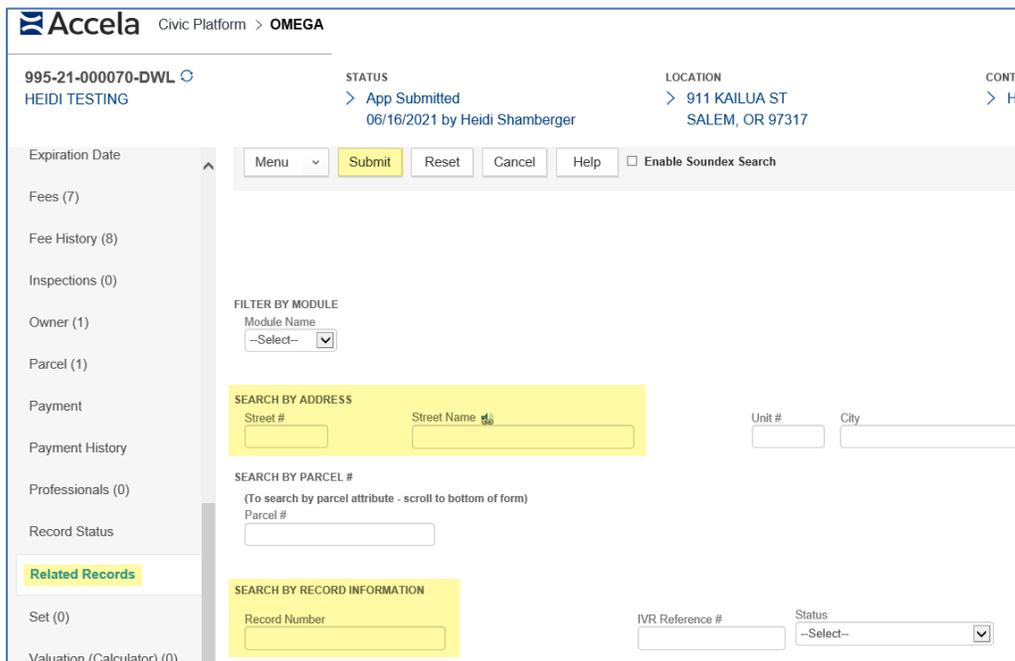
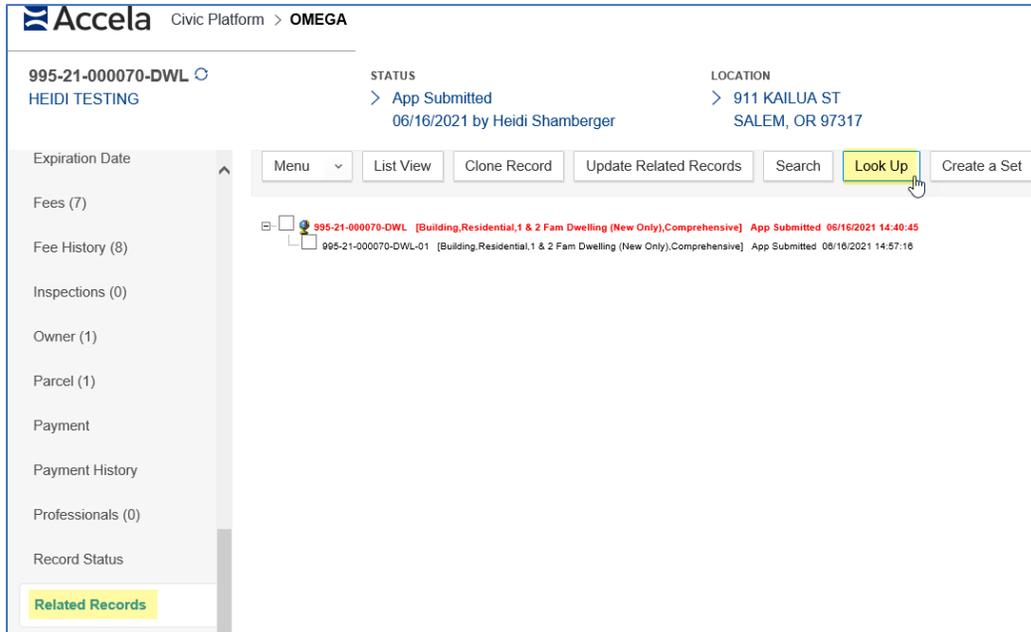


# How to Relate Existing Records

## Relating existing Records

- Locate/browse to your Parent record, the record you want to be the Parent to the overall project.
- Once located, go to the Related Records tab > select Look Up to search for related records – upon selecting Look Up, record search criteria will be displayed. The ideal search is by address, as all records occurring on or about the same project would reference the same address. However, you are able to search directly by Record Number or any other criteria to locate any related records > Submit.



