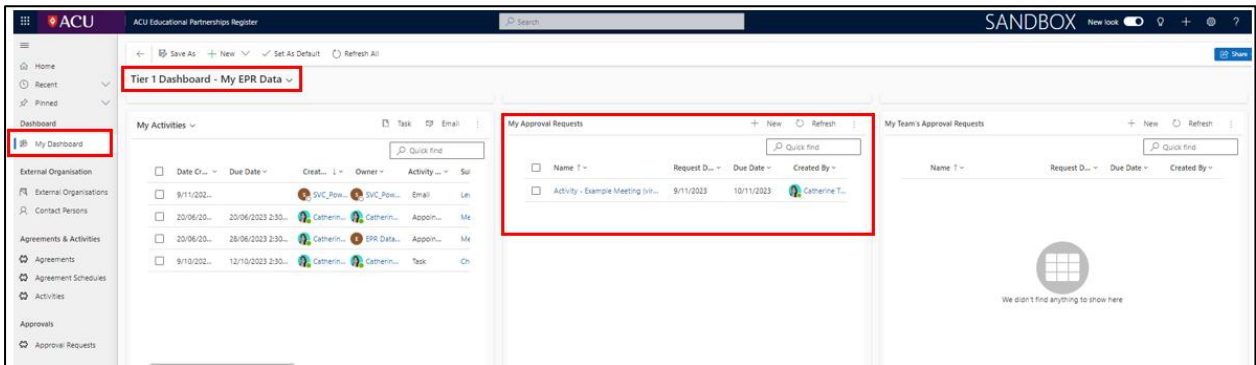

Note: You can save and close the request, once approved you can continue with the record.
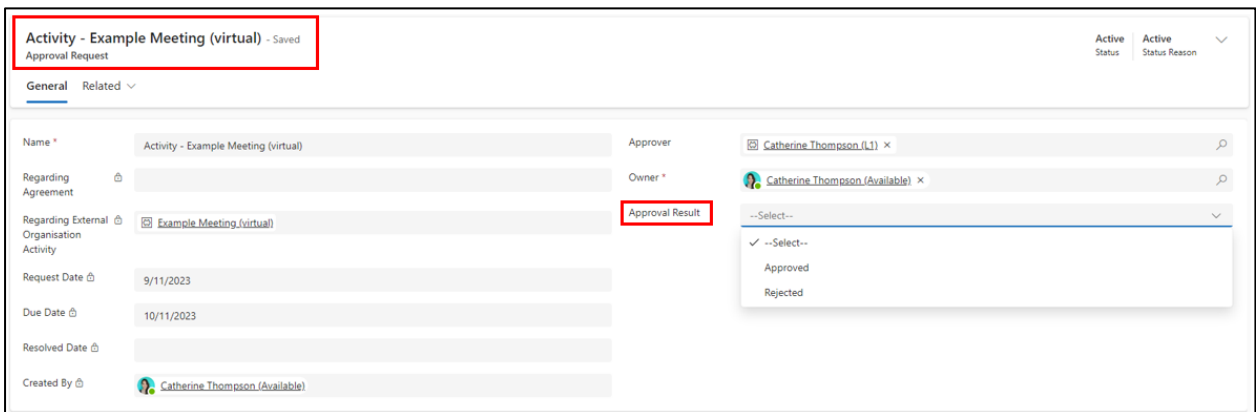
Requests for approval

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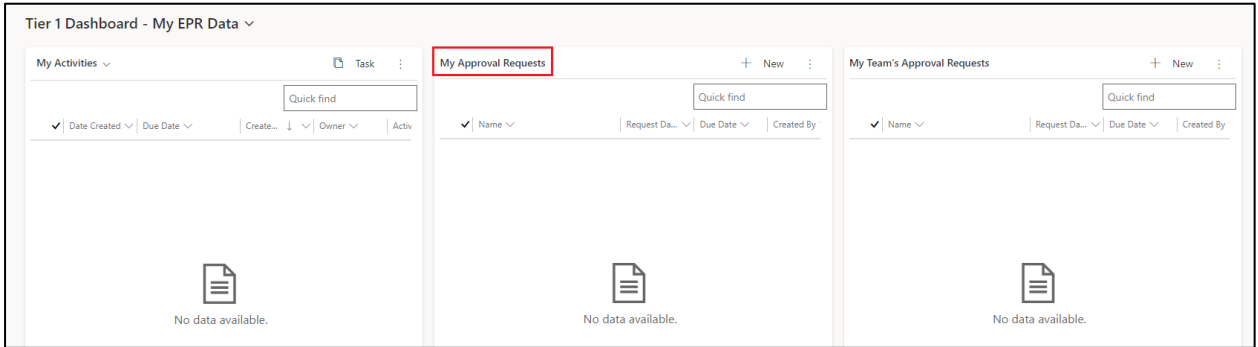

