

Managing Supporting Documents

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Managing Supporting Documents

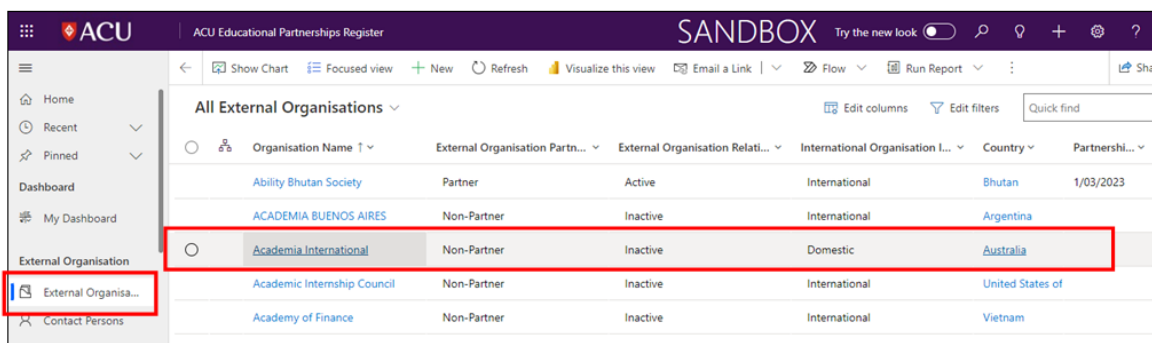
You can upload, create, or edit supporting documents in the Educational Partnerships Register (EPR) using EPR's document storage solution. These documents can be stored under External Organisations, Agreements, or Activities.

Business Units will need to **define their own business processes** for managing supporting documents, determining storage locations, and implementing an appropriate naming protocol for documents.

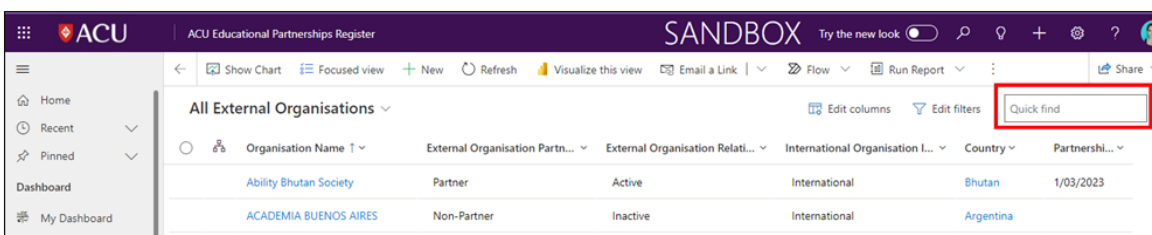
The examples provided in this manual will focus on **External Organisations**. However, the same process can be applied when managing supporting documents in Agreements and Activities.

Locating a record

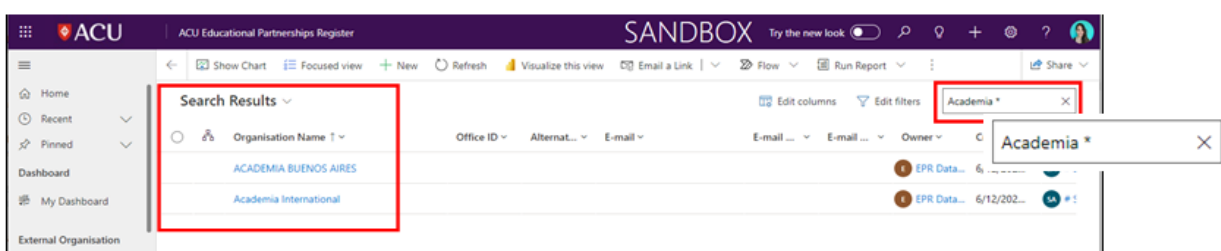
To locate the required record for creating, uploading, or editing a document, navigate to the **External Organisations** page. Select the appropriate organisation record where you will create your document.



If you can't immediately locate your record, you can search for the external organisation using the **Quick Find** functionality.

