

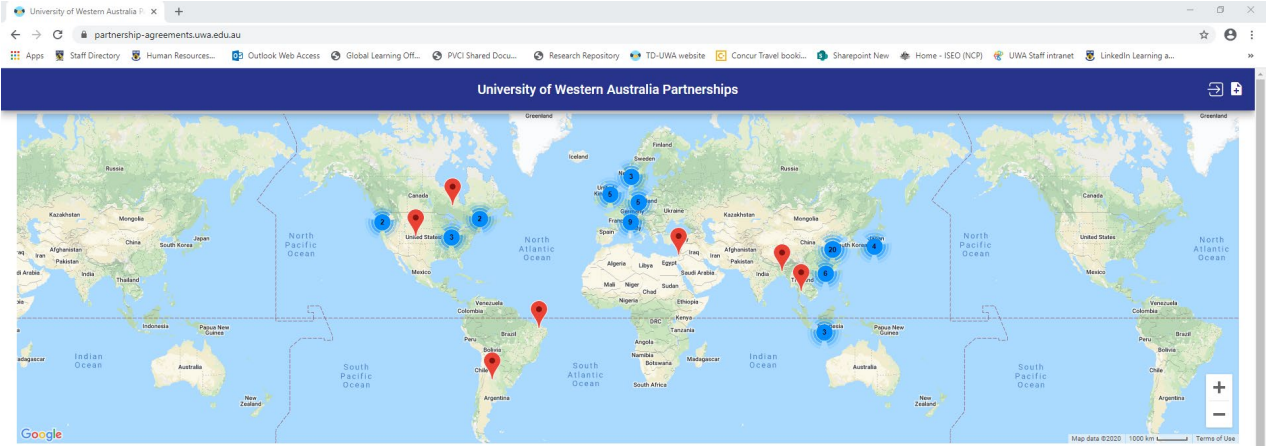
## Global Engagement Office – International Partner Agreements Database (GEO-IPAD)

### 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 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 shows a web browser displaying the 'University of Western Australia Partnerships' website. The main feature is a world map with red and blue markers indicating partnership locations. Below the map is a table listing partner universities, the type of agreement, and the location.

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.

## Process for establishing new agreements

### 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). A User Guide for Proposers will be available to assist UWA users on how to complete the forms.

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 is logged in as "Tamas Zeg". 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. The form 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.
- Next button (with a plus icon)
- Save as Draft button

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

A notification will be sent to Agreement Admin (GEO staff) for each proposal that is submitted from the GEO-IPAD website. The Agreement Admin will review each proposal to ensure 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)


### 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:

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 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

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This message was generated automatically

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

Once 1<sup>st</sup> Approver clicks the green “approve” button an auto generated email will be sent to the 2<sup>nd</sup> 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 a web browser window with the URL `partnership-agreements.uwa.edu.au/proposal-edit?id=177`. The page title is "Agreement Edit View" and the user is "Tamas Zegrea". The main content area is titled "TEST Articulation Bocconi 6" and has tabs for Overview, Details, Attachments, Approval History, and Activities. The "Approval History" tab is active, showing a "Required Approvals" section with three items:

Item	Approver	Status
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

Below this is an "Approval Log" table:

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	

At the bottom, there is an "Amendments Log" section with the text "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 "Agreements Admin" interface. The user is "Tamas Zegrea" and the date is "2020.13.05.1". The page has tabs for Renewal, Overview, Details, Attachments, Approval History, and Activities. The "Renewal" tab is active, showing a form with the following details:

- Agreement Type: test
- Partner: University of Denver

Below the details, there are two radio buttons for the recommendation:

I recommend Renewal  Do Not Renew

At the bottom, there is a "Save" button and a "Submit for approval" 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

Staff Directory Human Resources... Outlook Web Access Global Learning Off... PPCI 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	