

On-line Tutorial Series

Module Eleven

Record Relationships

Viewing Related Records

Deleting a Record from a Related

Records Relationship

Record Relationships

Related records all have information in common and are either related or associated with each other in some way. For example, a planning record that was approved for rezoning might be related/associated to several building permits. The relationships between these records streamline the communication between different DSD divisions and agencies.

Viewing Related Records

← LAND-PLAT-18

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

Custom Lists

Inspections

Conditions

Owner

Related Records

Comments

LAND-PLAT-18-000989; [LandDevelopment, Land Entitlement, Plat, Major] ; Under Review; city major pac 1; 3619 S ZARZAMORA City of San Antonio, TX 78225

Note: To display related records, click the + sign to the left of the Record ID# to expand.

← LAND-PLAT-18

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

Custom Lists

Inspections

Conditions

Owner

Related Records

LAND-PLAT-18-000989; [LandDevelopment, Land Entitlement, Plat, Major] ; Under Review; city major pac 1; 3619 S ZARZAMORA City of San Antonio, TX 78225

PLAT-SITEIMPEXT-18-000043; [LandDevelopment, Land Entitlement, Plat, Site Improvement Time Ext] ; Approved;; 3619 S ZARZAMORA City of San Antonio, TX 78225

Note: Clicking the + sign expands the category. Related records display.

LAND-PLAT-18

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

LAND-PLAT-18-000989; [LandDevelopment, Land Entitlement, Plat, Major] ;Under Review;city major pac 1; 3619 S ZARZAMORA City of San Antonio, TX 78225

PLAT-SITEIMPEXT-18-000043; [LandDevelopment, Land Entitlement, Plat, Site Improvement Time Ext] ;Approved;; 3619 S ZARZAMORA City of San Antonio, TX 78225

Related Records display as hyperlinks. Click on a Record ID# to switch between listed records.

Owner

Related Records

Select List View to display information in list form.

LAND-PLAT-18

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

LAND-PLAT-18-000989; [LandDevelopment, Land Entitlement, Plat, Major] ;Under Review;city major pac 1; 3619 S ZARZAMORA City of San Antonio, TX 78225

PLAT-SITEIMPEXT-18-000043; [LandDevelopment, Land Entitlement, Plat, Site Improvement Time Ext] ;Approved;; 3619 S ZARZAMORA City of San Antonio, TX 78225

Owner

Related Records

LAND-PLAT-

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

Showing 1-2 of 2

<input type="checkbox"/>	Relationship	Address Line	Assigned Date	Percent Complete	Record ID	Short Notes	Record Type	Record Type Alias	Status	Opened Date	Priority	Street Name	First Name	Last Name	E-mail
<input type="checkbox"/>	Current			<div style="width: 50%;"></div>	18CAQ-00000-05172		LandDevelopment/Land Entitlement/Plat/Major	Major Plat	Under Review	07/05/2018		ZARZAMORA	Larry	Odis	lo09...
<input type="checkbox"/>	Child			<div style="width: 100%;"></div>	18CAQ-00000-05200		LandDevelopment/Land Entitlement/Plat/Site Improvement Time Ext	Site Improvement Time Extension	Approved	07/05/2018		ZARZAMORA	Larry	Odis	lo09...

Page 1 of 1

Owner

Related Records

List view displays information in list form. Note Relationship column.

List View offers page customization using the Menu drop-down option (shown).

LAND-

Menu Tree View Clone Sgl

- Customize Content
- CSV Export
- My Filters
- Expand List
- Copy
- Print Page

Owner

Related Records

Select Fields, width and display order (shown). Click Save when through with the customization of your List View page.

