Add Name or Description Concatenations to an Object Type

Last Modified on 08/12/2024 2:58 pm EDT

Overview

A concatenation uses data from properties and fields to populate the name and description properties of objects.
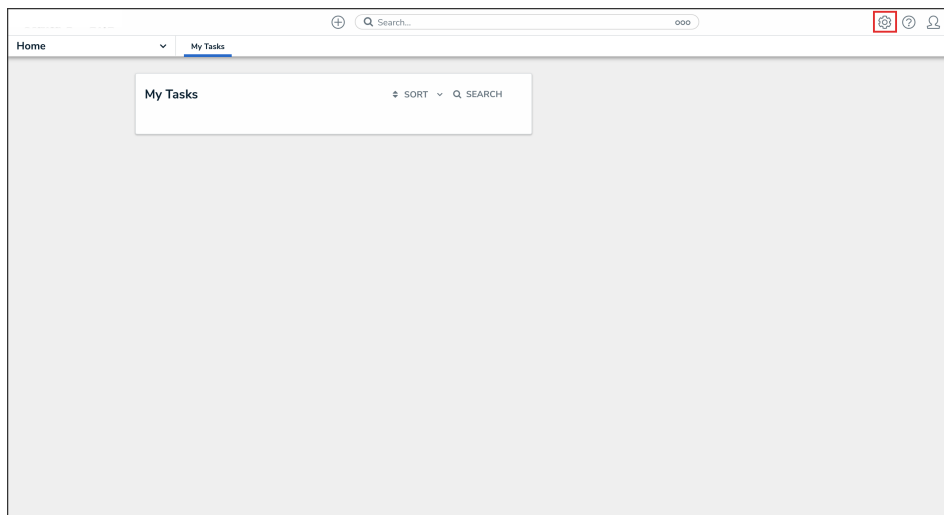
User Requirements

The user must have Administrator permissions in order to access the **_Admin Overview_** section.

Related Information/Setup

Please refer to the Name & Description Concatenation Overview article for more information on using name and description concatenations.
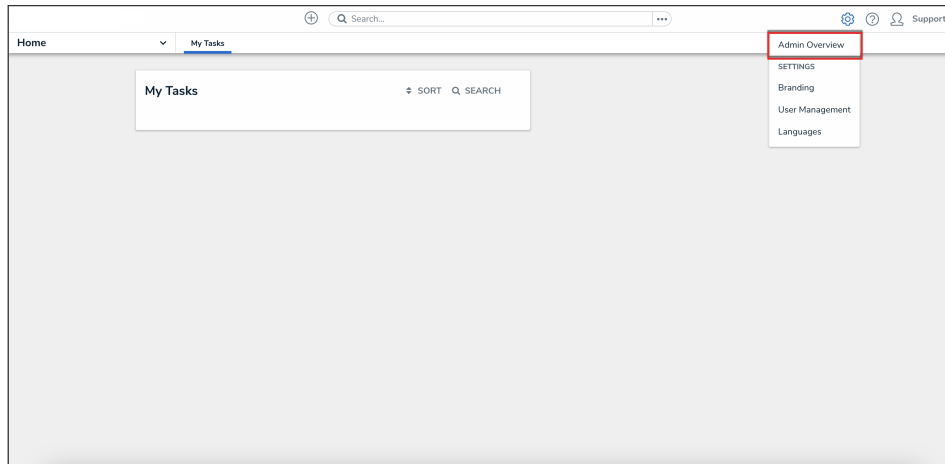
Navigation

