

Add Relationships to an Object Type

Last Modified on 06/13/2024 11:01 am EDT

Overview

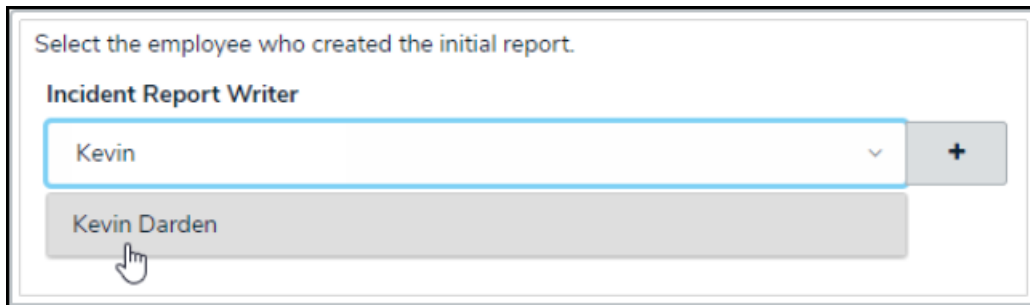
Relationships link different object types together.

Users 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 a field, table, or [location map](#) on a [configurable form](#) for the object type the relationship is saved to. Administrators can then 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.

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 record from the Incident Report Writer field on the form.



The screenshot shows a form field with the title "Select the employee who created the initial report." Below the title is the label "Incident Report Writer". The field contains a dropdown menu with "Kevin" selected. A plus sign (+) is visible to the right of the dropdown. Below the dropdown, a list of suggestions is shown, with "Kevin Darden" highlighted and a mouse cursor pointing to it.

How a Relationship can be Displayed on an Object Type

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](#).



Note:

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.

User Account Requirements

Depending on the permission structure of the [roles](#) granted access to this object type, you may need to configure the [inferred permissions](#) to ensure users will have access to the object type(s) in the relationship.

Related Information/Setup

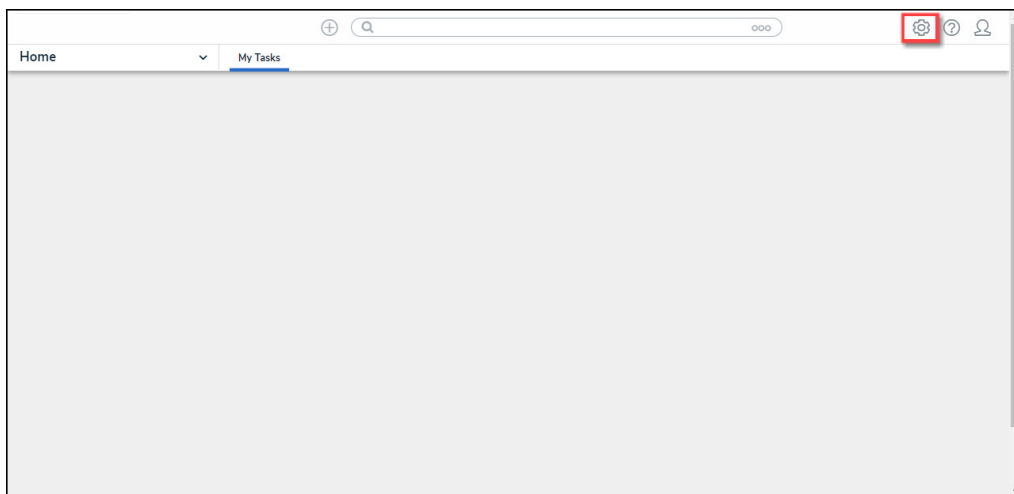
Please refer to the [Relationship Graphs](#) article to learn more about relationship graphs.

Please refer to the [Add References to an Object Type](#) article for more information about adding references to an Object Type.

Please refer to the [Create a New Object Type Group](#) article for more information on creating an object type group.

