

Creating New External Organisations and Contact Persons

Educational Partnerships Register (EPR)
Staff Training Guide

Contents

1.	External Organisations	3
1.1.	Checking for Duplicates	3
1.2.	Creating a New Organisation Record	4
1.3.	Adding a Business Unit	5
1.4.	Navigating External Organisation tabs	6
1.5.	Uploading Supporting Documentation to Organisation Record	7
2.	Contact Persons	7
2.1.	Checking for Duplicates	7
2.2.	Creating a New Contact Record	8
2.3.	Merging Duplicate Contact Records	10

External Organisations and Contact Persons

External Organisations are entities outside the University with which a formal relationship has been established, or for which an agreement has been proposed or created. These organisations may include, but are not limited to, granting bodies, academic or research institutions, health practitioners, and educational providers.

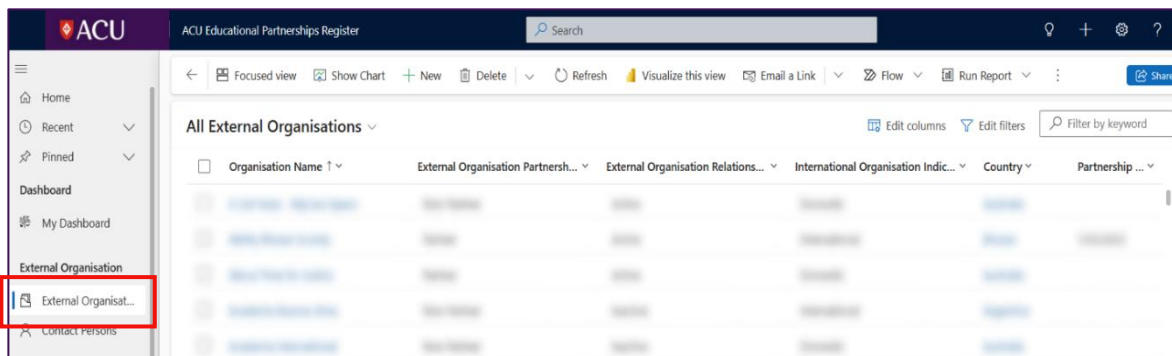
Contact Persons are individuals associated with an External Organisation who act as the primary point of contact for matters relating to the partnership or agreement.

1. External Organisations

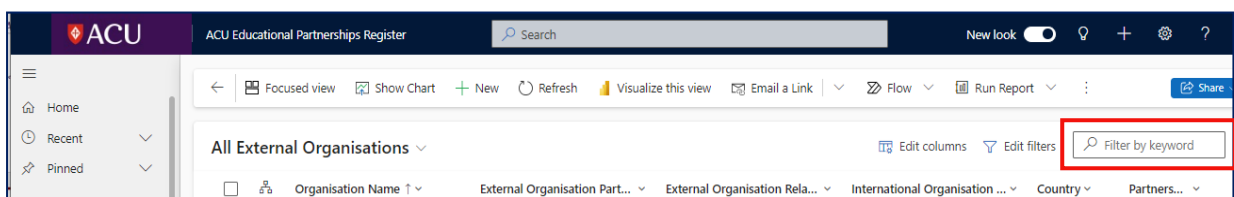
1.1. CHECKING FOR DUPLICATES

Before creating a new External Organisation record, you must first confirm that the organisation does not already exist in the Educational Partnership Register (EPR). Performing this check helps prevent duplicate records and ensures the accuracy and integrity of data within the system.

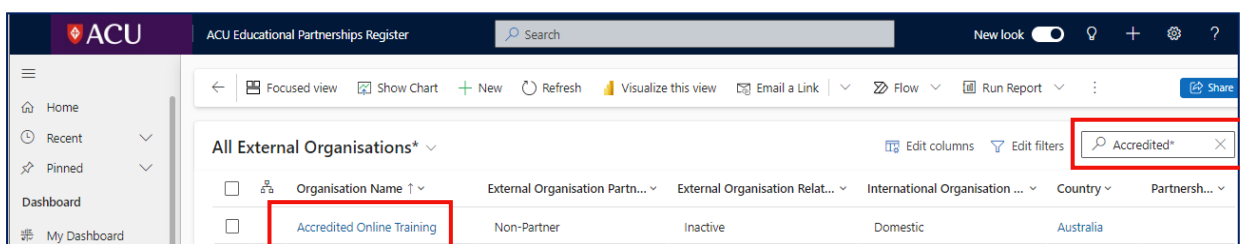
- In the left-hand navigation bar, select **External Organisations**.



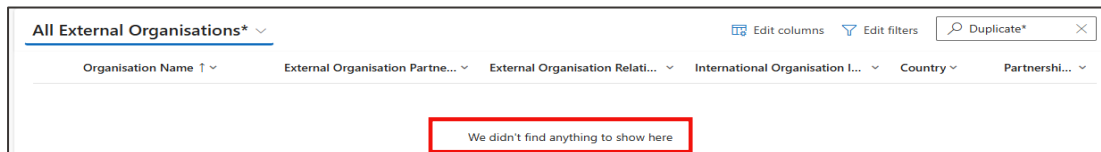
- Before creating a new organisation record, perform a keyword search to confirm that the organisation does not already exist in the system.



