

Creating Parent-Child Relationships between Organisations

Educational Partnerships Register (EPR)
Staff Training Guide

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1. Parent-Child Relationships

A parent-child relationship entails a hierarchical framework wherein a primary organisation (parent) can have one or more secondary organisations (children), signifying a type of organisational or structural reliance.

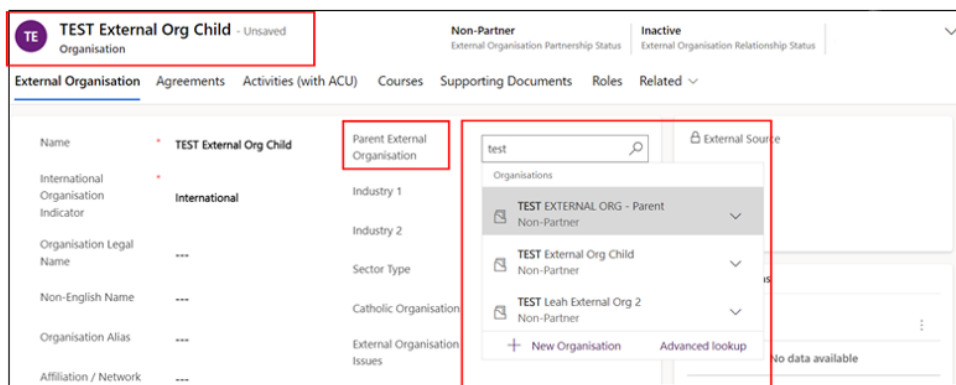
A parent organisation can have multiple children organisations, e.g. parent – 3 x children.

A parent-child relationship can have multiple levels, e.g.. grandparent – parent – child.

See **Creating New External Organisations and Contact Persons** instruction guide, page 3 for instructions on how to create a New External Organisation.

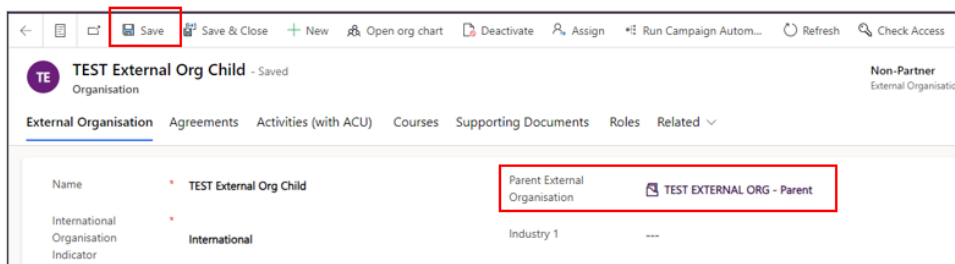
1.1. CREATING A PARENT-CHILD RELATIONSHIP

- To associate an organisation to a parent organisation, navigate to an organisation that is a 'child' in the organisational structure, click in the Parent External Organisation field and search for the parent organisation.



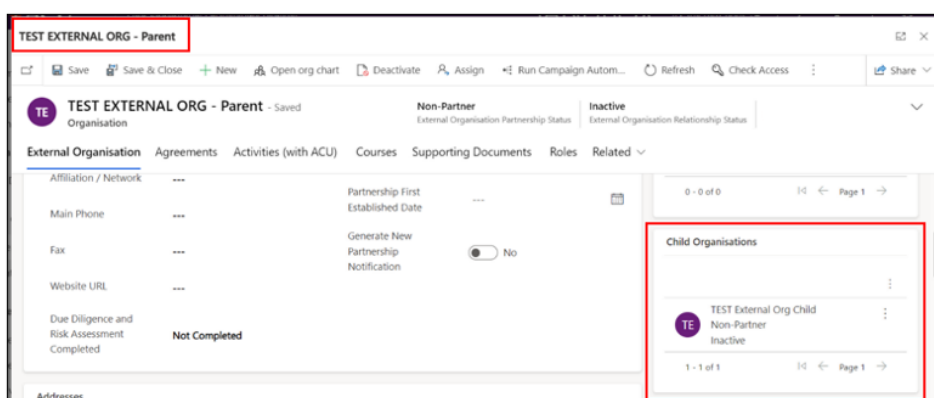
The screenshot shows the 'TEST External Org Child' form. The 'Parent External Organisation' field is highlighted with a red box. A search dropdown is open, showing a list of organisations including 'TEST EXTERNAL ORG - Parent', 'TEST External Org Child', and 'TEST Leah External Org 2'. The 'TEST EXTERNAL ORG - Parent' option is selected.

