

***On-line Tutorial Series***

***Module Eleven***

***Cloning Single Related Records***

# Cloning Single Records

**To create a new record that has the same owner, contact or licensed professional information as an existing record, use the cloning feature.**

**When you clone a record, a duplicate of the original record is being created but with a new record ID number. The source record is the parent record, and the new cloned record is the child.**

**Please see your BuildSA Change Agent or Supervisor with any questions about the Cloning Single Records process.**

**1. Retrieve the record.**

**2. Click the Record ID hyperlink to access the record.**

ADDR-COD-18-000126

Menu ▾ Refine Search New Create By Form Create From Model Delete GIS Create a Set ▾ View Log ▾ Help

Showing 1 of 1

<input type="checkbox"/>	ID	Record Type	Project Name	Status	Organization Name	First Name	Last Name
<input type="checkbox"/>	<a href="#">ADDR-COD-18-000126</a>	Certificate of Determination	NCFL Project 55	Under Review		Patricia	Cavazos

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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

**3. From the Record's navigation bar, click on the *Related Records* tab.**

**4. Click on *Clone Sgl*.**

**NOTE: DSD is not using the Clone Multiple (Cline Mult) feature at this time.**

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

The screenshot shows a web form titled "Select a record type". At the top left, there are two radio buttons: "Create one Record for all Parcels" (which is selected) and "Create one Record for each Parcel". A red circle with the number "1" and a yellow arrow points to the first radio button. A yellow callout box with a red circle "1" contains the text: "Click the radio button to the left of Create one Record for all Parcels." Below the radio buttons is a search bar labeled "Search Record Type" and a "Select Module" dropdown menu set to "All Modules". The main area of the form is a list of record types, grouped into two categories: "AMENDMENTS ONLY" and "LAND DEVELOPMENT". Yellow arrows point to the "AMENDMENTS ONLY" and "LAND DEVELOPMENT" headers. A red circle with the number "2" and a yellow callout box with a red circle "2" contains the text: "Select a record type from the AMENDMENTS ONLY categories or the LAND DEVELOPMENT categories." At the bottom of the form are three buttons: "Cancel", "Help", and "Create Application".

**5. The Record Picker form displays. Click to select the record type for the child record.**

Continue 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:
- Status History

**General Record Information**

- Record Details ([Set Application Description](#))
- Parcel
- Owner
- Address
- Assets
- Licensed Professionals ([Select](#))
- Contact ([Select](#))
- Document
- Preserve Dates
- Record Conditions ([Select](#))
- Inspection Conditions ([Select](#))
- Conditions of Approval ([Select](#))
- Education
- Continuing Education
- Examination
- Record Comments
- Activities

**6. The Data Element selection form displays. Check the box to the left of fields you want copied over to the child record. Select Parcel, Owner and Address fields.**

**7. Click Continue.**

Continue Reset Cancel Help

Record Type - Specific Information	General Record Information	
<input type="checkbox"/> Fee Items ( <a href="#">Select</a> )	<input type="checkbox"/> Record Details ( <a href="#">Set Application Description</a> )	<input type="checkbox"/> Record Conditions ( <a href="#">Select</a> )
<input type="checkbox"/> Workflow Status	<input type="checkbox"/> Parcel	<input type="checkbox"/> Inspection Conditions ( <a href="#">Select</a> )
<input type="checkbox"/> Inspection ( <a href="#">Select</a> )	<input type="checkbox"/> Owner	<input type="checkbox"/> Conditions of Approval ( <a href="#">Select</a> )
<input type="checkbox"/> Custom Fields ( <a href="#">Select</a> )	<input type="checkbox"/> Address	<input type="checkbox"/> Education
<input type="checkbox"/> Additional Info	<input type="checkbox"/> Assets	<input type="checkbox"/> Continuing Education
<input type="checkbox"/> Valuation Calc	<input type="checkbox"/> Licensed Professionals ( <a href="#">Select</a> )	<input type="checkbox"/> Examination
<input type="checkbox"/> Workflow Task Specific Information	<input type="checkbox"/> Contact ( <a href="#">Select</a> )	<input type="checkbox"/> Record Comments
<input type="checkbox"/> Status or New Status: <input type="text" value="--Select--"/>	<input type="checkbox"/> Document	<input type="checkbox"/> Activities
<input type="checkbox"/> Status History	<input type="checkbox"/> Preserve Dates	

**Note: Blue text hyperlinks display additional field options to copy.**

**Address** *(This section is not required.)*

Search Delete Get Parcel Set Primary GIS

<input type="checkbox"/>	Primary	Street Number	Street Name	Direction	Street Type	Unit/Suite	City	Zip
<input type="checkbox"/>	<input checked="" type="radio"/>	134	SOLEDAD		ST		City of S...	78205
<input type="checkbox"/>	<input type="radio"/>	505	ROOSEVELT		AVE		City of S...	78210
<input type="checkbox"/>	<input type="radio"/>	8702	GERONIMO		DR			78254
<input type="checkbox"/>	<input type="radio"/>	27215	HIDDEN TRAIL					78006
<input type="checkbox"/>	<input checked="" type="radio"/>	902	HAYS		ST		City of S...	78202

**Parcel** *(This section is required.)*

Search Delete GIS

<input type="checkbox"/>	Primary	Parcel #	Legal Description
<input type="checkbox"/>	<input checked="" type="radio"/>	12345	NCB 1657 LK E LOT N 12...
<input type="checkbox"/>	<input type="radio"/>	134	NCB A20 BLK LOT 43 (1.535 AC...
<input type="checkbox"/>	<input type="radio"/>	442	NCB 106 BLK LOT 4
<input type="checkbox"/>	<input type="radio"/>	88847	CB 4499A BLK 1 LOT 7
<input type="checkbox"/>	<input type="radio"/>	71891	CB 4709B BLK LOT 14

**Owner** *(This section is not required.)*

Search Delete Set Primary GIS

- Name
- SERRANO ANGEL & MARIA
- GLASS DAMD A
- WEIGHMANN KANDICE F & KARL J
- SOLEDAD HOUSE LLC % AMS COMMERCIAL REAL ESTATE
- MARTIN LINEN SUPPLY CO ATTN:CONTROLLER

Note the fields selected copied to the new record.

**8. The APPLICATION**

**INTAKE Form displays.**

**9. Complete all required fields for the new child record.**

**10. Click Submit. BuildSA systematically relates it to the parent record.**

GIS

Contacts

Custom Fields

Custom Lists

Inspections

Menu

List View

Clone Sgl

Clone Mult

Update Related Records

Search

Look Up

Create a Set

Delete

Help

LAND-BSL-18-000027 record(s) added successfully.



LAND-BSL-18-000027; [LandDevelopment, Land Entitlement, Plat, Building Setback Line]; Under Review; NCFL56; 902 HAYS ST City of San Antonio, TX 78202

**BuildSA generates a message displaying the new Record ID # and stating it was added successfully.**

Owner

Related Records

***Congratulations!***

***This concludes Module Eleven***

## ***Cloning Single Records***

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

## TEST YOUR RECALL

1. When you clone a single record, you are creating a \_\_\_\_\_ of the original record.
2. The source record of the cloned record is the parent record.  
\_\_\_\_True \_\_\_\_False
3. The cloned record is systematically given a new record ID number.  
\_\_\_\_True \_\_\_\_False.

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



**If you answered:**

- 1. Duplicate**
- 2. True**
- 3. Sibling**
- 4. True**

**You are correct!**

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

## **Organization Change Management Team Contact Information**

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