

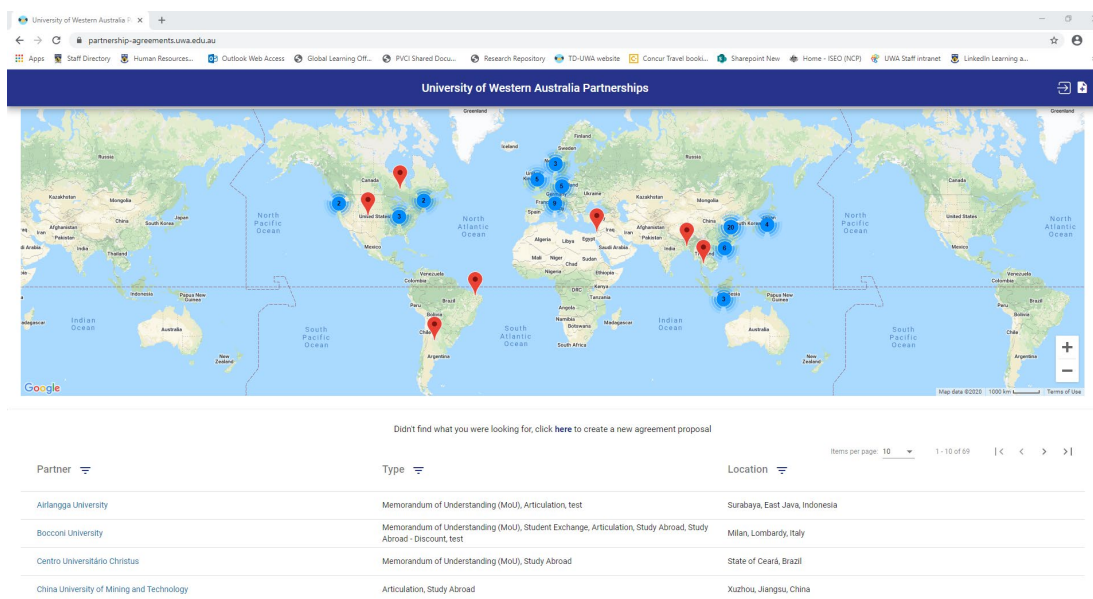
## Global Engagement Office – International Partner Agreements Database (GEO-IPAD)

### Background

- Terra Dotta is a web-based software solution provider that can automate and streamline processes for Agreement proposals, approvals and contract renewals for all international agreements (articulation, MoU's, mobility, joint degree, research, etc).
- The Terra Dotta Agreements module (GEO-IPAD) is expected to link to existing UWA systems (PowerBI, GLO's Global Studio is using Terra Dotta) and will be the repository of all activity/engagement related to partnerships across UWA.

### GEO-IPAD website

- This UWA [URL link](#) will be available for public viewing (including all UWA staff) to provide a simple overview of UWA's partnerships. An example is shown below.



The screenshot displays the 'University of Western Australia Partnerships' website. At the top, there is a navigation bar with the title 'University of Western Australia Partnerships'. Below this is a world map with several red location pins indicating partnership locations. Below the map, there is a table with columns for 'Partner', 'Type', and 'Location'. The table lists four partners: Airlangga University (Surabaya, East Java, Indonesia), Bocconi University (Milan, Lombardy, Italy), Centro Universitário Christus (State of Ceará, Brazil), and China University of Mining and Technology (Xuzhou, Jiangsu, China). The table also includes a 'Type' column with details like 'Memorandum of Understanding (MoU), Articulation, test' and 'Study Abroad - Discount, test'.

Partner	Type	Location
Airlangga University	Memorandum of Understanding (MoU), Articulation, test	Surabaya, East Java, Indonesia
Bocconi University	Memorandum of Understanding (MoU), Student Exchange, Articulation, Study Abroad, Study Abroad - Discount, test	Milan, Lombardy, Italy
Centro Universitário Christus	Memorandum of Understanding (MoU), Study Abroad	State of Ceará, Brazil
China University of Mining and Technology	Articulation, Study Abroad	Xuzhou, Jiangsu, China

- The information viewed on this page can be filtered by partner, type of agreement and/or location or by simply zooming in/out of the map view.
- UWA users can submit new agreement proposals via the UWA log in (top right hand corner) or by clicking create new proposal. Further information including simple reporting on existing partnerships and copies of all international agreements will be available to admin/authorised users only via a separate [URL link](#).

## PHASE 1 – Proposer submit new (DRAFT) proposal to Agreements Administrators

UWA users will be able to log in with their Pheme credentials and submit new agreement proposals. Depending on agreement type selected, UWA users will be asked to submit relevant supporting documentation (Feasibility Study, Checklist etc).