- When using the keyword search bar, include an asterisk (*) as a wildcard if you are unsure of the full organisation name. For example, searching for **Accredited** will return all organisations that contain the word "Accredited" in their name.



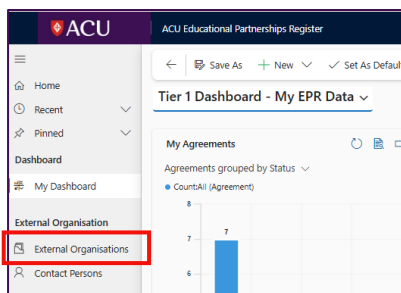
- If the organisation does not appear in the search results and you have confirmed that no duplicate record exists, you may proceed with creating a new External Organisation record.



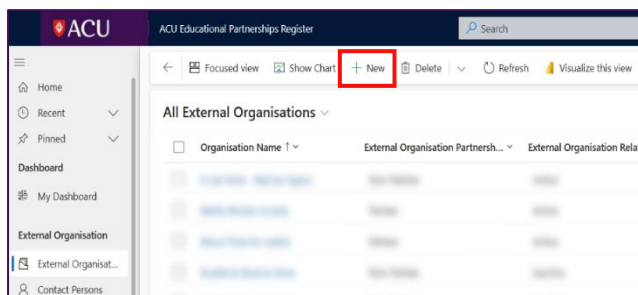
1.2. CREATING A NEW ORGANISATION RECORD

To create a new External Organisation record:

- Using the left-hand navigation menu, select **External Organisations**.



- In the top menu bar, click the **+ New** icon to create a new record.

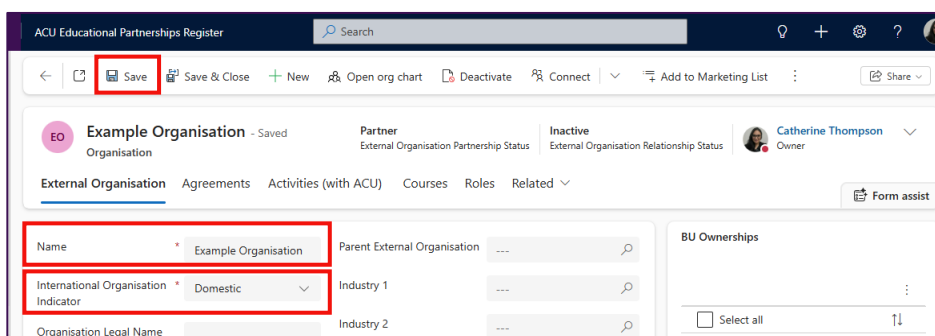


A **New Organisation** page will open.

- Complete the following required fields:
 - **Name:** Enter the name of the Organisation
 - **International Agreement Indicator:** Select either *Domestic* or *International* from the drop-down menu.

Note: Fields marked with a red asterisk (*) are mandatory.

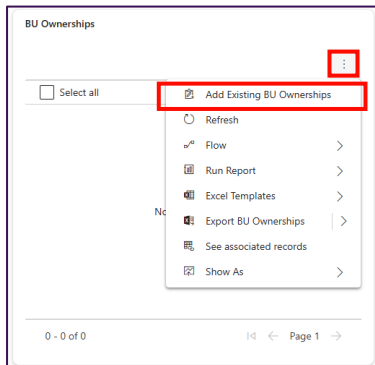
Once the required fields have been completed, click  **Save**. The new **External Organisation** record will then be created.



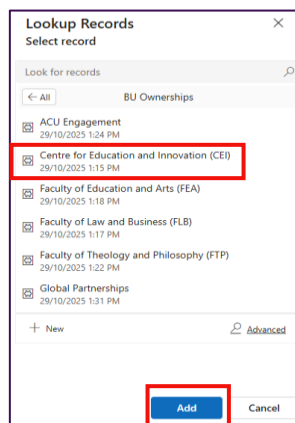
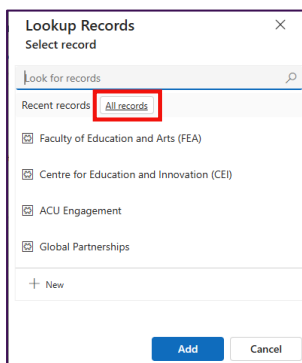
1.3. ADDING A BUSINESS UNIT

To ensure the organisation is associated with the correct business unit and that reporting remains accurate, the relevant business unit must be added to the **BU Ownerships** field.

- In the BU Ownerships field, click the three dots.
- Select **Add Existing BU Ownerships**.

