

Section 8 Request Parent/Child Relationship

Parent/Child Relationships are established to allow one agency (ALC) to retrieve report activity for another. A Parent/Child Relationship enables the Parent ALC to access the HeadQuarters Transaction Download and HeadQuarters Transactions options as described in *Section 5 – Reports*. A Parent ALC can have multiple Child ALCs, but a Child ALC can only have one Parent.

All Parent/Child Relationship requests are forwarded to FMS for approval. FMS has the capability to approve or reject relationship requests. If you should not be authorized to view transactions for the requested Child ALC(s), FMS will reject the request.

Selecting the **Request Parent/Child Relationship** option enables you to request a new Parent/Child Relationship, view the status of an existing relationship or edit an existing relationship. Each of these functions is described in detail in this Section.

Accessing the Parent/Child Relationship Request Function

To submit an IPAC Parent/Child Relationship request for FMS approval, or to view the status of an existing relationship, log on to the IPAC System and choose the IPAC option from the **IPAC System Main Menu** as explained in the *Introduction*. The **IPAC Main Menu** is shown in Figure 8.1.

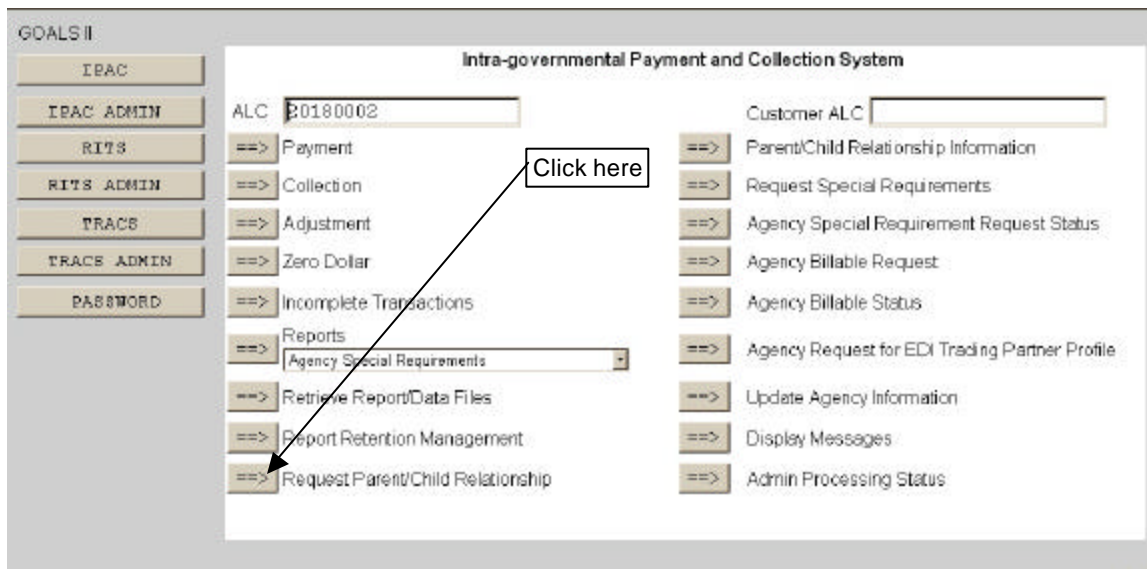


Figure 8.1 IPAC Main Menu

ALC

The first field on this screen is the **Agency Location Code (ALC)**. This is the ALC of your agency or of the agency for which you are doing business. Your Logon ID will determine the ALC(s) for which you are authorized to do business within IPAC.

If you are only authorized to act on behalf of **one ALC**, that ALC will display in the ALC data entry box.

If you are authorized to do business for **multiple ALCs**, those ALCs will display in a drop-down list box for the ALC.

If you are authorized to do business for **more than 25 ALCs**, the ALC field will display as a blank data entry box.

The ALC field is required and you must accept the ALC shown as a default, choose an ALC from the drop-down menu or enter an ALC in this field.

Customer ALC

No entry is required in the Customer ALC field.

Select the "Request Parent/Child Relationship" button as shown in Figure 8.1. This will display the **Parent Child Relationship Request** screen shown in Figure 8.2.

IPAC - Parent Child Relationship Request			
OK	Clear	Return To IPAC Main Menu	Help
Parent ALC	20180002		
Start Date	2001-04-27		
End Date	2001-12-31		
Child ALC's			
20180005			
20180008			
20180011			
OK	Clear	Return To IPAC Main Menu	Help

Figure 8.2 Parent Child Relationship Request

The **Parent Child Relationship Request** screen can be used to request a new Parent/Child Relationship or retrieve existing relationships for viewing or editing.

Parent Child Relationship Request Data Entry Fields

Parent ALC

The Parent ALC is the ALC of the Agency to serve as Parent in this Relationship. The ALC from the ALC field on the **IPAC Main Menu** will display in the Parent ALC data entry box. This field is required.