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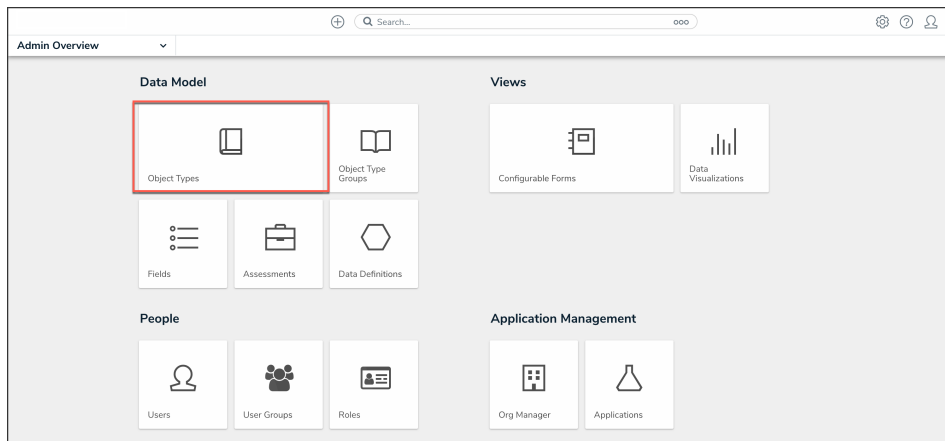

Administration Icon

2. From the **Administrator Settings** menu, click **Admin Overview**.
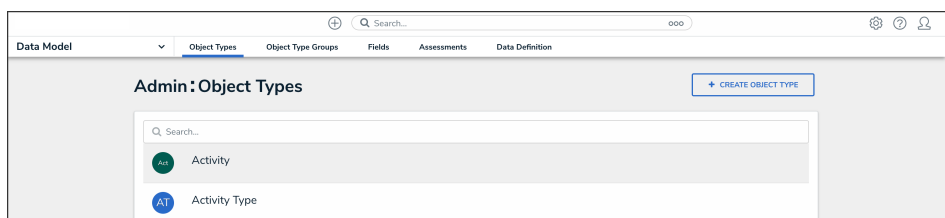
Administrator Settings Menu

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

Object Types Tile

4. From the list of object types, click the object type that you want to add a name or description concatenation to.


Object Type Name

Adding a Name or Description Concatenation to an Object Type

Before you can add a name or description concatenation to an object type:

- Ensure that the 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.
- Ensure the data definition you wish to use to filter the data has been created from the Data Definitions settings.

1. From the **Admin: Edit Object Type** screen, click the **Concatenations** tab.
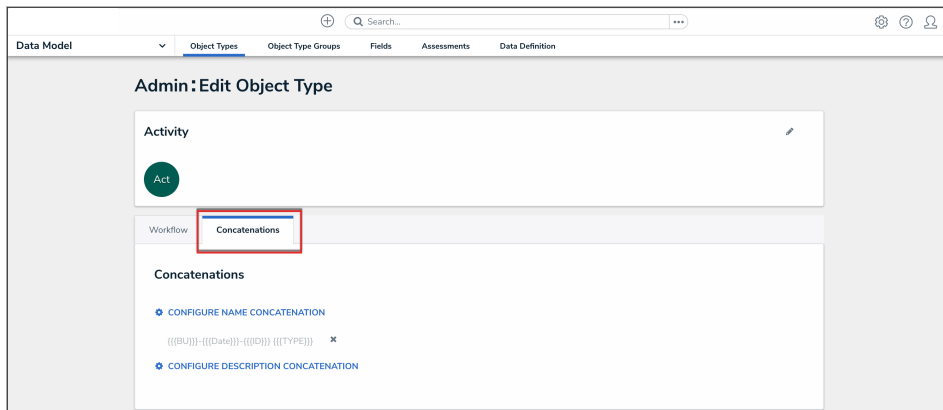
Concatenations Tab