Screen shot below of new agreement proposal created via GEO-IPAD:

The screenshot shows a web browser window with the URL `partnership-agreements.uwa.edu.au/create-agreement-proposal`. The page title is "Agreement Proposal" and the user name "Tamas Zeg..." is visible in the top right corner. The form is divided into four steps: 1. Proposal Overview, 2. Contacts & Addresses, 3. Details, and 4. Supporting Documents. The "Proposal Overview" step is active. It contains the following fields and sections:

- Agreement Name \*
- Type \*
- Proposed Start date
- Sponsoring College \*
- Sponsoring Department \*
- Location of the activity
- Briefly describe or summarize the purpose of this proposed agreement.
- Partner institution section with fields for Name \* and Website URL.

At the bottom right, there is a "Next" button with a plus sign and a "Save as Draft" button.

Hints for creating new proposal in the system:

- Agreement name can be partner name and type of agreement (ie Memorandum of Understanding Partner University).
- Location of activity can be the general city or host location of activity. If "Perth UWA is also included site visits between both partners can be recorded under "Activities" tab.
- Sponsoring contact should automatically fill with proposer details. This contact can be changed if required.
- If location auto-populated with a generic location ie "Shanghai, China", consider re-entering institution name which will automatically suggest a suitable address. Otherwise, the map pin will show a generic location in "Shanghai, China" instead of actual location.
- Language skills are not mandatory and can be filled out only if applicable. This can also be completed in the feasibility form.
- Supporting documents should be downloaded, completed and uploaded to consider the proposal.
- When clicking Save (or Submit) please let it process until the confirmation message comes up rather than clicking save multiple times.

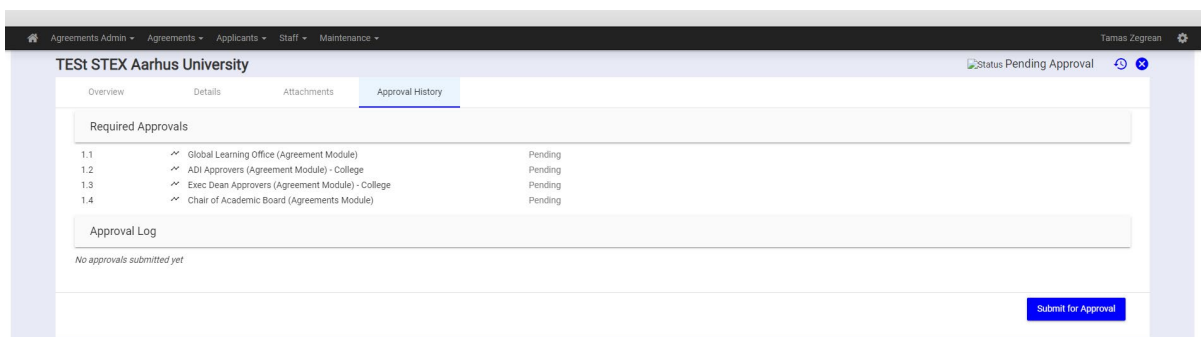
The proposal can be saved and continued at a later time. Once submitted the proposal status will be changed to pending and sent to Agreement Admin to view/edit.

## PHASE 2 – Agreement Admin review proposal and submit (FINAL) proposal for approval

A notification will be sent to Agreement Admin for each proposal that is submitted from the GEO-IPAD website. The Agreement Admin will review each proposal to ensure all mandatory fields have been completed, all relevant documentations are attached (feasibility, checklist etc) and any other preliminary checks/approvals (Risk and Legal/ Finance) are in place. Agreement Admin will then submit proposal to begin the agreement approval process.

Note: Proposal will be routed to relevant approver based on the workflow for different agreement types and the sponsoring Faculty/School. (ie Faculty sponsor of proposal will be routed through Faculty Approval group and different supporting documentation can be uploaded depending on agreement type)

Note: example screen shot below only visible to Agreement Admin users



## PHASE 3 – Agreement Approval workflow

When a final proposal is submitted final proposal for approval, an automated email is sent to the relevant approver groups based on agreement type workflows. A typical workflow will include approval from GLO, ADI, HoS, CAB once preliminary checks (School endorsement, Finance/Risk and Legal approval – where required etc) have been obtained.

Example of email received by approvers:



Fri 27/11/2020 2:47 PM

studyabroad@uwa.edu.au

**Agreement Proposal Pending Review - Fujian Medical University**

To Tamas Zegrean

You forwarded this message on 27/11/2020 2:57 PM.

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Dear Tamas,

The agreement proposal listed below has been submitted for your review:

**Proposal Name:** Fujian Medical University UWA Master of Public Health Articulation Program

**Agreement Types:** Articulation

**Sponsoring Contact:** David Connell

**Department:** School of Population and Global Health

**Partner:** Fujian Medical University

**Location:** Fuzhou, China;Perth, Australia

**Start Date:** November 30, 2020

[Click here to review](#)

Best,

Global Engagement Office (GEO)

(Global Partnerships)

UWA Global Learning Office

The Approver can click on the link from the email which will open a web browser without having to log into the online system. The Approver can review the proposal using the various tabs, download relevant attachments and then approve/reject via the green and red buttons. There is an optional comment section to record any comments. Note, any comments will be visible to all Approvers, Agreement Admin and the Sponsor (Proposer).