Available Fields

- Address Line 1
- Address Line 2
- Address Type Flag
- Alternate ID
- Anonymous
- Appearance Date
- Appearance Day
- Application Name
- Assign to Organization
- Assigned Date

Selected Fields

- Relationship
- Assigned to Staff

Number of Records

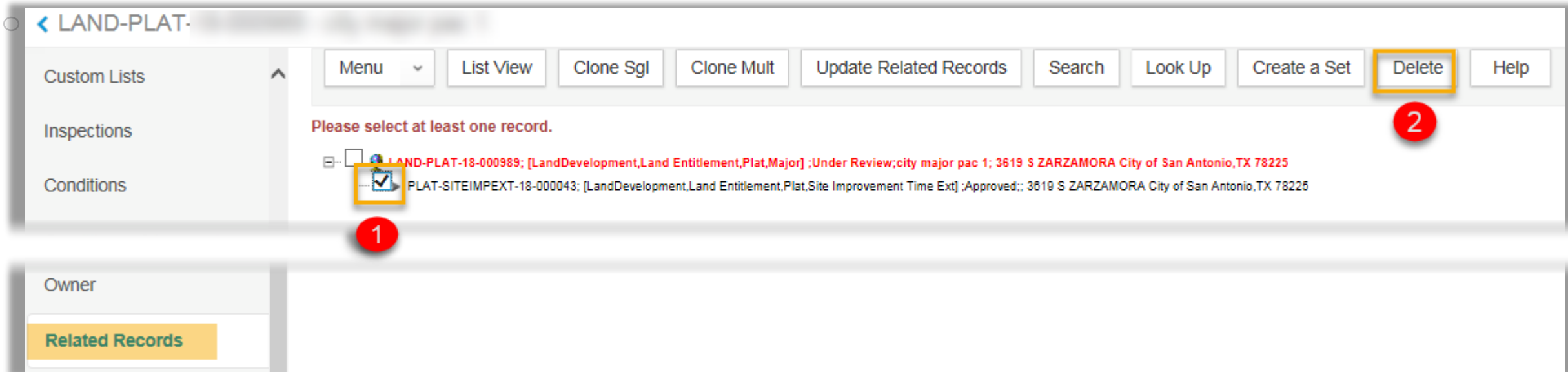
Contract

Expand

Element	Width (pixels)	Display Order	Label
Relationship	<input type="text" value="100"/>	<input type="text" value="1"/>	<input type="text"/>
Assigned to Staff	<input type="text" value="140"/>	<input type="text" value="2"/>	<input type="text"/>

Removing Relationships

To Remove a Record from a Relationship



- 1. Check box to the left of the Record you want removed from the relationship (#1 shown).**
- 2. Click Delete (#2 shown).**

If a Record is removed from a relationship, it is not removed (deleted) from BuildSA, only the Relationship is removed-not the Record.

The screenshot shows the BuildSA interface for a record titled "LAND-PLAT-18-000989: [LandDevelopment, Land Entitlement, Plat, Major] ; Under Review; city major pac 1; 3619 S ZARZAMORA City of San Antonio, TX 78225". The interface includes a navigation menu on the left with options like "Custom Lists", "Inspections", and "Conditions". A toolbar at the top contains buttons for "Menu", "List View", "Clone Sgl", "Clone Mult", "Update Related Records", "Search", "Look Up", "Create a Set", "Delete", and "Help". A yellow box highlights the message "1 record(s) deleted successfully." with a yellow arrow pointing to it from another yellow box that says "The relationship is deleted, not the record." Below the message, there is a "Related Records" section.

3. BuildSA displays a *1 record(s) deleted successfully* message.

Congratulations!

This concludes Module Eleven

Viewing Related Records

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

TEST YOUR RECALL

1. Use the _____ Tab to view Related Records.
2. Record Relationships can be parent or _____.
3. A record may have numerous related records. _____ True _____ False.
4. Deleting a Record from a Related Relationship does not delete the Record, only the relationship is deleted. _____ True _____ False

Answers on the next slide...



If you answered:

- 1. Related Records**
- 2. Child**
- 3. True**
- 4. True**

You are correct!

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

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