2. The approval request will show on the **Tier 1 Dashboard – My EPR Data,** under **My Approval Requests:**

3. Click on the approval request to open it. In the **Approval Result** field select **Approved** or **Rejected.** Click [Save & Close icon] :

4. The **Tier 1 Dashboard – My EPR Data** will update to show the removal of the approval request in the **My Approval Request** grid:


Any relevant information regarding the approval or rejection should be noted on the activity timeline.

See *Creating New External Organisations and Contact Persons* instruction manual for instructions on how to record an email on the **Agreement timeline**.
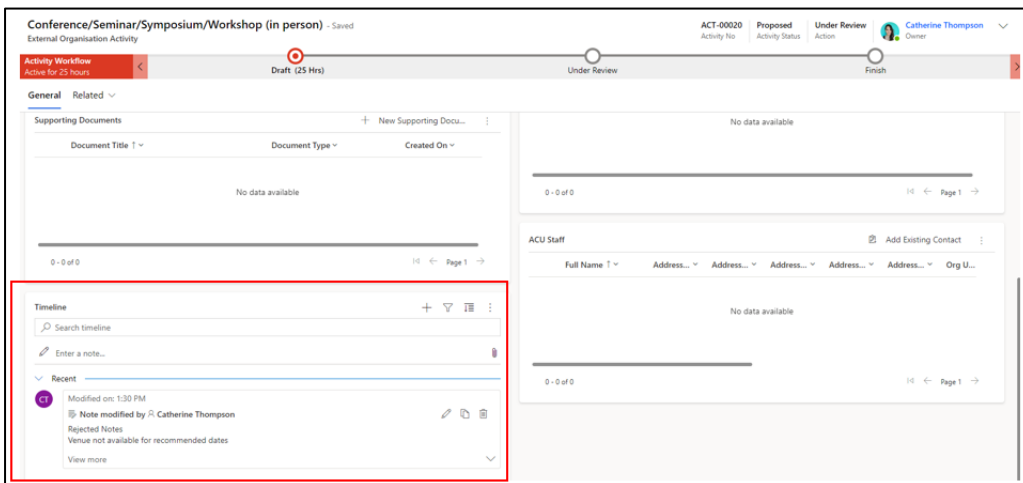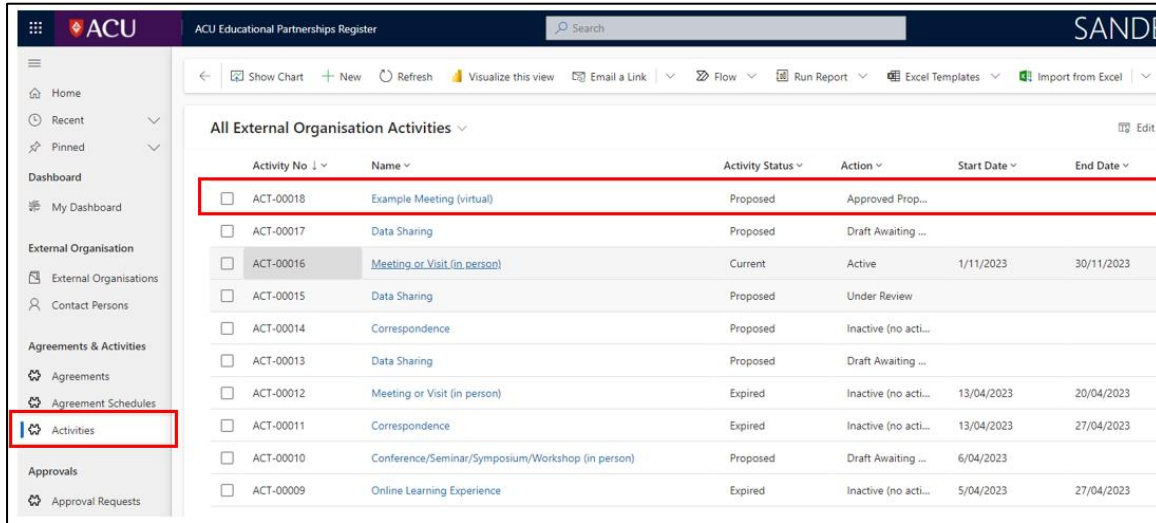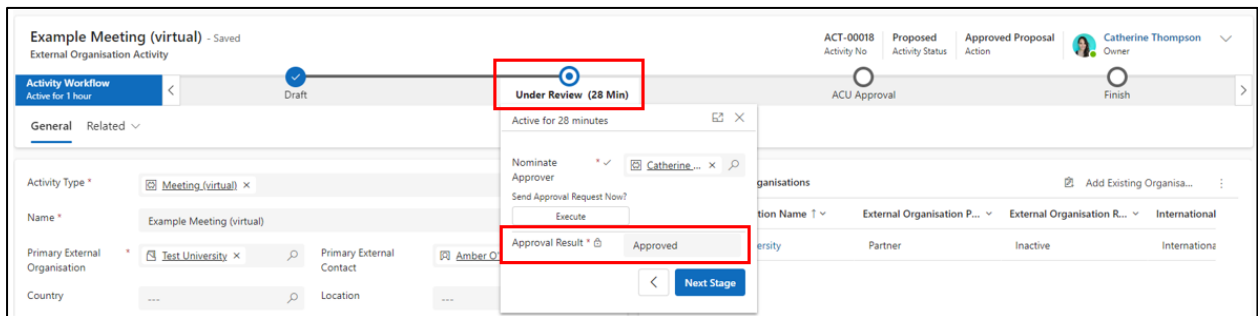

