

# Add an Update Field Concatenations Action to a Transition

Last Modified on 11/22/2024 10:55 am EST

## **Overview**

The **Update Field Concatenations** action allows Administrators to update object names beyond the Creation state.



Note:

The **Update Field Concatenations** workflow action is only available for button triggers in Library and Assessment workflows.

For example, Incident name concatenations can now be automatically updated after they transition from the Triage state to the Open state.

### **User Account Requirements**

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

#### **Related Information/Setup**

Please refer to the Workflows section for more information on using workflows in object types in Resolver.

## Navigation

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



		Q Search		 ® 0 2
Home	V My Tasks			
	My Tasks	\$ SORT Q SEARCH	4	

#### Administration Icon

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

		Q Search	••••	@	? <sup>2</sup>
lome	✓ My Tasks		6	Admin Overview	
			S	iettings	
	My Tasks	\$ SORT Q SEARCH	2	User Management	
			g	Branding	
				Languages	

#### Administrator Settings Menu

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



Admin Overview 🗸		Q Search	***	· • • • • • • • • • • • • • • • • • • •
	Data Model		Views	
	Object Types	Object Type Groups	Configurable Forms	<b>DOD</b> Data Visualizations
	Fields	Data Definitions	Dashboard Data Sets Dashboard Builder	2
	<b>۲</b> Playbooks Automation			
	Data Access		Application Management	
	User Groups Roles		Org Manager Applications	Dashboard Deployment

Object Types Tile

 From the *Object Types* screen, enter an object type name in the **Search** field to narrow down the object types list.

		\$ @ L
Data Model	V Object Types Object Type Groups Fields Assessments Data Definition Playbook Automation	
	Admin:Object Types + CREATE OBJECT TYPE	
	Q Search	
	Activity	
	AT Activity Type	
	Alert     Alerts inform compliance teams when new or proposed regulatory changes are	

Search Field

- 4. Click the object type that you want to edit.
- 5. From the *Edit Object Type* screen, click a workflow under the **Workflow** tab.

			•	Q Search				)	\$ ® \$
Data Model	~	Object Types	Object Type Groups	Fields	Assessments	Data Definition	Playbook Automation		
	Admi	n:Edit Ob	ject Type						
	Incide	nt						1	
			object in the Incident Ma in all areas of capture, in				dent lifecycle, all primary incid	ent data, and links to multiple	
	Workfl	low Concat	enations						
		kflow Configure Workfi	LOW						

Workflow Tab

6. If there are no workflows listed, click the **Configure Workflow** button.



		\$ ? L
Data Model	V Object Types Object Type Groups Fields Assessments Data Definition Playbook Automation	
	Admin:Edit Object Type	
	Incident	
	The primary object in the Incident Management Application. Contains all the steps in the Incident lifecycle, all primary incident data, and links to multiple child records in all areas of capture, investigation and root cause outcomes.	
	Workflow Concatenations	
	Workflow	



# Add an Update Field Concatenations Action to a Transition

1. From the *Edit Workflow* screen, click the trigger that you want to add the Update Field Concatenations action to.

	Q Search	•••	\$\$ @ L
Data Model	✓ Object Types Object Type Groups Fields Assessments Data Definition		
	TRIAGE TRIGGERS + ADD TRIGGER Copy Location = Transitions to Triage	1 REQUIRED COMPONENTS	
	Mark As Open = Transitions to Open		
	SHOW MORE		
	OPEN	1 REQUIRED COMPONENTS	
	Open Investigation 😄 Transitors to Under Investigation	I REQUIRED COMPONENTS	
	Update Primary Location 🛛 🛱 Transitions to Open		

Workflow Trigger

2. From the **Edit Trigger** pop-up, click the **Configure** icon under **Transitions**.

			$\oplus$	<b>Q</b> Search			•••	\$ © \$
Data Model	~	Object Types	Object Type Groups	Fields	Assessments	Data Definition		
		TRIAGE				EDIT TRI	IGGER	×
		7 TRIGGERS	+ ADD TRIGGER				Mark As Open	di s
		Copy L	ocation	riage			Triage to Open	
	Mark As Open # Transitions to Open			TRANSITI	ONS			
	SHOW MORE		Open	Open === Transitions to Open	os ×			
		OPEN				+ ADD TR	IANSITION	
		7 TRIGGERS	+ ADD TRIGGER					
		Open li	nvestigation	s to Under Inve	stigation			

