

***On-line Tutorial Series***

***Module Eleven***

***Record Relationships***

***Associating Records***

## Related Records are

- **Records *cloned* from a parent record, or**
- **Records *associated* to one another.**

# Associating Related Records

# Associating Record Types

## Overview

**Associated records have information in common and are related to each other in some way. Associated Records are records that were created independently. For instance, a MDP record exists for a specific project and a TIA record also exists for the same project. You now want to 'associate' the two records.**

**1. Retrieve the record.**

○ **2. From the record's navigation bar, click on the Related Records tab.**

**3. Click Look Up to search the BuildSA database for the record you want to *Associate*.**

Record ID: ADDR-COD-18-000126

Custom Lists    Menu    List View    Clone Sgl    Clone Mult    Update Related Records    Search    **Look Up**    Create a Set    Delete    Help

Inspections

Conditions

Owner

**Related Records**

ADDR-COD-18-000126; [LandDevelopment,Addressing,Certificate of Determination,NA] ;Under Review;NCFL Project 55; 902 HAYS ST City of San Antonio,TX 78202

Record ID: ADDR-COD-18-000126

Custom Lists

Inspections

Conditions

Menu

List View

Clone Sgl

Clone Mult

Update Related Records

Search

Look Up

Create a Set

Delete

Help

 ADDR-COD-18-000126; [LandDevelopment,Addressing,Certificate of Determination,NA] ;Under Review;NCFL Project 55; 902 HAYS ST City of San Antonio,TX 78202

Owner

Related Records

**Search button searches only this page when relationship tree becomes very large.**



LAND-PLAT-18-

Submit Reset Cancel Help  Enable Soundex Search

Custom Lists

Inspections

Conditions

Conditions of Approval

Fee

Assess Fee History

Payment

Payment History

Communications

Meetings

Owner

**Related Records**

Search by Record Attributes

Record Type Group	Type	Subtype	Category
--Select--	Land Entitlement	Plat	Building Setback Line

Opened Date:  
From: 07/22/1968  
To: 07/10/2018

Record ID

Current Workflow Task

Status

Current Workflow Status

Search by Contact

First Name

Contact Organization Name

Last Name

E-mail

Search by Address/Parcel

Street #

Unit/Suite

Street Name

City Parcel Number

Street Type

Legal Description

*Look Up form not shown in its entirety.*

**4. The Look Up form displays. Search by Record Type or other fields for which you have information.**

**5. Click Submit.**

**6. BuildSA returns all matches.**

**7. Check the box to the left of the Record you want to select for Association.**

**8. Select the relationship, either *Select as Parent* or *Select as Child*.**

The screenshot shows the BuildSA interface for record LAND-PLAT-18-000989. At the top, there are buttons for 'Select as Parent' and 'Select as Child', with a yellow arrow pointing to the 'Select as Child' button and a callout box that says 'Select either Select as Parent or Select as Child.' Below this is a table of records with columns: Alternate ID, Record Type Alias, Status, Opened Date, Street #, Street Name, Street Type, Unit/Suite, First Name, Last Name, Organization Name, E-mail, and Record ID. The table contains three records, with the third record (ID 18CAQ-00000-05200) selected (checkbox checked).

Alternate ID	Record Type Alias	Status	Opened Date	Street #	Street Name	Street Type	Unit/Suite	First Name	Last Name	Organization Name	E-mail	Record ID
<input type="checkbox"/> PLAT-SITEIMPEXT-18-000053	Site Improvement Time Extension	Under Review	07/10/2018	215	ISABEL			dinesh	shankar		dinesh.shank...	18CAQ-00000-05292
<input type="checkbox"/> PLAT-SITEIMPEXT-18-000049	Site Improvement Time Extension	Under Review	07/06/2018					Kawsar	Test		kawsar.hussa...	18CAQ-00000-05237
<input checked="" type="checkbox"/> PLAT-SITEIMPEXT-18-000043	Site Improvement Time Extension	Approved	07/05/2018	3619	ZARZAMORA			Larry	Odin		lo09420@sana...	18CAQ-00000-05200



**9. You will be prompted to select the sections and details to copy from the source record to the target record. Select them by clicking on the box to their left. Select Parcel, Owner and Address.**