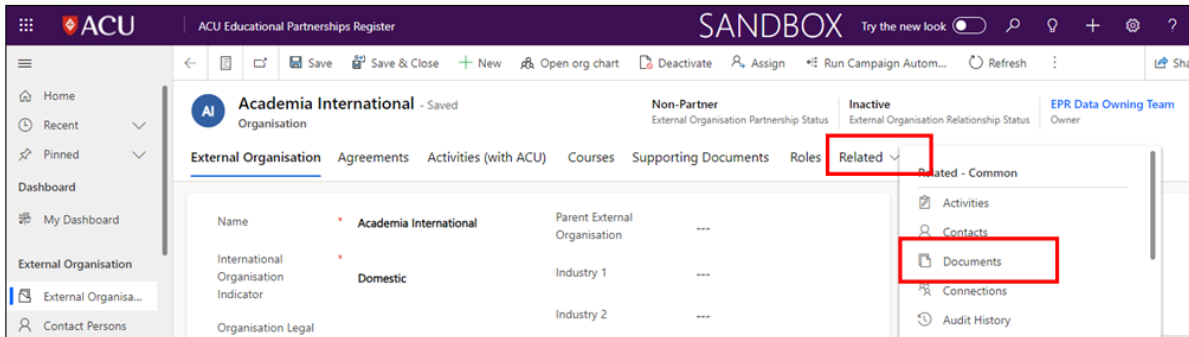


When using the **Quick Find** functionality, if the full name of the external organisation is unknown, you can use an asterisk as a wild card. For example **Academia*** will provide results for all organisations that begin with **Academia**.

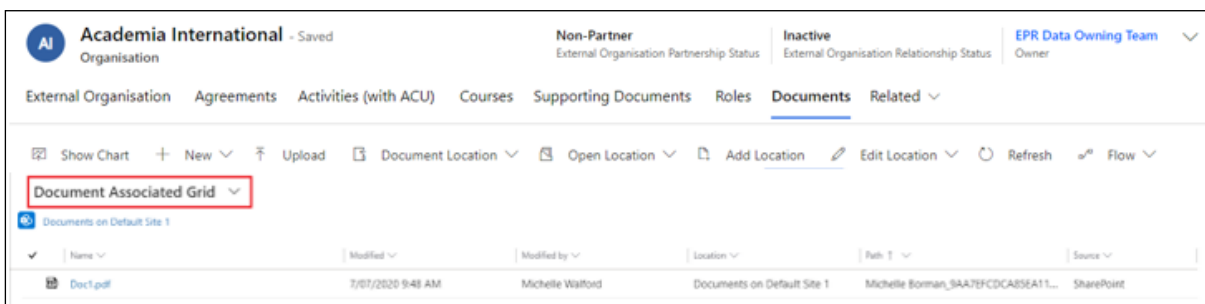


Uploading a document to a record

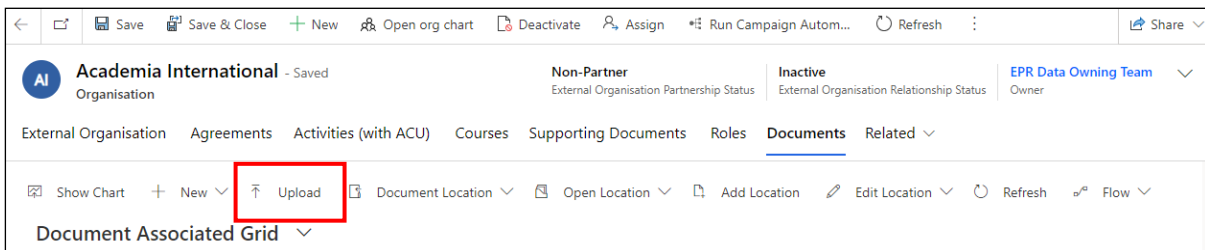
1. In the appropriate **External Organisation** record, navigate to the **Related** drop-down. From the drop-down list, select **Documents**.



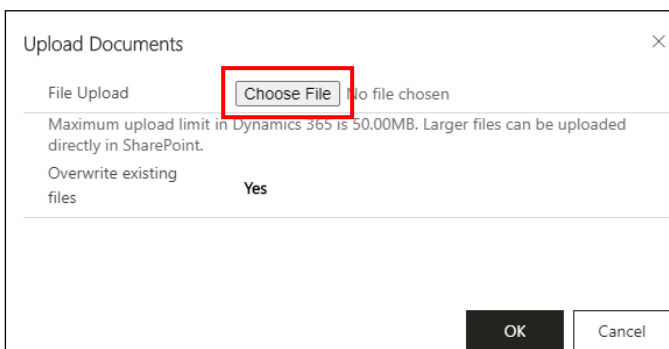
The **Document Associated Grid** opens.