- Once a list of matching search results are displayed, carefully review the Record descriptions and statuses before making your selections, to assure that you are selecting the correct records for relating. You can select one or many records to relate – checkbox those records you wish to relate. You then have the choice to Select as Parent or Select as Child – because our recommendation is to start at the Parent record to create your relationships as best practice, you would choose Select as Child. If there is a situation where it makes sense to make the selected a Parent, you are able to do so.
- The next screen displayed is only used if you are copying, in this case you are only relating existing records. Don't select anything and click submit.

917-23-00001-STR STATUS App Submitted LOCATION 1335 SE JETTY AVE CONTACT p.146 LLC  
 Stacey Test - Com res 4-plex apartment 01/03/2023 by Stacey Thias WARRENTON, OR 97146

Submit Reset Cancel Help

**Do not select any of the items**

**Record Type - Specific Information**

- Fee Items (Select)
- Workflow Status
- Inspection (Select)
- Custom Fields (Select)
- Additional Info
- Valuation Calc
- Workflow Task Specific Information
- Status of New Status: --Select--
- Status History

**General Record Information**

- Record Details (Set Application Description)
- Parcel
- Owner
- Address
- Assets
- Licensed Professionals (Select)
- Contact (Select)
- Document
- Decision Dates

**Record Conditions (Select)**

- Inspection Conditions (Select)
- Conditions of Approval (Select)
- Education
- Continuing Education
- Examination
- Record Comments
- Activities

**Note:** you will get a 'Copy Successful' pop up message with record numbers listed, please disregard this as there was no 'copy' done, just that we are using the cloning/copy functionality to create the relationships and it was successful.

Accela Civic Platform > OMEGA

995-21-000070-DWL STATUS App Submitted LOCATION 911 KAILUA ST CONTACT HEIDI  
 HEIDI TESTING 06/16/2021 by Heidi Shamberger SALEM, OR 97317

Expiration Date  
 Fees (7)  
 Fee History (8)  
 Inspections (0)  
 Owner (1)  
 Parcel (1)  
 Payment  
 Payment History  
 Professionals (0)  
 Record Status  
 Related Records  
 Set (0)  
 Valuation (Calculator) (0)

Menu Select as Parent Select as Child Search Cancel Help

Showing 21-40 of 100

| <input type="checkbox"/>            | Permit Number         | Record Type                               | Number | Street Name | City  | Status                   |
|-------------------------------------|-----------------------|---|--------|-------------|-------|--------------------------|
| <input type="checkbox"/>            | 995-21-000025-BUSR-21 | Business License Regulatory               | 911    | KAILUA      | SALEM | App Submitted            |
| <input type="checkbox"/>            | 995-21-000024-BUSR-21 | Business License Regulatory               | 911    | KAILUA      | SALEM | App Submitted            |
| <input type="checkbox"/>            | 995-21-000001-BUS-21  | Business License                          | 911    | KAILUA      | SALEM | License Issued           |
| <input type="checkbox"/>            | 995-21-000002-BUS-21  | Business License                          | 911    | KAILUA      | SALEM | License Issued           |
| <input checked="" type="checkbox"/> | 995-21-000019-ELEC    | Residential Electrical                    | 911    | KAILUA      | SALEM | Permit Issued            |
| <input type="checkbox"/>            | 995-21-000014-MECH    | Commercial Mechanical                     | 911    | KAILUA      | SALEM | Permit Issued            |
| <input type="checkbox"/>            | 995-21-000007-DWL     | Residential 1 & 2 Fam Dwelling (New Only) | 911    | KAILUA      | SALEM | App Accepted/In Review   |
| <input type="checkbox"/>            | 995-21-000016-PRMT-01 | Onsite Permit                             | 911    | KAILUA      | SALEM | Permit Issued            |
| <input type="checkbox"/>            | 995-21-000016-AUTH    | Onsite Authorization                      | 911    | KAILUA      | SALEM | App Submitted            |
| <input type="checkbox"/>            | 995-21-000006-STR     | Commercial Structural                     | 911    | KAILUA      | SALEM | TCO Requested/Under Insp |
| <input checked="" type="checkbox"/> | 995-21-000005-MECH    | Residential Mechanical                    | 911    | KAILUA      | SALEM | App Accepted/In Review   |