Approved Requests

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:
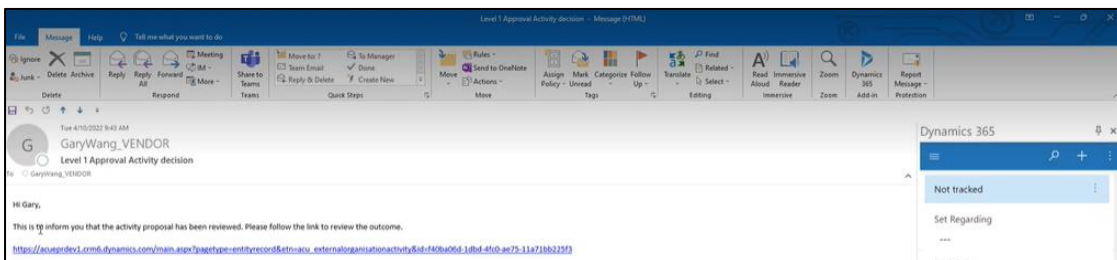
Note: You can go directly to the EPR to access the activity. Open the EPR, navigate to **Activities**, and search for your external Organisation activity:


2. The **External Organisation** workflow, under the **Under Review** dropdown, the **Approval Result** field has updated to **Approved**, click Next Stage :
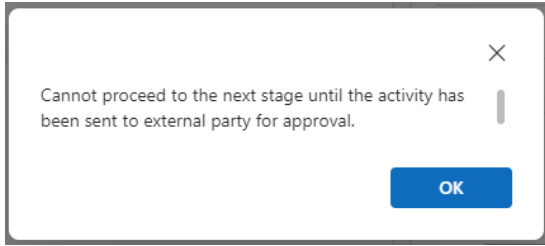

Follow the above steps for the second level approval in the **ACU Approval** dropdown. Once the request has been approved, click Next Stage .

