

Manual Linking Operations

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Permission Required

The operations described here can only be executed by a CO Administrator or CMP Administrator.



Unresolved Petitions

It is possible to change the links for Organizational Identities and CO Person records that are attached to unresolved [Petitions](#). This is not recommended as it may lead to unexpected behavior if, say, an enrollee attempts to respond to a confirmation email attached to an organizational identity that is no longer attached to the CO Person in the petition. It is generally advisable to resolve (approve or deny) a Petition before manipulating links.



Documenting Actions

It is a best practice to document why a manual linking operation has been performed. This can be done by manually creating a [history record](#).

Organizational Identity Linking Operations

Link

An Organizational Identity can be manually linked to an existing CO Person record when the Organizational Identity is not currently linked to a CO Person record within the destination CO.

To create a link:

1. Select the appropriate Organizational Identity (*People >> Organizational Identities*, then click *Edit*)
2. Select the *CO People* tab.
3. If the identity is eligible to be linked, a *Link* button will appear. Click this button.
4. Find the target CO Person record in the list presented and click *Link*.
5. Confirm.

This process can also be initiated via the CO Person Canvas.

Relink


An Organizational Identity can be manually moved (relinked) from one CO Person to a different CO Person.

To relink:

1. Select the original CO Person record (the one to which the Organizational Identity is currently attached) (*People >> My Population*, then click *Edit*).
2. In the *Organizational Identities* section, click *Relink* next to the appropriate Organizational Identity.
3. Find the target CO Person record in the list presented and click *Relink*.
4. Confirm.

Unlink

An Organizational Identity can be manually unlinked from a CO Person, when there is at least one additional Organizational Identity attached to the CO Person. Both the Organizational Identity and CO Person will continue to exist independently after being unlinked.

 As of Registry v4.1.0, the requirement of one Organizational Identity per CO Person is no longer enforced.

1. Select the CO Person record (the one to which the Organizational Identity is currently attached) (*People >> My Population*, then click *Edit*).
2. In the *Organizational Identities* section, click *Relink* next to the appropriate Organizational Identity.
3. Find the target CO Person record in the list presented and click *Relink*.
4. Confirm.

CO Person Role Linking Operations

Relink

A CO Person Role can be manually moved (relinked) from one CO Person to a different CO Person.

To relink:

1. Select the original CO Person record (the one to which the Role is currently attached) (*People >> My Population*, then click *Edit*).
2. In the *Role Attributes* section, click *Relink* next to the appropriate Role.
3. Find the target CO Person record in the list presented and click *Relink*.
4. Confirm.