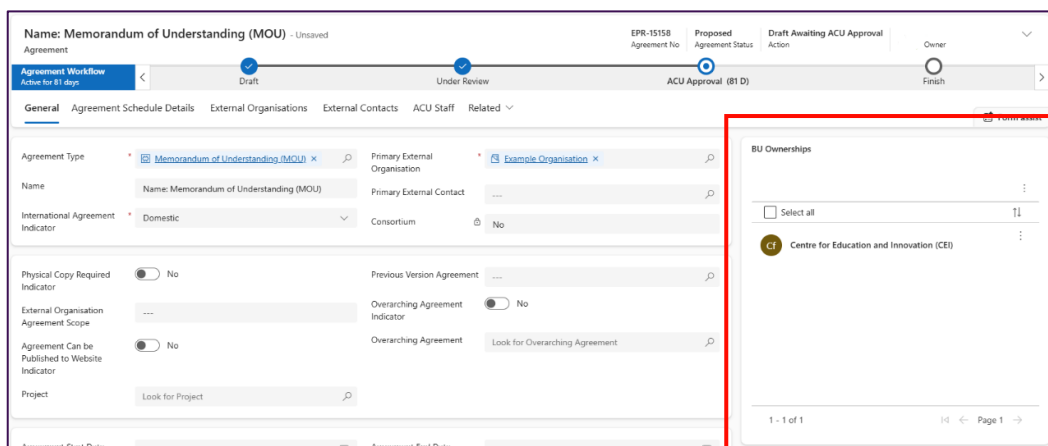


- A list of recent business units will appear. If your business unit is not listed, select **All Records** to search for it. Select or search for your business unit, then click **Add**.

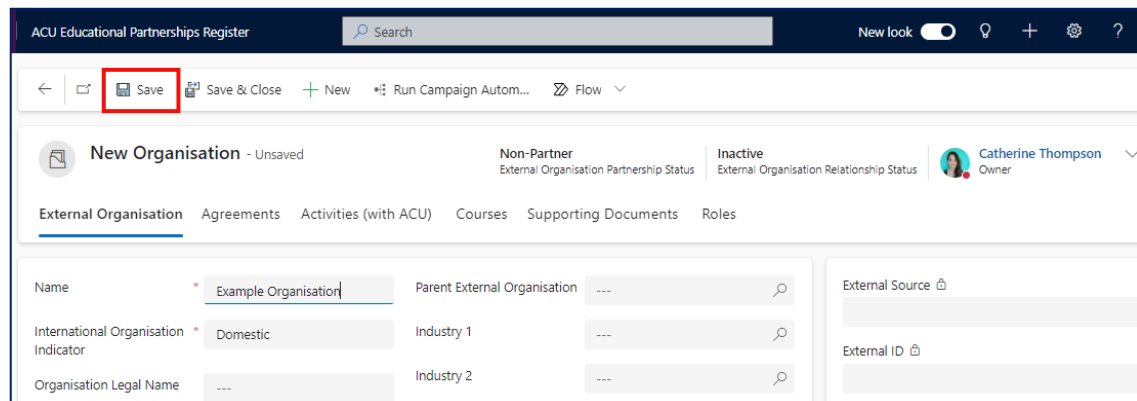


Note: If your business unit is not listed, please contact EPR Support via the **General Enquiry** form on **Service Central**.

- Your business unit will now be listed under BU Ownerships



- Enter any additional required or relevant information for the **External Organisation**, then click **Save**.



ACU Educational Partnerships Register

Search

New look

Save Save & Close New Run Campaign Autom... Flow

New Organisation - Unsaved

Non-Partner External Organisation Partnership Status Inactive External Organisation Relationship Status Catherine Thompson Owner

External Organisation Agreements Activities (with ACU) Courses Supporting Documents Roles