- Select the parent organisation you want to associate with your external child organisation record and click **Save**.



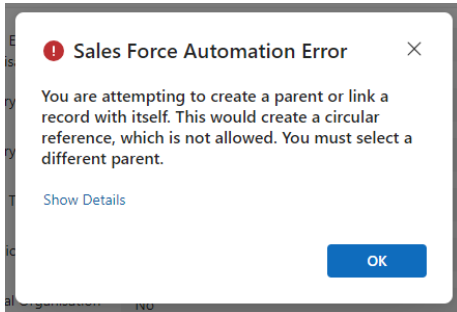
The screenshot shows the 'TEST External Org Child' form after saving. The 'Parent External Organisation' field is now populated with 'TEST EXTERNAL ORG - Parent'. The 'Save' button in the top toolbar is highlighted with a red box.

- To check the relationship with your external child organisation, go to the parent organisation record. Under the Child Organisations grid, the newly associated record will appear.



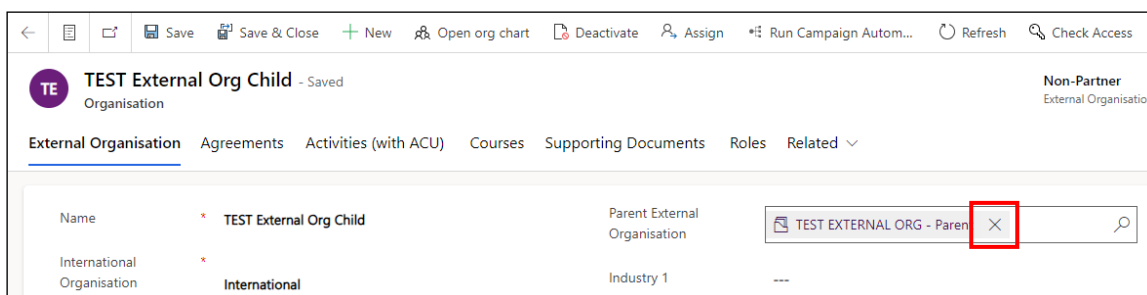
The screenshot shows the 'TEST EXTERNAL ORG - Parent' form. The 'Child Organisations' grid is highlighted with a red box, showing the newly associated record 'TEST External Org Child'.

Note: EPR will prevent you from creating a circular relationship if you attempt to make a child organisation the parent of its parent organisation.



1.2. REMOVING A PARENT-CHILD RELATIONSHIP

- To remove a child organisation from a parent organisation, navigate to an organisation that is a 'child' in the organisational structure and in the Parent External Organisation field click on the X to remove the parent organisation.



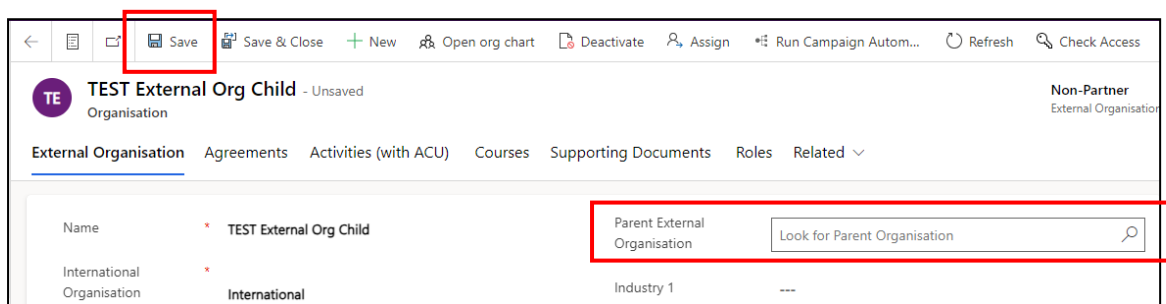
← Save Save & Close + New Open org chart Deactivate Assign Run Campaign Autom... Refresh Check Access

