


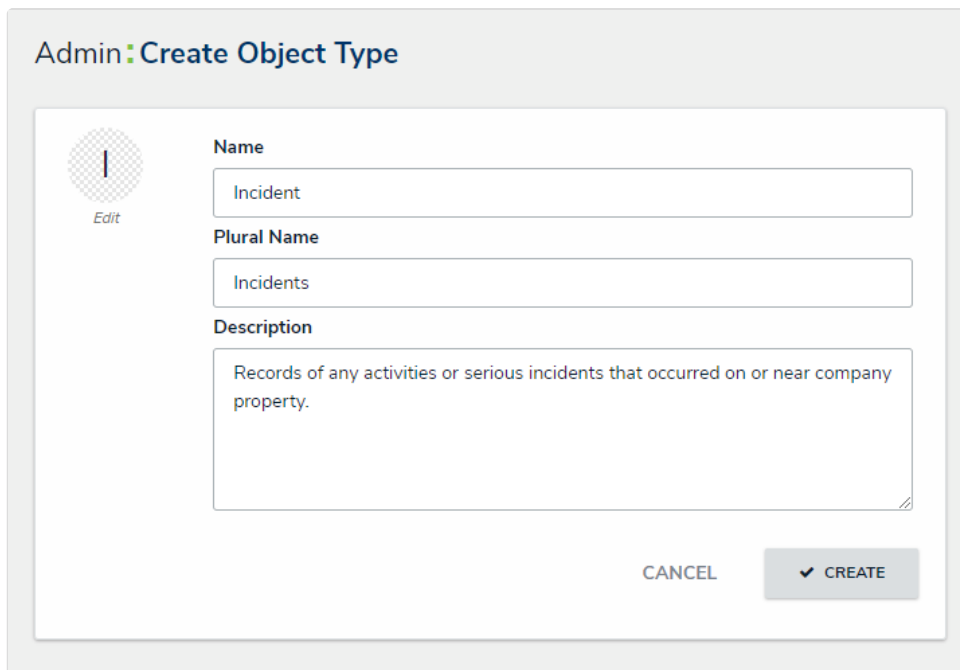
Object Types & Objects

Last Modified on 11/18/2024 10:27 am EST


Create a New Object Type

To create a new object type:

1. Click the  icon in the top bar > **Object Types** in the **Data Model** section.
2. Click **Create Object Type**.
3. Enter a name for the object type in the **Name** field.
4. **Optional:** Enter a plural name for the object type, which will appear when viewing a list of the objects for that type (e.g. "View Incidentss" instead of "View Incident").
5. **Optional:** Enter a description of the object type, which will appear on the **Edit Object Type** page when editing the object type.



Admin: Create Object Type

 |
Edit

Name
Incident

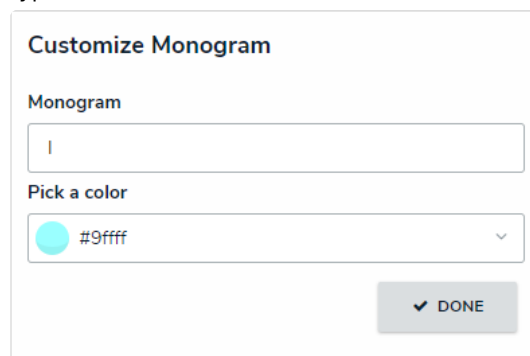
Plural Name
Incidents

Description
Records of any activities or serious incidents that occurred on or near company property.

CANCEL CREATE


The Create Object Type page.

6. **Optional:** To customize the object type monogram:
 - a. Click the monogram icon to the left of the **Name** field.
 - b. Enter 1 to 3 characters in the **Monogram** field.
 - c. Click the **Pick a color** dropdown menu to reveal the color picker. You can also type a hex color into this field to select a color.



Customize Monogram

Monogram
I

Pick a color
 #9ffff

DONE

The Customize Monogram screen.




The monogram is used to help you quickly identify an object type throughout CORE. If you're creating multiple similar object types (e.g. Incidents and Incident Review) you may want to apply the same or similar colors to their monograms to help create a theme.


- d. Click **Done**.
7. Click **Create** to display **Edit Object Type** page.

Admin: **Edit Object Type**


INCIDENT


 Records of any activities or serious incidents that occurred on or near company property.

WORKFLOW

 CONFIGURE WORKFLOW

CONCATENATIONS

 CONFIGURE NAME CONCATENATION



 CONFIGURE DESCRIPTION CONCATENATION

Overview Fields (0) Formulas (0) Relationships (0) References (0) Roles (0)

Summary information about the Object Type: related forms, object type groups, activities / applications, Reports, report definiti

Related Forms


Related Data Definitions

A new object type. By default, new object types do not have any workflows, concatenations, or components.