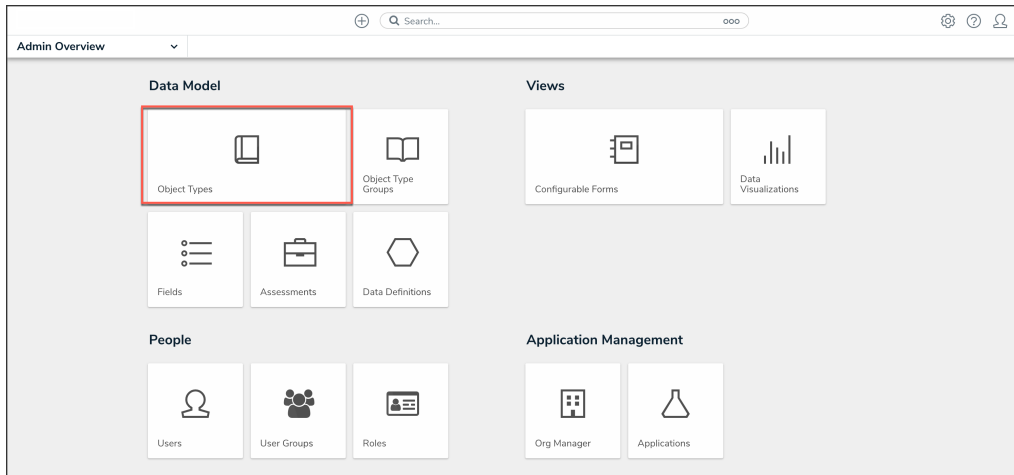
Navigation

1. From the **Home** screen, click the **Administration** icon.



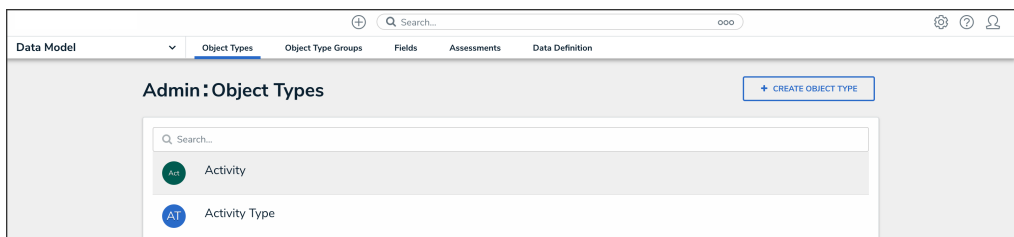
Administration Icon

2. From the **Admin Overview** screen, click the **Object Types** tile under the **Data Model** section.



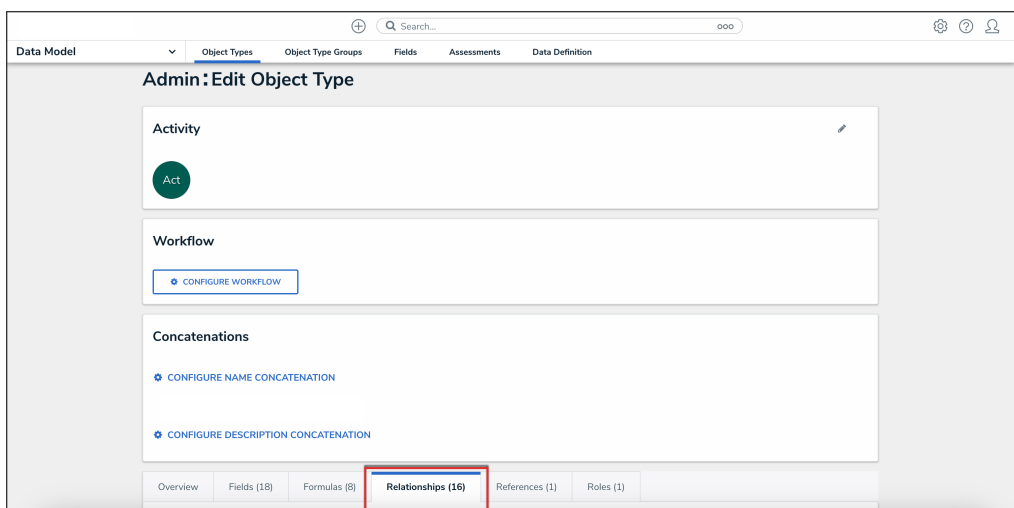
Object Types Tile

- From the **Admin: Object Types** screen, enter a keyword in the **Search** field to narrow the Object Types list and click the Object Type you wish to add a relationship to.



