

EDUCATIONAL PARTNERSHIPS REGISTER

Managing Supporting Documents

Contents

Managing Supporting Documents	3
Locating a record	3
Uploading a document to a record	4
Creating a document in a record	6
Editing a document in a record	7
Renaming a document	10

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.

III 🔮 ACU	ACU Educ	ational Partnerships Register		SANDBC)X Try the new look 💽	+ ۹ م	@ ?
=	← 🛱 Sh	now Chart 🛛 🗯 Focused view 🗧	🕂 New 🖒 Refresh 🔞 Visualize	e this view 🛛 🖾 Email a Link 🗸	🔊 Flow \vee 🗐 Run Report	× :	🖻 Sha
 ☆ Home ③ Recent ∨ 	All Ext	ernal Organisations \vee			😨 Edit columns 🛛 🍸 Edit	filters Quick fi	nd
S Pinned ∨	0 %	Organisation Name ↑ ~	External Organisation Partn ~	External Organisation Relati $ \sim $	International Organisation I $$	Country ~	Partnershi ~
Dashboard		Ability Bhutan Society	Partner	Active	International	Bhutan	1/03/2023
恭 My Dashboard		ACADEMIA BUENOS AIRES	Non-Partner	Inactive	International	Argentina	
External Organisation	0	Academia International	Non-Partner	Inactive	Domestic	Australia	
External Organisa		Academic Internship Council	Non-Partner	Inactive	International	United States of	
Contact Persons		Academy of Finance	Non-Partner	Inactive	International	Vietnam	

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

	ACU	ACU Educational Partnership	is Register		SANDBC)X Try the new look 💽	م (8 H	⊦ ⊚	? 🧯
≡		← 🖾 Show Chart 🗯 Fe	ocused view 🕂 New 🖒 Refr	esh 🛛 👍 Visualize this	view 🛛 🕄 Email a Link 🛛 🗸	🔊 Flow 🗸 🗐 Run Rep	ort 🗸	:		🖻 Share
G ⊨		All External Organis	sations \sim			🖬 Edit columns 🛛 🍸	Edit filters	Quick	find	
¢ ₽		ා ස් Organisation Na	ame 1 ~ External Organ	isation Partn Y Ext	ternal Organisation Relati ~	International Organisation I.	. ~ Cou	ntry ~	Partne	rshi 🛩
Dasht	ooard	Ability Bhutan Se	ociety Partner	A	Active	International	Bhut	an	1/03/2	023
新 N	/ly Dashboard	ACADEMIA BUE	NOS AIRES Non-Partner	Ir	nactive	International	Arge	ntina		

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**.

 A Home Search Results ∨ B Edit columns C Edit filters Academia * × 	🖩 🔮 ACU	ACU Educational Partnerships Register	SANDBO	🔿 X Try the new lock 💽 🕫 🔉 + 🐵 ? 🧌
© Recent > Search Kesülts > Itig Edit columns ¥ Edit inters Azademia * >> > > Atternat × E-mail × E-mail × E-mail × Owner × C Academia *	=	← 🖾 Show Chart i≡ Focused view + 1	New 💍 Refresh 👍 Visualize this view 🛛 🛱 Email a Link 🗠	$\hfill >$ Flow $\hfill >$ $\hfill =$ Run Report $\hfill >$ $\hfill =$ Share $\hfill >$
Pinned O [®] Sorganisation Name 1 × Office ID × Alternat × E-mail × E-mail × E-mail	Home	Search Results \vee		🕼 Edit columns 🛛 🖓 Edit filters 🛛 Academia * 🛛 🗙
Dashboard ACADEMIA BUENOS AIRES		් ඒ Organisation Name † ∽	Office ID Y Alternat Y E-mail Y	E-mail ~ E-mail ~ Owner ~ C Academia *
	Dashboard	ACADEMIA BUENOS AIRES		EPR Data61
# My Dashboard Academia International () EPR Data_ 6/12/202_ 😒 + 5	骄 My Dashboard	Academia International		💽 EPR Data 6/12/202 😣 # 5

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**.