Create a New Object Type Group

To create a new object type group:

1. Click the  icon in the top bar > **Object Type Groups** in the **Data Model** section.
2. Click **Create Object Type Group**.
3. Enter a name for the object type in the **Name** field.
4. **Optional:** Enter a brief description of the object type group in the **Long Name** field, which will appear below the object type when editing it.

Admin: **Create Object Type Group**

Name

Long Name

These are people who are involved in an incident (witnesses, victims, suspects, etc.) and may be an employee or visitor.

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

CANCEL

The Create Object Type Group page.

5. Click **Create** to display the **Related Object Types** section.
6. In the field in the **Related Object Types** section, enter the name of the object type you want to add or select it from the dropdown menu. Continue to add more object types as needed.

Admin: **Edit Object Type Group**

PEOPLE

Name

Long Name

These are people who are involved in an incident (witnesses, victims, suspects, etc.) and may be an employee or visitor.

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

RELATED OBJECT TYPES

Employee Record x Person x

A new Object Type Group. After clicking Create, the Related Object Types section is displayed.

7. Click **Add Selected**.
8. Click **Done** when finished.

Edit or Delete an Object Type

Overview

Administrators can edit or delete object types from your org.



Warning:

If any data has been saved to or associated with an object type, it's strongly recommended that you **do not** delete it.

User Account Requirements

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

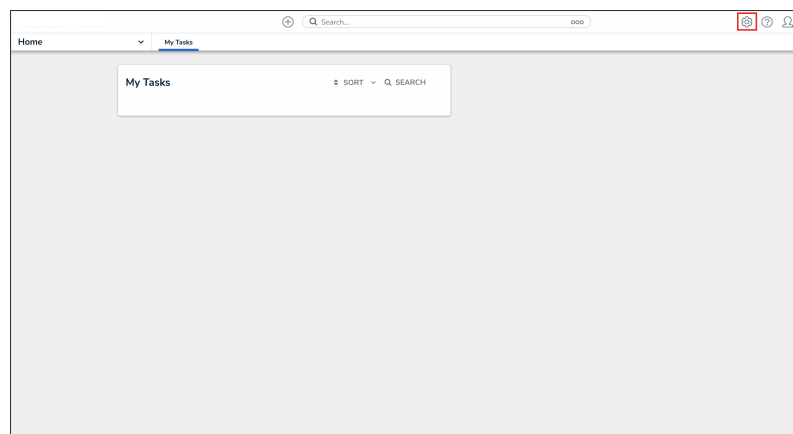
Related Information/Setup

Please refer to the [Object Types Overview](#) article for more information on object types.

Please refer to the [Delete an Object](#) article to learn more about deleting objects before deleting an object type.

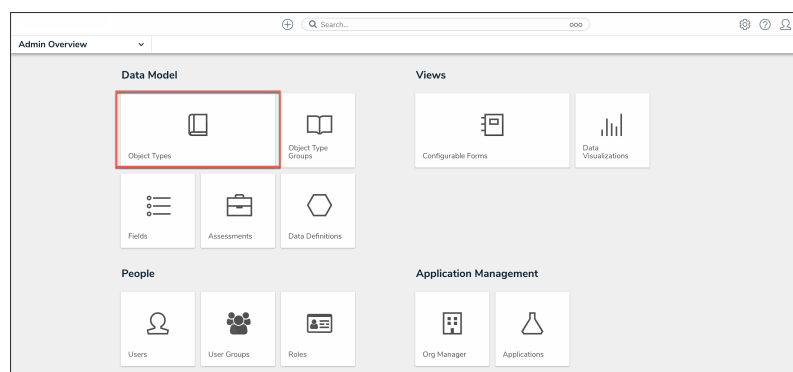
Navigation

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



Administration Icon

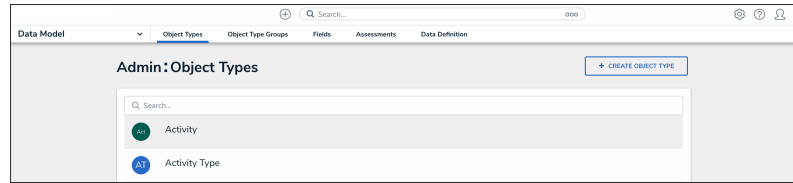
2. From the **Admin Overview** screen, click the **Object Types** tile under the **Data Model** section.



