

# Managing Related Records in Axiom

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As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. All knowledge content has moved to the new [Veracross Community](#). Please update your bookmarks.

[Here is the new version of this article in the Veracross Community.](#)

## Overview

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Records can be linked to other records within the system. For example, users can indicate relationships by linking person records on the Related People tab of a person record. Users can also link student records to class records to indicate which students are enrolled in a particular class.

Other examples of related records:

- Person records to a household record
- Class enrollment records linked to class records
- Attendance records linked to class records and student records
- Application records linked to an admissions candidate record
- Group records tied to group event records
- Donation records link to pledge records (if the donation should be applied to the pledge)

On a record, if a link to another record can be made, there will be an "Add Record" button to input the related record. In Axiom, the name of the grid that displays and makes management possible is called the "Input Grid."

## Managing Related Records

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### Adding New Related Records

If the "Add Record" button is available within an existing record, it is possible for that record to be tied to other records within the system.

Veracross: DEMO

Main Person: Cobb, James - Parent, Prnt of Applicant

RELATED PEOPLE

HOUSEHOLD: Cobb

MAILING ADDRESS (MULTI-LINE): Mr. James Cobb, 47 Union St, Framingham, MA 01701

**Add Record**

Related Person	Relationship	Roles	Resident	Legal Custodi	Portal Acces	Pick Emerg Up	Gener Correl	Repor Cards	Medic Autho	Custody Deper	Updat Status	Permi Notes
<a href="#">Cobb, Michelle</a>	Wife	Parent, Prnt of Applicant	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	<input type="checkbox"/>
<a href="#">Cobb, Andrew</a>	Son	Applicant, Sibling	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Normal	<input checked="" type="checkbox"/>					
<a href="#">Cobb, Dennis</a>	Son	Student (FK)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Normal	<input checked="" type="checkbox"/>					

**For example:** on the Related People tab, an “Add Record” button is present. When this button is selected, a new row will appear in the input grid. The user will be able to choose the related record by clicking on the  icon. Once a related person is selected from the resulting search grid, a relationship record is created, and the row on the initial person’s record will populate with the related person’s information. The user will then be able to use the additional fields on the input grid to indicate the relationship between two people, as well as add any permissions the related person might have for the initial person.

Another example of a related record appears on the General tab of a class record. Just like when adding a related person to a person record, the “Add Record” button will introduce an extra row to the input grid. The user will be able to choose a student record to tie to this class record by either typing the students name or by clicking on the  icon. Adding the student to the class creates a class enrollment record, and users are then able to use the input grid on the General tab to insert more information, such as Late Date Enrolled.

## Editing Related Records

Related Person	Relationship	Roles	Resident	Legal	Portal	Pick	Gener	Repor	Medic	Custody	Updat	Notes
Cobb, Michelle	Wife	Parent, Prnt of Applicant	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	<input type="checkbox"/>	
Cobb, Andrew	Son	Applicant, Sibling	<input checked="" type="checkbox"/>	Normal	<input checked="" type="checkbox"/>							
Cobb, Dennis	Son	Student (PK)	<input checked="" type="checkbox"/>	Normal	<input checked="" type="checkbox"/>							
Cobb, Colleen	Godmother		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	<input type="checkbox"/>	

To edit the related record, users can navigate to the input grid on a record. The location of the input grid may vary depending upon the record.

**For example:** on a person record, related records can be found on the Related People tab. On a class record, related records can be found on the General tab.

Once the input grid is located, the user can change the information within the grid and then use the “Update Record” button to save.

**For example:** a user might need to make a student’s grandparent an emergency contact by changing the permission flags on the student’s Related People tab. The user would check the “EM” checkbox for the grandparent and update the record. Similarly, a user might need to withdraw a student from a class. To do so, the user would navigate to the input grid on the General tab of the class, add a date to the Date Withdrawn field for the student enrolled in the class, and update the record.

In both the case of changing the emergency contact information or withdrawing a student from a class, the changes are made within the input grid, and then the master record is updated to save the changes.

## View Related Record Detail

To view the related record’s detail screen, the user can navigate to the input grid on the master record. The user can then click on the  icon located in the second to last column of the input grid. By clicking the arrow icon, the system will open the record within the same window.

## Deleting Related Records

To delete the related record, the user can again navigate to the input grid on the master record. From the input grid, the user can click the red X located in the last column of each row. When the red X is selected the record will be highlighted in red. Once the row is highlighted, clicking the Update button at the top of the screen will remove the related record.