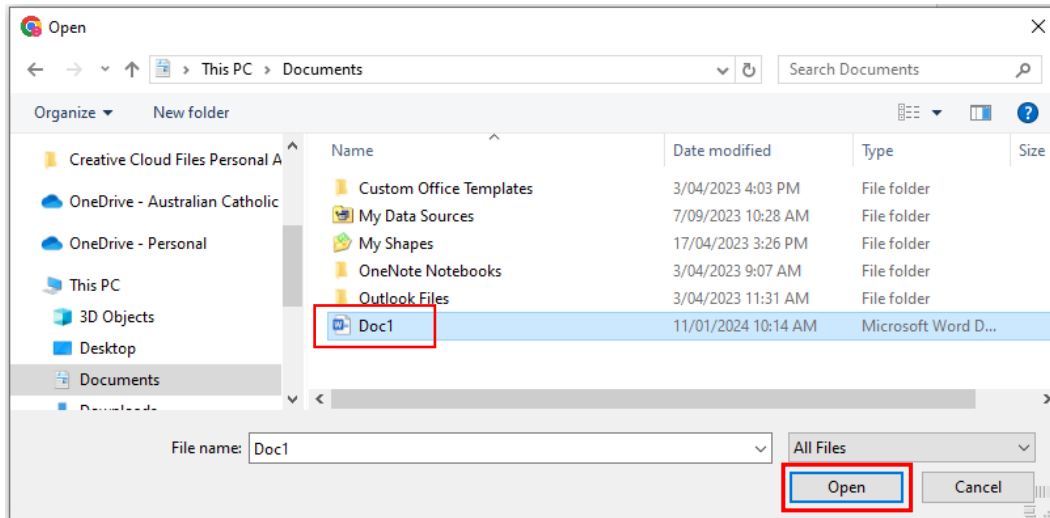
2. To upload a document, click  Upload.



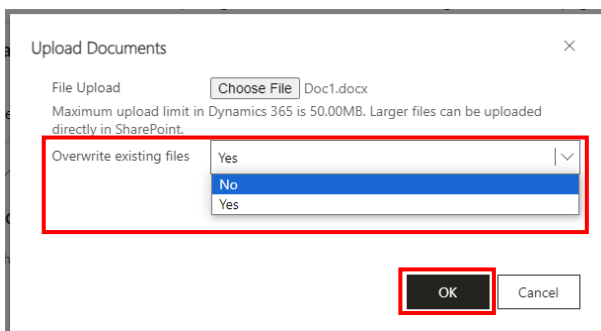
3. The upload documents window will open. In the section **File Upload**, click on **Choose File**.



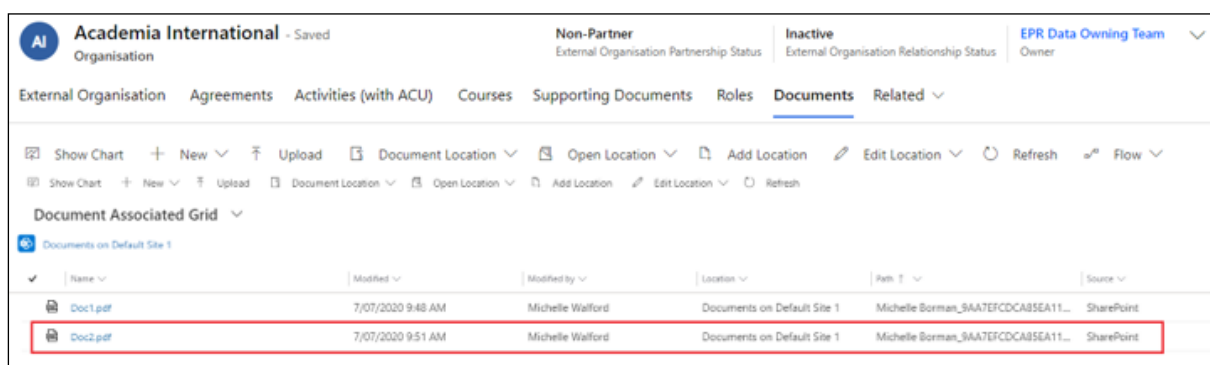
- Navigate to where the document is located on your computer. Select the document and click open.



- If there is an existing version of the document in the Document Associated Grid, which is being replaced, select **Yes** in the **Overwrite existing files** field. Otherwise, select for **No**. Click **Ok** to confirm.

