Add Name or Description Concatenations to an Object Type

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To add name or description concatenations to an object type:

1. Ensure required the fields and Location properties (if applicable) have been added to the object type and appropriate configurable form. If the concatenation will be pulling data from other object type(s), ensure the appropriate relationships and references have been added to those object types, along with the relevant fields. See the Concatenation Overview article for more information.

2. Ensure the data definition you wish to use to filter the data has been created from the Data Definitions settings in **Administration**.

3. Click the ⚙ icon in the top bar **> Object Types** in the **Data Model** section.

4. Click the object type or enter the name of the object type in the **Search** field, then click it to display the **Edit Object Type** page.

5. Click either **Configure Name Concatenation** or **Configure Description Concatenation** to open the **Edit Concatenation** palette.

6. Select a data definition from the **Data Definition** dropdown menu. This will determine which object types' properties and fields are available to add as variables.

A new concatenation.

> ℹ️ If you want to select another data definition, you must delete the concatenation by clicking the **X** icon beside the concatenation on the **Edit Object Type** page, then recreate it.

7. Click **Add Variable**.

8. Select an object type in the data definition from the **Select Object Type** dropdown menu.

9. Select a property or field you want to auto-populate in an object's name or description from the **Available Component** dropdown menu.

   - If you selected the **Created On** property or date field, select a date format (e.g. YYYY-MM-DD) from the **Variable Format** dropdown menu. See the Time Zone Conversions on Concatenations article for more information on how this information is captured.

   - If you selected the **Location** property, choose an address component from the **Select Address Component** dropdown menu (i.e., House Number, Street, City, State, ZIP Code, or Country). Note that a separate variable must be created for each address component.

10. Enter a name for the variable in the **Variable Name** field.

> *i*   Spaces and special characters in variable names are not permitted. For example, naming a variable **RiskName** in the **Variable Name** field is valid, but entering **Risk Name** in this field will result in an error.

11. **Optional:** To display a default word or phrase in the concatenation when the variable has no data, enter that word or phrase in the **Default Value** field (e.g., "Null" or "None provided").

12. If the variable has been created from a component on the same object type where the concatenation is saved (e.g., the Incident Name property is being saved to an expression on the Incident object type) select the **Self** checkbox.

VARIABLES

Select Object Type

⬤ Incident   ⌄

Available Component

Property: Created On   ⌄

Variable Name

CreatedOn

Variable Format

YYYY-MM-DD   ⌄

Today's date in the above format is: **2020-04-01**

Default Value

☑ Self

ADD   CANCEL

The Variables section of the Edit Concatenation palette.

13. Click **Add** to save the variable.

VARIABLES

CreatedOn   ✖
Property: Created On

+ ADD VARIABLE

A new variable.

14. Repeat steps 7-13 above to continue adding variables as needed.

15. Type the variable names in the **Expression** field. Variables can be entered in any order,

but they must be enclosed in triple curly braces (e.g. {{{CreatedBy}}}) **with no spaces or special characters within the braces**. If needed, you can include spaces and other alphanumeric characters between the variables.

EXPRESSION

{{{DateSubmitted}}} - {{{IncidentType}}} - {{{CreatedBy}}}

Variables must be wrapped in triple braces. Eg: **{{{VARIABLE1}}}-{{{VARIABLE2}}}**

SAVE EXPRESSION

An expression with variables. All variables must be enclosed in triple curly braces.

16. Click **Save Expression**.

CONCATENATIONS

⚙ CONFIGURE NAME CONCATENATION

{{{DateSubmitted}}} - {{{IncidentType}}} - {{{CreatedBy}}}   ✖

⚙ CONFIGURE DESCRIPTION CONCATENATION

The new expression saved to the object type and displayed on the Edit Object Type page.

17. To edit a variable, it must be deleted by clicking the ✖ icon from the **Edit Concatenation** palette, then recreated.

18. To delete the concatenation, click the ✖ icon from the **Edit Object Type** page.