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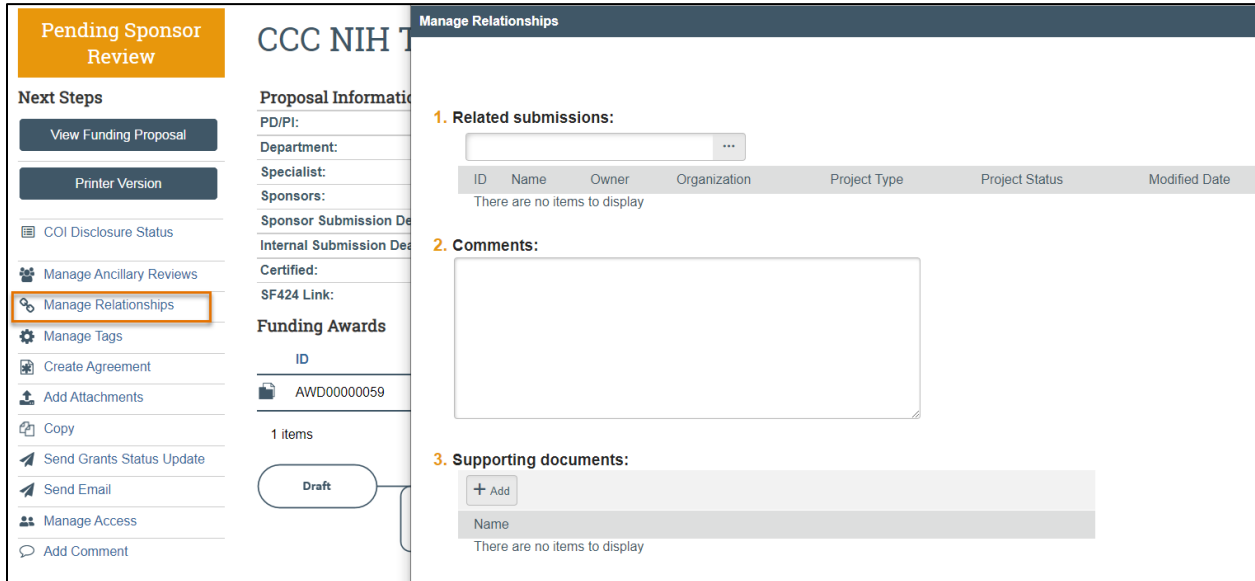
Job Aid: **Manage Relationships**

How to Manage Relationships

Proposals and Awards can be linked to Agreements using the “Manage Relationships” activity.

Follow the steps below to associate an agreement with a proposal or award:

1. Navigate to the *Proposal Workspace* or *Award Workspace*, as appropriate.
2. On the *Workspace*, click the **Manage Relationships** activity.



The screenshot shows the 'Manage Relationships' interface. On the left, a sidebar contains a 'Next Steps' section with buttons for 'View Funding Proposal' and 'Printer Version', and a list of activities including 'Manage Relationships' (highlighted with a red box). The main content area is divided into 'Proposals' and 'Funding Awards' sections. The 'Proposals' section shows details for 'CCC NIH' with fields for PD/PI, Department, Specialist, Sponsors, and Submission Dates. The 'Funding Awards' section shows a 'Draft' button and a list of 1 item with ID 'AWD00000059'. The right-hand panel, titled 'Manage Relationships', contains three sections: '1. Related submissions:' with a search bar and a table with columns ID, Name, Owner, Organization, Project Type, Project Status, and Modified Date; '2. Comments:' with a text input area; and '3. Supporting documents:' with an '+ Add' button and a table with a 'Name' column.

3. In the *Manage Relationships* window, search for the related submission you would like to link. Select the appropriate project and click **OK**.
4. When complete, click **OK**.



Note: *Linked agreements are displayed on the Related Projects tab of the Workspace.*

Budgets	SF424 Summary	History	Reviewers	Attachments	Financials	Reviewer Notes	Related Projects	Change Log
Related Projects								
Filter by ? ID ▼ <input type="text" value="Enter text to search"/> 🔍 + Add Filter ✕ Clear All								
ID	Name	Owner	Organization	Project Type	Project Status	Modified Date		
MTA00000014	20210727 AVT	Orlando Max (rev1)	The Rector & Visitors of the University of Virginia	Agreement	Active	1/17/2022 8:30 PM		