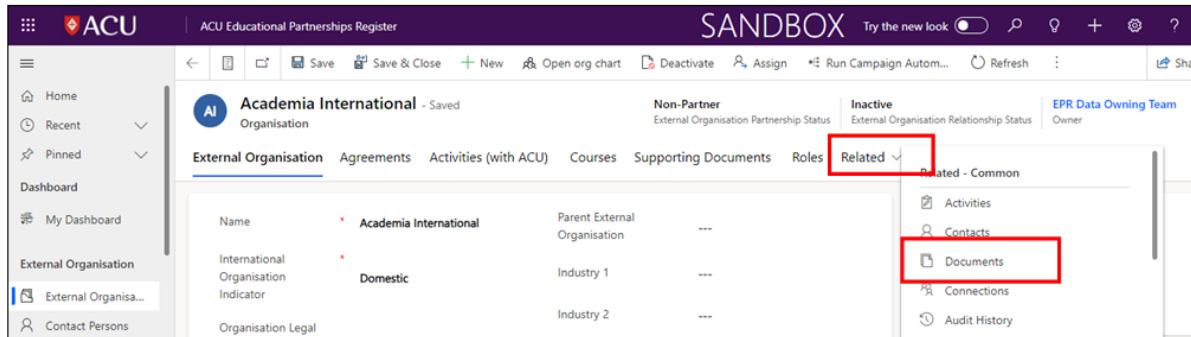


- The document will now appear in the **Document Associated Grid**.

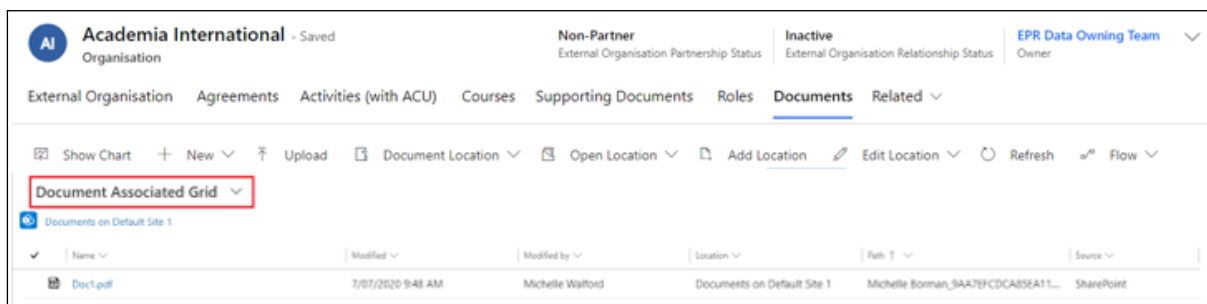


Creating a document in a record

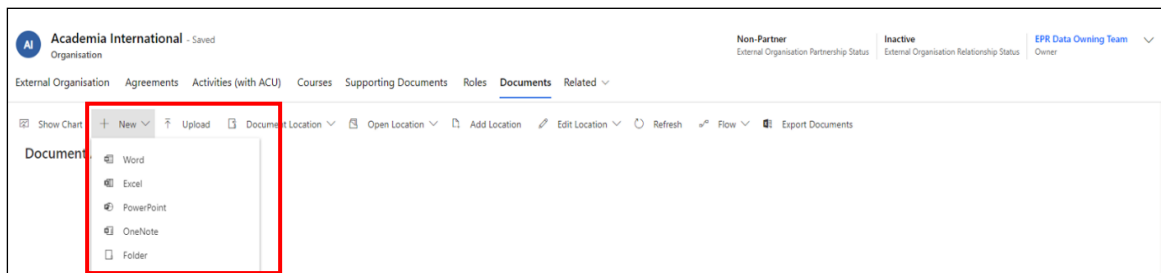
1. In the appropriate **External Organisation** record, navigate to the **Related** drop-down. From the drop-down list, select **Documents**.

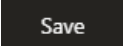


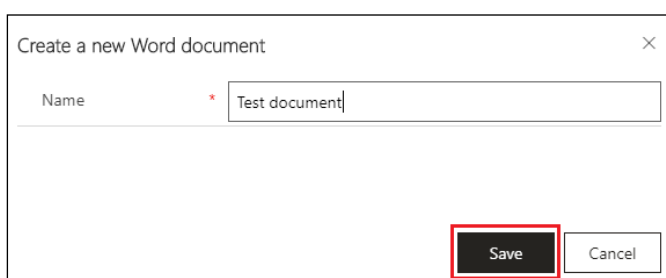
The **Document Associated Grid** opens.