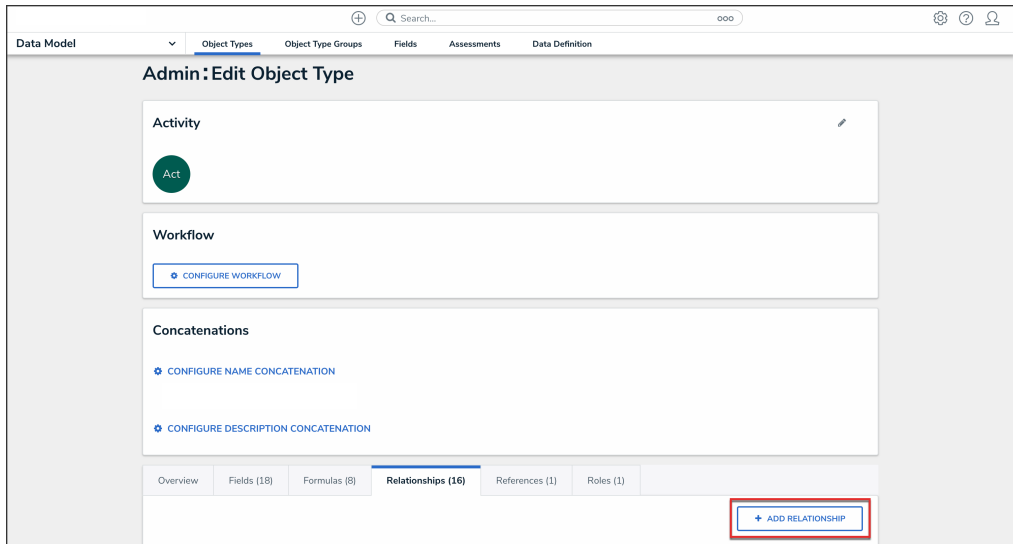
Object Type Name

- From the **Edit Object Type** screen, click the **Relationships** tab.



Relationships Tab

- Click **Add Relationship**.



Add Relationship Button

Adding a Relationship to an Object Type

Before a user can add a relationship to an object type, they must create an [object type group](#) that includes the object type(s) you wish to add to the relationship.

1. From the **Create a New Relationship** pop-up, enter a relationship name in the **Relationship Name** field (e.g. Activity Task).

The screenshot shows the 'Admin: Edit Object Type' interface. A modal dialog titled 'Create a New Relationship' is open. The dialog has a search bar at the top and a close button (X) in the top right corner. The main content area contains the following fields:

- * Relationship Name**: A text input field with a red border. The placeholder text is 'e.g., Location of Incident, Witness, etc.'.
- Reference Name**: A text input field.
- Long Name**: A larger text input field.
- * Object Type Group**: A dropdown menu currently showing 'Activities'.

At the bottom right of the dialog are two buttons: 'CANCEL' and 'CREATE'.

Relationship Name Field

2. **(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.

Create a New Relationship

* Relationship Name

Service Requests

Reference Name

The Reference name is the reverse of the relationship name (e.g. Witness > Witnessed). It will be used when a relationship is displayed as a reference on an object type form.

Long Name

The Long Name is optional and can be used in select parts of the application to provide a more detailed question to the user.

* Object Type Group

CANCEL CREATE

Reference Name Field

3. **(Optional)** Provide additional information or instructions on completing the field in the **Long Name** field, 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.

Create a New Relationship [X]

*Relationship Name
Service Requests

Reference Name
Activity

The Reference name is the reverse of the relationship name (e.g. Witness > Witnessed). It will be used when a relationship is displayed as a reference on an object type form.

Long Name

The Long Name is optional and can be used in select parts of the application to provide a more detailed question to the user.

*Object Type Group

CANCEL [CREATE]

Long Name Field

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

Resolver interface showing the "Create a New Relationship" dialog box. The dialog is titled "Create a New Relationship" and has a close button (X) in the top right corner. It contains the following fields and options:

- * Relationship Name:** Text input field containing "Service Requests".
- Reference Name:** Text input field containing "Activity". Below this field is a note: "The Reference name is the reverse of the relationship name (e.g. Witness > Witnessed). It will be used when a relationship is displayed as a reference on an object type form."
- Long Name:** Large text area, currently empty. Below it is a note: "The Long Name is optional and can be used in select parts of the application to provide a more detailed question to the user."
- * Object Type Group:** A dropdown menu with "Activities" selected. This field is highlighted with a red border.

At the bottom right of the dialog, there are two buttons: "CANCEL" and "CREATE" (with a checkmark icon).

Object Type Group Dropdown

5. Click the **Create** button.

Create a New Relationship ✕

*** Relationship Name**

Reference Name

The Reference name is the reverse of the relationship name (e.g. Witness > Witnessed). It will be used when a relationship is displayed as a reference on an object type form.

Long Name

The Long Name is optional and can be used in select parts of the application to provide a more detailed question to the user.

*** Object Type Group**

CANCEL

Create Button