Object Types Tile

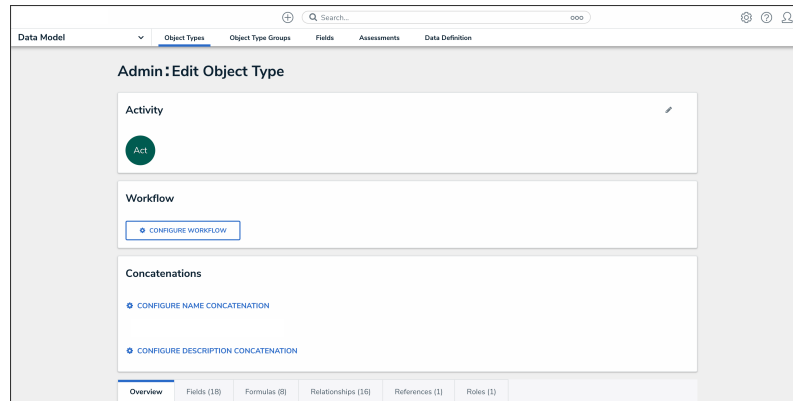
3. From the **Object Types** screen, enter a keyword in the **Search** field to narrow the Object

Types list and click the Object Type you wish to edit or delete.



Object Type Name

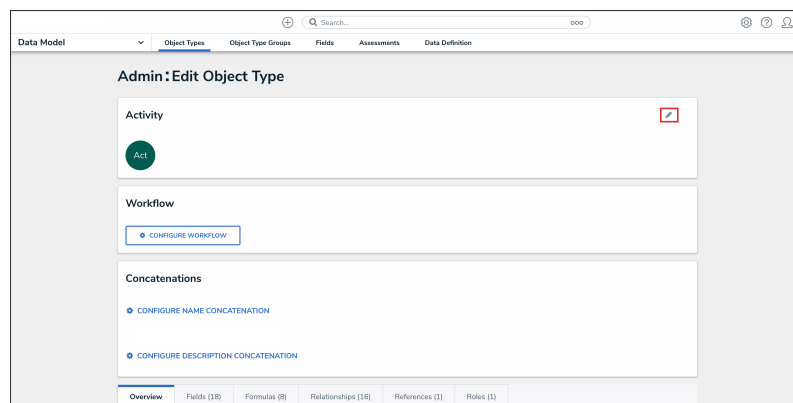
5. You can edit and delete the object type from the **Edit Object Type** screen.



Edit Object Type Screen

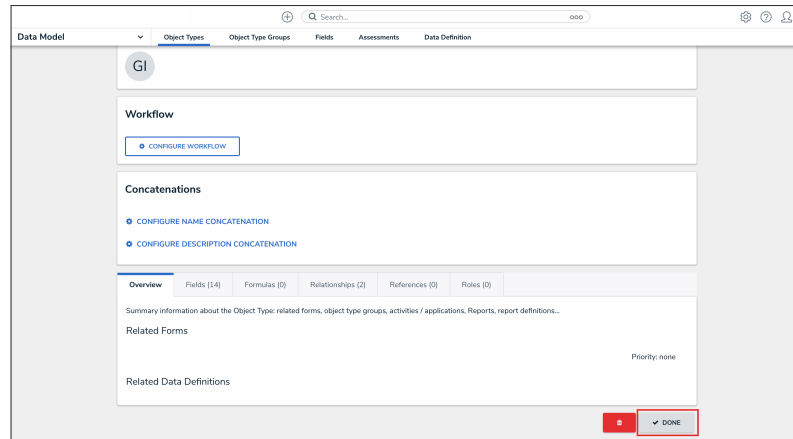
Editing an Object Type

1. To edit the object type's name, description, or monogram, click the **Edit** icon beside the object type's name.



Edit Object Type Icon

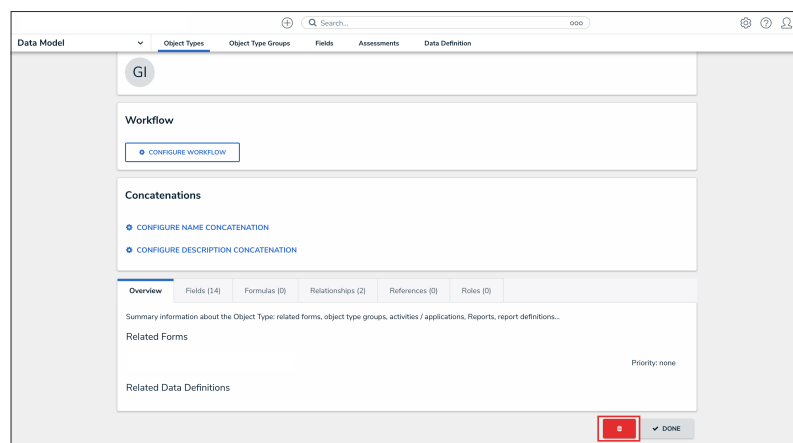
2. Click the tabs to edit or delete the components added to the object type.
3. Click the **Done** button.