The agreement approval history tab can be used to check status of proposal and confirm who has already approved the proposal. This approval history is visible to both Agreement Admin and each Approver.

Screen shot below shows approval history and other available tabs:

**Approval Request**

**Fujian Medical University UWA Master of Public Health Articulation Program** Approved

Approval Overview Details Attachments **Approval History** Internal

**Required Approvals**

1.1	✓ ADI Approvers (Agreement Module) - College	Approved
1.2	✓ Exec Dean Approvers (Agreement Module) - College	Approved
1.3	✓ Chair of Academic Board (Agreements Module)	Approved

**Approval Log**

Date	User	Action	Message
27/11/2020 15:11	Da Silva Rosa, Raymond	Approved	
27/11/2020 14:11	Fisher, Colleen	Approved	
27/11/2020 14:11	Zheng, Ming	Approved	

Example of approval request visible to Approvers:

**Approval Request**

**Test SA Norwegian University of Life Sciences - Discount** Pending Approval

Approval Overview Details Attachments Approval History

Agreement Type: Study Abroad - Discount  
Partner: Norwegian University of Life Sciences

Additional message for the user

**REJECT** **APPROVE**

Once 1st Approver clicks the green “approve” button an auto generated email will be sent to the 2nd approver prompting them to do the same. If for any reason a proposal is rejected, an auto generated notification will be sent to the Agreement Admin (GEO) and the proposer (sponsor contact on the proposal). The rejected proposal can then be amended and re-submitted for approval from the beginning or discarded altogether.

The Agreement Admin receives automated notification each time an Approver responds (approve/reject). If a proposal has been idle for a long period of time, the Agreement Admin will receive notification to follow up.

## Example of typical approval workflow:

The screenshot shows the 'Agreement Edit View' interface for 'TEST Articulation Bocconi 6'. The 'Approval History' tab is active, displaying a table of required approvals and an approval log.

Required Approvals		
1.1	✓ ADI Approvers (Agreement Module) - College	Approved
1.2	✓ Exec Dean Approvers (Agreement Module) - College	Approved
1.3	✓ Chair of Academic Board (Agreements Module)	Approved

Approval Log			
Date	User	Action	Message
May 12, 2020 10:37	Connell, David	Approved	
May 12, 2020 10:14	Ingate, Millicent	Approved	
May 12, 2020 09:02	Hughes, Christine	Approved	

Amendments Log	
No amendments started yet	

Note: when logged into the GEO-IPAD, Proposer can see status of the proposal they submitted.

Once approved by the last Approver an automated notification is sent to Agreement Admin to process the agreement.

## Agreement renewals for existing partners

Similarly, for the renewal of existing agreements the Agreement Admin will submit a recommendation to renew the agreement to the relevant approver groups. A similar process with a revised workflow according to each agreement type will be routed accordingly and recorded in the approval history.

## Example of Agreement Admin view to recommend/ not recommend renewal:

The screenshot shows the 'Agreement Admin' view for '2020.13.05.1'. The 'Renewal' tab is active, displaying the agreement type and partner, along with radio buttons for recommending or not recommending renewal.






Agreement Type: test  
Partner: University of Denver









I recommend Renewal  Do Not Renew


No additional details to complete

Submit for approval (button)  
Save (button)

## Example of approval workflow for a Student Exchange renewal:

→ [globalstudio.uwa.edu.au/index.cfm?FuseAction=Agreements.ProposalEdit&amendment\\_id=7&nav=0&renew=1](http://globalstudio.uwa.edu.au/index.cfm?FuseAction=Agreements.ProposalEdit&amendment_id=7&nav=0&renew=1)     

pps  Staff Directory  Human Resources...  Outlook Web Access  Global Learning Off...  PVICI Shared Docu...  UWA Partnerships  Sharepoint New  Home - ISEO (NCP)

 THE UNIVERSITY OF WESTERN AUSTRALIA

Agreements Admin ▾ Agreements ▾ Applicants ▾ Maintenance ▾ Tamas Zegrean

### WHU, Otto Beisheim School of Management Student Exchange StatusApproved

Renewal   Overview   Details   Attachments   **Approval History**   Activities   Nominations

#### Required Approvals

1.1	✓ Global Learning Office (Agreement Module)	Approved
1.2	✓ ADI Approvers (Agreement Module) - College	Approved

#### Approval Log

Date	User	Action	Message
12/05/2020 15:05	Hughes, Christine	Approved	
12/05/2020 15:05	Curran, Chelsea	Approved	