How do I record and search for relationships?

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Database Search - making the most of your data

It can be very useful to know when certain members of your school community have family and/or business connections with one another. Using Potentiality, you can record as many different relationships within each user profile as you wish. The simplest is a 1-1 relational field i.e. a single record connected to another single record. An example of this could be a Father and Daughter or Husband and Wife relationship.

Below is an example of a user who has 4 related records. To view each individual relationship, you simply go to the Relationship tab inside a user's record and click on the relevant numbered tab. Alternatively, you can search your database for records which have relationships attached to them. See Searching for related records for more details.
To add a relationship:

1. Quick Search for the individual that you wish to add a relationship to (e.g. we have searched for a user called Lily Wakeman) > right-click on their name to view/edit the record.

2. Go to the Relationships tab inside their profile and enter the following details into the screen below:

   Name: Type the name of the person that 'Lily' (your user) has a relationship with. As you type, the database will return a list of existing user records that match the characters that you enter.
3. Once you have entered the name of the person that Lily has a relationship with (in the example below, we have entered Steve Wilson as the relation). You will be prompted to create a 'reverse link' (this is to allow the relationship to display inside Steve's user profile too).
4. Choose a relationship type, from the Relation, drop-down list, for the individual entered in the Name field i.e. What is Lily's relationship to Steve - Sister? Cousin? We have selected Sister in Law in the example screenshot above.

5. Enter relation dates (If applicable - this is not mandatory).

6. Enter the Reciprocal relationship i.e. If Lily is Steve's Sister in Law then the reciprocal relationship would be that Steve is her Brother in Law. Click Update to save your changes.

7. After you have entered the reverse link information. You will be returned to the original relationship tab where you must continue to update the relation and reciprocal fields.
Relationship

Name
Relation
[Choose one]
Date From
YYYY-MM-DD
Date To
YYYY-MM-DD
Reciprocal
[Choose one]

Relationship

Name
Relation
Brother-in-law
Date From
YYYY-MM-DD
Date To
YYYY-MM-DD
Reciprocal
Sister-in-law
8. Choose the relevant relationship type, from the Relation drop-down list, for the individual entered in the Name field. Steve's name appears in the Name field above therefore the relation type would be Brother in law.

9. Select the reciprocal relationship (what is Lily’s relationship with Steve?). i.e If Steve is Lucy’s Brother-in-law then the reciprocal relationship will be that she is his Sister-in-law.

10. Click Update User Details in the top right-hand corner of the screen to save your changes.

NOTE: To add multiple relationships to a record. Click on the icon underneath the ‘Relationship’ heading and repeat the steps outlined above for each relationship that you wish to add.

Searching for related records

You can easily search on related records by expanding the Relationships field within the ‘User fields’ search interface and entering which relation that you’d like to search on.

To display parent relationship records, click Relational searches underneath Search Result Options, choose Relationship>Name from the Return records referenced in a relational field drop down (this will return everyone who is recorded as a parent relation within the Relationships tab on your database).

NOTE: If you want to return everyone who has a parent relation on the database (as opposed to the actual parents), you would select "Relationship>Name" from the "Return records which reference these records in a relational field” > select Parent from the Relation drop-down list.

In summary, the above search is divided into two parts. The first stage selects which primary records to find (i.e. in the example above, all the ‘relation’ records). The second stage then tells the system to only show the parent relation records, rather than the original primary records. You can, however, click the “Keep primary records in search results” checkbox, if you wish to return BOTH the individuals who have a parent relationship record AND the actual parent records.

Custom export fields - custom relational fields
Within Potentiality, you can create "pseudo fields" which are a combination of other fields within the database. This is a variable called "custom Export Fields" and can be setup to export relational information.

Address: \{title\} \{initials:fname\} \{initials:mname\} \{lname\}

Partner Address: \{printRelational:field=Relationship&filter=relation%3dspouse&printField=\{title\} \{initials:fname\} \{initials:mname\} \{lname\}\}

This format prints the information of a related record filtered by the spouse in the relation sub-field, it then prints the same Address format as above for any found records.

Partner preferred name: \{printRelational:field=Relationship&filter=relation%3dspouse&printField=preferred\}

Partner ref_no: \{printRelational:field=Relationship&filter=relation%3dspouse&printField=\{ref_no\}\}

Each of these create a pseudo field in the database which can be used to run exports or mail merges.