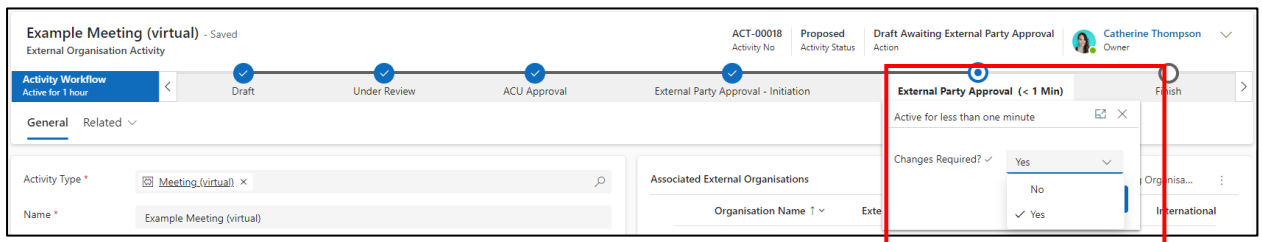3. The **External Party Approval – Initiation** dropdown will show, select **Yes** in the **Sent to External Party for Approval?** field:
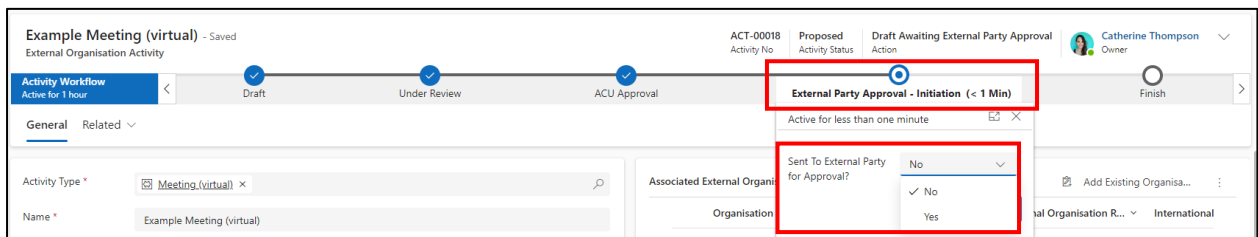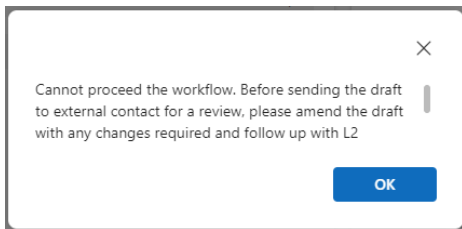
Note: If you select **No**, the activity will no longer progress and the below window will open, click OK :
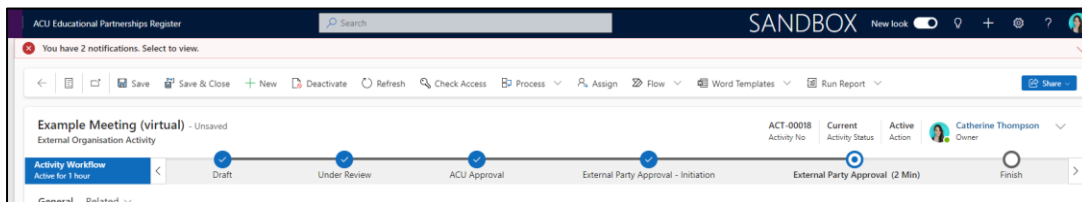

4.   The **External Party Approval** option asks if there are any changes required, click **No**:

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

When you click **No**, if you have not entered in Start and End dates for the Activity, you will receive an error message prompting you to enter start and end dates.

Enter Start and End Date for the Activity.
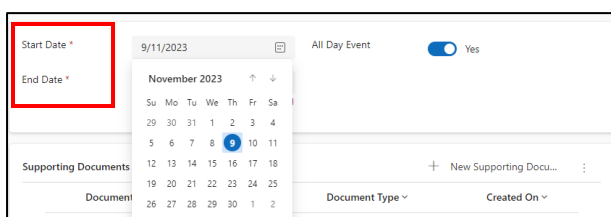
If the activity is not an all day event, use the toggle and enter the appropriate times.