Start Date

Date the Relationship is requested to start in YYYY-MM-DD format. The Start Date must be the following day (tomorrow) or later. Please request the Relationship at least one week in advance of the Start Date so that FMS has ample time to respond to your request. The Relationship will not be in effect until it is approved by FMS.

End Date

Date the Relationship is requested to end in YYYY-MM-DD format. The End Date must be later than the Start Date.

<p style="text-align: center;">When entering dates, either both dates must be entered or neither date should be entered.</p>

Child ALCs

Up to 30 Child ALCs may be entered. These will be the ALCs to serve as the Children in this Relationship.

Parent Child Relationship Request Function Buttons

“OK”

Submits your Parent/Child Relationship request to FMS for approval.

“Clear”

Resets the data entry fields to their values the last time the screen was displayed. No data is submitted to the IPAC database.

“Return to IPAC Main Menu”

No data entered on the current screen will be saved to the IPAC database. You will be returned to the **IPAC Main Menu**.

“Help”

Displays help information for this screen.

Request a New Parent/Child Relationship

Enter the Parent ALC, Start Date, End Date and Child ALC's as shown in Figure 8.2. If all of the fields contain valid data, selecting the "OK" button will submit the request to FMS for approval.

View All Existing Parent/Child Relationship Requests For A Parent

Enter the Parent ALC, leaving all the other data entry fields on the **Parent/Child Relationship Request** screen blank. This will display the **Parent/Child Relationship Request Status** screen, shown in Figure 8.4, for all relationships involving the specified Parent ALC.

View All Existing Parent/Child Relationship Requests for Specific Child ALC(s)

Enter the Parent ALC and the Child ALCs, leaving all the other data entry fields on the **Parent Child Relationship Request** screen blank. This will display the **Parent Child Relationship Request Status** screen, shown in Figure 8.4, for only those relationships that satisfy the criterion entered.

Edit an Existing Parent/Child Relationship Request (for a specific Child ALC and a specific date range)

Enter the Parent ALC, Start Date, End Date and one Child ALC. This will display the **Parent Child Relationship Add/Update Details** screen shown in Figure 8.5b.

Note: The multiple ALC data entry boxes on this screen are used for initial requests for Parent/Child Relationships. They are not designed for use in editing a specific Parent/Child Relationship. If multiple ALCs are entered with Start and End Dates, you will receive an error message like the one shown in Figure 8.3.

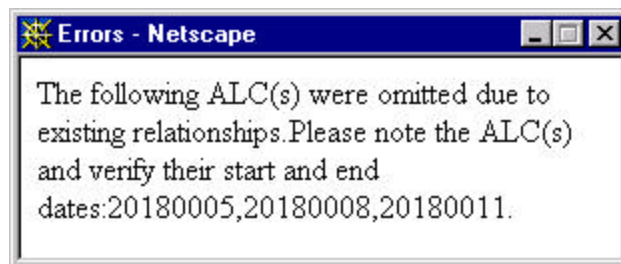


Figure 8.3 Multiple ALCs for Initial Request Error

IPAC - Parent Child Relationship Request Status									
<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Return To IPAC Main Menu"/> <input type="button" value="Help"/>									
Parent ALC 20180002									
	Child ALC	ID	Related ID	Start Date	End Date	Request Type	Status	Status Date	Rejec
<input type="radio"/>	20180005	35		2001-05-01	2009-12-31	A	A	2001-04-23	
<input type="radio"/>	20180005	50	35	2001-05-01	2009-12-31	D	R	2001-04-26	Inva
<input type="radio"/>	20180005	48		2001-04-27	2001-11-30	A	P	2001-04-26	
<input type="radio"/>	20180008	36		2001-05-01	2009-12-31	A	A	2001-04-23	
<input type="radio"/>	20180008	49	36	2001-04-27	2001-11-30	E	P	2001-04-26	
<input type="radio"/>	20180011	37		2001-05-01	2009-12-31	A	A	2001-04-23	
<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Return To IPAC Main Menu"/> <input type="button" value="Help"/>									

Figure 8.4 Parent Child Relationship Request Status

(The left side of the screen is shown above and the right side below. The entire screen will not fit in most browser windows and you must scroll to the right to view the entire contents of the screen.)

Parent Child Relationship Request Status						
<input type="button" value="Return To IPAC Main Menu"/> <input type="button" value="Help"/>						
Related ID	Start Date	End Date	Request Type	Status	Status Date	Rejection Explanation
	2001-05-01	2009-12-31	A	A	2001-04-23	
35	2001-05-01	2009-12-31	D	R	2001-04-26	Invalid Request
	2001-04-27	2001-11-30	A	P	2001-04-26	
	2001-05-01	2009-12-31	A	A	2001-04-23	
36	2001-04-27	2001-11-30	E	P	2001-04-26	
	2001-05-01	2009-12-31	A	A	2001-04-23	
<input type="button" value="Return To IPAC Main Menu"/> <input type="button" value="Help"/>						

Figure 8.4 Parent Child Relationship Request Status (continued)

Parent Child Relationship Request Status Fields

Child ALC

Child ALC in the Parent/Child Relationship request.