Configure Icon



3. Click the **Add Action** button under **Actions**.

	(Q Search		\$\$ @ L
Data Model	V Object Types Object Type Groups Fields Assessments	5 Data Definition	
	TRIAGE	EDIT TRIGGER	×
	TRIGGERS + ADD TRIGGER	+ ADD CONDITION	
	Copy Location 🛛 🛱 Transitions to Triage	ACTIONS	
	Mark As Open = Transitions to Open	Notify Incident Owner	ø ×
	SHOW MORE	Triaged By	e x
	OPEN  TRIGGERS + ADD TRIGGER	Incident Aging Check	ø ×
	Open Investigation = Transitions to Under Investigation	Update Formulas	e x
Update Primary Location 🛛 🛱 Transitions to Open		TRIAGEDATE	/ ×
	SHOW MORE	+ ADD ACTION	V DONE
	UNDER INVESTIGATION		✓ DONE

Add Action Button

4. Select **Update Field Concatenations** from the **Type** dropdown menu.

	⊕ (Q Search	··· هُ ٥ ک
Data Model	✓ Object Types Object Type Groups Fields Assessments	Data Definition
		EDIT TRIGGER X V Bypass Required Fields.
	TRIGGERS + ADD TRIGGER	Continue working with object once transition is complete?
	Copy Location 🛛 🛱 Transitions to Triage	Yes 🛛
	Mark As Open = Transitions to Open	No No
	SHOW MORE	CONDITIONS
	OPEN	+ ADD CONDITION
	TRIGGERS + ADD TRIGGER	ACTIONS
Open Investigation = Transitions to Under Investigation		Type
	Update Primary Location = Transitions to Open	Update Field Concatenations
	SHOW MORE	Pull Data Values Set Field Value
	UNDER INVESTIGATION	

Type Dropdown Menu

5. Type a name for the action in the **Name** field.



	(Q Search	··· 🕸 🕅 🗘			
Data Model	✓ Object Types Object Type Groups Fields Assessments	Data Definition			
	TRIAGE	EDIT TRIGGER X			
	TRIGGERS + ADD TRIGGER	<ul> <li>Yes <b>0</b></li> <li>♥ No</li> </ul>			
	Copy Location = Transitions to Triage	CONDITIONS			
	Mark As Open = Transitions to Open	+ ADD CONDITION			
	SHOW MORE	Actions			
	OPEN	ACTIONS			
	TRIGGERS + ADD TRIGGER	Type Update Field Concatenations ~			
	Open Investigation = Transitions to Under Investigation	Name			
	Update Primary Location = Transitions to Open	Update			
	SHOW MORE	Select one V			
	UNDER INVESTIGATION				

Name Field

 Select the Name Property to update the name concatenation of from the Update dropdown menu.

	Q Search	··· 🔅 🖗 🗘
Data Model	✓ Object Types Object Type Groups Fields Assessments	Data Definition
	TRIAGE TRIGGERS + ADD TRIGGER Copy Location = Transitions to Triage	EDIT TRIGGER         ×           Yes @            No
	Mark AS Open = Transitions to Open	CONDITIONS + ADD CONDITION
	OPEN  TRIGGERS + ADD TRIGGER  Open Investigation == Transitions to Under Investigation	ACTIONS Type Update Field Concatenations V Name
	Update Primary Location # Transitions to: Open	Update Select one v Name property

Update Dropdown Menu

7. Click the **Create** button.



	( Q Search	··· 🕸 🕐 🔉
Data Model	✓ Object Types Object Type Groups Fields Assessments	Data Definition
	TRIAGE  TRIGGERS + ADD TRIGGER	EDIT TRIGGER         ×           ○ Yes ●            ご No
	Copy Location = Transitions to Triage Mark As Open = Transitions to Open SHOW MORE.	CONDITIONS + ADD CONDITION
	OPEN  TRIGGERS + ADD TRIGGER	АСТІОНS
	Open Investigation == Transitions to Under Investigation	Update Field Concatenations v Name .
	Update Primary Location III Transitions to Open	Update V
		CANCEL CREATE

Create Button

8. From the **Edit Trigger** pop-up, click the **Done** button to save your changes.

	(Q Search		\$ @ L
Data Model	✓ Object Types Object Type Groups Fields Assessments	Data Definition	
	TRIAGE TRIGGERS + ADD THIGGER		×
	Copy Location = Transitions to Triage	Notify Incident Owner	ø x
	Mark As Open = Transitions to Open	Triaged By	ø x
	SHOW MORE	Incident Aging Check	e x
	OPEN  TRIGGERS + ADD TRIGGER	Update Formulas	/ ×
	Open Investigation = Transitions to Under Investigation	TRIAGEDATE	ø ×
	Update Primary Location 🛛 🛱 Transitions to Open		/ ×
	SHOW MORE	+ ADD ACTION	✓ DONE
	UNDER INVESTIGATION		

Done Button