III 🔮 ACU	ACU Educational Partnerships Register	SANDBOX Try the new look 💽 🕫 🕈 🕸 ?
=	← 🗄 🖬 Save 🛱 Save & Close + New & Open org @	chart 🚺 Deactivate 🔍 Assign +E Run Campaign Autom 🕐 Refresh 🗄 🖻 SI
 ☆ Home ③ Recent ∨ 	Academia International - Saved Organisation	Non-Partner Inactive EPR Data Owning Team External Organisation Partnership Status External Organisation Relationship Status Owner
🖈 Pinned 🗸 🗸	External Organisation Agreements Activities (with ACU) Cour	ses Supporting Documents Roles Related - Related - Common
靜 My Dashboard	Name Academia International Parent E Organis	
External Organisation	International * Organisation Domestic Industry	
External Organisa	Indicator Industry Organisation Legal	2 ③ Audit History

The **Document Associated Grid** opens.

Academia International - Saved Organisation		Non-Partner External Organisation Partn	ership Status External Organ	sation Relationship Status Owner	a Owning Team 🛛 🗸
External Organisation Agreements Activit	ies (with ACU) Courses	Supporting Documents	Roles Documents	Related $ \smallsetminus $	
Image: Show Chart + New ∨ T Upload Document Associated Grid ∨ Image: Show chart State 1	\Box Document Location \lor	$\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ $	🗅 Add Location 🖉	Edit Location \checkmark 🖒 Refresh	∞° Flow ∨
✓ Name ∽	Modified V N	Addied by 🗸	location V	Neh † 🗸	Source ~
B Docl.pdf	7/07/2020 9:48 AM	Achelle Walford	Documents on Default Site 1	Michelle Borman, SAA7EFCDCA85EA11	SharePoint

2. To upload a document, click $\overline{\uparrow}$ Upload

< 다 B Save 짧 Save & Close + New & Open org chart	🔓 Deactivate 🔗 Assign 📲 Run Car	mpaign Autom 🕐 Refresh :	🖻 Share 🗸
Academia International - Saved Organisation	Non-Partner External Organisation Partnership Status	Inactive External Organisation Relationship Status	EPR Data Owning Team V Owner
External Organisation Agreements Activities (with ACU) Cour	rses Supporting Documents Roles	Documents Related \vee	
🖾 Show Chart $+$ New \checkmark $\overline{\uparrow}$ Upload 🖸 Document Locatio	n 🗸 🖪 Open Location 🗸 🗅 Add L	ocation 🖉 Edit Location 🗸 💍	Refresh $_{ m e'^a}$ Flow \checkmark
Document Associated Grid 🛛 🗠			

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

Upload Documents		×
File Upload	Choose File Ilo file chosen	
Maximum upload lim directly in SharePoint.	it in Dynamics 365 is 50.00MB. Larger files can be uploaded	
Overwrite existing files	Yes	
2	Yes	
	OK Cance	2

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

🚱 Open			×
\leftarrow \rightarrow \checkmark \bigstar This PC \Rightarrow Doc	uments	✓ ^C Search	Documents 🔎
Organize 🔻 New folder			::: • 🔟 ?
Creative Cloud Files Personal A	Name	Date modified	Type Size
 OneDrive - Australian Catholic 	📕 Custom Office Templates	3/04/2023 4:03 PM	File folder
OneDrive - Australian Catholic	🖮 My Data Sources	7/09/2023 10:28 AM	File folder
OneDrive - Personal	🔌 My Shapes	17/04/2023 3:26 PM	File folder
interview and the second secon	📕 OneNote Notebooks	3/04/2023 9:07 AM	File folder
	Outlook Files	3/04/2023 11:31 AM	File folder
3D Objects	🐏 Doc1	11/01/2024 10:14 AM	Microsoft Word D
Desktop			
🗄 Documents			
Decomber de	<		2
File name: Doc1		 ✓ All File O 	s V pen Cancel

5. 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.