5. In the **External Organisation** workflow click [Finish ⚑] in the **Finish** dropdown:

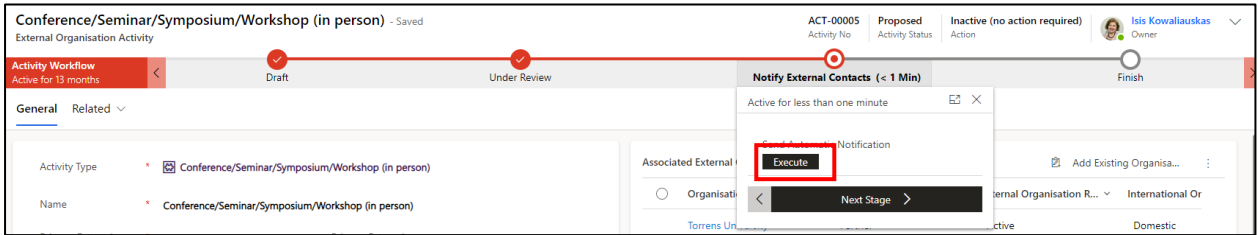6. The **External Organisation Activity** will update and save:

You can [Save & Close] to exit the record.

Rejected Requests

1. If an Activity is rejected, under the **Under Review** dropdown, the **Approval Result** field will be updated to **Rejected**, click [Next Stage >]:

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

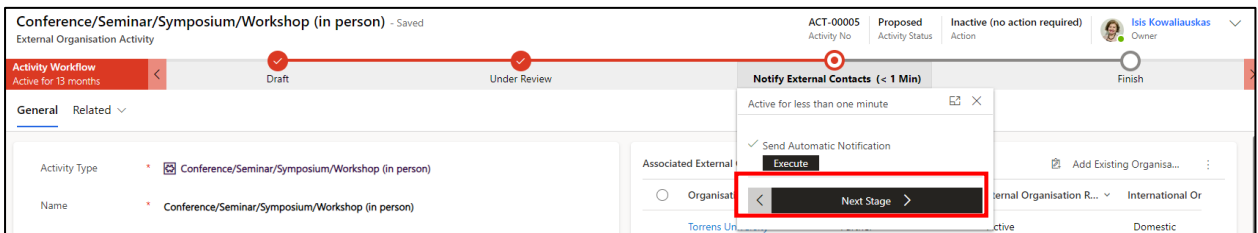
The **Agreement WF Action – Send Not Pursue** window opens, click Execute to send off a notification email to the external contact that the agreement will not be pursued:
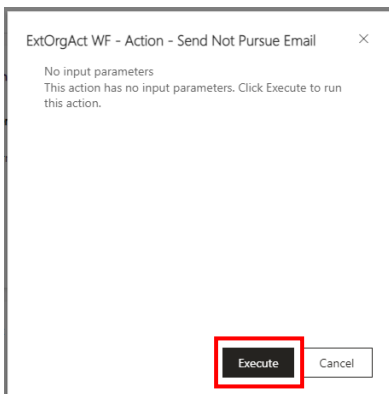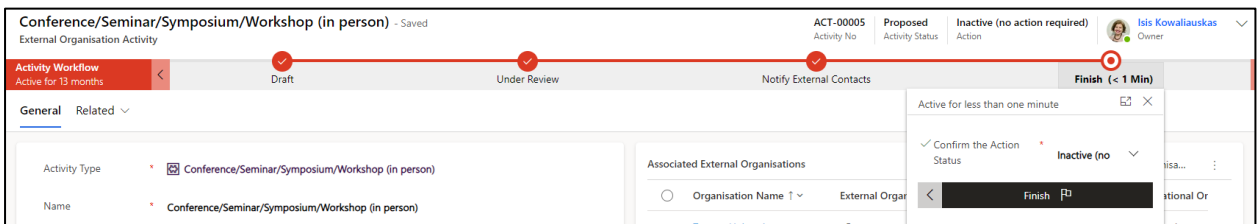

Note: Users may wish to manually send an email via Outlook with further details.

3.   Click Next Stage :

4.   Click Finish in the **Finish** dropdown.

Note: The Finished bar will turn green indicating this has been saved.