The screenshot displays a web interface for managing records, titled "LAND-PLAT-18-". It features three panels of options for selecting details to copy from a source record to a target record. The interface includes a top navigation bar with "Submit", "Reset", "Cancel", and "Help" buttons. The first panel, "Record Type - Specific Information", lists options like "Fee Items", "Workflow Status", "Inspection", "Custom Fields", "Additional Info", "Valuation Calc", "Workflow Task Specific Information", "Status or New Status", and "Status History". The second panel, "General Record Information", lists options like "Record Details", "Parcel", "Owner", "Address", "Assets", "Licensed Professionals", "Contact", "Document", and "Preserve Dates". The third panel lists options like "Record Conditions", "Inspection Conditions", "Conditions of Approval", "Education", "Continuing Education", "Examination", "Record Comments", and "Activities". In the "General Record Information" panel, the "Parcel", "Owner", and "Address" options are checked and highlighted with a yellow box.

< LAND-PLAT-18-

Submit Reset Cancel Help

**Record Type - Specific Information**

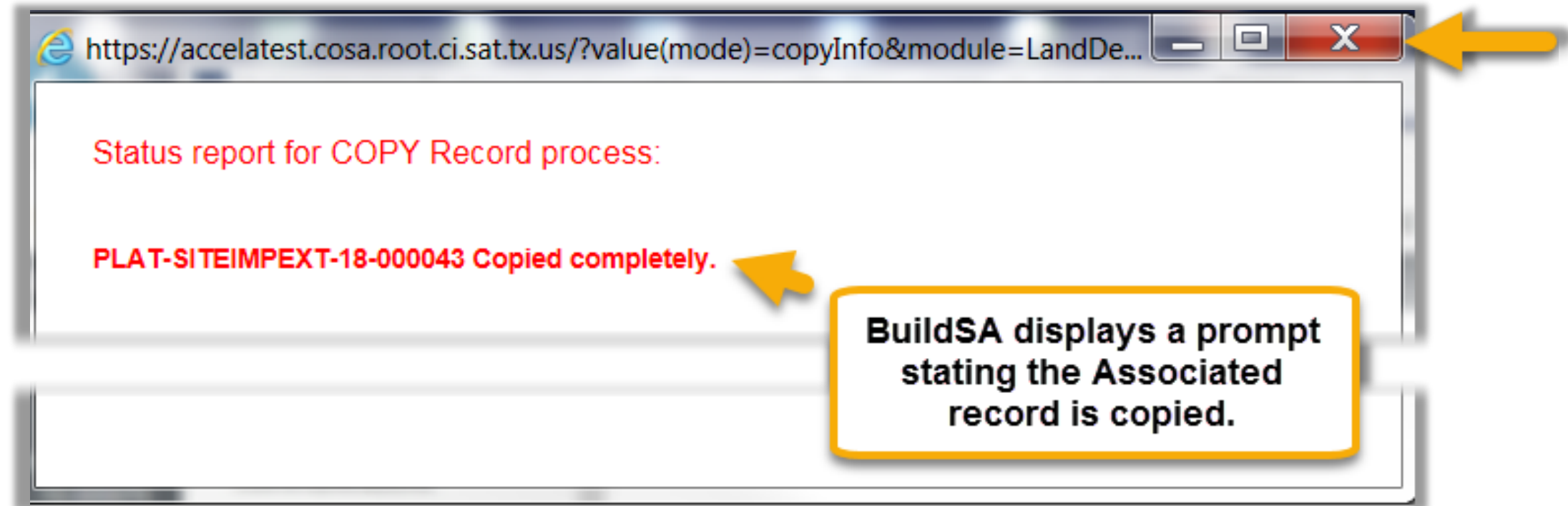
- Fee Items [\(Select\)](#)
- Workflow Status
- Inspection [\(Select\)](#)
- Custom Fields [\(Select\)](#)
- Additional Info
- Valuation Calc
- Workflow Task Specific Information
- Status or New Status: --Select--
- Status History

**General Record Information**

- Record Details [\(Set Application Description\)](#)
- Parcel
- Owner
- Address
- Assets
- Licensed Professionals [\(Select\)](#)
- Contact [\(Select\)](#)
- Document
- Preserve Dates

**Record Conditions**

- Record Conditions [\(Select\)](#)
- Inspection Conditions [\(Select\)](#)
- Conditions of Approval [\(Select\)](#)
- Education
- Continuing Education
- Examination
- Record Comments
- Activities

