



Odyssey CMS Cheatsheet

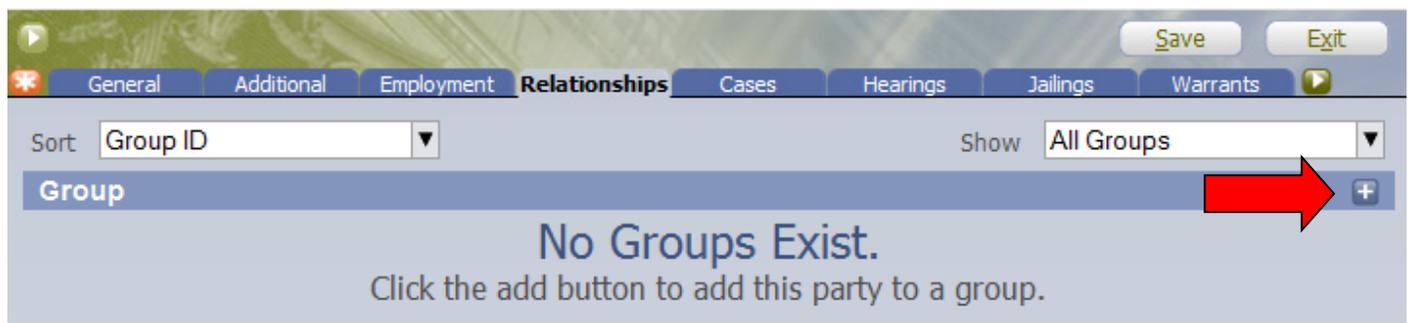
Topic: Adding Relationships

Date: 5/26/2015

Summary: This cheatsheet will explain how to add Relationships to a party.

Important: Odyssey is software owned by Tyler Technologies, Inc. Any screenshots of Odyssey may contain proprietary information that should not be disclosed to non-Odyssey users.

1. Access a party record using Find a Party or by clicking on the party name in a case.
2. On the party record, click on the Relationships tab.
3. Click the + to add a Relationship Group.



4. To find an existing relationship group to add this party to, enter the criteria and click Search.

The screenshot shows the 'Find a Group' search form. It has a title bar with a close button. Below the title bar, there are two sections: 'Search by Group Information' and 'Search by Party Information'. The 'Search by Group Information' section has two text input fields: 'Group ID' and 'Description'. The 'Search by Party Information' section has radio buttons for 'Person' (selected) and 'Nickname'. Below the radio buttons are several text input fields: 'Last Name', 'First & Middle', 'Suffix', 'Date of Birth', 'Death', 'Driver's License', and 'Person ID'. At the bottom of the form, there are five buttons: 'Search', 'Clear', 'Exit', 'Use Advanced Search', and 'Add Group'. A red arrow points to the 'Add Group' button.

5. To add a new Relationship group for the party, click Add Group.



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6. Select Family Jacket for the group type.
7. From the Relationship drop down menu, select this party's relationship in the Relationship Group. For example, a juvenile party would typically be identified as "son" or "daughter" in the relationship group.
8. Add a description to identify the group and a comment if desired.
9. Click Continue.

Add Group

Party **Collins, Terri**

Group ID **System Assigned** Manual

Group Type **Family Jacket**

Description **Terri Collins Family**

Comment

Relationship **Target**

Continue **Exit**

10. Click the + to add additional family members to the relationship group.

Group Editor

Group ID **0000770**

Group Type **Family Jacket**

Description **Terri Collins Family**

Comment

Parties

Collins, Terri	Target	Added: 02/28/2012
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Continue **Exit**



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11. Enter criteria to search for the party you want to add to the Relationship Group. Click Search.

Find A Party

Search by Party Information Use Soundex

Person Nickname

Last Name: Collins

First & Middle: Aidan

Date of Birth: [Calendar Icon] Death: [Calendar Icon]

Driver's License: [Dropdown]

Person ID: [Text Box]

Search **Clear** **Exit** **Use Advanced Search** **Add Party**

12. Click on the name of the appropriate party. If the person is not found, click Add Party, enter the details and click Save.

13. Once you have selected a party or added a new one, from the drop down menu select the party's relationship in the Relationship Group.

Add Group Relationship

Group ID: 0000770

Group Type: Family Jacket

Party: Collins, Aidan

Relationship: Son

Added: 02/28/2012

Removed: [Calendar Icon]

Reason: [Dropdown]

Comment: [Text Box]

Continue **Exit**

14. Click Continue.

15. Repeat this process (steps 10-14) to add additional family members to the Relationship Group.