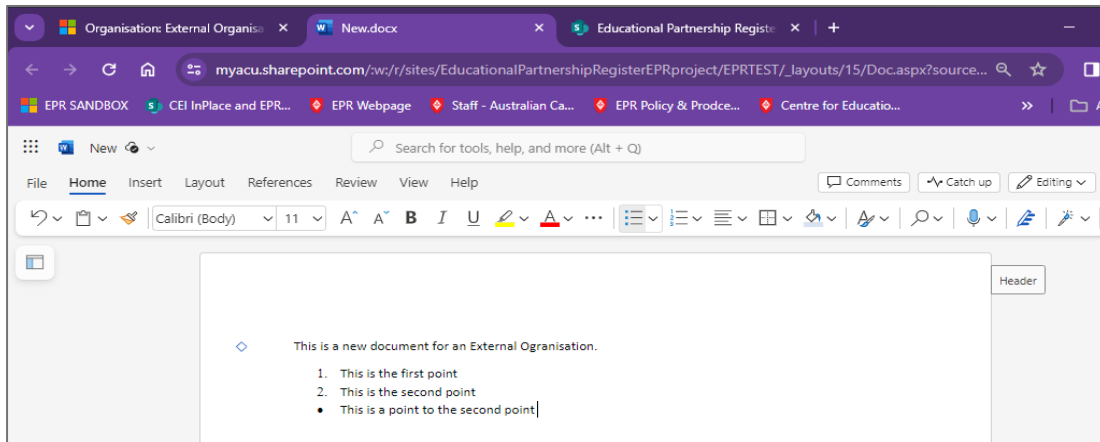
2. Click  and select the type of document you are creating.



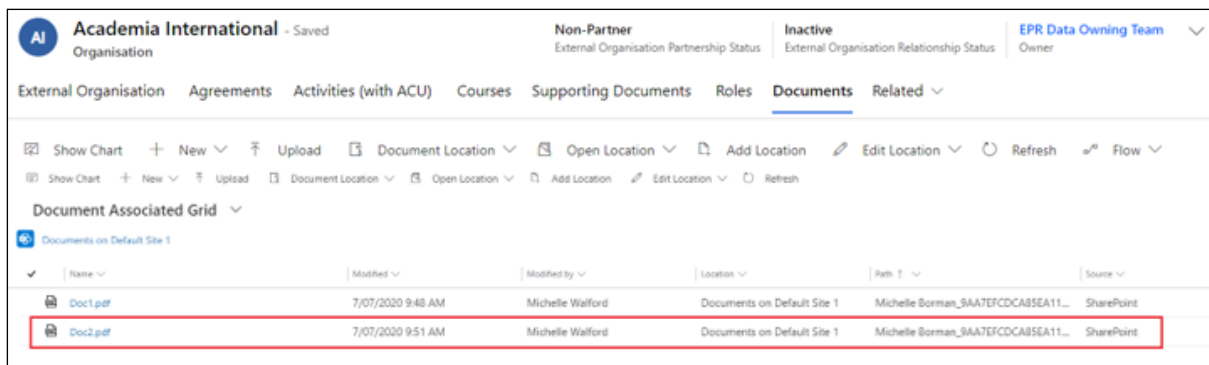
3. When creating a new document, a new window will appear to Name the document before the document program opens. In the example of creating a **Word** document, a **Create a new Word document** window opens. Enter a name for the document, using the process determined by your business unit, and click .



4. A **Word** document window will open, depending on your computer settings this may open as a new tab in your browser. You can start creating your document. The document will automatically save. Close the window to close the document.