Name * Example Organisation Parent External Organisation ---

International Organisation Indicator * Domestic Industry 1 ---

Organisation Legal Name --- Industry 2 ---

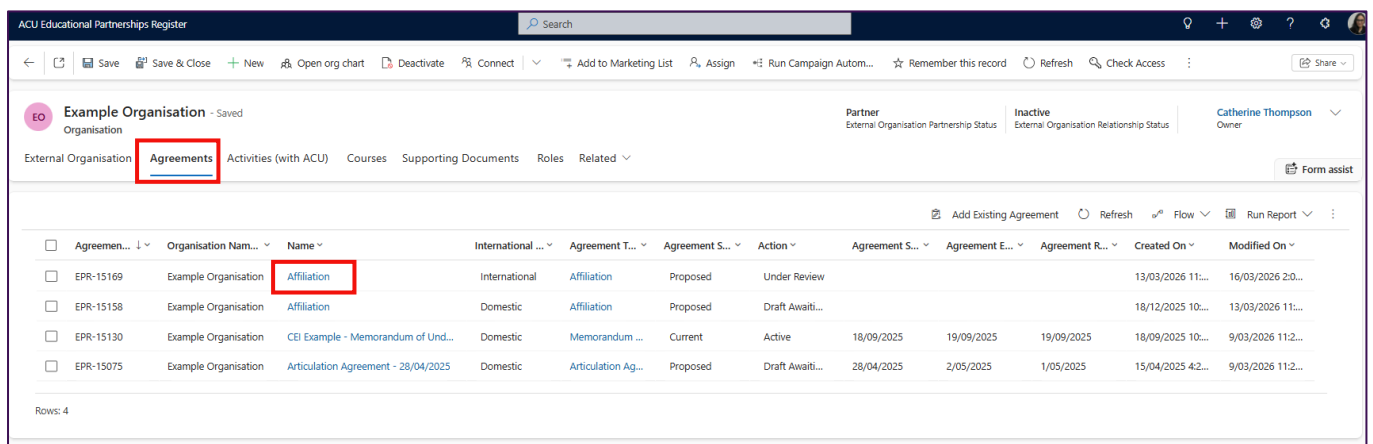
External Source

External ID

1.4. NAVIGATING EXTERNAL ORGANISATION TABS

Within the **External Organisation** record, multiple tabs are available for entering and viewing information related to the organisation. Some tabs are linked to other sections of the EPR and may automatically populate based on information entered elsewhere in the system. However, these sections can also be managed and updated directly from the relevant tabs within the organisation record.

For example, the **Agreements** tab displays agreements associated with the External Organisation. A list of agreements linked to the organisation will be displayed. Selecting an agreement from the list will open the agreement record.



ACU Educational Partnerships Register

Search

Example Organisation - Saved

Organisation

Partner External Organisation Partnership Status Inactive External Organisation Relationship Status Catherine Thompson Owner

External Organisation **Agreements** Activities (with ACU) Courses Supporting Documents Roles Related

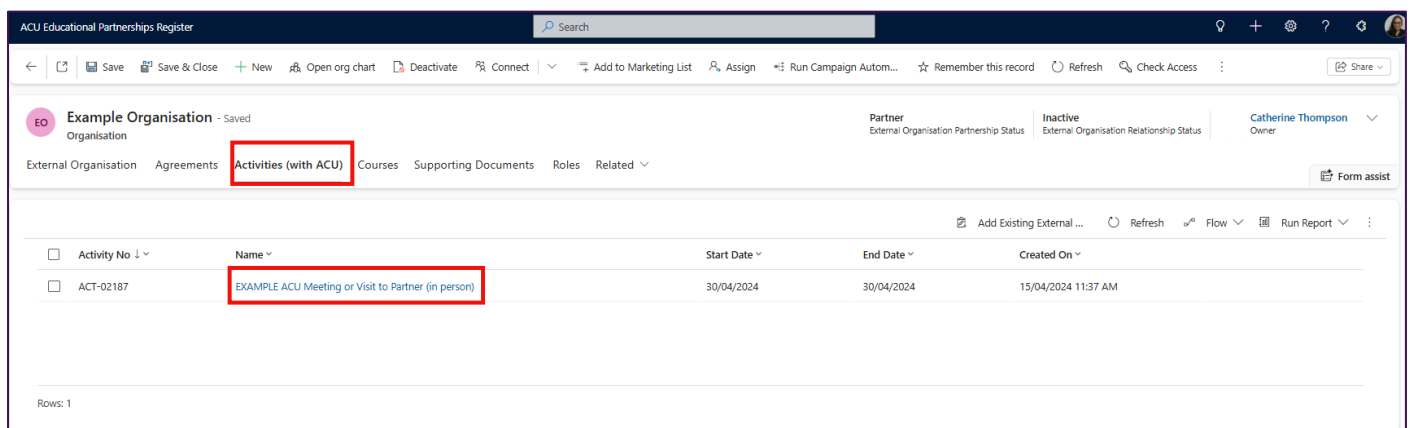
Form assist

Add Existing Agreement Refresh Flow Run Report

Agreement...	Organisation Nam...	Name	International ...	Agreement T...	Agreement S...	Action	Agreement S...	Agreement E...	Agreement R...	Created On	Modified On
☐ EPR-15169	Example Organisation	Affiliation	International	Affiliation	Proposed	Under Review				13/03/2026 11:...	16/03/2026 20:...
☐ EPR-15158	Example Organisation	Affiliation	Domestic	Affiliation	Proposed	Draft Awaiti...				18/12/2025 10:...	13/03/2026 11:...
☐ EPR-15130	Example Organisation	CEI Example - Memorandum of Und...	Domestic	Memorandum ...	Current	Active	18/09/2025	19/09/2025	19/09/2025	18/09/2025 10:...	9/03/2026 11:2...
☐ EPR-15075	Example Organisation	Articulation Agreement - 28/04/2025	Domestic	Articulation Ag...	Proposed	Draft Awaiti...	28/04/2025	2/05/2025	1/05/2025	15/04/2025 4:2...	9/03/2026 11:2...