ID

System generated number for each Parent/Child Relationship request.

Related ID

ID number of the original Relationship request. This field allows you to trace the new request back to the original request that was edited or deleted.

Start Date

Start date of the relationship requested.

End Date

End date of the relationship requested.

Request Type

Code signifying whether the Relationship request was being “**A**”dded, “**E**”dited or “**D**”eleted.

Status

Code signifying the status of the Relationship request. Available status’ are “**A**”pproved, “**P**”ending and “**R**”ejected. Only those Parent/Child Relationship requests with a approved status are currently in effect.

Status Date

Date of the last status change to the Relationship request. If the approval date for the Parent/Child Relationship request follows the start date requested, then the effective date of the relationship will be the approval date. If the approval date precedes the start date, the effective date will be the start date requested.

Rejection Explanation

Rejection reason displayed when FMS rejects the Relationship request.

Parent Child Relationship Request Status Function Buttons

“Add”

Select this button to add a new Parent Child Relationship request. This will display the **Parent Child Relationship Add/Update Details (add)** screen shown in Figure 8.5a.

“Edit”

Select the option button beside the existing relationship you want to edit. By selecting this button the **Parent Child Relationship Add/Update Details (update)** screen shown in Figure 8.5b will display. Only requests in a pending or approved status may be edited.

“Delete”

Select this button to delete a Parent/Child Relationship request. Only requests in a pending or approved status may be deleted. When a pending request is deleted, a **Parent Child Relationship Confirmation** screen will display and the Relationship request will be deleted immediately. When you request deletion of an approved

Relationship, the **Parent Child Relationship Confirmation (add/update)** screen shown in Figure 8.6 will display and the request for deletion will be forwarded to FMS for approval.

“Return to IPAC Main Menu”

No data entered on the current screen will be saved to the IPAC database. You will be returned to the **IPAC Main Menu**.

“Help”

Displays help information for this screen.

IPAC - Parent Child Relationship Add/Update Details	
OK	Clear
Return To IPAC Main Menu	
Help	
Parent ALC	20180002
Child ALC	20180011
Start Date	2001-04-27
End Date	2001-12-31
OK	Clear
Return To IPAC Main Menu	
Help	

Figure 8.5a Parent Child Relationship Add/Update Details (add)

IPAC - Parent Child Relationship Add/Update Details	
OK	Clear
Return To IPAC Main Menu	
Help	
Parent ALC	20180002
Child ALC	20180008
Start Date	2001-04-27
End Date	2001-11-30
OK	Clear
Return To IPAC Main Menu	
Help	

Figure 8.5b Parent Child Relationship Add/Update Details (update)

Parent Child Relationship Add/Update Details Data Entry Fields

Child ALC

If you are adding a new Parent/Child Relationship request, the Child ALC field will display blank and require data entry. If you are editing an existing relationship, the Child ALC from the selected Relationship on the **Parent Child Relationship Request Status** screen will display, and you will not be able to change this field.

Start Date

Date the Relationship is requested to start in YYYY-MM-DD format. The Start Date must be the following day (tomorrow) or later. Please request the Relationship at least one week in advance of the Start Date so that FMS has ample time to respond to your request. The Relationship will not be in effect until it is approved by FMS.

End Date

Date the Relationship is requested to end in YYYY-MM-DD format. The End Date must be later than the Start Date.

Parent Child Relationship Add/Update Details Function Buttons

“OK”

Select this button to submit your Parent/Child Relationship request to FMS for approval. Then you will receive the **Parent Child Relationship Confirmation** screen as shown in Figure 8.6

“Clear”

Resets the data entry fields to their values the last time the screen was displayed. No data is submitted to the IPAC database.

“Return to IPAC Main Menu”

No data entered on the current screen will be saved to the IPAC database. You will be returned to the **IPAC Main Menu**.

“Help”

Displays help information for this screen.

Parent/Child Relationship Request Submission

After completing all of the data entry fields on the **Parent Child Relationship Request** screen, select “OK” to submit the request for FMS approval. If there are no errors in the data submitted, the **Parent/Child Relationship Confirmation** screen shown in Figure 8.6 will be displayed. You may also receive this confirmation screen after adding a new request by selecting “OK” from the **Parent Child Relationship Add/Update Details** screen shown in Figure 8.5a.

Parent ALC	Child ALC	Start Date	End Date
20180002	20180011	2001-04-27	2001-12-31

Figure 8.6 Parent Child Relationship Confirmation (add/update)

When submitting a request to delete an existing Parent/Child Relationship request from Figure 8.4, the **Parent/Child Relationship Confirmation** screen shown in Figure 8.7 will be displayed.

Parent ALC	Child ALC	Start Date	End Date
20180002	20180005	2001-05-01	2009-12-31

Figure 8.7 Parent Child Relationship Confirmation (delete)

Parent/Child Relationship Confirmation Function Buttons

“OK”

Returns you to the previous **Parent Child Relationship Request Status** screen as shown in Figure 8.4.

“Help”

Displays help information for this screen.

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