

Creating Parent and Child Relationships between Organisations

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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.

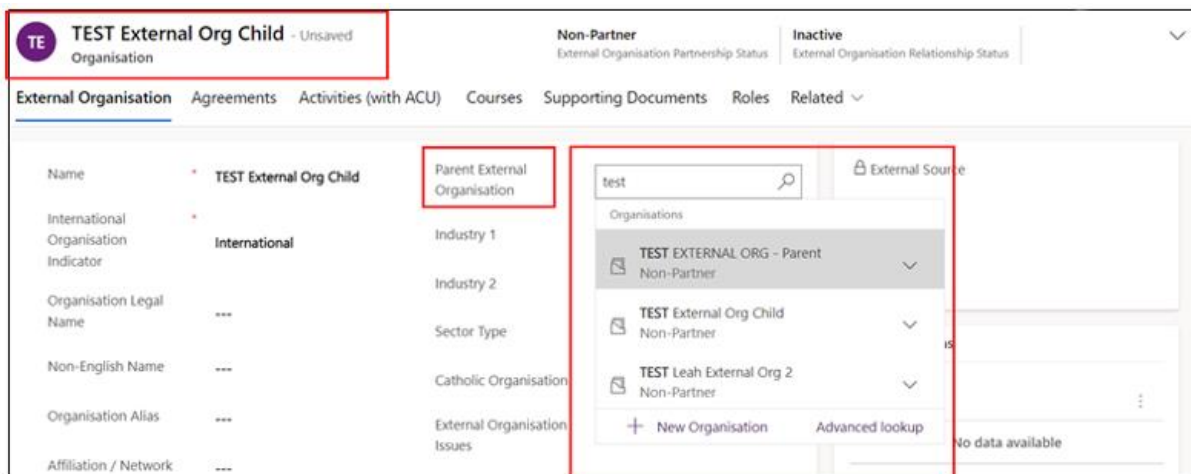
A parent organisation can have multiple children organisations, e.g. parent – 3 x children.


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

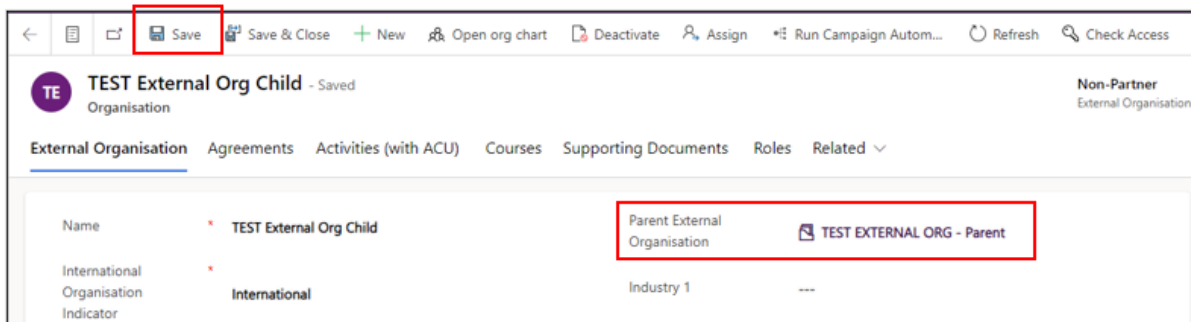
See **Creating New External Organisations and Contact Persons** instruction guide, page 3 for instructions on how to create a New External Organisation.

Creating a parent-child relationship

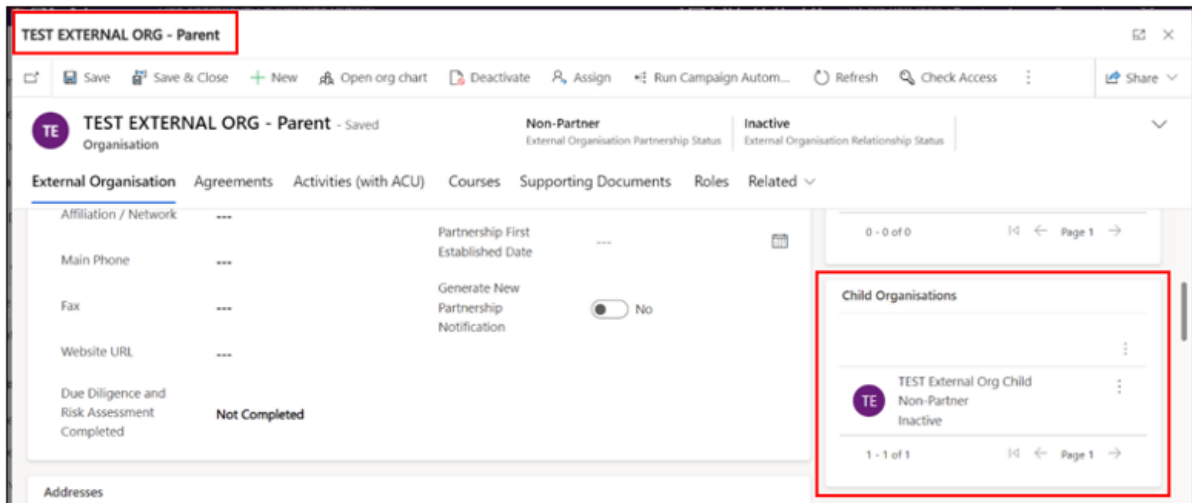
1. To associate an organisation to a parent organisation, navigate to an organisation that is a ‘child’ in the organisational structure, click in the Parent External Organisation field and search for the parent organisation.



