Add Relationships to an Object Type

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You can connect two or more objects together by adding object types to an object type group, then adding that group to a relationship on another object type (e.g. the Visitor and Employee Record object types in a People Involved relationship saved to the Incident object type). Once a relationship is created, it will appear either as field, table, or location map on a configurable form for the object type the relationship is saved to, where administrators can allow users to select an existing object or create a new one on the object type(s) added to the group, which then forms a relationship between the two objects.

Depending on the permission structure of the roles granted access to this object type, you will likely need to configure the inferred permissions to ensure users will have access to the object type(s) in the relationship, as required.
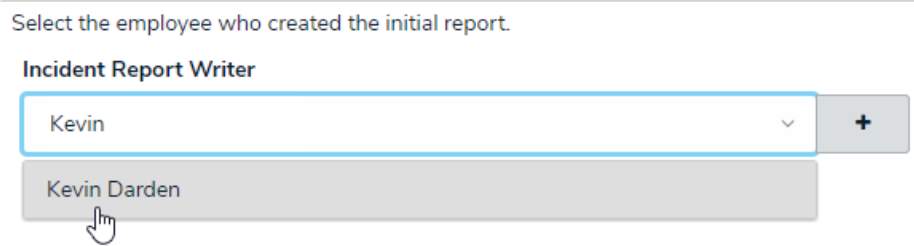
EXAMPLE

If you had an Incident object type and an Employee Record object type, you may want to link those object types together to track which employees created new incident objects. To do this, you create a new object type group called "Employees" and add Employee Record as the related object type. You would then use the Employee object type group to create a relationship on Incident, called "Incident Report Writer." Once that relationship has been added, users can indicate which employee is creating the incident by selecting an existing Employee Record object or creating a new record from the Incident Report Writer field on the form.

An example of how a relationship can be displayed on an object type. In this case, the Incident Report Writer field was created from a relationship on the Incident object type using the Employees object type group.

References are automatically created with relationships, but they don't appear on an object type until the **References** element has been added to a configurable form. See Add References to an Object Type for more information.

> ℹ️ You cannot create a new object through a relationship on an object that hasn't transitioned out of the Creation state as the object has not yet been created and saved.

To add a relationship to an object type:

1. If not already created, create an object type group that includes the object type(s) you wish to add to the relationship.
2. Click the ⚙ icon in the top bar > **Object Types** in the **Data Model** section.

3. Click the object type you wish to add a relationship to or enter the name of the object type in the **Search** field, then click it to display the **Edit Object Type** page.

4. Click the **Relationships** tab **> Add Relationship**.

5. Enter a name for the relationship as it will appear on the forms in the **Relationship Name** field (e.g. Incident Report Writer).

6. **Optional:** Enter a reference name in the **Reference Name** field, which will appear as a field if references are added to a configurable form. See Add References to an Object Type for more information.

7. **Optional:** If needed, provide additional information or instructions on completing the field in the **Long Name** section, which can be styled using Markdown formatting. If a long name is provided, you can choose to display it on a configurable form above the relationship or reference elements to provide more information to end users.

8. Select an object type group from the **Object Type Group** dropdown menu.

Adding a relationship to an object type.

9. Click **Create**.

10. To edit the relationship, click on it from the **Relationships** to open its settings.

11. To delete a relationship, click the 🗑 icon, then **Yes** to confirm.