2. From the **Concatenations** tab, click either the **Configure Name Concatenation** or **Configure Description Concatenation** button.
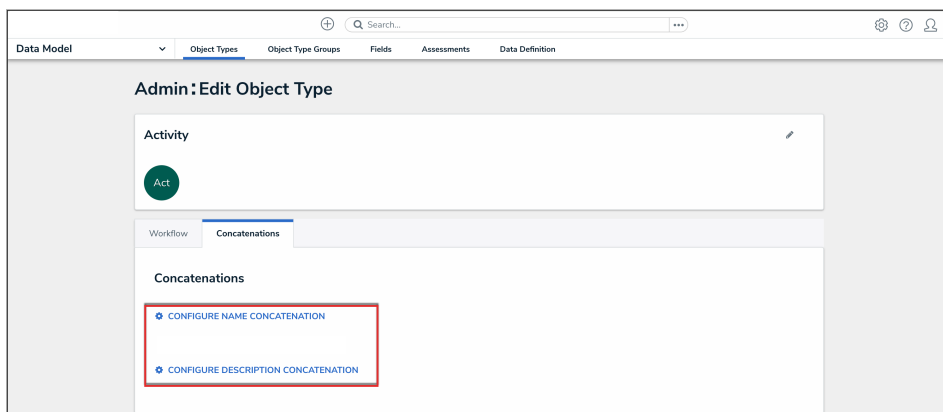
Configure Name Concatenation and Configure Description Concatenation Buttons

3. From the **Edit Concatenation** pop-up, 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.

Data Definition Dropdown

> **Note:**
> 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.

4. To define the variables for your concatenation:
    - Click the **Add Variable** button.

Add Variable Button

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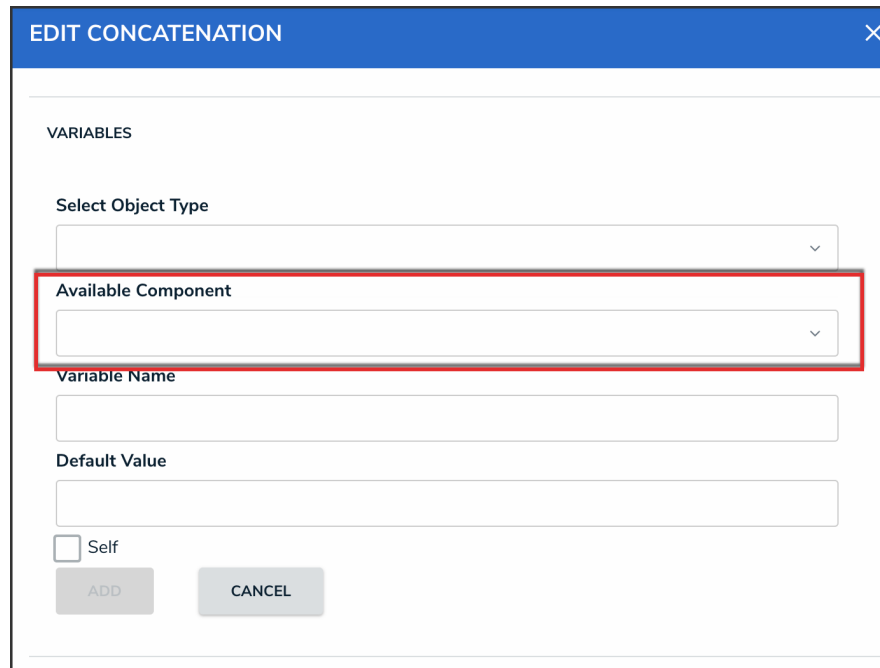

Select Object Type Dropdown

- Select a property or field you want to auto-populate in an object's name or

description from the **Available Component** dropdown menu.

Available Component Dropdown

- 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:**
> A separate variable must be created for each address component.

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

Variable Name Field

> **Note:**
> 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.

5. **(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").

Default Value Field

6. 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.

Self Checkbox

7. Click the **Add** button to save the variable.

Add Button

8. Type the variable names in the **Expression** field. Variables can be entered in any order, but they must be enclosed in triple curly brackets (e.g. {{{CreatedBy}}}) **with no spaces or special characters within the brackets**. If needed, you can include spaces and other alphanumeric characters between the variables.

Expression Field

9. Click the **Save Expression** button**.**

10. From the ***Admin: Edit Object Type*** screen, click the **Done** button.

Done Button