File Upload Maximum upload limit in directly in SharePoint.	Choose File Doc1.docx Dynamics 365 is 50.00MB. Larger files can be up	ploaded
Overwrite existing files	Yes	\sim
	No	
	Yes	

6. The document will now appear in the Document Associated Grid.

AI	Academia International - Saved Organisation		Non-Partner External Organisation Partn	nership Status External Org	anisation Relationship Status Owner	ata Owning Team
xterna	al Organisation Agreements Activiti	ies (with ACU) Courses	Supporting Documents	Roles Document	Related \sim	
-	and the second at the second	E a	5	D Add Location /	Editoria V. A. Defect	n →° Flow ∨
(2) Sha	how Chart + New ∨ 주 Upload w Chart + New ∨ ∓ Upload ⊡ Document ument Associated Grid ∨				Edit Location V O Refresh	1 ≥° How ∨
Doci	w Chart + New ∨ ∓ Uplead 🖪 Document				Edit Location V 🔾 Netresh	1 ∞ HOM ∧
Docu Docu	w Chart + New ∨ ₹ Uplead □ Document ument Associated Grid ∨				Pan 1 ~	Source ∨
Docu	w Chart + New > 후 Uplead B Decument ument Associated Grid ~ umenta on Default Ske 1	Location \vee 🖪 Open Location \vee	D. Add Location 🥜 EditLoca	tion ∨ D Refresh		Source ~

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**.

III 🔮 ACU	ACU Educational Partnerships Register	SANDBOX Try the new look 💽 🕫 🕈 🕸 ?
=	← 🗄 🖬 Save 🛱 Save & Close + New & Open org @	chart 🚺 Deactivate 🔍 Assign +E Run Campaign Autom 🕐 Refresh 🗄 🖻 SI
G Home ③ Recent ✓	Academia International - Saved Organisation	Non-Partner Inactive EPR Data Owning Team External Organisation Partnership Status External Organisation Relationship Status Owner
🖈 Pinned 🗸 🗸	External Organisation Agreements Activities (with ACU) Cour	ses Supporting Documents Roles Related - Related - Common
靜 My Dashboard	Name Academia International Parent E Organis	
External Organisation	International * Organisation Domestic Industry	
External Organisa	Indicator Industry Organisation Legal	2 ③ Audit History

The **Document Associated Grid** opens.

Academia International - Saved Organisation		Non-Partner External Organisation Part	nership Status External Organ	isation Relationship Status Owner	a Owning Team 🛛 🗸
External Organisation Agreements Activiti	es (with ACU) Courses	Supporting Documents	Roles Documents	Related \sim	
Ø Show Chart + New ✓ T Upload Document Associated Grid ✓ Ø Documents on Default Site 1	☐ Document Location ∨	$\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ $	D. Add Location 🥖	Edit Location \vee 🙁 Refresh	∞° Flow ∨
✓ I Name ✓	Modified V	Modified by \vee	Location V	Neh † 🗸	Source ~
Doct.pdf	7/07/2020 9:48 AM	Michelle Walford	Documents on Default Site 1	Michelle Borman_SAA7EFCDCA85EA11	SharePoint

2. Click \vdash New \checkmark and select the type of document you are creating.

Academia International - Saved Organisation	Non-Partner Inactive External Organisation Relationship Status Owner Owner
External Organisation Agreements Activities (with ACU) Courses Supporting Documents Roles Documents Related V	
 ☑ Show Chart H New ✓ T Upload ☑ Document ☑ Word ④ Excel ④ ProwerPoint ④ OneNote ☐ Folder 	iow 🗸 🛿 Export Documents

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

Create a new V	Vord docur	ment	×
Name	*	Test document	
		Sa	ve Cancel

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:**

A	Academia International - Saver Organisation	1	Non-Partner External Organisation Partr	nership Status External Organi	sation Relationship Status Owner	Owning Team 🛛 🗸
Exte	ernal Organisation Agreements Activ	ities (with ACU) Courses	Supporting Documents	Roles Documents	Related $ \smallsetminus $	
Image: Show Chart + New ∨ ↑ Upload Image: Document Location ∨ Image: Open Location ∨ Image: Add Location Image: Edit Location ∨ Note: Flow ∨ Image: Show Chart + New ∨ ↑ Upload Image: Open Location ∨ Image: Open Location ∨						
~	Name 🗸	Modified \sim	Modified by \lor	Location V	Rem † 🗸	Source V
~						
	Doc1.pdf	7/07/2020 9:48 AM	Michelle Walford	Documents on Default Site 1	Michelle Borman_9AA7EFCDCA85EA11	SharePoint

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**.