- Upon Submitting, on the Related Records tab - you will now see the records you selected listed as children under your Parent record number. This indicates that your relationships were created successfully.

The screenshot shows the Accela Civic Platform interface for record 995-21-000070-DWL. The parent record is HEIDI TESTING, with a status of 'App Submitted' and a location of '911 KAILUA ST SALEM, OR 97317'. The interface includes a sidebar with navigation options like 'Expiration Date', 'Fees (7)', 'Fee History (8)', and 'Inspections (0)'. A toolbar contains buttons for 'Menu', 'List View', 'Clone Record', 'Update Related Records', 'Search', and 'Look Up'. The main content area displays a tree view of related records:

- 995-21-000070-DWL [Building,Residential,1 & 2 Fam Dwelling (New Only),Comprehensive] App Submitted 06/16/2021 14:40:45
- 995-21-000005-MECH [Building,Residential,Mechanical,Comprehensive] App Accepted/In Review 01/21/2021 07:17:16
- 995-21-000019-ELEC [Building,Residential,Electrical,Comprehensive] Permit Issued 03/04/2021 08:58:16
- 995-21-000070-DWL-01 [Building,Residential,1 & 2 Fam Dwelling (New Only),Comprehensive] App Submitted 06/16/2021 14:57:16

You can now move very easily between these project-related records by clicking the link provided in the Related Records tab.

**IMPORTANT!** The power of relating records includes the following:

- The expiration date of all the records in the related group will fully synchronize, which prevents any record in the group from individually expiring, causing interruption to the overall project. And any time any record in the group has a positively-resulted inspection that outdates its' expiration, all other records in the group will benefit from that same extension of the expiration date by another 180 days.
- All records in the related group will be referenced on any Certificate of Occupancy or Certificate of Satisfactory Completion which meets requirements. This helps an agency to manager all the related records at the project level, particularly for Final.

**Related Permits**

995-21-000070-DWL-01  
 995-21-000005-MECH  
 995-21-000019-ELEC

**Permits Status**

App Submitted  
 App Accepted/In Review  
 Permit Issued

**To Break a Relationship in Related Records**

Sometimes you might want or need to break a relationship with a record in Related Records - it was Voided or Withdrawn and is cluttering up the project group, or was the wrong record/an error, etc – there is an easy way to break the relationship to the problem record.

1. Locate the Parent record, to access the Related Record tab. Checkbox the record(s) that you no longer need to be related – select the Delete button. This will only delete the relationship, not delete the record. Now that disconnected record will no longer show in the Related Record tab/group, but is still available in the Record List and can be searched as needed.

995-21-000070-DWL   
HEIDI TESTING

STATUS  
> App Submitted  
06/16/2021 by Heidi Shamberger

LOCATION  
> 911 KAILUA ST  
SALEM, OR 97317

CONTACT  
> HEIDI SHAMBERGER

- Expiration Date
- Fees (7)
- Fee History (8)
- Inspections (0)
- Owner (1)
- Parcel (1)
- Payment
- Payment History
- Professionals (0)
- Record Status

Menu

- 995-21-000070-DWL [Building,Residential,1 & 2 Fam Dwelling (New Only),Comprehensive] App Submitted 06/16/2021 14:48:45
- 995-21-000005-MECH [Building,Residential,Mechanical,Comprehensive] App Accepted/In Review 01/21/2021 07:17:16
- 995-21-000019-ELEC [Building,Residential,Electrical,Comprehensive] Permit Issued 03/04/2021 08:58:16
- 995-21-000070-DWL-01 [Building,Residential,1 & 2 Fam Dwelling (New Only),Comprehensive] App Submitted 06/16/2021 14:57:16

Related Records