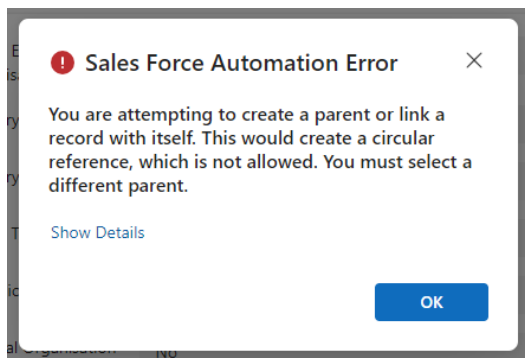
2. Select the parent organisation you want to associate with your external child organisation record and click  Save.



- 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.

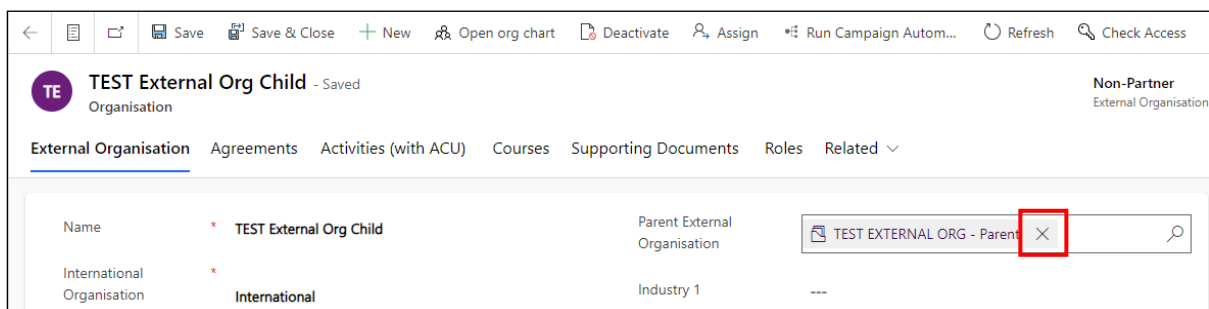


Note: EPR will prevent you from creating a circular relationship if you attempt to make a child organisation the parent of its parent organisation.

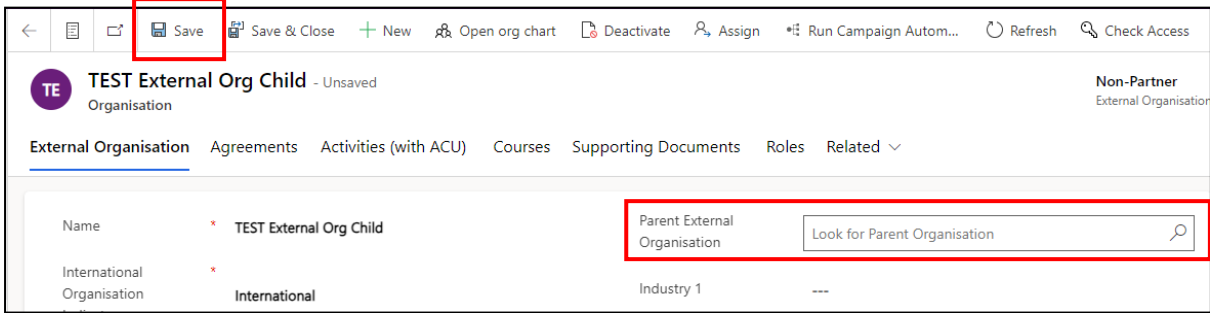


Removing a parent-child relationship

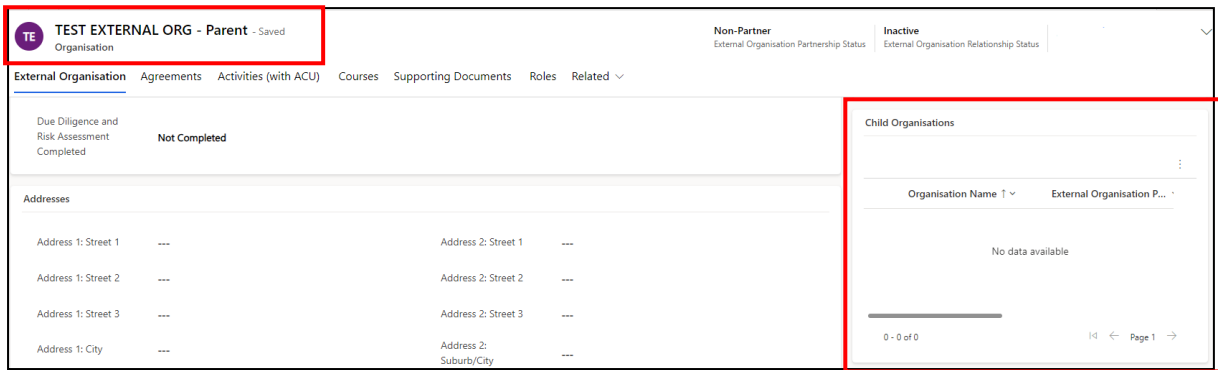
- To remove a child organisation from a parent organisation, navigate to an organisation that is a 'child' in the organisational structure and in the Parent External Organisation field click on the X to remove the parent organisation.



2. Once the Parent External Organisation field is empty. Click  Save



3. 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.



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.



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