Rows: 4

The **Activities (with ACU)** tab displays activities associated with the External Organisation. A list of activities linked to the organisation will be displayed. Selecting an activity from the list will open the activity record.



ACU Educational Partnerships Register

Search

Example Organisation - Saved

Organisation

Partner External Organisation Partnership Status Inactive External Organisation Relationship Status Catherine Thompson Owner

External Organisation Agreements **Activities (with ACU)** Courses Supporting Documents Roles Related

Form assist

Add Existing External ... Refresh Flow Run Report

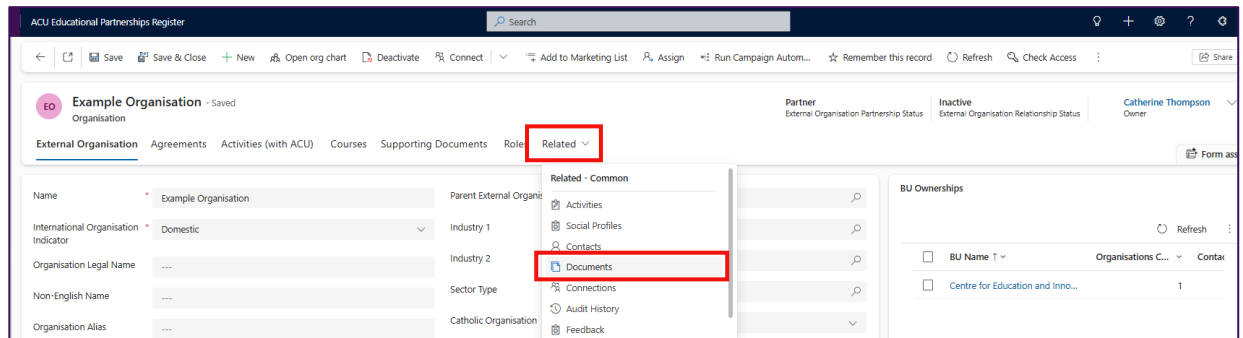
Activity No	Name	Start Date	End Date	Created On
☐ ACT-02187	EXAMPLE ACU Meeting or Visit to Partner (in person)	30/04/2024	30/04/2024	15/04/2024 11:37 AM

Rows: 1

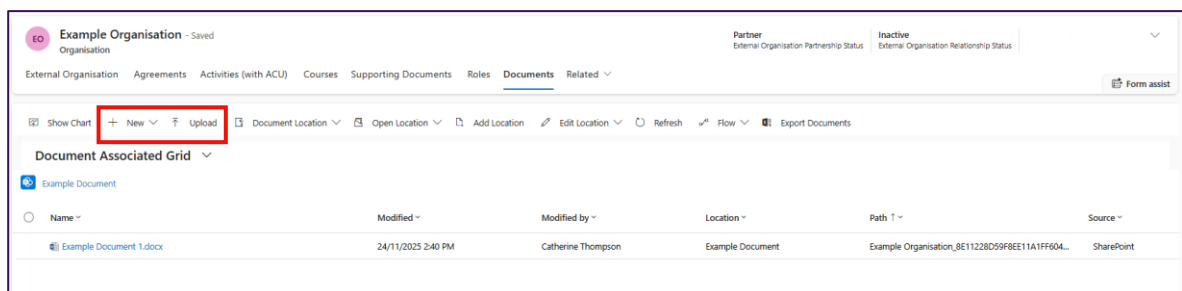
1.5. UPLOADING SUPPORTING DOCUMENTATION TO ORGANISATION RECORD

Additional records related to the External Organisation, including Supporting Documentation can be accessed through the Related menu.

- To add or save a supporting document associated with the **External Organisation**, select the **Related** tab, then choose **Documents** from the drop-down menu.



- This will open the **Documents Associated Grid**. From here, you can create or upload documents associated with the **External Organisation**.