Done Button

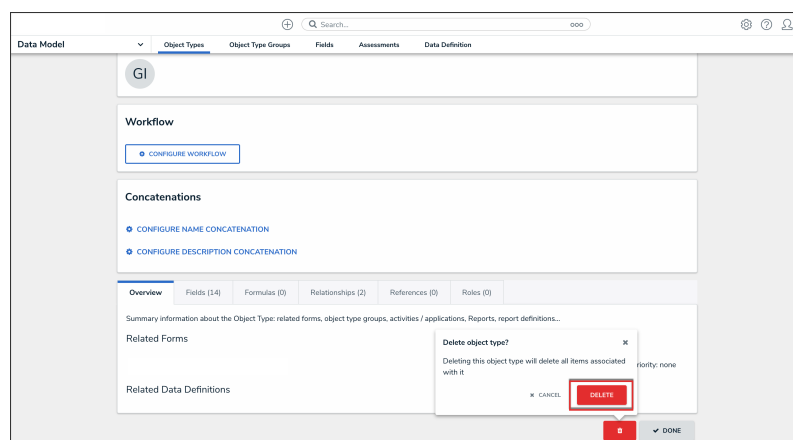
Deleting an Object Type

1. Before deleting an object type, you must **delete all objects** associated with it.
2. To delete the object type, click the **Delete** icon.



Delete Icon




3. Click the **Delete** button to confirm.



Delete Button

Edit or Delete an Object Type Group

To edit or delete an object type group:

1. Click the  icon in the top bar > **Object Type Groups** in the **Data Model** section.
2. Click the object type group you want to edit to display the **Edit Object Type Group** page.
3. Enter an alternate name in the **Name** or **Long Name** fields, as needed.
4. To add an additional related object type, enter the name of the object type you want to add or select it from the dropdown menu in the **Related Object Types** section, then click **Add Selected**.
5. To remove a related object type, click the  icon next to that object type.
6. To delete the object type, click the , then click **Yes** to confirm.
7. Click **Done** when finished.



Delete an Object

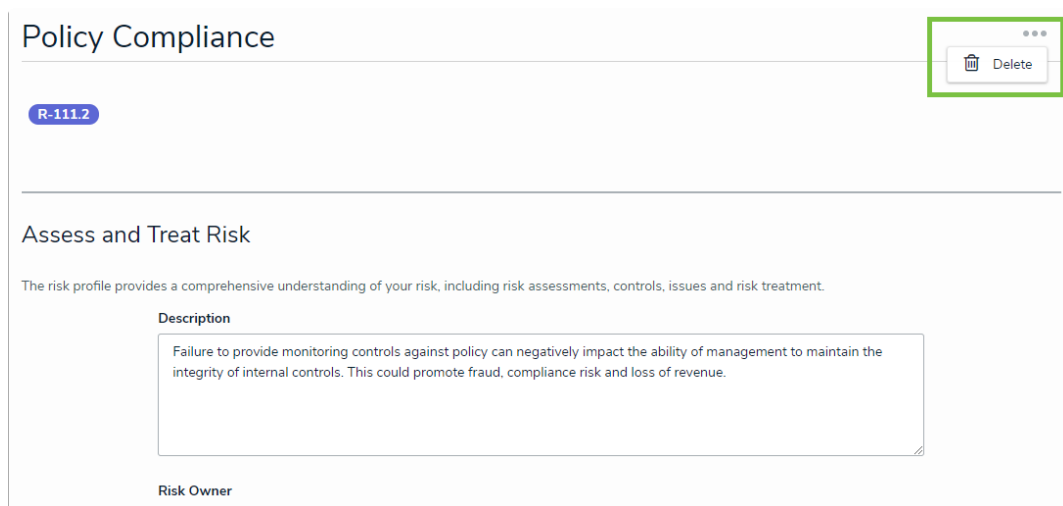
Depending on their [role permissions](#), both administrators and end users can delete objects. However, before an object can be deleted, you must review the **Deletion Request** warning, which outlines how deleting that specific object impacts other objects connected through relationships or references.



An object cannot be deleted when it's viewed on a navigation form or from the rightside editor palette.

To delete an object:

1. Open the object form in full screen mode.
2. Click the  icon at the form's top-right, then click **Delete**.
3. Review the **Deletion Request**, which summarizes the number of impacted relationships and references.
4. Once you've ruled out negative impacts on those related/reference objects, click  to confirm.



The Delete option at the top-right of the page.



Deleting an object with relationships or references will delete that object's connection to those other objects, but it will **not** delete the other objects to which it was related.