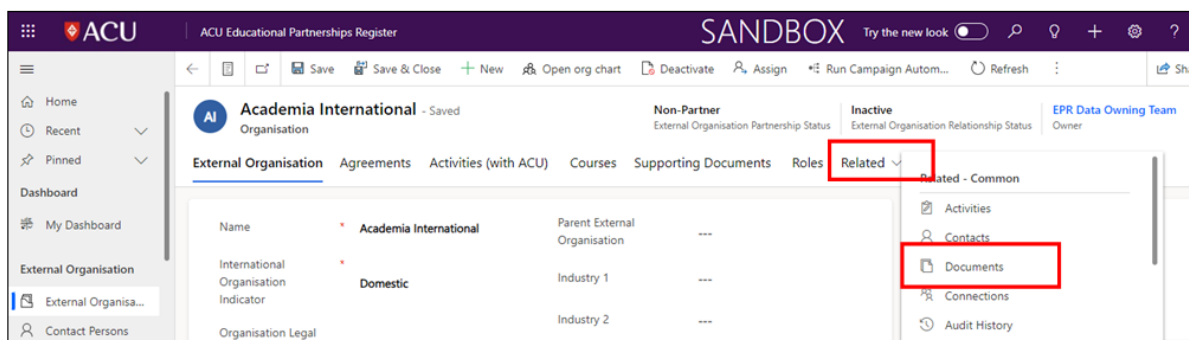


5. The document will now appear in the **Document Associated Grid**:

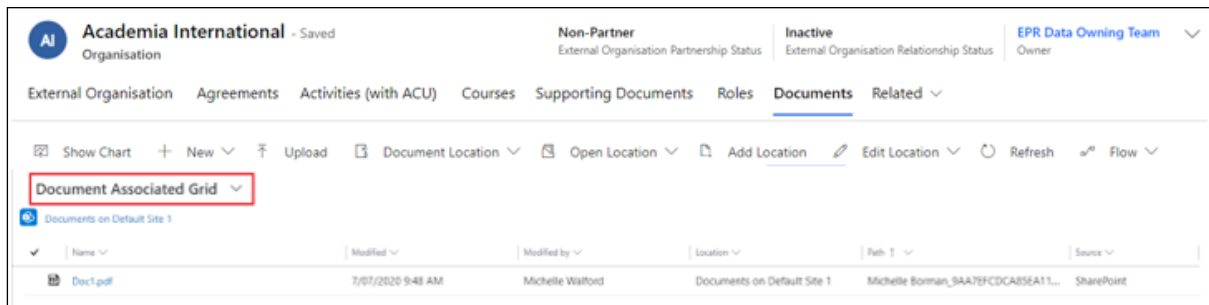


Editing a document in a record

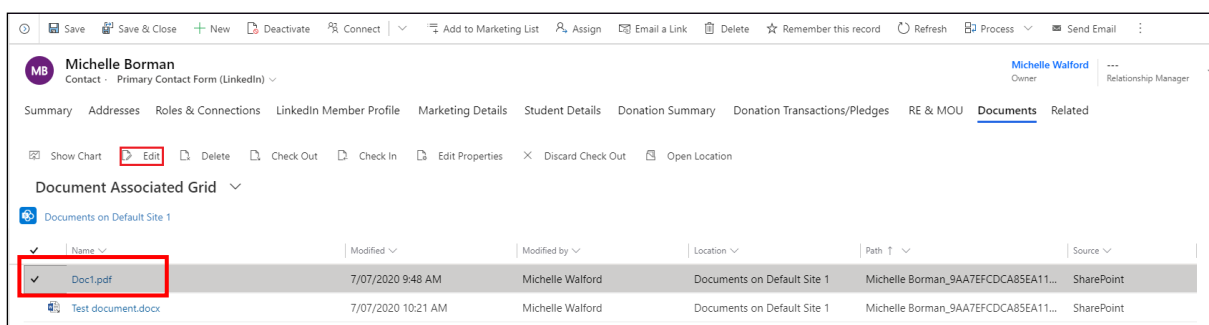
1. In the appropriate **External Organisation** record, navigate to the **Related** drop-down. From the drop-down list, select **Documents**.



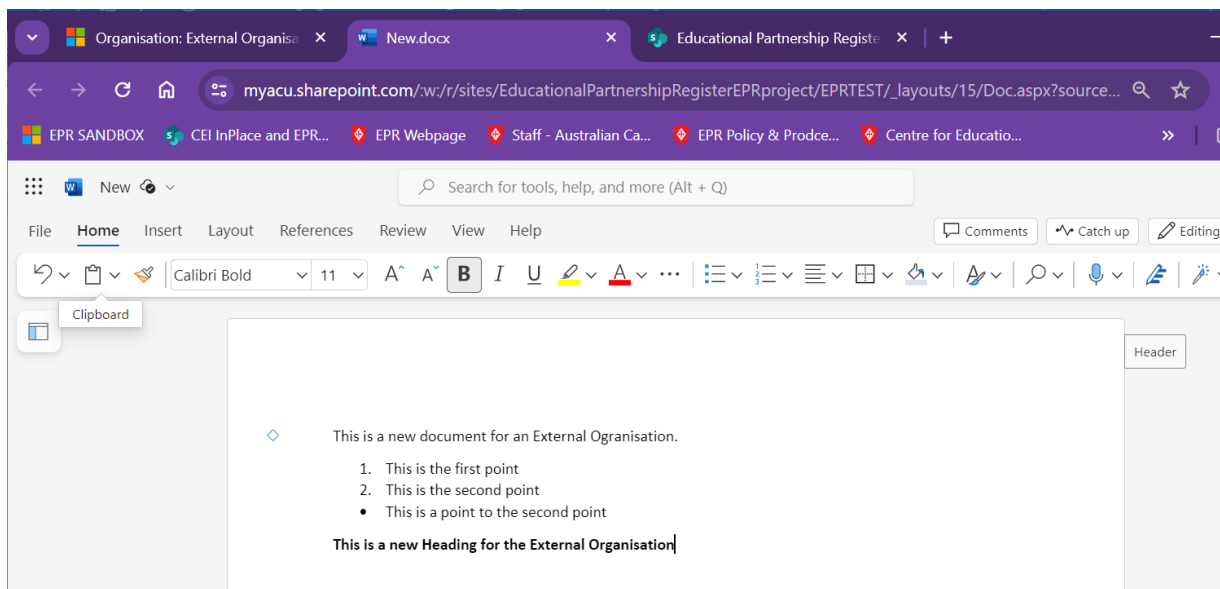
The **Document Associated Grid** opens.