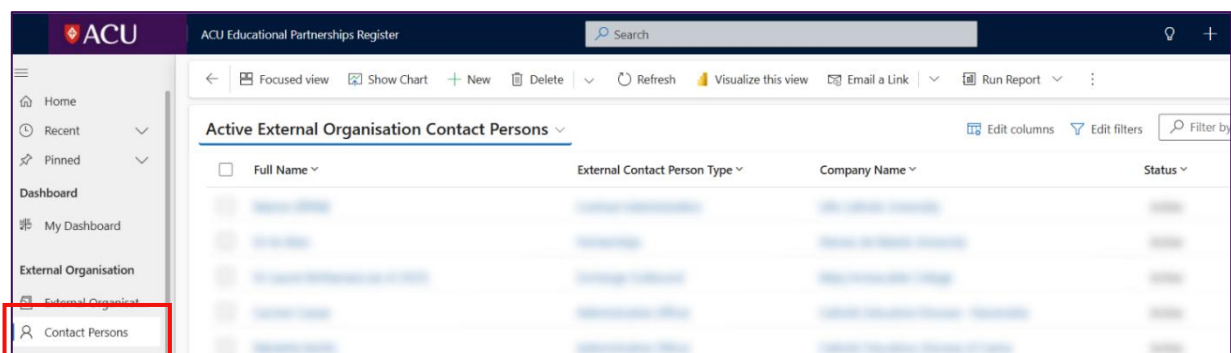


2. Contact Persons

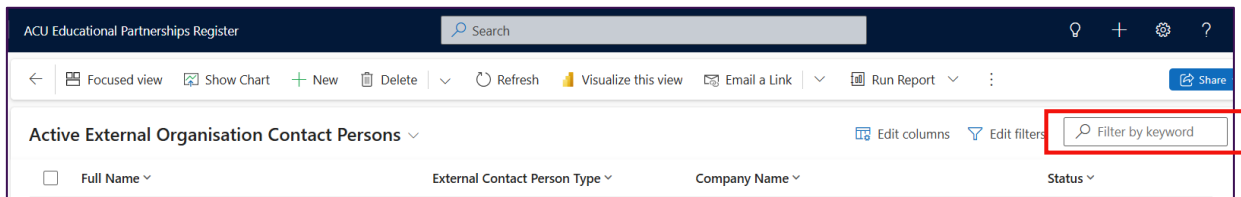
2.1. CHECKING FOR DUPLICATES

Before creating a new **Contact Person** record, you must first confirm that the contact does not already exist in the EPR. Performing this check helps prevent duplicate records and ensures the accuracy and integrity of the data.

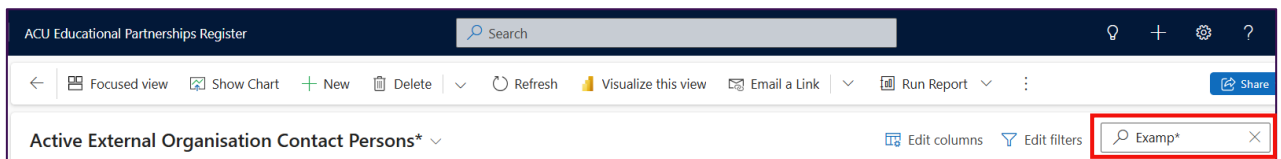
- In the left-hand navigation bar, select **Contact Persons**.



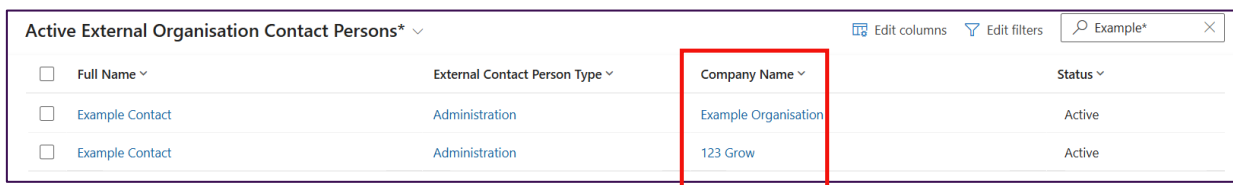
- Before creating a new contact record, perform a keyword search to confirm that the contact does not already exist in the system.



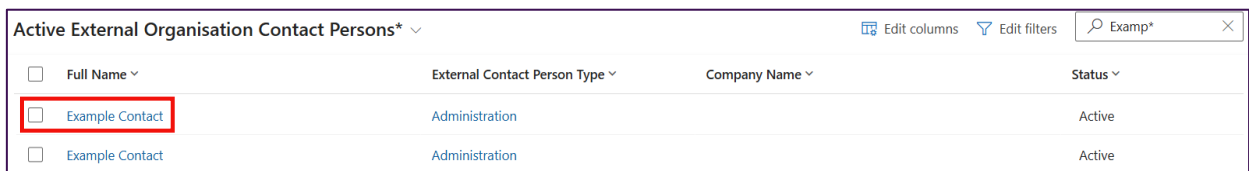
- When using the keyword search bar, include an asterisk (*) as a wildcard if you are unsure of the spelling of the name.



- If the person has a common name, they may already exist in the EPR. To confirm whether it is the same individual, check the associated **Company Name**.



- Alternatively, select the contact's name to open the record and view more detailed information.

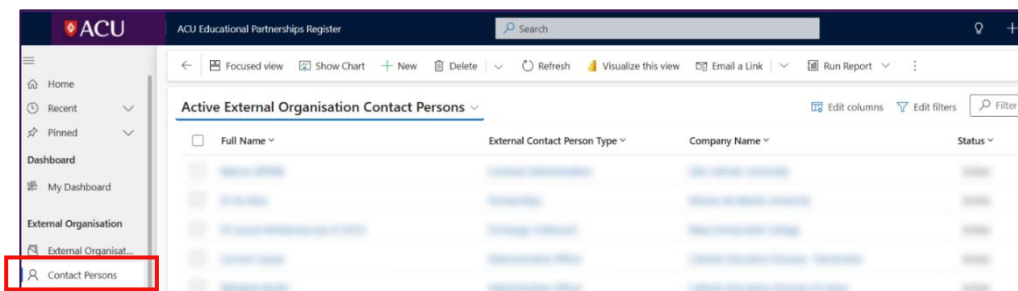


Note: When using the search function, you can enter a contact's full name, email address, or mobile number to locate existing records. Searching by email address or mobile number will often return more accurate and specific results.