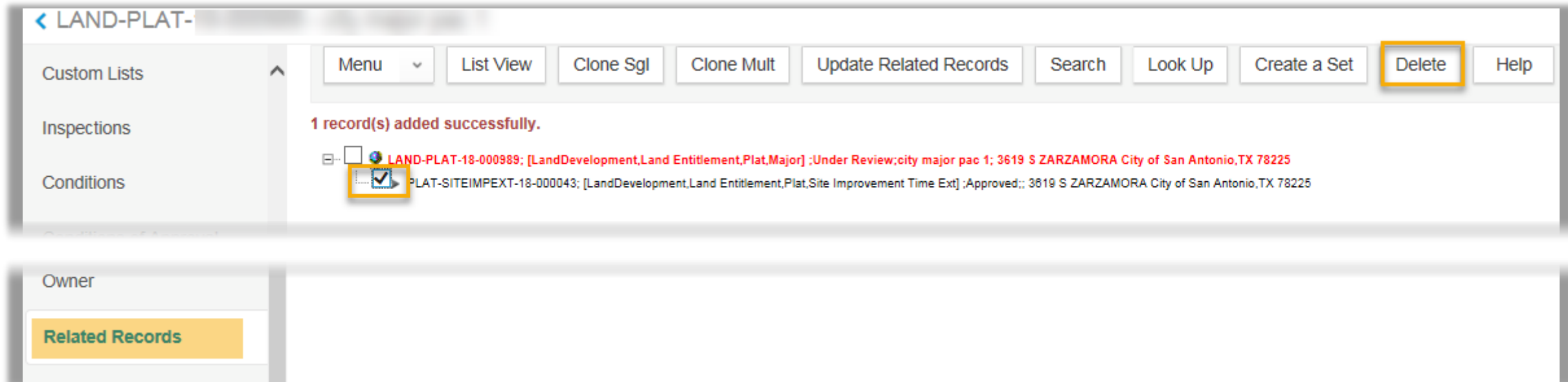


- 10. Close the prompt by clicking on the white 'X' in the upper right-hand corner.**

The screenshot shows the BuildSA interface for a record titled "LAND-PLAT-18-". The interface includes a left sidebar with navigation options: Custom Lists, Inspections, Conditions, and Conditions of Approval. The main content area displays a message "1 record(s) added successfully." with a yellow arrow pointing to it. Above this message is a callout box stating "BuildSA displays a 1 record(s) added successfully message. The Records are now Associated." To the right of the message are buttons for "Look Up", "Create a Set", "Delete", and "Help". Below the message, a list of records is shown, including "LAND-PLAT-18-000989; [LandDevelopment, Land Entitlement, Plat, Major] ;Under Review;city major pac 1; 3619 S ZARZAMORA City of San Antonio, TX 78225" and "PLAT-SITEIMPEXT-18-000043; [LandDevelopment, Land Entitlement, Plat, Site Improvement Time Ext] ;Approved;; 3619 S ZARZAMORA City of San Antonio, TX 78225". At the bottom left, there is a "Related Records" button.

**11. The Associated record displays on the source record's Related Records page.**

# Removing a Record from the Associated Record relationship



- 1. Check the box to the left of the Record whose relationship you wish to remove from the Related Records relationship.**
- 2. Click Delete. The Relationship is 'deleted' not the Record. The Record remains active in the BuildSA database.**

***Congratulations!***

***This concludes Module Eleven***

# ***Associating Records***

***It is time to test your recall.....***

## TEST YOUR RECALL

1. Associated records are records that were created independently. \_\_\_True \_\_\_False
2. The Look-up button on the Related Records space is used for \_\_\_\_\_.
3. The Search button on the Related Records space is used to \_\_\_\_\_.
4. Multiple records may be selected to associate with the source record. \_\_\_True \_\_\_False.
5. Creating record associations is done from the \_\_\_\_\_tab of the Record's Navigation bar.

***Answers on the next slide...***



If you answered:

1. True
2. Finding the Record or Records to associate to the source record.
3. Finding a related record on the relationship tree of the source record when the related record tree gets very large.
4. True
5. Related Records

**You are correct!**

**Time to begin the next module...**



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