2. Once you select the document that requires editing, the **Edit** option will appear, click

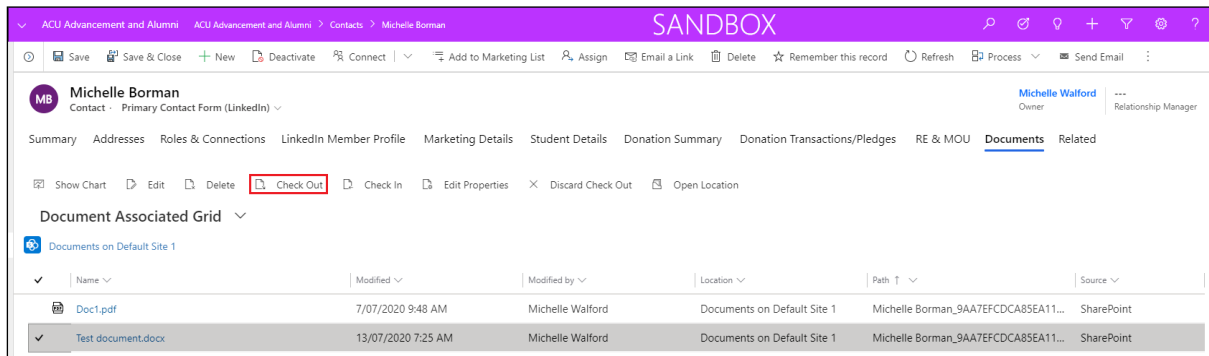


6. A **Word** document window will open, depending on your computer settings this may open as a new tab in your browser. You can start editing your document. The document will automatically save.



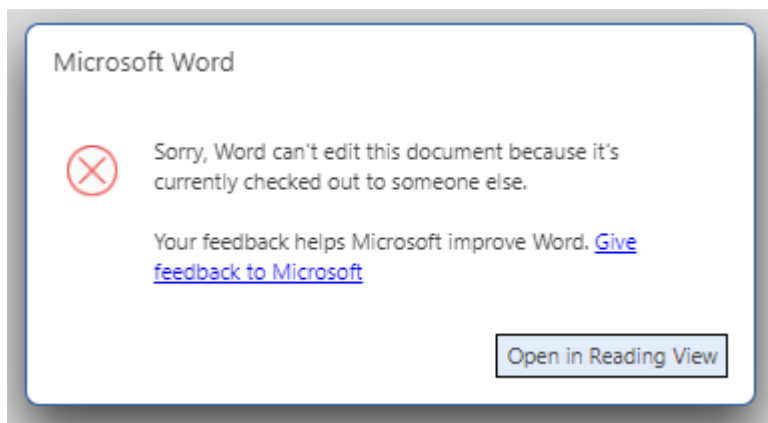
Close the window to close the document.


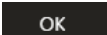
- To make changes to a document but keep others from making changes at the same time, select the  **Check Out** document, click

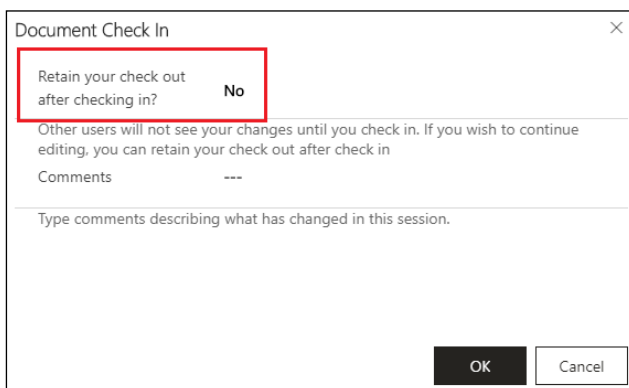


The file can now be edited either online in Microsoft 365 or offline, saving changes as needed before checking the file back in.