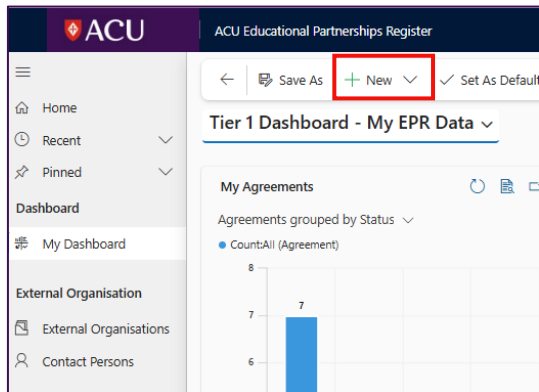
2.2. CREATING A NEW CONTACT RECORD

To create a new **Contact Person** record:

- Using the left-hand navigation menu, select **Contact Persons**



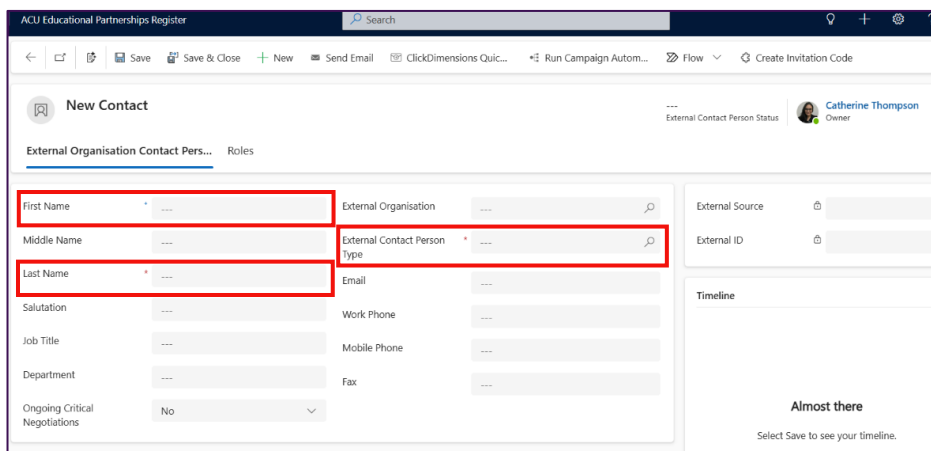
- In the top menu, click the **+New** icon.



A new **Contact Person** page will open.

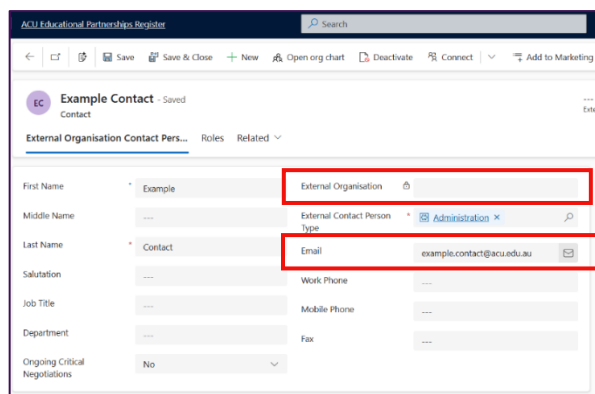
- Complete the following required fields:
 - **First Name:** Enter the first name of the contact
 - **Last Name:** Enter the last name of the contact
 - **External Contact Person type:** Select from the available list. Use the lookup icon to search for the appropriate type.

Note: Fields marked with a red asterisk (*) are mandatory.



While not mandatory, it is recommended that you add the **External Organisation** and at least one contact method (e.g. email or phone) to ensure the record is complete and to improve data accuracy.

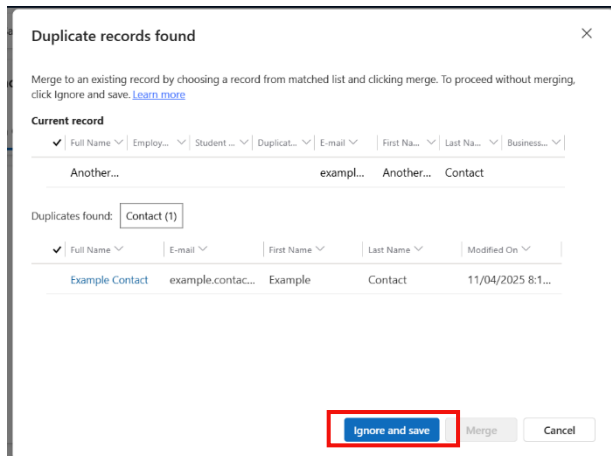
Once all required and relevant fields have been completed, click **Save** to create the contact record.