TEST External Org Child - Saved Organisation Non-Partner External Organisation

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

Name	* TEST External Org Child	Parent External Organisation	TEST EXTERNAL ORG - Parent X
International Organisation	International	Industry 1	---

- Once the Parent External Organisation field is empty. Click **Save**.



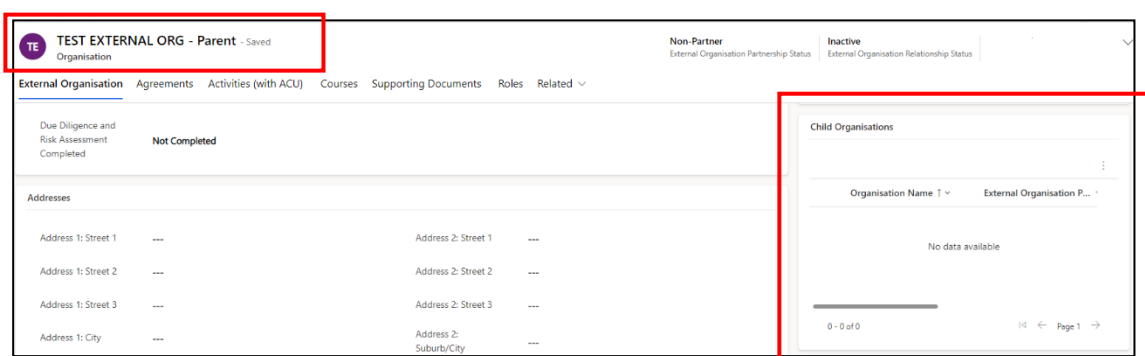
← Save Save & Close + New Open org chart Deactivate Assign Run Campaign Autom... Refresh Check Access

TEST External Org Child - Unsaved Organisation Non-Partner External Organisation

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

Name	* TEST External Org Child	Parent External Organisation	Look for Parent Organisation
International Organisation	International	Industry 1	---

- To check the relationship with your external child organisation has been removed from the parent organisation, go to the parent organisation record. Under the Child Organisations grid, the external child organisation will no longer appear.



TEST EXTERNAL ORG - Parent - Saved Organisation Non-Partner External Organisation Partnership Status Inactive External Organisation Relationship Status

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

Due Diligence and Risk Assessment Completed **Not Completed**

Addresses

Address 1: Street 1	---	Address 2: Street 1	---
Address 1: Street 2	---	Address 2: Street 2	---
Address 1: Street 3	---	Address 2: Street 3	---
Address 1: City	---	Address 2: Suburb/City	---

Child Organisations

Organisation Name ▾ External Organisation P... ▾

No data available

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2. Identifying Organisations in a Hierarchy

External organisations within a hierarchical structure (comprising of parent-child relationships) can be determined within the External Organisations list. The hierarchy symbol will be displayed in the far-left column.

All External Organisations ▾						
☐		Organisation Name ↑ ▾	External Organisation Partnership Status ▾	External Organisation Relationship Status ▾	International Organisation Indicator ▾	Country ▾
						Partnership First... ▾

In this example “test” organisations demonstrate how the hierarchy symbol will appear.

Search Results ▾	
☐	 Organisation Name ↑ ▾
☐	 TEST EXTERNAL ORG - Parent
☐	 TEST External Org Child
☐	 TEST Grandparent organisation
☐	 TEST Leah External Org 2
☐	 TEST new organisation