Note: If other users attempt to edit the checked-out document, a dialogue box will appear to the other user:



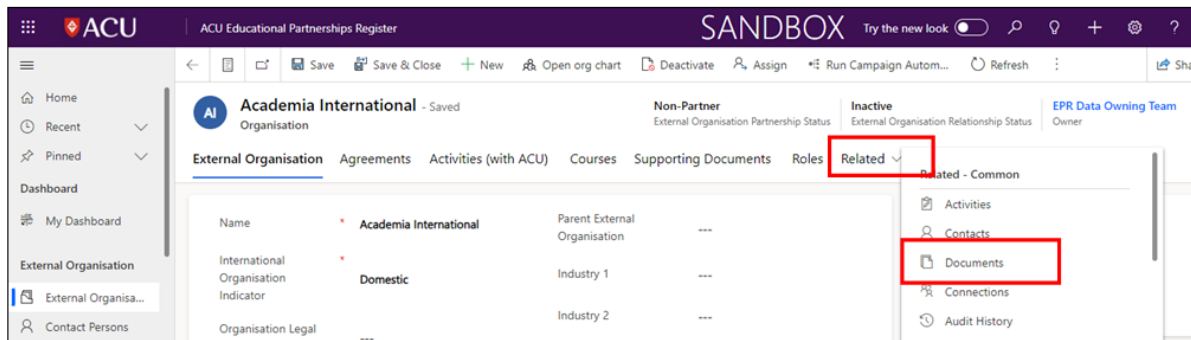
- After completing all edits to the document, close the file, and click  **Check In**. The **Document Check In** window opens. In the field **Retain your check out after checking in?**, select **No**. This will ensure others will have access to check out the document if they need to make edits in the future. Click .



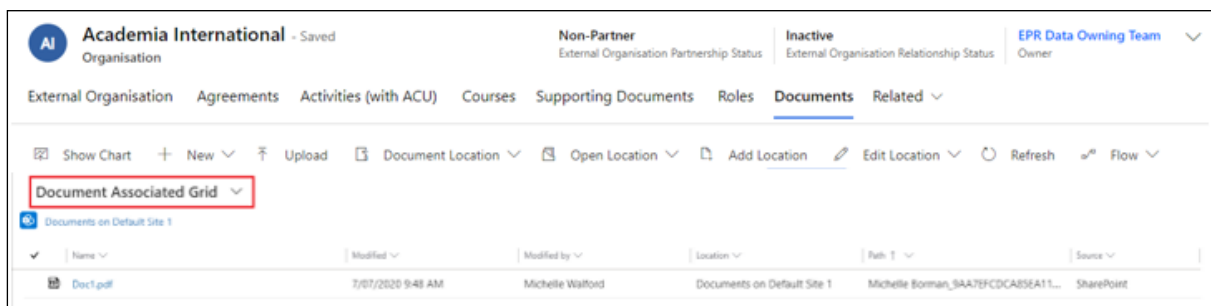
The document has now been checked in and is available for other users to edit.

Renaming a document

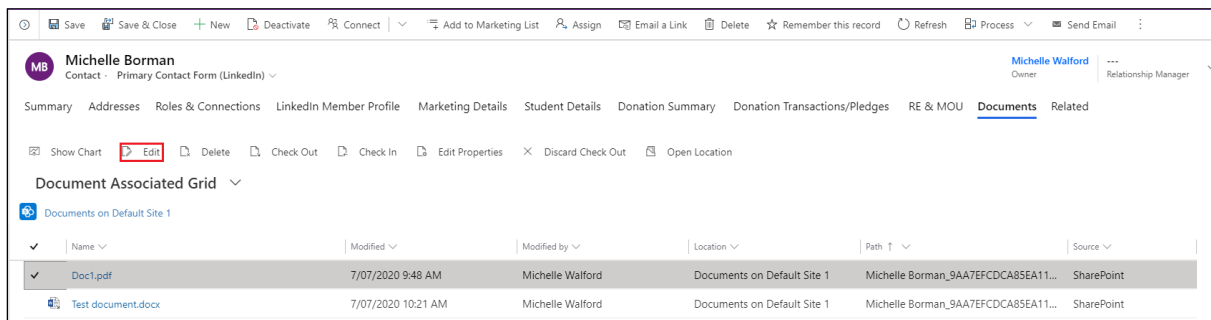
1. Open the External Organisations record, click Related, select Documents.



2. The Document Associated Grid opens.



3. Select the document that requires renaming and click Edit Properties



4. **Edit Document Properties** window will appear. Rename the document and click