	♦ACU	ACU Educational Partnerships Register	SANDBOX Try the new look 💽 タ ロ + 🐵 ?
=		← 🗄 🖆 🖬 Save 🛱 Save & Close + New 🙈 O	pen org chart 🔀 Deactivate 🔗, Assign 📲 Run Campaign Autom 🕐 Refresh 🗄 🖻 Sha
6) (-)	Home Recent V	Academia International - Saved Organisation	Non-Partner Inactive EPR Data Owning Team External Organisation Partnership Status External Organisation Relationship Status Owner
	Pinned V	External Organisation Agreements Activities (with ACU)	Courses Supporting Documents Roles Related - Related - Common
	My Dashboard	Name * Academia International	Parent External Organisation
Exte	ernal Organisation	International * Organisation Domestic	Industry 1
1	External Organisa	Indicator	内 Connections
8	Contact Persons	Organisation Legal	Industry 2 🕚 Audit History

 $|\ln t| \sim$ Documents on Default Ste 1 Michelle Borman_SAA7EFCDCA85EA11... SharePoint

EPR Data Owning Team

Academia International - Saved Non-Partner Inactive AI External Organisation Partnership Status External Organisation Relationship Status Organisation External Organisation Agreements Activities (with ACU) Courses Supporting Documents Roles Documents Related \sim

Modified \checkmark

7/07/2020 9:48 AM

The Document Associated Grid opens.

Document Associated Grid 🗸 Documents on Default Site 1

~ Name V

Doc1.pdf

2. Once you select the document that requires editing, the Edit option with Edit .	ll appear, click
💿 📓 Save 🆓 Save & Close 🕂 New 🕃 Deactivate 🖏 Connect 🗸 🧮 Add to Marketing List 🔍 Assign 🖾 Email a Link 🗊 Delete 🛠 Remember this record 🖒 Refresh	🗄 Process \vee 📾 Send Email 🗄
Michelle Borman Contact · Primary Contact Form (LinkedIn) ~	Michelle Walford Owner Relationship Manager
Summary Addresses Roles & Connections LinkedIn Member Profile Marketing Details Student Details Donation Summary Donation Transactions/Pledges RE & MC	DU Documents Related
😰 Show Chart > Edit D. Delete D. Check Out D. Check In D. Edit Properties X Discard Check Out 🖪 Open Location	

🖾 Show Chart 🕂 New 🗸 🍈 Upload 📑 Document Location 🗸 🖸 Open Location 🗸 🗅 Add Location 🖉 Edit Location 🗸 🖒 Refresh 🖉 Flow 🗸

Location \lor

Modified by \checkmark

Michelle Walford

	Iment Associate					
/	Name 🗸	Modified \lor	Modified by \checkmark	Location \lor	Path ↑ ∨	Source V
/	Doc1.pdf	7/07/2020 9:48 AM	Michelle Walford	Documents on Default Site 1	Michelle Borman_9AA7EFCDCA85EA11	SharePoint
	Test document.docx	7/07/2020 10:21 AM	Michelle Walford	Documents on Default Site 1	Michelle Borman_9AA7EFCDCA85EA11	SharePoint

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.

