Name & Description Concatenation Overview

Last Modified on 09/18/2024 3:58 pm EDT

Overview

A **concatenation** pulls data from properties (including the Location property and its address components) and fields to automatically populate the **Name** and/or **Description** properties of objects. This feature is useful for ensuring important information is captured in an object's name or description and to ensure object names and descriptions are consistent across the org.

Concatenations can also be added to plain text fields. See the Text Fields article for more information.

To specify which data is populated in the **Name** and/or **Description** properties, administrators edit an object type, select a related data definition and an object type in that definition, then one or more properties or fields to create variables (similar to a formula variable), which are then used to create an expression. For example, if you created variables for the First Name and Last Name plain text fields, your expression would look similar to {{{FirstName}}} {{{LastName}}}.
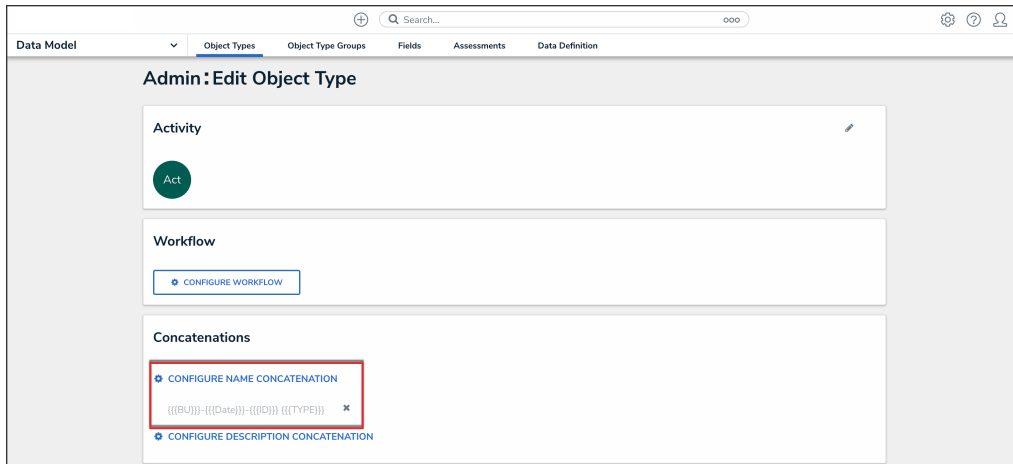
Results from concatenation calculations are currently limited to the following:

- Object Name, Single-line Text fields - 300 characters
- Object Description, Multi-line Text fields - 20,000 characters

If the data definition includes additional object types related through relationships or references, you can create variables from those object types to include in the expression, which will display specific field or property data from the relationship or reference elements on the form. For example, creating a variable for the Name property on the Person object type, which is related to the Incident object type through a relationship, means that when a person is selected as witness on an incident, that person's name will be automatically populated in the incident's Name property.

Example:

When reporting incidents, your company requires that each object's name is automatically generated based on the object's unique ID, the date it was created, and the incident code. Additionally, the description of each object must display where the incident occurred, what type of incident it was, and who created the object. As such, you create variables for the Incident object type's Unique ID property, the Incident Type Code select list, and the Created On property, then add them to the expression for the Name Concatenation option on the Edit Object Type page. For the Description Concatenation, an expression is created using the Location and Incident Type select lists and the Created By property. Now, when an end user creates a new incident, the object's name and description is populated based on the variables and expressions saved to the concatenation settings.

An Example of a Name Concatenation

User Account Requirements

The user must have Administrator permissions to in order to access the ***Admin Overview*** section.

Related Information/Setup

Please refer to the Add Name or Description Concatenations to an Object Type article for more information on adding name and description concatenations to an object type.

Important Notes

- Prior to creating expressions, you must ensure the required fields and **Location** property, if applicable, have been added to the object type and have been added to the relevant configurable form. The **Unique ID**, **Created By**, and **Created On** properties do not need to be added to the form as they are auto-generated and cannot be modified.
- As concatenation expressions override any values entered into an object's **Name** or **Description** properties upon saving, it's recommended these properties are **not** added to a configurable form.
- Spaces and special characters in variable names or inside the curly braces are not permitted. For example, **{{{RiskName}}}** is valid, but **{ {{Risk Name}}}** will result in an error.
- Name concatenations can be updated on existing objects by a workflow action.
- Description concatenations cannot be applied to existing objects.
- Custom form titles or sub-titles take precedence over any concatenation expressions.
- When adding data from the **Location** property, a separate variable must be created for each address component you wish to include in the concatenation (i.e., City, State,

Country, etc.).

- When the **Country** location component is added as a variable, its values are displayed using the ISO 3-character code (e.g., CAN for Canada or USA for United States).
- When the **State** location component is used as a variable, it's displayed using the ISO 2-character code. If the state or province belongs to a region that does not use 2-character codes (e.g., Australia), a 3-character code is used instead.
- Concatenations do not automatically update if their property or field variables are changed. A new object must be created to reflect any changes. For example, if the concatenation **{{{FirstName}}} {{{LastName}}}** displays **John Smith**, but the **{{{FirstName}}}** property is changed to **Joe**, the concatenation will still display **John Smith**.
- If multiple users from different time zones are simultaneously triggering concatenations that use Date & Time field or Created On property data, they may produce different results. This is because the date and time selections made in a **Date & Time** field are based on the time zone of the user who made the selection. Likewise, the date generated in the **Created On** property is based on the time zone of the user who created the object. See the Time Zone Conversions on Concatenations article for more information.