2.3. MERGING DUPLICATE CONTACT RECORDS

The EPR includes built-in duplication rules, including a rule that checks for unique email addresses. If you attempt to create a contact using an email address that already exists in the system, a duplicate record warning will be triggered.

- If you are adding a new contact for an organisation that uses a shared inbox (e.g. multiple contacts at a hospital or school using a generic email address), select Ignore and Save when the duplicate warning appears.



Duplicate records found

Merge to an existing record by choosing a record from matched list and clicking merge. To proceed without merging, click Ignore and save. [Learn more](#)

Current record

Full Name | Employ... | Student... | Dupli... | E-mail | First Na... | Last Na... | Business...

Another... example... Another... Contact

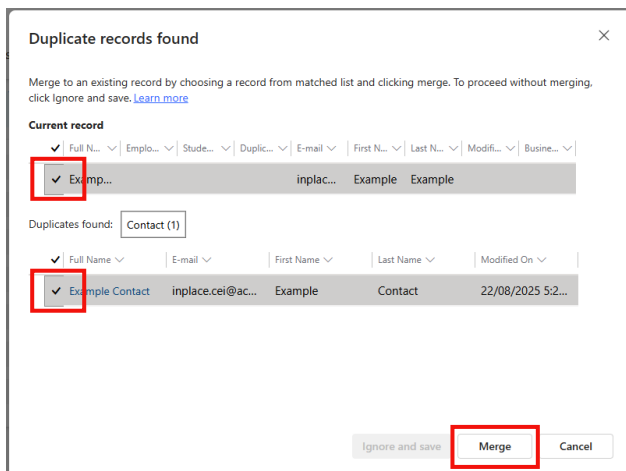
Duplicates found: Contact (1)

Full Name | E-mail | First Name | Last Name | Modified On

Example Contact	example.contact...	Example	Contact	11/04/2025 8:1...
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Ignore and save Merge Cancel

- If you are adding a new contact who may be replacing an existing one and a duplicate warning appears, select both records to enable the **Merge** button, then click **Merge** to combine the records and prevent outdated or duplicate entries.



Duplicate records found

Merge to an existing record by choosing a record from matched list and clicking merge. To proceed without merging, click Ignore and save. [Learn more](#)

Current record

Full Name | Employ... | Stude... | Duplic... | E-mail | First N... | Last N... | Modifi... | Busine...

☒ Example... inplac... Example Example

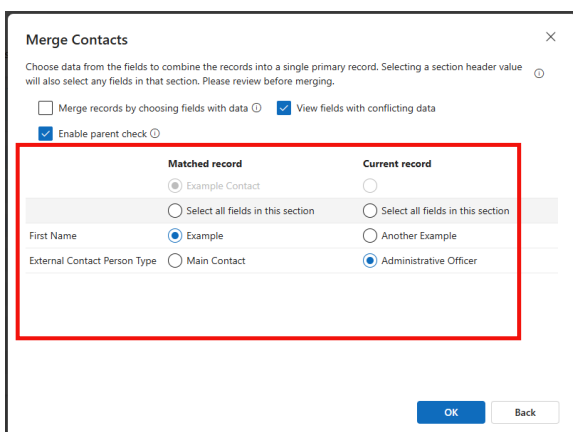
Duplicates found: Contact (1)

Full Name | E-mail | First Name | Last Name | Modified On

☒ Example Contact	inplace.cei@ac...	Example	Contact	22/08/2025 5:2...
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Ignore and save **Merge** Cancel

- You will then be prompted to select the correct record from the merged contacts for the Contact Person you are adding.



Merge Contacts

Choose data from the fields to combine the records into a single primary record. Selecting a section header value will also select any fields in that section. Please review before merging.

☐ Merge records by choosing fields with data ☒ View fields with conflicting data

☒ Enable parent check

Matched record	Current record
☒ Example Contact	☐
☐ Select all fields in this section	☐ Select all fields in this section
First Name ☒ Example	☐ Another Example
External Contact Person Type ☐ Main Contact	☒ Administrative Officer

OK Back

- Once you have selected the appropriate options, click **OK** to merge the contacts into a single record and create the updated contact entry.

Merge Contacts

Choose data from the fields to combine the records into a single primary record. Selecting a section header value will also select any fields in that section. Please review before merging.

☐ Merge records by choosing fields with data

☒ View fields with conflicting data

☒ Enable parent check

Matched record

Example Contact

Select all fields in this section

Current record

Select all fields in this section

First Name

Example

External Contact Person Type

Main Contact

Another Example

Administrative Officer

OK

Back