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

V ACU A	Advancement and Alumni ACU Advancement and Alumni > Cont	acts 🗧 Michelle Borman	SAI	NDBOX	P Ø () + V 🐵 ?
•	Save 🛱 Save & Close 🕂 New 🚺 Deactivate 😤	Connect 🗸 🚎 Add to Marketin	ng List 🔍 Assign 🖾 Email a Linl	k 🗓 Delete 🖈 Remember this re	ecord 🖒 Refresh 🛛 Process 🗸	📼 Send Email 🗄
	Michelle Borman Contact · Primary Contact Form (LinkedIn) ∨				Michelle Owner	Walford Relationship Manager
Summa	ry Addresses Roles & Connections LinkedIn Mer	nber Profile Marketing Details	Student Details Donation Sur	nmary Donation Transactions/Pl	ledges RE & MOU Documents	Related
	ow Chart D Edit D Delete D Check Out E	2 Check In 📑 Edit Properties	× Discard Check Out 🖪 Ope	en Location		
_	uments on Default Site 1					
~	Name \sim	Modified \lor	Modified by \backsim	Location \lor	Path ↑ ∨	Source 🗸
	Doc1.pdf	7/07/2020 9:48 AM	Michelle Walford	Documents on Default Site 1	Michelle Borman_9AA7EFCDCA85EA11	SharePoint
~	Test document.docx	13/07/2020 7:25 AM	Michelle Walford	Documents on Default Site 1	Michelle Borman_9AA7EFCDCA85EA11	SharePoint

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 OK.



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.

III 🔮 ACU	ACU Educational Partnerships Register	SANDBOX Try the new look • クロ・+ の?
=	← 🗄 🖬 Save 🛱 Save & Close + New 🏚 Open org chart	t 🗋 Deactivate 🔍 Assign +E Run Campaign Autom 🕐 Refresh 🗄 🖻 S
 ☆ Home ③ Recent ✓ 	Academia International - Saved Organisation	Non-Partner Inactive EPR Data Owning Team External Organisation Partnership Status External Organisation Relationship Status Owner
☆ Pinned ∨ Dashboard	External Organisation Agreements Activities (with ACU) Courses	Supporting Documents Roles Related V
#5 My Dashboard	Name Academia International Parent Exten Organisation	
External Organisation	International * Organisation Domestic Industry 1	Documents
 External Organisa Contact Persons 	Indicator Industry 2 Organisation Legal	Ounrections

2. The Document Associated Grid opens.

Academia International - Saved Organisation		Non-Partner External Organisation Partn	ership Status External Organi	sation Relationship Status Owner	Owning Team	/
External Organisation Agreements Activit	ies (with ACU) Courses	Supporting Documents	Roles Documents	Related $ \smallsetminus $		
El Show Chart + New ✓ T Upload Document Associated Grid ✓ Documents on Detault Site 1	\square Document Location \checkmark	$\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ $	D Add Location	Edit Location \vee 💍 Refresh	ω^{o} Flow \checkmark	
✓ Name ✓	Modified V	lodified by \vee	Location V	Neh † 😒	Source ~	
B Doct.pdf	7/07/2020 9:48 AM M	fichelle Walford	Documents on Default Site 1	Michelle Borman_SAA7EFCDCA85EA11	SharePoint	

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

Michelle Borman Contact · Primary Contact Form (L	inkedIn) \sim			Michelle Owner	Walford Relationship Manag
Summary Addresses Roles & Conne	ections LinkedIn Member Profile Marketing	g Details Student Details Donat	ion Summary Donation Transactions,	/Pledges RE & MOU Documents	Related
🖾 Show Chart 🚺 Edit 🗋 Delete		operties × Discard Check Out [Open Location		
Document Associated Grid	\vee				
Documents on Default Site 1					
		Modified by 🗸	Location \checkmark	Path ↑ 🗸	Source 🗸
✓ Name ∨	Modified \checkmark	Modified by V	20000011		
✓ Name ✓ Doc1.pdf	Modified ~ 7/07/2020 9:48 AM	Michelle Walford	Documents on Default Site 1	Michelle Borman_9AA7EFCDCA85EA11.	SharePoint

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

Edit Document	Properties		×
Name	*	EPR001_Doc1	
Title			
		2 PM by Catherine Thompson 24 2:33 PM by Catherine Thompson	
		Save Cancel	

Save