Changing Family Relationships - Include v1.1.3

Each organization in a family has a hierarchical relationship to the other members of the family (as applicable). Refer to Family Organization Relationships for details. You can change any of these relationships as necessary.

> ✓ You also can make these changes in the organization record itself. See Curating Organizations.

How to Change Hierarchical and Functional Relationships

1. On the main menu, under **Organization Family**, click **List**.
   The Families page appears.

Families Page

2. Locate the appropriate family, and click **Edit**.
   The Family Details Page displays the list of organizations that currently belong to the family you selected.

Family Details Page

3. In the **Organization Family Members** list, locate the organization that you want to change, and click **Edit**.
   The Family Organization Relationship Page displays the organization's current functional relationship with the family, and the hierarchical relationship it has with other members of the family.

Family Organization Relationship Page – Organization Removed from Family

4. To change the functional relationship, from the **Functional Relationship** drop-down list, select the functional role that the organization plays in the family. See Family and Organization Relationships for valid values.
5. To change the hierarchical relationships, in the **Hierarchical Relationship to other Organizations within this Family** table, locate the organization whose relationship to the current organization you want to change, and click **Change**.
The Change Hierarchical Relationship window appears.

Change Hierarchical Relationship Window

6. From the **Select a Relationship** drop-down list, select the relationship that the selected organization has with the current organization.
For example, if Organization 1 is the parent of Organization 2, and you selected Organization 1, select **Child** from the **Select a Relationship** drop-down list, because Organization 2 is the child of Organization 1.
7. Click **Add New Relationship**.
If a relationship had been established previously, the Change Hierarchical Relationship window displays the old and new relationships.

Change Hierarchical Relationship Window – Old and New Relationships

8. In the **End Date field**, enter the date on which the former relationship ended (if appropriate) .

> ⚠ Adding an end date inactivates and hides the organization's relationship with this family.

9. In the **Start Date** field, enter the date on which the new relationship started. The system default is the current date.

⚠️

10. Click **Add New Relationship**.
    The Family Organization Relationship window displays the new hierarchical relationship.

Family Details   ② Help

Family Information

Family ID: Status:
13086495 ACTIVE
* New Status:
ACTIVE ▼
* Start Date:
02/03/2011 🗓
* Family Name:
Example Family Name

💾 Save   ➤ Return to Families

Organization Family Members   ⊕ Add

Organization ID	Organization Name	Functional Relationship	Effective Dates	Action
13066699	Example Organization	ORGANIZATIONAL	02-21-2011	✎ Edit 🗑 Remove

One item found.

Family Organization Relationship Window – New Hierarchical Relationship

11. To remove an existing relationship, in the **Hierarchical Relationship to other Organizations within this Family** table, click **Remove**.
12. Click **Save**, and then click **Return to Families**.